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*Igor LUKŠIČ**

HEGLOVSTVO V POLITOLOGIJI ADOLFA BIBIČA**[1]

Povzetek. *Bibič se je s Heglom srečal na več ravneh. Neposredno se je lotil Hegla v svojem doktoratu, v katerem je preučeval razmerje med civilno družbo in državo pri Heglu in Marxu. Tu se ni ustavil samo pri Filozofiji prava, temveč se je lotil tudi Fenomenologije duha, ki je ključno Heglovo delo za vstop v heglovski način mišljenja. Za globino teoretskega izraza se je v dvajsetem stoletju izkristalizirala navezava na Helga. Misel, ki zapuščino Hegla obide, je plitka, tista, ki se od Hegla vsaj poskuša učiti, se nameri posegati v globino. Hegel državo kot najvišjo formo v razvoju človeštva postavlja najvišje v hierarhiji oblik bivanja svobode človeštva. Politično pri njem ne biva samo v državi, temveč začenja že v naravni in civilnodružbeni formi, v državi kot svetovnemu procesu pa se samo domojstri. Slovenska politologija je imela to srečo, da se je njen glavni utemeljevalec Adolf Bibič namenil politiko utemeljiti prav ob opori na Hegla.*

Ključni pojmi: *Hegel, heglovstvo, civilna družba, država*

Uvod

Članek se ukvarja s teoretskim utemeljevanjem in umeščanjem politologije pri Bibiču. Ker je Bibič deloval v času doktrinarne prevlade marksizma in samoupravnega socializma in ker je bila tudi Visoka šola za politične vede (1961) ustanovljena v kontekstu prizadevanj Zveze komunistov Jugoslavije, da se poglobi in razširi vedenje marksizma in socializma,[2] bi pričakovali, da se bo njegova politologija uklonila vladajoči ideologiji. V nasprotju s tem pričakovanjem podrobna analiza njegove zapuščine kaže, da je veliko bolj kot nereflektirani del družboslovja v Sloveniji in Jugoslaviji, ki je paktiral s

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** *Izvirni znanstveni članek.*

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[2] *O tem podrobneje pišem v razpravi Politologija v Republiki Sloveniji (Lukšič, 2022).*

površinsko kritiko socializma in marksizma, prispeval k poglabljanju razumevanja praktične politike in k razvoju koncepta politike. Bibič (1962) si je najprej obetal, da naveza na sociologijo v podobi kake politične sociologije odpira tudi za fenomen politike dovoljšen mentalni okvir, ko pa se je poglobil v študij Hegla, je ugotovil, da sociologija ne zmore konceptualnega okvira za razvoj nove znanstvene discipline in preveč zamejuje razumevanje polja politike (Bibič, 1964 in zlasti 1972).

Najprej se članek ukvarja s pomenom heglovstva v družboslovju, še zlasti v okviru miselnega toka, ki se mu reče marksizem ali, še ožje, heglomarksizem. Nato se posveča percepciji Hegla na Slovenskem. Da bi odprli nove dimenzije socializmu in ga odlepili od stalinistične ali vulgarnomaterialistične navlake, je bilo namreč nujno revitalizirati marksizem prav skozi Heglovo misel.

Od tu pa sledimo heglovstvu v delih Adolfa Bibiča, utemeljitelja slovenske in jugoslovanske politologije, ki je prav v navezovanju na Heglovo zapuščino utrdil posebno pozicijo novi znanstveni disciplini.

Heglovstvo kot teoretska globina

Za merjenje globine teoretskega izraza se je konec devetnajstega stoletja, še bolj eksplicitno pa v dvajsetem stoletju izkristalizirala navezava na Hegla.[3] Misel, ki zapuščino Hegla obide, je plitka, tista, ki se od Hegla vsaj poskuša učiti, se nameri posegati v globino. Tako se je tudi uveljavilo spoznanje, da je marksizem lahko samo heglomarksizem ali pa je vulgarni in sholastični poizkus opletanja s kakšno od Marxovih misli oziroma citatom iz njegove zapuščine. »Tudi racionalna refleksija zgodovine marksizma nam razkriva, da se v vseh obdobjih, ko govorimo o renesansi marksizma, ponovno aktualizira ravno heglovska dediščina.« (Debenjak, 1985: 34)

Hegel je bil rojen v srednjeveški svet. V njegovem času so se politična razmerja tako zelo zasukala, da je s francosko revolucijo prišel na oblast novi red, kapitalizem, miselni svet pa so znotraj tega preobrata pripravili razsvetljenstvo in prvi možje nemške klasične filozofije. Hegel je sistematiziral vse te družbene, politične in miselne dosežke boja za odpravo fevdalizma in celokupnega francoskega starega reda (ancient regime). Hkrati pa je razširil svobodo v filozofijo, ki predstavlja vrh, ker je sinteza vse dotedajšnosti.

[3] *Karl Popper, veliki apologet pozitivizma, je v delu Odprta družba in njeni sovražniki Hegla postavil na častitljivo mesto zagovornika zaprte družbe in posebej izpostavil, da je njegova dialektika, ki ubija pravo pot do resnice, nemogoča. Heglov historicizem je razglasil za »zastrupljevalsko intelektualno bolezen«, ki ji je nadel ime »orakeljska filozofija« (Popper 1945/1986: 9). Prav tako je njegovo idejo države razglasil za totalitarno in povsem neprimerno za čase odprte družbe, kar pomeni v obdobju vladavine liberalizma, ki gradi na absolutni svobodi posameznika in njegove privatne lastnine. Trdi, da je Hegel »manjkajoči člen« »med Platonom in moderno obliko totalitarizma« (Popper 1945/86: 31).*

Hegel je »mislil vpričnì stik med srednjeveškim in modernim«, in če njegovo filozofijo postavimo v historični kontekst, potem je jasno, da imamo opravka »z ostro kritiko vpričnih razmer in ne samo z misticizmom, ki je iz razmer izhajal, kot je rekel Marx« (Cole, 2014: XV). Hegel je doživel, izkusil, predelal in zapisal izkušnjo tega prehoda, je mislec te velike revolucije,[4] preobrata, nastavka za novo, obeta novega sveta in hkrati ohranjanja, je dejanski mislec dialektike[5]; aufhebung ancient regime, aufhebung sta izraza, ki idejo njegove dialektike najbolje instantno povzemata.[6] In v tem je tudi mislec pojma, misel je sistematično razvil do pojma, ki, obogaten z izkustvom in posredovanjem, nosi resnico in je odrivna točka novega mišljenja, novih generacij, ki kaj historično relevantnega izkušajo. In s tem se je Hegel izpostavil in vzpostavil kot merilo teoretske globine za celo zgodovino misli, vključno z 21. stoletjem.

Cole (1915: 1) ugotavlja že takoj v prvem stavku svojega članka o rojstvu teorije, da je treba *»Heglu pripisati izum teorije,* ne pa Marxu ali Nietzscheju, ki sta nadaljevala tam, kjer je Hegel končal«. Prepričan je, da je Hegel vzpostavil teorijo s prelomom s Kantom, s tem se je namreč »filozofija pretvorila v teorijo, kot jo poznamo danes«.

Debenjak ugotavlja, da je

> *poglavitni vir čudenja za Hegla sama zgodovina in posameznik, ki se v to zgodovino in vsakokratnost njenega dogajanja vključuje. Zanima ga udeležba posameznika v širši celoti – ljudstvu in zgodovinska usoda ljudstva. ...: ne zgolj tako, da bi zgolj rasla človeška pamet, ... temveč tako, da je* svetovni um skozi muke in navzkrižja zgodovine prihajal sam do sebe. *S tem je zgodovina dobila smisel ...* (Debenjak, 1981: 29)

Hegla so torej zanimali politika in politično delovanje, država in svoboda. Njegova ideja, da je filozofija čas, zajet v mislih, in da je vsaka misel otrok svojega časa, kaže na »čas«, ki ni prazna mehanska kategorija, temveč kategorija, napolnjena z razmerji političnih sil: ideje, ki so ta čas, nosijo v sebi vprična razmerja političnih sil.

»Šele z reflektiranjem interesa, šele ko 'ideja' odkrije svojo zvezo z njim, šele tedaj lahko misel postane historična, šele tedaj lahko določi svoj topos v

[4] *»Francoski filozofi 18. stoletja so revolucionarji. ... V Nemčiji pa so filozofi spoštovani univerzitetni profesorji, privilegirani uradniki pruske monarhije, čeprav se pri njih, v njihovi filozofiji, pogosto skriva plodno revolucionarno jedro. Toda revolucionarne misli v Nemčiji služijo bolj kot nek ventil v zadušljivi atmosferi absolutizma, h kateremu se zatekajo in ga izkoriščajo izolirani posamezniki.« (Ziherl 1952: 59)*

[5] *Največja zasluga nemške klasične filozofije in zlasti Hegla je bila »obnovitev dialektike kot najvišje metode mišljenja« (Debenjak 1969: 168).*

[6] *Fenomenologija duha je bila za Rosenkranza, urednika prve izdaje Heglovih zbranih del leta 1844, »povsem nova filozofija, ki je izhajala iz koncepta samo-zavesti«. Hegel je v tem delu razvil »koncept izkustva, ki tvori samozavest« (Rosenkranz cit. po Shannon 2021: 2).*

človeški zgodovini. Pozitivni, kritični elementi zgodnjega socializma so postali zgodovinsko relevantni šele tedaj, ko se je izvršil temeljit miselni preobrat, ko je mišljenje zajelo same zgodovinske predpostavke mišljenja in s tem postalo *historično, zgodovino reflektirajoče, alias dialektično mišljenje ...*; v tem, ko je radikalna sprememba zavesti, je izraz radikalno spremenjene biti (zakaj »zavest ne more biti nič drugega kot zavedna bit«), radikalno spremenjenega socialnega življenja, torej historične eksistence ljudi.« (Debenjak, 1969: 166–167)

Heglovi učenci so po njegovi smrti razpadli na dve struji: mladoheglovce in staroheglovce. Njegova misel je razpadla na dva dela, svet je v svojem obetu poenotenja skozi Heglovo filozofijo razpadel na dva dela. Marx si je v vrstah mladoheglovcev zastavil nalogo, da heglovsko enotnost[7] ponovno obudi v novih razmerah z uporabo bisera njegove zapuščine: dialektiko in historičnim načinom mišljenja.

Marx je že kmalu na začetku študija dognal globino Heglove misli, saj je že v pismu očetu napovedal, da se namerava »še enkrat potopiti v morje« Heglove filozofije, da bi iz njega »prinesel na svetlo najčistejši biser« (Marx, 1969: 26). Rezultat tega potapljanja je bil dobro poznavanje Heglove filozofije, ocena njenega dometa in preseganje, ohranjanje in odpravljanje njegove misli. Marx je zlasti izpostavil pomen Heglove dialektike kot načina mišljenja, ki je potopljeno v delovanje ljudi.

Engels je v delu »Položaj delavskega razreda v Angliji« (1845) v predgovoru zapisal, da »ta knjiga povsod izdaja sledove izvora enega od prednikov modernega socializma – *nemške klasične filozofije*« (Engels, 1969: 542). V delu »Razvoj socializma od utopije do znanosti« je v predgovoru zapisal, da so »nemški socialisti ponosni na to, da izhajamo ne le od Saint-Simona, Fouriera in Owna, ampak tudi od Kanta, Fichteja in Hegla« (Engels, 1979: 555). V drugi formulaciji pa pravi, da k »skicirani zgodovini razvoja socializma« sodita tudi »klasična nemška filozofija in Hegel« (Engels, 1979: 554–555). Hegel ima posebno mesto. Zastavil si je veliko zgodovinsko nalogo, ki je sicer ni rešil, je pa njegova zasluga, da je

> prvikrat orisan ves naravni, zgodovinski in duhovni svet kot proces, tj. v nenehnem gibanju, spreminjanju, preobražanju in razvoju, in storjen poskus, dokazati notranjo povezanost v tem gibanju in razvoju. *S tega stališča zgodovina človeštva ni bila več divja zmeda nesmiselnih nasilij, ki so pred sodnim stolom sedaj dozorelega filozofskega razuma vsa enako vredna obsodbe, in je najbolje, da jih čimprej pozabimo, temveč se je razodela kot razvojni proces človeštva samega.* (Engels, 1979: 607)

[7] *Podobno ugotavlja Antonio Gramsci: »Nadaljevalci njegove misli so razdružili to enotnost na materializem in idealizem. Marx pa je združil ta dva elementa v sintezi, v kateri 'človek stoji na svojih nogah'« (Gramsci 1977: 1861).*

Lenin je v času prve svetovne vojne v Filozofskih zapisih zapisal, da marksisti *niso razumeli Marxa, ker niso brali Helga*. O Leninu pa so njegovi nasledniki vedeli povedati, da je Marxa bolj na grobo razumel zato, ker je od Hegla bral samo Logiko, ne pa tudi Fenomenologije duha.[8] To »novo, filozofsko in k Heglu ter nemški klasični filozofiji sploh usmerjeno branje Marxovega in Engelsovega opusa, kot sta ga v dvajsetih letih najbolj izrazito prikazala Korsch in Lukacs« je »daleč presegalo kapaciteto poprejšnje teoretske senzibilnosti« (Zgaga, 1989: 22).

Gramsci pri analizi razmerja med Heglom in evropsko kulturo ugotavlja, da je bila »tudi evropska kultura podvržena procesu poenotenja in je v zgodovinskem trenutku, ki nas zanima, dosegla vrhunec pri Heglu in kritiki heglovstva« (Gramsci, 1977: 1826). Združila sta se dva procesa: »francoski politično-pravni in drugi, *nemški, teoretsko-spekulativni*«.

»Iz razgradnje heglovstva pa izhaja začetek novega kulturnega procesa, katerega značaj se razlikuje od vseh predhodnih, v tem, da združuje praktično gibanje in teoretsko mišljenje (oz. poskušata se združiti skozi tako praktični kot teoretski boj).«[9] (Gramsci, 1977: 1826) Od tu torej izhaja »nov način koncipiranja sveta in človeka, ki ni več rezerviran za velike intelektualce, profesionalne filozofe, temveč se usmerja k ljudstvu, množici, s konkretnim svetovnim značajem, spreminjajoč ljudsko mišljenje, mumificirano ljudsko kulturo« (Gramsci, 1977: 1826).

Kako zelo je povezana globina Heglove misli z marksizmom (filozofijo prakse), je Gramsci predstavil v naslednji misli: »Filozofija prakse kot rezultat in krona celotne predhodne zgodovine. Iz kritike heglovstva se rodi moderni idealizem in filozofija prakse. Heglovski imanentizem postane historicizem; ampak absolutni historicizem obstaja le s filozofijo prakse, absolutni historicizem ali absolutni humanizem.« (Gramsci, 1977: 1826–1827)

Na drugem mestu pa je k izvorom marksizma dodal še druge miselne tradicije in politične prakse:

> *Filozofija prakse predpostavlja to celotno kulturno preteklost, renesanso in reformacijo, nemško klasično filozofijo in francosko revolucijo, kalvinizem in klasično angleško ekonomijo, laični liberalizem in historizem, ki predstavlja temelj vseh modernih koncepcij življenja. Filozofija*

[8] *Lenin je leta 1914 v Filozofskih zvezkih zapisal: »Ni moč do kraja doumeti Marxovega 'Kapitala' in zlasti njegovega I. poglavja, če nisi preštudiral in doumel Heglove Logike. Torej nihče od marksistov ni doumel Marxa pol stoletja sem!« In še: »Če Marx ni zapustil Logike, pa je zato zapustil logiko 'Kapitala' … V 'Kapitalu' je v eni vedi uporabljena logika, dialektika in spoznavna teorija materializma, ki je pri Heglu vzel vse, kar je pri njem dragocenega, in je to dragoceno razvil naprej.« (Lenin 1975: 47)*

[9] *»Hegel je na konju francoske revolucije in restavracije dialektiziral dva momenta življenja misli, materializem in spiritualizem, vendar je bila sinteza »človek, ki stoji na svoji glavi.« (Gramsci, 1977: 1861)*

> *prakse je krona vsega tega gibanja intelektualne in moralne reforme, dialektiziranega v kontrastu ljudske kulture in visoke kulture. Ustreza neksusu protestantska reforma + francoska revolucija: je filozofija, ki je tudi politika in je politika, ki je tudi filozofija.* (Gramsci, 1977: 1860)

Gramsci (1977: 1054) ugotavlja, da se »*s Heglom začenja čas, ko se ne misli več v terminih 'kast' ali 'stanov', ampak v terminih 'države',* katere 'aristokracija' so ravno intelektualci. 'Patrimonialna' koncepcija države (ki je način mišljenja na podlagi 'kast') je neposredno tisto pojmovanje, ki ga mora Hegel uničiti«. Pri tem ugotavlja, da je »Heglovo pojmovanje lastno razdobju, v katerem se je razvoj buržoazije v širino lahko zdel neomejen: ves človeški rod bo buržoazen« (Gramsci, 1987: 131). Prav tako je izpostavil, da je bila izjemnega pomena »ne samo v pojmovanju politične znanosti, temveč v celotnem pojmovanju duhovnega in kulturnega življenja ... pozicija, ki jo je Hegel dodelil intelektualcem« (Gramsci, 1977: 1054).

Kot kaže, se je na Slovenskem pred drugo svetovno vojno s Heglom ukvarjal predvsem Evgen Spektorskij, ki je Heglovo misel predstavil v obsežnem delu Zgodovina socijalne filozofije II. (1933) na treh straneh, kasneje pa je napisal razpravo z naslovom Comte in Hegel (1940). Tudi iz njegovih člankov o razmerju med sociologijo in filozofijo (1943) ter o razmerju med teorijo in empirijo (1942) je čutiti nemehanicistični, lahko bi rekli celo heglovski duh, saj opozarja na to, da sociologija brez filozofije ne more in da »vsaka empirija šele sledi tej ali oni teoriji« (Spektorskij, 1943: 212). Je pa Spektorskij ostro nasprotoval povezovanju Hegla z marksizmom.[10]

Heglovstvo po letu 1945 v Sloveniji

Če je heglovstvo doživelo pravo renesanso v objemu prve svetovne vojne, tj. v veliki krizi svetovnega kapitalizma, ki se konča s prvim prebojem v oktobrski revoluciji, je druga renesansa spet plod nove krize, druge svetovne vojne in iskanja poti v razumevanje tega, kaj se je v tej bestialnosti zgodilo s človeštvom in kako naprej.[11]

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[10] *»Pripisovati Heglu tezo, antitezo in sintezo, pomeni ga pretvarjati v levičarskega hegeljanca ali v marksista, ker so oni največ prispevali k takemu pojmovanju njegove dialektike. Toda Hegel niti kronološko niti načelno ni bil marksist.« »Skupaj s Sombartom se moramo samo čuditi, kako se še nahajajo ljudje, ki zbližujejo materialistično dialektiko s Heglovo dialektiko.« (Spektorskij, 1940: 248) Heglu je odkazoval svojstveno filozofijo, češ da je to samo malo bolj sofisticiran spinozizem: »pomikajoči se spinozizem«, medtem ko je »spinozizem ustavljeno hegeljanstvo« (Spektorskij, 1940: 249).*

[11] *Friškovec potrebo po tej drugi renesansi umešča takole: »Izkušnja tiranije in padca človeštva v barbarstvo druge svetovne vojne ... ni potrdila ... ponovnega ubitja Hegla ... Prav pod vtisom prestane vojne se je začela Heglova renesansa. Človeštvo je hotelo doumeti prestano preizkušnjo in vzroke, ki so do nje privedli ... Prav zavest krize je tisto, kar nosi in označuje ves Heglov sodobni preporod, ki ni več enotno gibanje in ni stvar ene same filozofske smeri.« (Friškovec 1985: 140–141)*

Ko si je še mlada država Jugoslavija zadala poglabljanje politične in družboslovne teorije v petdesetih letih 20. stoletja, je v središče postavila tudi študij in prevajanje Marxa in Engelsa in del marksistov. Že takoj na začetku se je izkazalo, da sta poznavanje in razumevanje nemške klasične filozofije, zlasti pa Heglove zapuščine, prvi pogoj za razumevanje Marxa, Engelsa in marksizma.

O Heglu so v družboslovju po letu 1945 pisali bolj obrobno. Najbolj vpliven avtor je bil gotovo Boris Ziherl[12] z delom Dialektični in historični materializem (1952), ki je nastalo po stenografskih zapisih njegovih predavanj na Inštitutu društvenih nauka v Beogradu v letih 1949–50. Ziherl že na začetku uvede *Hegla kot »vrhunec in konec klasične buržoazne filozofije*«, marksizem pa je njen »edini možen nadaljevalec« in predstavlja hkrati »kvalitativen skok v razvoju filozofije« (Ziherl, 1952: 12). Hegla Ziherl (1952: 44) spet izpostavi pri obravnavi dialektike in še posebej v posebnem poglavju Dialektika (53–78), nato pa še v poglavju o državi. Ziherl nikjer med literaturo ne navaja Heglovih del, tako da njegove misli vedno navaja ali povzema po Leninu, Marxu in Engelsu. Izpostaviti velja njegovo dokaj besno nastrojenost proti Heglu – konzervativcu in meščanskemu ideologu,[13] ko gre za vprašanje države[14] in svobode, ceni pa njegovo dialektiko in historizem. »Dve osnovni in nedvomni zaslugi Hegla, ki ga vzpostavljajo kot največjega filozofa po Aristotelu in pred Marxom, sta v tem, da je, prvič, razvil novo dialektično logiko in jo sistematično razdelal v svojem delu 'Znanost logike' in, drugič, s tem ko je dialektiko, seveda idealistično, ampak dialektiko, vnesel v zgodovino človeštva.« (Ziherl, 1952: 60) Stališča Hegla do narave Ziherl ocenjuje kot predkantovsko (Ziherl, 1952: 64).

Ziherl je o Heglu govoril tudi v svojem nastopnem predavanju na Oddelku za sociologijo na Filozofski fakulteti leta 1954 z naslovom Historični materializem in sociologija. Tu ugotavlja, da je »prvi vir« historičnega materializma »nemška klasična filozofija, predvsem Heglova filozofija zgodovine, kakor tudi neštete pripombe in primeri, s katerimi je Hegel ponazarjal posamezne postavke v svojih glavnih delih 'Phänomenologie des Geistes' in 'Wissenschaft

[12] *Ziherl je o Heglu pisal tudi že leta 1939 v članku Znanost in politika, kjer pripominja, da so bili »največji filozofi tudi največji znanstveniki svojega časa (Descartes, enciklopedisti, Kant, Hegel)« (Ziherl 1939/1974: 101) in v prid svoji tezi o posredovanju znanosti z družbenimi razmerji navaja Heglovo misel: »Die Philosophie ist ihre Zeit in Gedanken erfasst.« (Ziherl, 1939/1974: 96)*

[13] *»Po njegovem pojmovanju mora država pripadati najpremožnejšemu stanu ... S tem se je Hegel jasno vzpostavil kot ideolog buržoazije. Njegov ideal države je ustavna monarhija ... Ta najbolj reakcionarni del svoje teorije je Hegel razvil v 'Filozofiji prava' ... ko je že bil priznani državni filozof Prusije.« (Ziherl 1952: 65)*

[14] *»Znano je, da njegova teorija države in prava predstavlja najbolj reakcionarni del vse njegove filozofije. Tu Hegel opravičuje prusko monarhijo kot najvišjo, najbolj smiselno obliko vladanja.« »Njegovo razlago države in delitev narodov na državotvorne in nedržavotvorne so obilno uporabljali nemški šovinisti ...« (Ziherl 1952: 416)*

der Logik' in kjer je veliki nemški filozof idealist prišel do povsem historično materialističnih zaključkov. Zlasti pomembno je bilo Heglovo pojmovanje zgodovinskih pojavov kot notranje povezanih izrazov enotnega procesa, ki se odvija po dialektičnih razvojnih zakonih« (Ziherl, 1954/1974: 152).

Sociolog Jože Goričar Heglu namenja nekaj strani v delu Oris zgodovine političnih teorij (1959). Pa še tu, kot kaže, se bolj naslanja na sekundarne vire, zlasti Bertranda Russella[15] in Borisa Ziherla, kot na neposredni vir in študij Heglovih del. Razpravo o Heglu uvede s stavkom: »Najpomembnejša glava v vsej nemški klasični filozofiji je bil Georg Wilhelm Hegel (1770–1831).« (Goričar, 1959: 258) Goričar Heglu priznava predvsem zasluge za dialektiko in zgodovinsko mišljenje. Nato pa pripominja, da je Hegel štel za najvišji narod, ki je poklican, da vlada vsem drugim ljudstvom, Nemce »in je ta njegova ideja postala teoretična opora za imperialistične in germanizatorske težnje Nemcev nasproti Slovanom in drugim narodom«. Nato še v tem kritičnem duhu do Hegla dodaja: »Najbolj reakcionaren del vse Heglove filozofije vsebuje filozofija prava ...«[16] (Goričar, 1959: 262)

V istem letu je Goričar izdal tudi Sociologijo, kjer o Heglu govori pod poglavjem marksistična sociologija (1959a: 52–55). V tem delu Goričar Hegla neposredno navaja, ko govori o dialektiki, s katero presega evolucionizem (1959a: 54). Na krajši način kot v predhodnem delu izpostavlja Heglovo dialektiko in zgodovinski pristop.

Anton Žun je leta 1964 izdal učbenik Sociologija, ki ga je v uvodni opombi neambiciozno označil za »sistematični priročnik, praktičen mozaik«. Hegla omenja enkrat in to zelo obrobno: »Z drugimi besedami: v prvi stopnji svojega obstoja je razred v družbi samo objektivno in ekonomsko, samo kot 'razred po sebi', ne pa še tudi subjektivno in politično ideološko, z zavestjo o zasebnih interesih, kot 'razred za sebe' (Marxovi *heglovski izrazi*).« (Žun, 1964: 111)

V delu Pregled socioloških teorija iz leta 1969 Goričar nemško klasično filozofijo omenja kot eno od predhodnic sociologije (Goričar, 1969:11), vendar ne Kantu ne Heglu ne namenja niti minimalne pozornosti.[17] O Heglu piše le v malem pasusu, kjer povzema Proudhonovo kritiko Hegla (Goričar, 1969: 55).

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[15] Tako lahko mirno zapiše: »Najpomembnejša, najbolj revolucionarna stran vse Heglove filozofije pa je kritika tradicionalne formalne aristotelovske logike. Prav ob tej kritiki je Hegel utemeljil zavestno dialektiko.« (Goričar 1959: 262)

[16] To mesto navajam zato, da bo jasno, da se je Bibič lotil povsem nove interpretacije Heglove Filozofije prava prav z afirmacijo njegove delitve civilne družbe in države. Goričar je bil v komisiji za zagovor njegovega doktorata.

[17] Goričar (1969: 6) v uvodu pojasnjuje, da »ta pregled ne obravnava posebej marksistično teorijo o družbe«, ker je »ne moremo gledati kot eno od mnogih socioloških teorij«, ker se je »od svojega nastanka pa do danes silno razvejila na nekaj struj in tokov«. Hegla pa je v verziji iz leta 1959 obravnaval prav v poglavju o marksistični sociologiji. Z marksizmom je izpadla tudi nemška klasična filozofija in z njo Hegel.

Vse kaže, da so Hegla začeli študirati bolj sistematično na Inštitutu za sociologijo in filozofijo Univerze v Ljubljani. Božidar Debenjak je npr. leta 1964 objavil raziskovalno poročilo »Problemi slovenske marksistične filozofske terminologije v luči odnosa Hegel-Feuerbach-Marx«. V njem med drugim ugotavlja, da »slovenski meščanski filozofi niso zapustili niti kantovske terminologije, kaj šele heglovsko« (Debenjak, 1964: 9).

> *»Nemška klasična filozofija je ustvarila lasten jezik – jezik, ki je bil kot starogrški sposoben izraziti dialektiko. ... Jezik nemške filozofske klasike se močno loči od poprejšnje metafizične filozofije in je ostal kasnejšim metafizikom prav tako tuj. 'Zlovoljni, prevzetni in povprečni epigoni' so se posmehovali tej dialektiki in njenemu načinu izražanja, ki so ga označevali kot 'besedno igro'.«* (Debenjak, 1964: 31)

Hegla se je poglobljeno študiralo v sedemdesetih in osemdesetih letih na Filozofski fakulteti zlasti pod mentorstvom Božidarja Debenjaka. V osemdesetih so izšla velika dela, ki so plod tega študija, izpod peresa Slavoja Žižka (1980, 1985), Mladena Dolarja (1985, 1990), plod študija Hegla pa so tudi dela Lea Šešerka, Tomaža Mastnaka, Leva Krefta in Pavleta Zgage ter Jelice in Rada Rihe, Tineta Hribarja, Andreja Kirna in Boruta Pihlerja ter Cvetke Toth. Ob 150. obletnici Heglove smrti je novembra 1981 Univerza v Ljubljani v sodelovanju s ČKZ organizirala simpozij o Heglovi miselni zapuščini, na katerem so nastopili skoraj vsi imenovani, ni pa bilo Adolfa Bibiča. Politološke barve je zastopal Franc Friškovec (1985), ki je govoril o državi kot hieroglifu uma v Heglovi misli. Po Bibiču se v tem obsegu s Heglom v okviru politologije ni ukvarjal več nihče. Tudi Bibič se Heglu ni nikoli več vrnil na polno, ga je pa ohranil kot referenco tudi v kasnejših delih.

Politologija po heglovskih korakih

Že od ustanovitve Visoke šole za politične vede leta 1961 se je zdelo, da je posest politologije postavljena ravno v pomanjkanje znanj in študija in da se politologija neha tam, kjer se ta začno, oziroma da se politologija konča tam, kjer se začnejo prave študije resničnega sveta. Politologijo imajo često za brezvsebinsko vedenje, vsak o njeni temi lahko govori, ima mnenje, vendar pa globlji vpogled sporoča, da naj druge vede poskušajo z rezoniranjem brez politologije, kolikor hočejo, brez nje ne zmorejo imeti v sebi življenja in resnice, saj je ta vedno plod realnih razmerij političnih sil ali, kot bi rekel Hegel, je *otrok svojega časa*, je pogreznjena v *duh časa*. Duh časa pa vedno izreka politično resnico.

Slovenska politologija je imela to srečo, da se je njen glavni utemeljitelj Adolf *Bibič namenil politiko utemeljiti prav ob opori na Hegla*. Njegovo delo Zasebništvo in skupnost s podnaslovom Civilna družba pri Heglu in Marxu[18] je zavezalo politologijo v Republiki Sloveniji že v izhodišču k resni teoretizaciji[19] in k ukvarjanju s konceptualizacijo in refleksijo politike kot ključnega predmeta politologije.

Bibič je Hegla vključeval v svoja razmišljanja in zapise že v prvem večjem delu »Kaj je politična znanost?« leta 1969 (v ponatisu 2021). Ko govori o začetkih politične misli pri Platonu in Aristotelu, nadaljuje:

> *Kasnejši razvoj politične misli se je gibal, lahko bi rekli, ravno v smeri razkroja te antične 'nravne totalnosti' (Hegel) in k razkrivanju* dualizma med javno in privatno sfero, državo in družbo. *Začetke tega razdvajanja najdemo že v rimski dobi, ko se na temelju pojavljajoče se blagovne produkcije začne razlikovati javna in privatna sfera, politika pa postopoma izgublja svoj kasnejši smisel – garancije mirnega uživanja privatne lastnine.* (Bibič, 1969/2021: 15)

Ko govori o državi kot pomembnem predmetu politične znanosti, nikakor pa ne edinem, znova prikliče Heglovo misel:

> *Posebno na tistih območjih, kjer je spričo specifičnega razmerja družbenih sil igrala država izredno veliko vlogo, se je politična misel ne samo osredotočila, marveč tudi reducirala na njo. Ugotovljeno je bilo, da to velja zlasti za Nemčijo, kjer je* že Hegel s svojo divinizacijo države kot 'hoje boga po zemlji' *anticipiral nekatere tipične težnje, ko so kasneje, ne brez odločilnega vpliva 'pruske poti v kapitalizem', politično znanost omejile na občo teorijo države ali celo na njen del, kot 'uporabno in praktično znanost o državi' (Jellinek). Novejši razvoj države in njena čedalje večja vloga v družbenem življenju sta le še poudarili 'državni' karakter politike in v nekaterih skrajnih težnjah v celoti poistovetile politiko z državo, izključujoč iz interpretacije političnih pojavov zadnje ostanke dialektike v odnosih med državo in družbo, ki je bila v središču pozornosti pozitivne klasične tradicije.* (Bibič, 1969/2021: 25)

Bibič je v tem prvem delu Heglu namenil tudi nekaj krepkih iz arzenala tiste recepcije, ki se je hranila pri Ziherlu (1952) in ki jih v kasnejših delih

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[18] Bibič je leta 1969 obranil doktorat na Pravni fakulteti z naslovom »Civilna družba« in država pri Heglu in Marxu pod mentorstvom Gorazda Kušeja, v komisiji pa sta bila še Jože Goričar in Anton Žun. Delo je bilo objavljeno pod naslovom Zasebništvo in skupnost: »civilna družba« in država pri Heglu in Marxu pri Mladinski knjigi leta 1972, nato pa še nekoliko dopolnjen ponatis z rahlo spremenjenim naslovom Zasebništvo in skupnost: civilna družba in politična država pri Heglu in Marxu pri Delavski enotnosti leta 1984.

[19] O prispevkih k teoretizaciji v vrstah slovenske šole politologije glej obširneje v Pikalo (2022) o teoretizaciji politične posredovanost okoljskih razmerij pa v Lukšič A. (2022).

ni več izpostavljal. »S to svojo implikacijo teorija elit zgolj nadaljuje *nekritični pozitivizem Hegla, glede katerega se kaj rado pozablja, da je bil bolj kot monarhist predvsem prvi veliki moderni teoretik birokratsko-elitnega rezona*, ki je pripisujoč državnemu uradništvu fantastično sposobnost avtoprodukcije 'splošnega interesa' in moralnih vrlin, hkrati razglašal ljudstvo za tisti del države, ki ne ve, kaj hoče; ki je za predhodnike modernega proletariata uporabljal zaničljiv izraz Pöbel, anticipirajoč modernejši termin 'množica'; ki je ustavil dinamiko zgodovine ravno na tej točki realnega dualizma med vladajočimi in vladanimi, razglašujoč hkrati ta dualizem za presežnega in 'pomirjenega'.« (Bibič, 1969/2021: 40–41)

Če rečemo s Heglom (1998: 11), si je ob ustanovitvi Visoke šole za politične vede politologija zadala naslednjo nalogo: »Sodelovati pri tem, da bi se ... približala obliki vede – cilju, da bi odločila svoje ime ljubezni do vedenja in postala dejansko vedenje ...« *Tedaj je napočil čas za povzdigo politologije v vedo.* »Tisto, za kar zatorej gre pri študiju vede, je vzeti nase napor dojema (Begrif).« (Hegel, 1998: 42).

Kot ugotavlja Hegel (1998: 16) v Fenomenologiji duha, se na začetku kaže veda, »kot da je ezoterična posest nekaterih posameznikov«, »njena nerazširjena prikaznost dela« pa »njeno bivanje za posamezno«.

Kar zadeva prvo Heglovo ugotovitev, se je slovenska politologija konstituirala okrog dela prof. dr. Adolfa Bibiča in nekako prav po pojmu deluje kot njegova posest.[20] Oblikoval je tudi heglovsko zahtevo, tu smo že pri drugi ugotovitvi Hegla, ko je zahteval posebno znanstveno disciplino. V petdesetih letih so pod pojmom politične vede razumeli vse družboslovne vede, ki so se ukvarjale tudi s politiko. Jože Goričar, nestor povojne sociologije na Slovenskem, v delu z naslovom Oris zgodovine političnih teorij (1959), ugotavlja, da se »šele zadnjih nekaj let nekateri znanstveniki na Zahodu trudijo, da bi znanost o politiki utemeljili kot samostojno znanstveno panogo z lastnim predmetom in lastno metodo ter jo tako osamosvojili od vseh družbenih ved ... Danes je položaj tak, da *takšna formalno samostojna znanstvena panoga še ne obstaja*«. »Politična znanost« po njegovem prepričanju »posega zaradi vseobsežnosti svojega predmeta na področje prav vseh družbenih ved«[21] (Goričar, 1959: 17).

[20] Bibič je zasnoval predmeta Obča politologija in Zgodovina političnih idej. Bil je predstojnik Katedre za politične vede, nato še Oddelka za politične vede in centra za politične vede. Bil je tudi urednik Teorije in prakse, ki jo je usmerjal kot sicer fakultetno revijo, vendar je izpostavljal politološke poudarke. Bil je med ustanovitelji in prvi predsednik politološkega društva in v vodstvu jugoslovanskega politološkega združenja, dva mandata pa je bil tudi član izvršnega odbora IPSA (1976–1982). Bil je med vodilnimi v odboru IPSA za pluralizem, ki se je redno srečeval na delovnih konferencah enkrat letno. Bil je tudi mentor politoloških doktoratov na FSPN. Skratka, prvih petintrideset let se na področju politologije v Sloveniji ni zgodilo pravzaprav nič mimo Adolfa Bibiča.

[21] Goričar je leta 1959 v »politiko kot znanost« přištel »vsa tista področja družbenih ved, ki raziskujejo človekovo družbeno dejavnost, s katero doseza zaželene družbene smotre, predvsem pa tisto dejavnost,

Na začetku se je politologija v Sloveniji in v Jugoslaviji srečevala prav z istimi težavami, kot jih Hegel opisuje za filozofijo: »Absolutum (to je celokupna politika, ko gre za politologijo, op. I. L.) naj ne bo dojeman, temveč čuten in zrt, ne njegov dojem, temveč njegovo občutenje in zor naj imata glavno besedo in naj bosta izrekana.« (Hegel, 1998: 12) Nasproti vedovnemu mišljenju Hegel postavlja »rezoniranje semtertja«, to je »neka naključna zavest, ki je le potopljena v snov, kateri je zato težko, da bi iz materije hkrati čisto povzdignila svoje sebstvo in bila pri sebi« (Hegel, 1998: 42). Namreč »vedenje je dejansko in more biti prikazano le kot veda ali kot sistem« (Hegel, 1998: 22–23), kar pomeni, da še takšna obilica neurejenega materiala za vedo ne predstavlja na sebi prav nič. Zato je bilo treba začetne korake usmeriti v »naporno trudenje, ki se kaže skoraj gorečno in razdraženo, da bi ljudi iztrgali iz zatopljenosti v čutno, navadno in posamezno in usmerili njihov pogled navzgor k zvezdam ...« (Hegel, 1998: 13), tj. k oblikovanju sistema vedenja, konceptualizaciji.

Ko se je izkazala potreba po novi vedi o politiki, je poprej obstajal nakopičen material, ki je klical po novih smiselnih povezavah in ujetju v nove koncepte. Obstajala je neka »prazna širina«, a tudi »prazna globina«, »neka ekstenzija substance, ki se zliva v končno mnogovrstnost, brez sile, da bi jo držala skupaj, tako neka brezvsebinska intenzivnost, ki je, vzdržujoč se kot gola sila brez razširjenosti, isto kot površnost« (Hegel, 1998: 14).

Ob vseh težavah in tegobah (več o tem v I. Lukšič, 2022) ob utemeljevanju nove vede, je bilo treba odgovoriti tudi na vprašanje, v čem naj bi bil pomen in potreba politične znanosti v jugoslovanski državi in družbi, ki je razglašala, da država 'odmira' in ki je povezovala socializem s samoupravljanjem« (Bibič, 1985a: 788).

Da bi politologija utrdila svojo samobitnost, je v želji, da uide objemu prava, najprej *skočila v objem sociologiji*. Bibič je leta 1962 napisal članek Sociologija političnega življenja, v katerem se pridružuje sociologizaciji posameznih sfer življenja ljudi ob sociologiji lokalnih skupnosti, sociologiji umetnosti, ruralni sociologiji, sociologiji družbe in samoupravljanja. Bibič (1962: 683) ugotavlja, da bi za določitev predmeta raziskovanja v okviru politične sociologije morali najprej opredeliti, kako politiko razumeta »sodobna politična znanost in sociologija«. Posebna politična sociologija je utemeljena na »obči sociološki trditvi, da sta država in družba dva različna pojava družbenega življenja« (Bibič, 1962: 685). Tako bi se posebna sociologija ukvarjala s problemom razmerja med državo in družbo oziroma »s

ki jo narekujejo materialni in drugi interesi družbenih razredov in ki je v največji meri usmerjena na državo in državno oblast« (Goričar, 1959: 18). Tako razumljene politične vede so prišle v ime nove Visoke šole za politične vede ob ustanovitvi. Po tedanjih predstavah so politične vede vključevale vse vede, ki so pomembne za razumevanje in vodenje družbe in države: filozofijo, zgodovino, psihologijo, sociologijo, politično ekonomijo, pravo, mednarodne odnose.

heterogeno strukturo družbe in v dinamiki te strukture odkrivala mobilne sile političnega procesa« (Bibič, 1962: 685). Bibič tudi poudarja, da »sociologija političnega življenja nima objektivnih pogojev za obstoj v etatističnih sistemih, v katerih država absorbira družbo« (Bibič, 1962: 690). V razmerah odmiranja političnega (v ožjem smislu) bi sociologija političnega življenja imela prvenstveno nalogo, da preučuje nove politične procese, ki nastajajo na temelju tega odmiranja. Ta obsedenost z odmiranjem države in politike je gotovo v prvih letih zelo določala prednostno izbiro sociologije pred politologijo, ki je tako že po predmetu preučevanja nosila protisamoupravno in protirežimsko noto.

Slovenski politologiji je bilo na poti osamosvajanja še posebej težko zaradi vseutopitve v projektu odmiranja politike, ki je ekspertizo politologije prezirljivo zaničevala, saj je »samoupravna logika« vse po naravi vedela in znala sama, in *ofenzive sociologije* na Visoki šoli za politične vede. Če so bili na začetku skoraj vsi zaposleni profesorji bolj ali manj vključeni v politične vede in tako vsaj z enim udom politologi,[22] so se iz te naveze začeli počasi odklapljati sociologi in novinarji oz. komunikologi. Bibič se ni priklonil temu trendu, marveč je utemeljeval svojo pot, bolj zahtevno,[23] hkrati pa bolj osamljeno.[24]

[22] *Prvih petintrideset let se slovenska politologija razvija predvsem po zaslugi najbolj zagnanega utemeljitelja Adolfa Bibiča, ob tem pa imajo pomembne prispevke za njen razvoj tudi Stane Južnič, Vlado Benko, Stane Kranjc, Boštjan Markič, Anton Bebler, Janko Rupnik, Drago Zajc in Matjaž Maček ter Slavko Podmenik. Na njenem obrobju so delovali tudi Ernest Petrič (mednarodno pravo), Niko Toš (sociologija javnega mnenja), France Vreg in Slavko Splichal (politično komuniciranje in javno mnenje), Avguštin Lah (politična geografija) in Zdenko Roter (razmerje med cerkvijo in državo). Pri Bibiču so diplomirali med drugim Stane Kranjc (1963), Matjaž Maček, Rudi Rizman, Ivan Hvala, Ljubomir Jakimovski, Ciril Baškovič, Joco Klopčič, Boris Muževič, Milan Zver, Andrej Klemenc, Jasmina Držanič, doktorirali pa Gojko Stanič, Stane Kranjc, Vlado Sruk, Miha Ribarič, Drago Zajc, Igor Lukšič (diplomiral, magistriral in doktoriral), Radule Knežević, Samo Kropivnik; od uveljavljenih politologov pa sta pri njem magistrirala Andrej Lukšič in Dejan Jović (FPZ Zagreb in FPN Beograd).*

[23] *Med drugim se je intenzivno zavzemal za dvigovanje politične kulture prek (politološkega) izobraževanja za politiko in samoupravno delovanje ljudi, o čemer je med drugim obsežneje pisal Banjac (2022).*

[24] *Najprej so se pridružili imenu Visoke šole za sociologijo, politične vede in novinarstvo, nato pa so iz imena fakultete izrinili politologijo in pustili samo družbene vede (glej vir Mlinar, kako se sladi ob tem, da je sociologija zmagala). Politologija je bila hendikepirana tudi zato, ker kar nekaj ključnih politologov ni doktoriralo do sredine osemdesetih let, kar je v raziskovalnem in institucionalnem pogledu krepilo bolj propulzivno in bolj zakoreninjeno (apolitično) sociologijo. Na koncu je celo Vlado Benko, mednarodni politolog, našel svojo umestitev mednarodnih odnosov v sociologiji, in ne v politologiji, kjer se je vseskozi razvijala, in je v njen kontekst, tj. Oddelek za politologijo, tudi institucionalno postavljena. Benko je leta 1977 napisal delo Mednarodni odnosi, ki se osredini na politične mejnike in na državo ter na ekonomske povezave. O sociologiji ni ne duha ne sluha. Leta 2000 pa je napisal delo Sociologija mednarodnih odnosov, kjer že uvodoma opozarja, da je v mednarodnih odnosih sociologija zelo redka zlasti v primerjavi s politologijo. Vendar tu je pritisk sociologije: »V razpravah pri nas, domnevamo pa tudi drugod, je pogosto govor o potrebi 'sociologizacije' znanosti o mednarodnih odnosih, kar izhaja pretežno iz presoje o primatu politične znanosti na tem področju.« (Benko 2000: 8) Ni naključje, da je prav to delo, ne pa njegovo temeljno Mednarodni odnosi, doživelo ponatis leta 2022 pod uredniško taktirko sociologa Nika Toša.*

Kako obrobno vlogo je imel Hegel v dominantni ostali politološki sferi, kažejo dela Vladimirja Benka, politologa mednarodnih odnosov, ki Hegla v prvem delu Mednarodni odnosi (1977) niti v ponatisu (1987) ne omenja. Benko Hegla ni bral in poznal, zato v drugem svojem delu povzema nekaj, kar so netočno trdili drugi. V delu Sociologija mednarodnih odnosov trdi, da je »izvor stališč, da mednarodne skupnosti ni pri Hobbesu in Heglu«, ker da je »za Hegla država edina resničnost v mednarodnem življenju, ki ob sebi ne dopušča obstoja nekega višjega, državo omejujočega reda« (Benko, 2000: 128). Hegel namreč državo razume na treh ravneh: eno je notranja ureditev in njena suverenost, druga raven so mednarodni odnosi, tretja pa prehod države na raven svetovne zgodovine – takrat postane moment ideje svetovnega duha. Benko Hegla namaka tudi v stališče, da »pravni in moralni principi, čeprav obstajajo, ne morejo omejevati držav v njihovih ravnanjih« (Benko, 2000: 129). Hegel zadev nikoli ni obravnaval na pravno-pragmatični ravni obsodb ravnanj držav, kot se to počne v drugi polovici 20. stoletja, temveč se je ukvarjal z moralo in državo kot pojmom. Kar Hegel eksplicitno ugotavlja, je, da država in morala delujeta na različnih ravneh zavesti. Edina omemba Hegla v Benkovi knjigi Sociologija in teorija mednarodnih odnosov je obrobna: »Francoska revolucija, ki jo ima Hegel za osrednji dogodek in največji dosežek v človeški zgodovini (Willms, 1972: 52), je z velikanskimi koraki ...« (Benko, 2022: 70). Benko s tem pokaže vsaj dvoje: prvič, da se zaveda teže Hegla in ga navaja vsaj posredno prek drugega avtorja, in drugič, da Hegla ni bral, kar se seveda tudi pozna pri teoretizaciji. Zato je pot od politologije kot konteksta mednarodnih odnosov v objem sociologije tudi razumljiva. Bibič je imel obratno pot: začel je s poskusom, da bi politiko mislil v okviru sociologije, pa se mu je ob Heglu izkazalo, da je to smrtni greh, če postavimo zadevo v versko-moralni kontekst, sicer pa teoretsko prekratko in nemišljivo.

Hegel v Bibičevih delih

Samostojno vedo politologijo je Bibič utemeljeval od samega začetka in ključna spoznanja strnil v knjižici *Kaj je politična znanost* (1969, ponatis 2021). Ker je politično delovanje tako naraslo, da vzpostavljene znanstvene discipline ne morejo v celoti zaobseči vseh njegovih razsežnosti, je

> *potrebna znanstvena panoga, ki ne bo obravnavala političnega delovanja po obrokih, marveč ga bo zajela kot celoto, ki ima kljub svoji čedalje vsajenosti v vse bistvene družbene odnose še vedno neko specifično logiko delovanja in specifično vlogo, pa tudi specifično strukturo,*

> *ki omogoča in hkrati zahteva,* da se nova znanstvena panoga konstituira.[25] (Bibič, 2021/1969: 23)

Bibič je preučeval celoten Heglov opus in se pri tem posebej osredotočil na »temeljno vprašanje«, ki je Hegla ves čas vznemirjalo, to je »človekov položaj v politiki in njegova vloga v politični skupnosti« (Bibič, 1972: 25). V tem kontekstu najprej izpostavi Heglovo zanimanje za razmerje med politiko in religijo. Hegel se je v mladih letih še posebej ukvarjal s pomenom, dometom in vlogo krščanstva v zahodni misli.

Hegel se je najprej zelo navduševal nad antiko. Zanimalo ga je vprašanje narave antične republike, ki je dosegla najvišjo obliko v grški polis, in še bolj vzroki, zaradi katerih je propadla. Bibič ugotavlja, da je Hegel po francoski revoluciji ujet v duh časa, ko je bilo jakobinstvo politično poraženo, Nemčija polfevdalno nemočna za dosledni politični pluralizem, potenciali za socializem pa šele v kali. Hegel se je tako znašel v dualizmu med univerzalizmom antike in partikularizmom moderne, ki je določal njegovo politično misel vse do konca (Bibič, 1972: 34).

Bibič presoja Heglovo politično misel po kriteriju demokratičnosti, »to je, koliko si je Hegel pri konstruiranju modela človeškega sožitja predstavljal, da pri njegovem uresničevanju sodeluje ljudstvo« in po kriteriju, koliko je uspel »razkriti strukturne predpostavke in mehanizme dejanskega političnega življenja, razkriti zapletenost protislovij, ki se v modernem svetu pletejo na relaciji splošni–posebni interesi in torej tudi na relaciji civilna družba–država in znotraj njih« (Bibič, 1972: 35). Bibič ugotavlja, da Hegel bolj ko briljira po drugem kriteriju, manj pušča prostora prvemu kriteriju.

Bibič se posebej ukvarja s Heglovim razumevanjem lastnine, ki ga postavlja v kontekst fevdalizma in Nemčije. Po njegovi oceni je Hegel zelo kritičen do fevdalne politične strukture, ki je »reducirala javno pravo naravnost, brez posredovanja, na privatno pravo in tako izključevala um .... Hegel je jasno videl, kakšne posledice ima dominacija privatne lastnine, ki je samo po pravni obliki splošna, kot dejanski odnos pa tisto, kar ljudi med seboj izolira. Reducirati državo na privatno lastnino je po njem pomenilo uničiti državo kot oblast« (Bibič, 1972: 41).

Hegel se je lotil študija politične ekonomije in se ob tem zavezal, kot ugotavlja Bibič, »da se bo združil s časom, da bo poskušal najti odgovor na bistvena vprašanja epohe in njene 'usode'« (Bibič, 1972: 42). To je pomenilo, da je Hegel vse bolj »priznaval moč institucij moderne buržoazne dobe« in

[25] Na Hrvaškem so takšno zahtevo uspeli zastaviti šele v začetku 21. stoletja s knjigo Mirjane Kasapović »Izhod iz množine?« (2007), torej vstop v politologijo, ki ima svoj predmet in je samostojna znanstvena disciplina, ne pa nanos vedenj o politiki, ki se naplavijo ob robu jezerc vseh že etabliranih ved, ki se priložnostno in kurantno obrnejo tudi na polje političnega, kot se je to kazalo tudi Goričarju leta 1959.

tako »sublimiral kategorijo celote in idealiziral državo kot institucijo, ki naj bi to celoto predstavljala na političnem področju in tako zagospodovala nad partikularizmom zasebnih in posebnih interesov«.

Hegel v spisu Nemška ustava leta 1802 ugotavlja, da »Nemčija ni več država«, »Nemčija ni več politična celota«, »Nemška državna stavba ni nič drugega, kot vsota pravic, ki so jih posamezni deli odtegnili celoti, in ta pravičnost, ki skrbno bdi nad tem, da državi ne preostane nič od oblasti, je bistvo ustave«, »Politično stanje Nemčije je 'pravna anarhija', njeno državno pravo pa pravo proti državi« (nav. po Bibič, 1972: 47–48). Za moderno državo pa je bistveno ravno nasprotno, da se privatno in posamično podredi splošnemu. Za Hegla je za moderno državo bistvena »skupna obramba celote ... lastnine« (Bibič, 1972: 48). Hegel se zavzema za močno državo, ki brzda anarhoidne elemente posamičnosti, hkrati pa zahteva »veliko torišče svobodnega udejstvovanja« (Bibič, 1972: 49).

Bibič analizira še druge Heglove spise, ki pa imajo predvsem pripravljalne razsežnosti za njegovo veliko Fenomenologijo duha in na Filozofijo prava. V njih je izmojstril dialektiko in nekatere kategorije, ki jih je kasneje sestavil v svoj sistem.

Nato se je lotil tudi *Fenomenologije duha*, ki je ključno Heglovo delo za vstop v heglovski način mišljenja. Bibič za Marxom ugotavlja, da je Fenomenologija duha »po globini misli in po poletu duha edinstveno v svetovni filozofski literaturi«, je »rojstni kraj Heglove filozofije« (Bibič, 1972: 69) Bibič se referira tudi na Lukacsevo interpretacijo Fenomenologije in napoveduje, da se v svojem delu omejuje samo na tiste dele Fenomenologije, »ki so posebej zanimivi s stališča razvoja Heglovih družbeno-političnih nazorov« (Bibič, 1972: 70) in ki »so pomembni za razvoj Heglovih pogledov na državo in družbo« (Bibič, 1972: 78). Bibič analizira Heglovo pojmovanje razmerja med gospodarjem in hlapcem. V tej relaciji izpostavi odnos hlapčevske zavesti do smrti in odvisnost razmerja od dela. Bibič ugotavlja, da je Hegel »tu prvikrat na velikanskem zgodovinskem gradivu, v katero je zaobsegel celotni zgodovinski razvoj zavesti in stvarnosti, natančno razvil svojo dialektično metodo, povezujoč jo bistveno s problematiko dela« (Bibič, 1972: 78). Bibič izpostavlja, da se po Heglu »v delu združujeta subjekt in objekt, ko subjekt spozna, da je objekt produkt njegove zavesti« in ugotovitev, da je »delo ustvarilo človekovo samozavedanje, s tem pa tudi človeka kot človeka« (Bibič, 1972: 72). Po njegovem namreč »delovni proces usposobi človekovo zavest skozi zavest hlapca, da se dvigne do sposobnosti misliti« (Bibič, 1972: 72).

Svoja razmišljanja iz prejšnjih obdobij Hegel v Fenomenologiji postavi v sistem: grški polis kot organska skupnost, v kateri je posameznik neposredno prežet s splošnim, razpade na neskončno število atomov v rimski dobi, ki se konstituira na procesu razdvojitve splošnih in posebnih interesov, kar postane značilnost moderne dobe, v kateri vlada meščanstvo. Hegel pripelje razvoj politične skupnosti do francoske revolucije, ki je »zadnja stopnja v razvoju sebi odtujenega duha« (Bibič, 1972: 75). Z njo pride do »zveze med posamezno in občo voljo, ki je dejanska, ne pa samo zamišljena«, vsako »dejanje celote je hkrati neposredno in zavestno delovanje vsakega posameznika« (Hegel, cit. po Bibič, 1972: 75). Ta triumf se sprevrže v svoje nasprotje: »edino delo in dejanje absolutne svobode je smrt« (Bibič, 1972: 76). Strah pred smrtjo atomizirane posameznike pahne v sprijaznjenost, celotna revolucija pa konča v restavraciji. Ta restavracija ni vrnitev v predrevolucionarno dobo, temveč je revolucija obogatila misel s spoznanjem, da se obča volja ne da realizirati v dejanskem svetu, zato se preseli v novo deželo samozavedajočega se duha, ki ji ime posodijo Kant, Fichte in romantiki.

»Heglovo zgodovinsko globino« vidi Bibič v tem, »da je 'bogastvo' in 'državno oblast' prikazoval kot dve temeljni obliki alienacije ('sebi odtujenega duha') in da je tako postavil v svetovno zgodovinski razsežnosti, dasi v idealistični perspektivi, tudi problem zopetne prilastitve odtujenega sveta ekonomije in politike« (Bibič, 1972: 79).

Heglovsko zgodbo Bibič nadaljuje tudi v *marxovski koncepciji*, v kateri gre za »sintezo individualne svobode, svobode delovnih in drugih življenjskih asociacij svobodne skupnosti vseh ... Izhodišče tega koncepta je razredni boj, cilj pa preseganje razredne družbe in svobodna osebnost v svobodni skupnosti« (Bibič, 1983: 1642). Po tej koncepciji gre za preseganje zgolj politične emancipacije, ki človeka pripozna kot državljana in člana civilne družbe kot v prvi sferi svobodnega in enakega z drugimi, v drugi pa kot vezanega na vse dejanske procese neenakosti v produkciji življenja in na zahtevo po emancipaciji človeka kot človeka.

Prvi dve sta se že zgodili, druga je hkrati vladajoča, tretja pa je povsem konceptualne narave. Bibič izpostavlja, da je politika po svojem bistvu razmerje med dominacijo, izkoriščanjem in emancipacijo, zato je ne moremo reducirati na zgolj boj za oblast, vladanje ali nemoralno dejavnost, kar mirno počne vladajoči common sense.

V temeljnem delu slovenske politologije *Zasebništvo in skupnost* je Bibič ključni problem politologije opredelil takole: »Kako ohraniti svobodo posameznika in kako zagotoviti obstoj in razvoj politične celote, je bilo in je veliko vprašanje moderne politične misli in sodobne politične znanosti« (Bibič, 1972: 7). Zanj je *»zasebništvo samo privid individualne svobode, kot je politični absolutizem samo iluzija trajne skupne moči«* (Bibič, 1972: 7).

Bibič je poudarek iz razmerja med razredom in državo, na kar je »realno misleči socializem« reduciral pojmovanje države, dopolnil s poudarkom razmerja med državo in civilno družbo, kar je spet izvorno Heglovo stališče. V času nastanka te študije, konec šestdesetih let 20. stoletja, se je zdelo, da je država tako močno prisotna v civilni družbi in zlasti v ekonomiji, da je ločevanje med civilno družbo in državo izgubilo pomen. Zlasti vulgarni marksizem je stavil na to, da je vse država. S tem pa je izginil prostor za razliko med državno in družbeno lastnino, za razmerje med samoupravno politiko in strankarsko politiko, in seveda s tem tudi velika razlika med samoupravnim socializmom jugoslovanskega projekta in projektom državnega realsocializma sovjetskega tipa. Po letu 1990 se je ves intelektualni napor za utemeljevanje prostora emancipacije človeka v tej smeri izgubil, saj so v vladajoči zavesti tudi znotraj družboslovja to razlikovanje žrtvovali neoliberalni doktrini, po kateri je tudi socializem v celoti totalitarna ideologija. Ni naključje, da je v tem obdobju tudi Heglova misel izgubila tla pod nogami. *Sploščena praksa splošči tudi potrebo po globinah mišljenja.*

Razlikovanje med civilno družbo in državo pa nima pomena samo znotraj doktrine socializma, temveč nosi klico projekta emancipacije tudi v vseh drugih doktrinah. To razlikovanje izpostavlja realna razmerja med akterji, ki delujejo po dveh nasprotujočih si paradigmah: *civilna družba po načelu zasebništva, krepitve zasebnega interesa, država pa po načelu skupništva, skupnega interesa*. Zmaga neoliberalizma je v zadnjih štiridesetih letih močno okrepila proces koncentracije kapitala, s čimer je okrepila zasebno sfero do te mere, da lahko čedalje bolj instrumentalizira državo za potrebe hitrejše koncentracije kapitala v rokah vse manjše peščice ljudi. Heglova misel pa se zaenkrat ni izkazala kot dobro orodje za utemeljevanje in pospeševanje tovrstnih procesov, zato je v dobi neoliberalizma in neokonservativizma še bolj porinjena na obrobje glavnih ideoloških tokov.

Heglovstvo je pri Bibiču živelo tudi skozi ukvarjanje s heglovci, kot sta Roza Luxemburg in Antonio Gramsci. Leta 1977 je zbral, uredil in napisal predgovor v Izbrane spise Roze Luxemburg, leta 1987 pa v izbrane spise Antonija Gramscija. Roza se ni referirala na Hegla, ker je v svojih zapisih reflektirala predvsem svoje aktivistično delo in analizirala dogajanje na celotni fronti delavskega gibanja. Je pa zastopala tisti marksizem, ki je gradil na Heglovi zapuščini, tako imenovani heglomarksizem. Zato je tudi sorazmerno kmalu in večkrat stopila v konflikt s kanto- ali spinozomarksisti tipa Kautsky.

Drugače je z Gramscijem, o čemer piše tudi Bibič. Gramsci je na Hegla neposredno navezoval svoje misli in zapise. Po Heglovem vzoru je v osredje svoje analize postavil razmerje med civilno družbo in državo[26] (Bibič, 1987: 14). Gramsci je bil preučevalec politike in filozof, ki sodi med močne predstavnike politologije, ki iz Heglove zapuščine črpa ne le ključne koncepte, temveč tudi način razmišljanja in analize politike, pri čemer je spet treba izpostaviti prav dialektiko.

V to vrsto je treba dodati še Kardelja. O njegovi koncepciji politike je

[26] *»Gramsci sam izrecno poudarja, da razlikuje civilno družbo od politične družbe ali države v pomenu, 'kakor je to razumel Hegel'« (Bibič, 1987: 15).*

Bibič pisal, da se »navezuje na velike teme moderne politične teorije, ki sta jih zasnovala v meščanski epohi zlasti Rousseau *in Hegel* in ki so jih kritično prevzemali in presegali v svojih delih Marx, Lenin, Rosa Luxemburg in Gramsci« (Bibič, 1979: 1408). Po njegovem se Kardelj »zavzema za *dialektično* pojmovanje politike. Središče te dialektike je protislovje ...« Pri tem gre Kardelju za to, da se protislovje med dominacijo in emancipacijo »razrešuje v širjenju in poglabljanju politike kot *emancipacije*« (Bibič, 1979: 1408). Bibič opozarja, da je »bistveni sestavni del Kardeljeve koncepcije politike ... kritika 'politične države' (*od tod pomen poznavanja Heglove koncepcije politične države* in Marxove kritike te koncepcije, če hočemo razumeti bistvo Kardeljeve politične misli)« (Bibič, 1979: 1407). Bibič je torej v Kardelju prepoznal heglovske dimenzije njegove politične misli, ker se ga je lotil z izkušnjo poznavalca Hegla in ker mu je s tem izrekel najvišji možni kompliment, ki ga teoretik lahko da teoretiku.[27]

Bibič se je k Heglu vrnil ponovno v delu *Civilno društvo i politički pluralizam* leta 1990, ki je izšlo samo v hrvaškem jeziku. Ugotavlja, da ključno mesto v razpravi o nastanku ideje moderne civilne družbe pripada Heglu. Hegel je po njegovem to temo obdelal »najbolj sistematično, najbolj precizno in najbolj vplivno« (Bibič, 1990: 28). Bibič opozarja, da Hegel ni gradil le na razdvajanju civilne družbe in države, temveč tudi na njunem povezovanju. Po Heglu je država konkretna svoboda, tako da svoboda ni pri posamezniku v civilni družbi, ker je vezana na obče. Brez države ni svobode, civilna družba pa je prostor strukture potreb, korporacij in ekonomije, partikularnih interesov, ki se šele v državi lahko realizirajo in pripoznajo. Bibič v tem delu opisuje, kako je tudi njegovo delo Zasebništvo in skupnost oralo ledino znotraj socialistične recepcije civilne družbe in je bilo tako v osemdesetih letih lažje to diskusijo voditi v okviru reforme samoupravljanja kot v drugih delih države. Na Hrvaškem in v Srbiji sta se proti uporabi koncepta civilna družba postavila Stipe Šuvar in Miloš Nikolić, oba vidna ideologa jugoslovanske Zveze komunistov, v Sloveniji pa je proti uporabi pojma nastopil Zoran Polič, eden od prvoborcev NOB (Bibič, 1990: 67). Bibičevo ukvarjanje s Heglom in Marxom ter s civilno družbo je tako *pomagalo rekonceptualizirati samoupravljanje in njegov prehod v strankarsko demokracijo*. »Ne glede na to, kakšne so bile vsebine, ki so jih posamezniki pripisovali civilni družbi, je bilo za ta koncept značilno, da je bil povezan z globoko potrebo po reformi in obnovi našega javnega življenja.« (Bibič, 1990: 68)

Bibič analizira vpliv koncepta civilne družbe na koncept pluralizma in na pluralizacijo javnega življenja v Sloveniji in Jugoslaviji. V tem kontekstu kot

[27] Edvard Kardelj je umrl februarja 1979. V jeseni je že izšla posebna številka Teorije in prakse s članki, ki so razporejeni po posameznih področjih z ustreznimi uvodnimi študijami. Bibičev tekst Dialektika politike je postavljen kot jagoda na torti na zadnje mesto, kot kronska ocena veličine Kardeljeve politične teorije.

najboljšo možnost za nadaljnji razvoj političnega življenja razvija koncept *asociacijskega pluralizma*, ki ga utemeljuje na idejah iz zgodovine političnih idej. S tem konceptom bi rad Bibič rešil *heglovski problem* razlikovanja med zasebništvom in skupnostjo, med civilno družbo in državo, med burgeoisom in citoyenom: »Asociacijski pluralizem izraža zakonitost moderne dobe, ki ni, kot smo že poudarili, doba atomiziranih, izoliranih posameznikov, temveč epoha, v kateri ljudje vse bolj skupaj rešujejo skupne probleme. ... Ko naglašajo osnovno človekovo družbenost, mu asociacije ne odvzemajo njegove individualnosti.« (Bibič, 1990: 203) Tako je »individuum v središču stvari«. »Čeprav so asociacije zasnovane na konkretnih interesih ljudi, ostajajo asociacije povezane s človekom, njegovimi potrebami in težnjami, z njegovo družbeno naravo, ki ni samo sebična, temveč je usmerjena tudi k skupnosti.« (Bibič, 1990: 203) Hkrati pa se je treba zavedati, da je treba »zdraviti tudi patologije, ki jih rojeva življenje asociacij.« Gre za »'transcendiranje' posamičnosti v skupnostno«, kar je »politični proces v najširšem pomenu besede«. Demokratičnost tega političnega procesa pa se dosega na tak način, da »skupnostne povezave ustvarja tako, da hkrati ohranja individualnost tega, kar prehaja v skupnost. Skupnost pri tem, torej, ni sinonim zunanje oblasti, ki s silo varuje mehanske povezave med človekom in sabo, temveč je konkretno artikulirana celota, ki priznava avtonomijo delovanja človeku, svoje sile in legitimnost pa črpa iz priznavanja posameznika in asociacij« (Bibič, 1990: 203–204). V tem okviru imajo posebno mesto »politične asociacije«, ki se od interesnih razlikujejo »po stopnji splošnosti interesov, za katere se zavzemajo« (Bibič, 1990: 205). Njihova osnovna vloga je v tem, da agregirajo, artikulirajo in selekcionirajo interese različnih segmentov civilne družbe.

Asociacijski pluralizem »predpostavlja in zahteva širši koncept politike in demokracije. Za razliko od monoarhičnega načela se zavzema za »poliarhično« konceptualizacijo politike. Za razliko od elitistično-pluralistične koncepcije politike ... se asociacijski pluralizem poleg tekmovanja zavzema še za čim širšo udeležbo ljudi v politiki« (Bibič, 1990: 209). Bibič se torej zavzema za novo konceptualizacijo politike, ki bi »namesto bipolarne polarizacije« vpeljala »novo sintezo, ki zahteva pripoznavanje mnoštva protislovij in konfliktov, v katerih se družbeno in politično življenje prikazuje bolj raznovrstno, njihove rešitve pa so bolj zapletene« (Bibič, 1990: 211). Bibič je prepričan, da s takšno koncepcijo politike in asociacijskega pluralizma »socializem ne bi bil samo ali predvsem zahteva po večji enakosti, temveč tudi zahteva po večji svobodi človeka in skupnosti« (Bibič, 1990: 212).

Celotno delo prežemajo heglovska problematika in razumevanje družbenih in političnih procesov ter seveda uporaba kategorialnega aparata. Bibič je tako pokazal, kako heglovstvo lahko živi v politoloških delih tudi konec dvajsetega stoletja.

Sklep

Heglovstvo velja kot kriterij teoretske globine zlasti v najboljši tradiciji marksizma. V razmerah, ko Heglu ni bila peta slava niti v Jugoslaviji niti v svetu in ko je bilo na slabem glasu zlasti delo Temeljne črte filozofija prava, se je Bibič lotil afirmacije prav tega dela Heglove zapuščine v navezavi na interpretacijo celotne njegove zapuščine, vezane na politične ideje in Heglov način razumevanja vpričnе zdajšnjosti. Bibič je pav v tem Heglovem delu našel konceptualni okvir za razumevanje politike in s tem ključnega predmeta politologije, na katerem je utemeljil to novo propulzivno znanstveno disciplino. Pri tem se je spopadel z vladajočo ideologijo odmiranja države in zanikanja relevantnosti civilne družbe. Pokazal je, da je za širitev emancipatornega potenciala nove družbene in politične ureditve prav navezava na Heglovo razlikovanje med civilno družbo in državo ključnega pomena tako za Marxa in marksizem kot tudi najboljši okvir za razvoj politologije. Bibič je v politologijo uvajal tudi historicizem in dialektično mišljenje, s čimer se je okužil pri študiju Hegla. Na tej osnovi je razvil koncept asociacijskega pluralizma kot model polne politike, ki bi nadgradila liberalno demokratsko strankarski tip pluralizma.

Z naslonitvijo na misleca države in politike Hegla je politologija prek Bibiča pridobila utemeljitev in se z analitskim aparatom usposobila za analizo, razumevanje in predvidevanje razvoja države in politike v 21. stoletju. Izpostaviti velja, da je bila teoretska poglobljenost politologije po zaslugi Adolfa Bibiča utemeljena v študiju Hegla, Marxa in Gramscija, s čimer je politologija lahko izplavala iz sociologizmov v pristan neodvisne samostojne znanstvene discipline.

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GOSPODARSKA DIPLOMACIJA MAJHNIH DRŽAV V PRIMERJALNI PERSPEKTIVI: PRIMER SLOVENIJE, SRBIJE IN AVSTRIJE**[1]

Povzetek. *Namen pričujočega članka je analizirati gospodarsko diplomacijo treh majhnih držav – Avstrije, Slovenije in Srbije, v primerjalni perspektivi. Raziskati želimo, če in kako drugačna gospodarsko-politična struktura držav (Avstrija kot država s tržnim gospodarstvom, Slovenija kot potranzicijska država, Srbija kot država v tranziciji) vpliva na delovanje gospodarske diplomacije. S pomočjo primerjalne analize, ki je utemeljena na velikem številu intervjujev z akterji gospodarske diplomacije, ugotavljamo, da: (1) je ne glede na model, na podlagi katerega omenjene države oblikujejo svojo gospodarsko diplomacijo, pomen države vedno prisoten, še posebej v primerih težav ali zapletov na izbranem trgu (ex-post pristop); (2) se vse analizirane države soočajo z enakimi izzivi v gospodarski diplomaciji, ti pa niso pogojeni z njihovim gospodarsko-političnim sistemom, ampak z mednarodnim okoljem in delovanjem izvoznih ali investicijskih aktivnosti podjetij; (3) ostaja v primeru konceptualizacije in operacionalizacije gospodarske diplomacije znotraj diplomatskih študij še veliko neraziskanega, kar onemogoča njeno občo sprejetost, saj gospodarska diplomacija in sorodni koncepti tudi 20 let po začetku njenega aktivnega preučevanja še niso enovito konceptualizirani, hierarhizirani in umeščeni v kanon diplomatskih študij.*

Ključni pojmi: *gospodarska diplomacija, Avstrija, Slovenija, Srbija, diplomatske študije*

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[1] *Članek je rezultat študija na doktorskem programu Humanistika in družboslovje (smer: Diplomacija), raziskovalnega programa P5-0117 (Slovenija in njeni akterji v mednarodnih odnosih in evropskih integracijah) ter Ciljnega raziskovalnega projekta V5-2259 (Globalna prisotnost in domet Slovenije v OZN).*

Uvod

Gospodarska diplomacija kot dejavnost države, ki pomaga pri internacionalizaciji podjetij,[2] je kot koncept v diplomatskih študijah postala »popularna« predvsem po letu 2000, zagon njenega preučevanja pa se je razvil šele v drugi polovici novega tisočletja. Razloge za to gre iskati v treh smereh: prvič, gospodarska diplomacija je koncept v okviru diplomatskih študij. Ker so se te začele pospešeno razvijati šele po koncu hladne vojne (takrat so izstopile iz »sence« teorije mednarodnih odnosov in analize zunanje politike), se je takrat začela oblikovati tudi konceptualizacija gospodarske diplomacije. Drugič, gospodarska diplomacija je bila vseskozi razumljena kot presečišče dveh njej sorodnih konceptov – ekonomskega državništva (*economic statecraft*) in ekonomske zunanje politike (*economic foreign policy*) –, zato je (bila) njena konceptualizacija veliko zahtevnejša, kot bi bila, če bi bila samonikel koncept znotraj diplomatskih študij (Okano-Heijmans, 2011). Določene nerazmejenosti med omenjenimi koncepti še vedno obstajajo, to pa onemogoča dokončno konceptualizacijo in hierarhizacijo gospodarske diplomacije znotraj diplomatskih študij (prim. Naray, 2012; Ruel in Visser, 2012). Tretjič, novost in nedorečenost konceptov ter hierarhizacije gospodarske diplomacije v odnosu do sorodnih konceptov je vodila do osredotočenja raziskovalcev v izhodiščno konceptualizacijo pojava samega po sebi. To je povzročilo, da je zaradi pomanjkanja izhodišč v definiranju, kaj gospodarska diplomacija sploh je, umanjkal sistemski pristop k analizi gospodarske diplomacije na »specifičnih primerih«, kot so npr. gospodarska diplomacija v velikih državah, majhnih državah, državah v tranziciji, gospodarska diplomacija potranzicijskih držav, gospodarska diplomacija nedržavnih enot itd. Na tem raziskovalnem področju imamo le posamične študije (npr. Aleidan, 2019; Fry-McKibbin in Nguyenm, 2019; Teixeira et al., 2015; Kesteleyn, 2014; Gruden, 2005; Justinek, 2011; Arbeiter et al., 2019), to pa onemogoča strukturirano konceptualiziranje gospodarske diplomacije kot samostojnega koncepta znotraj kanona diplomatskih študij.

[2] *Gospodarska diplomacija kot koncept spada v okvir institucionalne teorije, in sicer v steber analize delovanja institucij, dilem in vprašanj transakcijskih stroškov; odnosa med politiko v najširšem pomenu (politics) in ekonomijo kot filozofijo (economics) ter konkretno politiko (policy) ter gospodarstvom (economy) kot konkretno aktivnostjo; v vprašanja institucionalne različnosti in uvedbe najboljših modelov za stroškovno učinkovitost (od ključnih načel javnih financ) ter v strateški okvir institucionalne teorije, v katerem se vzpostavlja odnos med državo (kot vseobsegujočo skupnostjo), ki občasno deluje kot agent (sredstvo) v rokah konkretnih podjetij. Seveda se gospodarska diplomacija umešča tudi v historični institucionalizem prek vprašanja javnih politik, sposobnosti države za zagotavljanje družbene in državne blaginje, nacionalne varnosti, odnosa do moči države v mednarodnih odnosih ter kompenzacije pomanjkanja slednje in še bi lahko naštevali. Za natančen pregled razvoja institucionalne teorije napotujemo na dela Aguilere in Grøgaarda (2019), Ramana Sharme et al. (2021), Raškovića in Takacs (2021) ter Raškovića (2015).*

Namen našega članka je prispevati k dopolnitvi tega manka, in sicer z analizo delovanja gospodarske diplomacije majhnih držav[3] z različno gospodarsko-politično strukturo. Tako bomo preverjali značilnosti gospodarske diplomacije kot koncepta na primeru Avstrije, države z dolgo delujočim tržnim gospodarstvom; Slovenije, države, ki je gospodarsko v potranzicijskem obdobju; in Srbije, države, ki svojo politično in gospodarsko tranzicijo živi vsakodnevno. Pri analizi bomo preverjali, če se značilnosti in izzivi gospodarske diplomacije, ki so bili do sedaj analizirani, prikazani in konceptualizirani znotraj teorije gospodarske diplomacije (in širše v diplomatskih študijah), pojavljajo tudi v analiziranih primerih. Pri tem se bomo osredinili predvsem na vprašanja, povezana s strukturnim delovanjem gospodarske diplomacije (modeli delovanja), z njim pogojene spremenljivke (finančni in človeški viri, okolje delovanja, prožnost oz. togost ipd.), ter na nikoli razrešeno vprašanje merjenja njene (ne)uspešnosti oz. (ne)učinkovitosti (Ruel in Zuidema, 2012). Vse našteto bomo preverjali v primerjalni perspektivi, pri čemer se zavedamo omejitev, ki jih takšna študija ima zaradi redke dostopnosti ali nedostopnosti podatkov, pa tudi zaradi določenih izhodiščnih razlik primerjanih držav.[4] Na podlagi povedanega smo si postavili raziskovalno vprašanje, na katero želimo odgovoriti, in sicer nas zanima, kakšne so značilnosti modelov gospodarske diplomacije znotraj teorije diplomatskih študij ter kako se konceptualizirane značilnosti gospodarske diplomacije kažejo na analiziranih primerih.

Na raziskovalno vprašanje bomo odgovorili s kombinacijo različnih raziskovalnih metod. V teoretskem delu, ki bo osnova za empirični del, bomo spoznanja o gospodarski diplomaciji prikazali, konceptualizirali in operacionalizirali s pomočjo opisne in primerjalno-kritične metode, s katerima bomo najprej razgradili (*decoupling*) obstoječa spoznanja in ugotovitve, nato pa s pomočjo metode sinteze spoznanj oblikovali modelsko razmišljanje o gospodarski diplomaciji, primerno za analizo izbranih primerov. Empirični del članka bo temeljil na podatkih, dobljenih s pomočjo

3 O tem, kako definirati »majhnost« države, je bilo v ekonomski teoriji ter teoriji mednarodnih odnosov izdelanih že veliko predlogov, a se nobeden ni zares prijel. Zgoščen pogled, kateri kriteriji bi lahko državo definirali kot »majhno«, lahko bralec najde v Udovič in Svetličič (2007: 32–37). Ne glede na vse mogoče kriterije, nekatere tudi tehtane ali izračunane po posebni formuli, se je na tihem za definiranje »majhnosti« države uveljavil populacijski kriterij, ki »majhne« države definira kot tiste države, ki imajo do približno 10 milijonov prebivalcev. Na Slovenskem se je med nekaterimi razpravljalci v mednarodnih odnosih uveljavilo še razlikovanje med mala in majhna država. Termin mala država naj bi označeval kategorijo držav ((samo)perceptivna kategorizacija), majhna država pa lastnosti države (npr. majhno ozemlje in majhno število virov, prebivalstva itd. – objektivne danosti torej) (prim. Bojinović, 2004: op. 5).

4 Avstrija in Slovenija sta članici Evropske unije, Srbija ni; Srbija je država v gospodarski in politični tranziciji, Slovenija je to še delno, Avstrija ni; Avstrija je gospodarsko najbolj razvita in ima najbolj razvit sistem gospodarske diplomacije, Slovenija se tu umešča v sredino, Srbija je od vseh treh držav gospodarsko najmanj razvita, njena gospodarska diplomacija je šele v vzpostavljanju.

poglobljenih polstrukturiranih intervjujev (*in-depth semi-structured interviews*) s 14 sogovorniki, ki so delovali ali delujejo na področju gospodarske diplomacije Avstrije, Slovenije in Srbije oz. se le-te poslužujejo (t.i. metoda intervjujev strokovnjakov; prim. Bogner et al., 2018; Döringer, 2020; Bogner in Menz, 2009). Pridobljene podatke bomo križno preverjali tudi s podatki, pridobljenimi z metodo opazovanja z udeležbo. Tak pristop nam ne bo omogočil samo testiranja empiričnih podatkov, ampak s povratno zanko tudi obogatitev teoretske zakladnice spoznanj o gospodarski diplomaciji.

Članek je sestavljen iz treh delov. Uvodu sledi teoretsko-konceptualni del, ki predstavlja okvir za konceptualizacijo gospodarske diplomacije kot aktivnosti med strukturo (*structure*), agentom (*agency*) in akterjem (*actorness*) ter uokvirja tudi predstavitev empiričnih ugotovitev, ki sledijo v tretjem delu članka. Članek zaključujemo s sklepom, v katerem bomo predstavili odgovor na raziskovalno vprašanje, izpostavili odprta vprašanja in podali nekaj napotil za raziskovanje v prihodnje.

Teoretski okvir: gospodarska diplomacija med strukturo, agentom in akterjem

Milan Brglez (2021) pojasnjuje, da je izhodišče za preučevanje diplomacije znotraj diplomatskih študij »diplomatska praksa, iz katere je mogoče diplomacijo teoretizirati prek dveh pristopov – *agentskega* in *strukturnega*«.[5] Po njegovem mnenju *diplomatska praksa* postane del strukture prek procesov reprodukcije in transformacije prakse same; na drugi strani pa sta prva pogoja za *agentizacijo* diplomatske prakse identifikacija in socializacija s slednjo. Ne glede na to, v katero smer se razvoj *diplomatske prakse* oblikuje, se ta znova dinamizira v »nadgrajeno diplomatsko prakso«, ki se oblikuje na podlagi določene oblike moči – *strukturna* se oblikuje prek strukturne moči, *agentska* pa prek relacijske moči.

Udovič (2022) je nadgradil Brglezovo razumevanje diplomacije v diplomatskih študijah še z enim konceptom, *akterjem*. Kot poudarja sam, je razumevanje diplomacije v diplomatskih študijah le skozi prizmo dihotomije med strukturo in agentom zastarelo, saj izhaja iz pozitivistične metodologije. Moderni pristopi v diplomatskih študijah pozitivistične pristope opuščajo (zares jih niso nikoli sprejeli) in jih nadomeščajo z interpretativističnimi. Njegovo razmišljanje tako sledi smeri, da poznamo v diplomatskih študijah

[5] *Vprašanje odnosa med agentom in strukturo ima v družboslovnih znanostih dolgo brado. Njegove začetke beležimo pri socioloških očetih (Durkheimu in Webru), prelom pa je to področje preučevanja doživelo z Giddensovo (1979) konceptualizacijo, ki jo štejemo za prelomno v tem okviru razmišljanja odnosa med strukturo in agentom. Z vidika teorije mednarodnih odnosov lahko zametke razmišljanja in dilem okoli tega odnosa najdemo že pri Singerju (1961), odprta vprašanja v odnosu med strukturo in agentom v teoriji mednarodnih odnosov pa obravnava Alexander Wendt v svojem članku iz leta 1987.*

tri ravni oz. akterje, ki so pomembni za razumevanje diplomatske aktivnosti državnih in nedržavnih akterjev: (1) strukturo, ki diplomatsko prakso uokvirja in reproducira; (2) agenta, ki diplomatsko prakso sooblikuje skupaj s strukturo ali samostojno ter jo izvaja; (3) akterja, ki diplomatsko prakso samo izvaja oz. je zgolj kanal za komuniciranje. Za slednjega je značilno, da ne deluje brez navodil, če navodila ima, jim sledi in jih ne skuša preoblikovati. Ključno je, da instrukcije (navodila nadrejenih oz. centrale) razume in obravnava brezpogojno in se do njih ne opredeljuje (prim. Udovič in Arbeiter, 2021: 12).

V sistemu gospodarske diplomacije skozi zgodovino in še danes najdemo vse tri oblike izvajanja gospodarske diplomacije. Ta je bila v prazgodovini in v predantiki prepuščena predvsem *ad hoc* odločitvam in je kot taka predvsem temeljila na agentskem in akterskem pristopu. Z oblikovanjem instituta *proksena* v antičnih Atenah, ki so ga imenovale domače oblasti v polisu in je bil »v službi« tujih trgovcev, je postala gospodarska diplomacija vse bolj strukturno pogojena. Seveda si lahko predstavljamo, da je bila njegova naloga veliko več kot le pomoč tujim trgovcem ob prihodu v mesto, a že načelo njegovega poročanja domačim oblastem ter tudi delovanja skladno z zahtevami polisa kaže, da je bilo njegovo delovanje del uveljavljene strukture mestne državice. Še bolj umeščena v strukturo državnega delovanja postane gospodarska diplomacija v starem Rimu, kjer so naloge v zvezi z gospodarsko diplomacijo opravljali *praetorji peregrinusi*. Ti so imeli s strani države poverjena pooblastila za promocijo trgovine, hkrati pa tudi sodna pooblastila (Udovič, 2013: 35–49). Gospodarska diplomacija se je v naslednjih stoletjih vse bolj strukturirala, višek svoje strukturnosti (ki obstaja še danes) je dosegla z institucionalizacijo diplomatskega aparata v času mestnih državic, v 14. stoletju. S tem premikom je struktura privzela vse pomembnejšo aktivnost in gospodarski diplomaciji okrepila tudi simbolično moč, ki je agenti – ki so delovali predvsem po načelu pragmatizma – niso nikoli imeli v takšnem obilju. Od tega preloma naprej je gospodarska diplomacija postajala vse bolj del strukture in vse manj agentska. Hkrati pa se je krepila tudi njena akterska vloga. S spremembami v »strukturi« in »akterjih« se je spremenila tudi raven izvajanja gospodarske diplomacije. Če je bila v izhodišču namenjena ali podrejena interesom posamičnega trgovca, se je s strukturalizacijo *održavila*. Njeno oblikovanje ni bilo več prepuščeno *agentom*, ampak so tematiziranje in prioritete gospodarske diplomacije bile določene državno oz. vsaj na državni ravni (Lee in Ruel, 2012: XIX). Gospodarska diplomacija je tako predstavljala več kot le instrument za pospeševanje gospodarske menjave, postala je sredstvo vpliva tudi na drugih področjih (Svetličič, 2011b; Saner in Yiu, 2003; Mercier, 2007; Reuvers in Ruel, 2012).

Spremembe v diplomaciji nasploh in v izvajanju gospodarske diplomacije so postale še bolj radikalne v 20. stoletju, s fragmentacijo mednarodne skupnosti, ko so v diplomaciji in v gospodarski diplomaciji začeli vse pomembnejše mesto zavzemati novi akterji, mdr. nevladni akterji (Naray, 2015: 173), pa tudi akterji, ki bi bili v klasičnem diplomatskem svetu uporabniki gospodarske diplomacije – podjetja (Jaklič in Šešum, 2019; Hajdukiewicz, 2019). Vstop podjetij v strukturo delovanja gospodarske diplomacije je odprl dilemo odnosa med *ponudbo* in *povpraševanjem* pri oblikovanju gospodarske diplomacije, v kateri država ni bila več edini odločevalec, ki je določal oblikovanje gospodarske diplomacije, ampak je to vse bolj prehajalo tudi v roke podjetij (Jaklič, 2011). To pa je seveda pomenilo, da delovanje gospodarske diplomacije po načelu »enotno za vse« (*one size fits all*) ne odgovarja več zahtevam časa (van Bergeijk, 2009: 180; prim. tudi Justinek, 2018).

Prav slednje je v razumevanju in oblikovanju gospodarske diplomacije ustvarilo neke vrste revolucijo, saj klasični/državni modeli gospodarske diplomacije v mnogih primerih niso več ustrezali realnosti oz. potrebam podjetij in drugih akterjev v gospodarski diplomaciji. Da bi države odgovorile na spremenjene trende v mednarodnih (ekonomskih) odnosih, so začele spreminjati klasično ureditev gospodarske diplomacije, ki je bila državocentrična, z velikim poudarkom na povezovanju z drugimi aktivnostmi diplomacije, v smeri potreb in želja njenih uporabnikov (Seringhaus in Botschen, 1991: 116). V tem okviru so se oblikovali trije[6] ključni modeli razvijanja in delovanja gospodarske diplomacije: (1) državocentrični (npr. Slovenija, Srbija, Francija), (2) interesni (npr. Češka, delno Hrvaška) ter (3) mešani (Avstrija, Italija).

Znotraj državocentričnega modela se gospodarska diplomacija razvija običajno v okviru ministrstev za zunanje zadeve in ministrstev za gospodarstvo, morda tudi v okviru agencij, ki so pod neposrednim nadzorom države. Gospodarska diplomacija je v teh okvirih predvsem aktivnost, ki sledi strateškim interesom države oz. panogam, ki so v strateškem interesu držav (de la Carriere, 1998). V splošnem bi lahko ta model poimenovali kot strukturni model, saj pomen državno ustvarjenih odločitev (tj. državna struktura) prevladuje nad interesi posamičnih podjetij ali panog.

Drugi model razvoja gospodarske diplomacije temelji predvsem na podjetniški pobudi. Gospodarska diplomacija *prima facie* ne zastopa interesov države, ampak interese podjetij. Ta, zbornični model je zasnovan na preseku pričakovanj potreb podjetij, ki so člani zbornic. V določenih državah sicer zbornice delujejo v imenu vseh podjetij, drugje le za svoje člane oz. za tiste,

[6] Rana (2016: 70) obstoječe modele razvršča v pet kategorij, Naray (2011: 142–143) pa navaja šest modelov organizacije gospodarske diplomacije.

ki storitve plačajo. Ta model gospodarske diplomacije bi lahko poimenovali kot agentski model, saj znotraj tega modela agenti (tj. podjetja in odposlanci zbornic) določajo aktivnosti, da zadovoljijo potrebe njihovih naročnikov.

Tretji model se nahaja nekje vmes – včasih je bolj podoben interesnemu, drugič bolj državocentričnemu, odvisno od potreb in strukture države ter podjetij. Ta model tako lahko prehaja od strukturnega k agentskemu, lahko pa je samo akterski, kar pomeni, da so struktura in agenti v drugih institucijah, določena pooblaščena institucija – ki je lahko tudi zunaj državnega sistema (npr. agencija s pooblastili za zastopanje na tujih trgih) pa le izvaja to, kar ji je naročeno.

Seveda ima vsak od naštetih modelov tudi svoje slabosti. Centraliziran, državocentričen model, ki je običajno umeščen v klasično strukturo državnega (birokratskega) aparata, lahko – kljub znanju in velikemu številu kontaktov in poznanstev – postane ovira, če zapade v klasične birokratske postopke; sočasno je ta aktivnost vedno omejena z mednarodno- (npr. 42. člen Dunajske konvencije o diplomatskih odnosih) in notranjepravnimi akti (npr. Ustava, zakoni ter podzakonski akti). Na drugi strani interesni sistem, če ni podprt z državnim ozadjem, v državah, kjer je politika še vedno pomemben odločevalec v gospodarstvu, nima prave veljave, saj nima ne dejanske ne simbolne moči. Agenti tako redko dostopajo do najvišjih (političnih) odločevalcev v državi, kar znižuje njihovo uspešnost pri izvajanju gospodarske diplomacije, pa tudi učinkovitost. Niso redki primeri, ko se lahko tudi zgodi, da mora – ker zbornični sistem ne uspe doseči ciljev – v postopek vstopiti država s svojim aparatom. To se dogaja predvsem v primerih *ex-post*[7] gospodarske diplomacije.

Z vidika slabosti so mešani primeri organizacije gospodarske diplomacije lahko najboljši, saj se minimizirajo slabosti državocentričnega in interesnega koncepta, sočasno se pa lahko krepijo njihove prednosti. Slabost tega koncepta je lahko nevarnost razpršenosti odgovornosti ter neusklajenost politik in aktivnosti, kar posledično vodi do neučinkovitosti. Pa tudi to, da lahko, če prihaja do težav v komuniciranju med različni akterji, posamezniki privzamejo vlogo akterja in »čakajo na navodila«, sami pa ne storijo ničesar, kar lahko vodi do številnih izgubljenih priložnosti ter tudi nevarnosti za določen gospodarski ali politični ugled države.

[7] *Udovič (2009) konceptualizira gospodarsko diplomacijo tudi glede na njeno časovno komponento. Po njegovem mnenju se gospodarska diplomacija oblikuje časovno po dveh načelih: ex-ante in ex-post. Ex-ante gospodarska diplomacija se ukvarja predvsem z vprašanji vstopa podjetij na trg (lahko bi jo zato imenovali strategija odpiranja vrat), ex-post gospodarska diplomacija pa se začne odvijati takrat, ko podjetje že deluje na tujem trgu in potrebuje »pomoč države pošiljateljice« ob nastalih problemih (to strategijo bi lahko označili kot kurativno delovanje).*

Tabela 1: PREDNOSTI IN SLABOSTI MODELOV GOSPODARSKE DIPLOMACIJE

Model	Prednosti	Slabosti
Državocentrični (strukturni)	1. Visoka simbolna moč 2. Dostop do najvišjih odločevalskih vrhov 3. Jasna linija odločanja in določanja prioritet 4. Nacionalni interes kot vodilo 5. Sposobnost *ex-ante* in *ex-post* delovanja 6. Jasnost financiranja	1. Nevarnost birokratizacije in razpršenost odgovornosti 2. Togost v odzivanju na krize in pobude 3. Težave z definicijo nacionalnih interesov in selekcijo projektov, ki zaslužijo pomoč 4. Notranje- in mednarodnopravne ovire 5. Nizka stopnja učinkovitosti 6. Omejeni finančni viri, kriteriji javnih financ
Interesni (agentski)	1. Fleksibilnost, hitrost, odsotnost birokracije 2. Jasna linija odgovornosti ter usmerjenost k uporabniku 3. Večja zmožnost ustvarjanja odnosov na ravneh *business-to-business* (B2B) in *business-to-consumer* (B2C) 4. Višja stopnja učinkovitosti od državocentričnega modela 5. Ciljnost financiranja	1. Nizka simbolna moč, omejen domet, zavzemanje le za člane 2. Nepoznavanje okolja, podcenjevanje značilnosti države vstopa 3. Omejeno znanje, odsotnost stikov s državo sprejemnico 4. Odsotnost strateškega in celovitega delovanja 5. Omejena sredstva, nestanovitnost v dotoku sredstev
Mešani*	1. Visoka simbolna legitimacija in sočasno večja učinkovitost 2. Hiter angažma veleposlaništva, če je potrebno, sicer predvsem vodenje poslov po načelu podjetniških pobud 3. Primerno uravnoteževanje med interesi »države« in »podjetij« 4. Sposobnost delovanja *ex-ante* in *ex-post*	1. Nevarnost pretiranega približevanja ali državocentričnemu ali interesnemu modelu in privzemanje njegovih slabosti 2. Prevelika razpršenost odgovornosti in s tem nevarnost neučinkovitosti in nedelovanja sistema 3. Problem pristojnosti in odgovornosti

* Mešani model lahko prehaja med vsemi tremi stopnjami – državocentričnim, interesnim in akterskim, zato ga je treba, ko ga analiziramo, časovno in krajevno zamejiti, da bi vedeli, za katero obliko gre.
Vir: Lasten prikaz.

Vse naštete prednosti in pomanjkljivosti opisanih treh modelov izhajajo iz logike delovanja teh modelov. A kot vedno v odnosih, v diplomatskih pa je to še toliko bolj pomembno, pridemo do vprašanja izvajalcev in udeležencev v modelih; to lepše napiše Svetličič (2011a: 124ff), ko pravi, da so kadri tisti, ki odločajo o uspešnosti ali neuspešnosti določene aktivnosti znotraj gospodarske diplomacije (prim. tudi Jazbec, 2022). Zato je treba tudi te kadre primerno izbrati glede na njihove značilnosti in sposobnosti, sočasno pa upoštevati tudi njihov status. Če imajo v državocentričnem modelu običajno že vnaprej določen (diplomatski) status, kar jim daje in določa prednosti in slabosti, pa je v interesnem modelu njihov status odvisen predvsem od moči interesne skupine ali organizacije, ki jih je predlagala. Najbolj fleksibilen pri njihovem uveljavljanju je mešani model, ki omogoča na eni strani, da dobijo vse prednosti iz državocentričnega modela, sočasno pa jim ni treba biti del tega modela (in s tem slabosti zmanjšujejo); na drugi strani pa lahko koristijo predvsem fleksibilnost iz interesnega modela, ne da bi jim bilo treba sprejeti slabosti iz tega modela.

Prikazane značilnosti navedenih modelov gospodarske diplomacije bomo v nadaljevanju preverjali na primeru treh analiziranih držav. Pri tem bomo skušali predvsem analizirati modele gospodarske diplomacije, ki jih obravnavane države imajo oz. jih vzpostavljajo, ter slednje oceniti glede na njihove prednosti in slabosti, kot so prikazani v Tabeli 1.

Gospodarska diplomacija Avstrije, Slovenije in Srbije v primerjalni perspektivi

Avstrija, Slovenija in Srbija so majhna in odprta gospodarstva, v katerih ima izvoz, pa tudi višje oblike izhodne internacionalizacije, velik vpliv na rast bruto domačega proizvoda. Za takšno obliko gospodarstva je še posebej pomembno, da država naredi vse potrebno, da se mednarodna trgovina odvija brez težav oz. da jo državna politika celo aktivno podpira. Pri tem se je treba zavedati, da je pomoč gospodarske diplomacije najbolj potrebna majhnim in srednjim podjetjem, ki se pri svojem vstopu na tuje trge in delovanju na njih pogosto soočajo s pomanjkanjem znanja, človeških in finančnih virov pa tudi z nepoznavanjem tujih trgov.[8] Kljub temu da v primeru treh analiziranih držav daleč največji del izvoza ustvarijo velika podjetja, postajajo majhna in srednje velika podjetja – tudi v obliki t. i. *born global* – vse pomembnejša za uspešno izhodno internacionalizacijo.[9] To gre pripisati predvsem dejstvu, da so majhna in srednje velika podjetja v primerjavi z velikimi podjetji fleksibilnejša in bolj odzivna (Cavusgil in Knight, 2015).

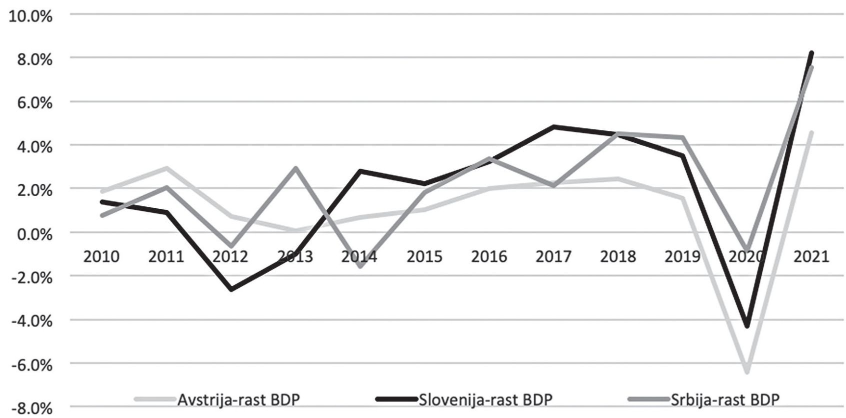
Že skladno z nordijsko šolo internacionalizacije se majhna odprta gospodarstva najprej internacionalizirajo na trge sosednjih držav oz. držav v regiji. Tej tezi pritrjujejo tudi naši podatki. Avstrija ima v Srednji in Jugovzhodni Evropi 35 % vseh svojih izhodnih tujih neposrednih investicij (ITNI) (Österreichische Nationalbank, 2023), Slovenija pa več kot 75 % (Banka Slovenije, 2022). Vse tri države tudi največ izvozijo na trge Evropske unije.

[8] Tako Jaklič in Šešum (2019: 105) kot intervjuvanci v naši raziskavi ugotavljajo, da mala in srednje velika podjetja potrebujejo največ pomoči pri internacionalizaciji svojega poslovanja, in sicer predvsem v njeni začetni fazi, ki je pogojena z omejenimi finančnimi in človeškimi viri, pomanjkanjem znanja ter nasploh višjimi fiksnimi stroški vstopa na tuje trge.

[9] Tega se zavedajo tudi na pristojnih ministrstvih, saj so majhna in srednje velika podjetja še osrednji fokus gospodarske diplomacije vseh treh obravnavanih držav (BMEIA, 2019: 180; Golubović, 2020: 239; Ministrstvo za zunanje zadeve Republike Slovenije, 2021: 3).

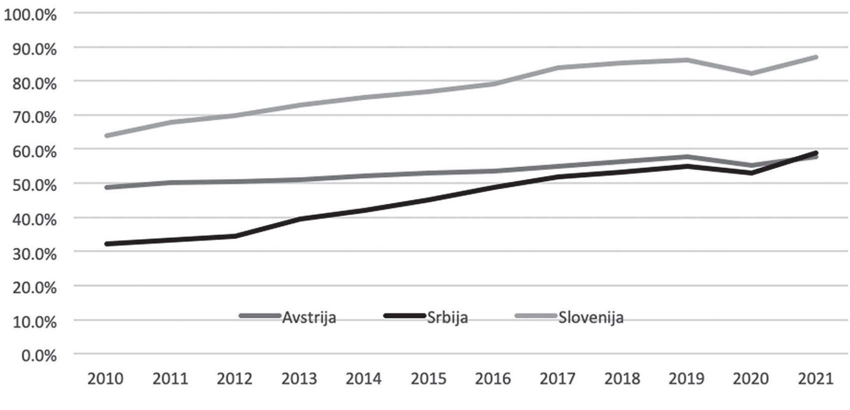
Povedano pokaže, da so si obravnavane države po izvoznih in investicijskih vzorcih podobne, zato bi bilo logično, da bi bili tudi vzorci vzpostavljanja, razvijanja in delovanja gospodarske diplomacije podobni.

Slika 1: RAST BDP-JA V AVSTRIJI, SLOVENIJI IN SRBIJI MED LETOMA 2010 IN 2021



Vir: Pripravljeno na podlagi podatkov Svetovne banke (2023).

Slika 2: DELEŽ IZVOZA V BDP-JU V AVSTRIJI, SLOVENIJI IN SRBIJI MED LETOMA 2010 IN 2021



Vir: Pripravljeno na podlagi podatkov Svetovne banke (2023).

Struktura delovanja gospodarske diplomacije oz. njen ponudbeni vidik

Osrednji organ, okoli katerega se razvija gospodarska diplomacija Avstrije, je Avstrijska gospodarska zbornica (Wirtschaftskammer Österreich – WKÖ), kar pomeni, da bi lahko avstrijski model umestili na prvi pogled v interesnega, a le če ne poznamo povezovanja WKÖ z državnimi deležniki.[10] Točneje bi bilo avstrijski model umestiti v mešani model, v katerem ima WKÖ res primat, a je njeno delovanje usklajeno z drugimi strukturami v državi. WKÖ ima poleg urada na Dunaju tudi deželne gospodarske zbornice v vsaki izmed devetih[11] zveznih dežel, ki pokrivajo svoje lokalno območje (kar kaže tudi spletna stran WKÖ) in interese podjetij iz posamičnih dežel. Zunanji obraz WKÖ predstavlja *Advantage Austria*. Njena glavna naloga je, da skrbi za promocijo zunanje trgovine v več kot 70 državah sveta (Advantage Austria, 2022). Četudi je *Advantage Austria* kot del WKÖ (uradno) ločen del avstrijskega ministrstva za zunanje zadeve, podatki kažejo, da ima *Advantage Austria*, kjer je le mogoče, sedež kar na veleposlaništvu;[12] to po mnenju sogovornikov »prinaša finančne, vsebinske in organizacijske sinergije« (Smole, 2022AT-a).[13]

Slovenska gospodarska diplomacija je v svojem razvoju prešla številne faze in tudi oblike delovanja (prim. Udovič, 2013: 255–304; Jekovec, 2012; Ramšak, 2014; 2015; Udovič, 2017; Udovič in Vojinović Jaćimović, 2019; Udovič, 2022). Od leta 2009 je nosilec gospodarske diplomacije Ministrstvo za zunanje zadeve (MZZ), ki pri izvajanju gospodarske diplomacije sodeluje s podpornimi institucijami, kot so npr. Ministrstvo za gospodarstvo, turizem in šport, Gospodarska zbornica Slovenije, SID banka, SPIRIT Slovenija in Slovenska turistična organizacija. Predstavništva gospodarske diplomacije so v slovenskem sistemu integrirana v strukturo MZZ, kar pomeni, da imajo nekatera veleposlaništva rezidenčne, druga pa nerezidenčne ekonomske svetovalce. Trenutno je teh svetovalcev 19, večina jih je lociranih v evropskih državah, in še to v glavnih mestih (na veleposlaništvu), z izjemo Milana in Šanghaja. V nekaterih primerih se gospodarska diplomacija poslužuje tudi lokalnega osebja, ki je lahko v izrazito pomoč pri oblikovanju smernic, iskanju partnerjev in pridobivanju poslov za slovenska podjetja. Slovenski model je tako klasičen državocentričen model.

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[10] V Avstriji je članstvo v gospodarski zbornici obvezno in ne prostovoljno, kot je v Sloveniji.

[11] Avstrijske zvezne dežele so Predarlska, Tirolska, Štajerska, Solnograška, Zgornja Avstrija, Spodnja Avstrija, Koroška, Gradiščanska in mesto Dunaj.

[12] V Sloveniji imamo takšen primer, ko je sedež Advantage Austria na sedežu avstrijskega veleposlaništva, na Prešernovi 23 v Ljubljani.

[13] To mešanje med interesnim in državocentričnim modelom je zanimivo ne samo z vidika urejanja gospodarske diplomacije Avstrije, ampak tudi z vidika privilegijev in imunitet, ki pripadajo članom Advantage Austria po Dunajski konvenciji o diplomatskih odnosih (31. in 34. člen ter 42. člen DKDO).

Podobno kot v Sloveniji je tudi v Srbiji, kjer se je po desetletju postavljanja gospodarske diplomacije (Udovič et al., 2014) ta dokončno ustalila na Ministrstvu za zunanje zadeve. A ker se ta še ni dovolj razvila, dejansko gospodarsko diplomacijo Srbije vodita Ministarstvo trgovine, turizma i telekomunikacija in Privredna komora Srbije,[14] ki ima svoje predstavnike v sosednjih državah in državah najpomembnejših trgovinskih partnericah (Nemčija in Italija) (Smole, 2022XS-f).[15] Povedano nakazuje na trotirno gospodarsko diplomacijo Srbije, pri čemer je ta uradno del MZZ, *de facto* pa jo izvaja predvsem Privredna komora Srbije. Deklarativno je torej srbski primer tipični primer državocentrične gospodarske diplomacije, dejansko pa gre za mešani model, ki je bližje interesnemu kot državocentričnemu.

Kako poteka vsakodnevno delovanje gospodarske diplomacije v analiziranih državah?

V Avstriji je WKÖ skupaj z *Advantage Austria* glavni odločevalec in izvajalec gospodarske diplomacije. Operativni sestanki med različnimi deležniki v avstrijskem sistemu potekajo tedensko, strateški na najvišji ravni vsaj dvakrat letno, na nižjih pa pogosteje, odvisno od tematike, njenega pomena za gospodarstvo Avstrije in tudi od strateških odločitev države (Smole, 2022AT-c).

Slovenski sistem je v primerjavi z avstrijskim veliko bolj tog, komunikacija med akterji, ki se v določeni meri še vedno razumejo kot konkurenti, poteka občasno, ob potrebah. Pri tem obstajata dve ravni pogovorov in dogovorov: formalna in neformalna.

Formaliziran okvir dogovarjanja deležnikov znotraj sistema gospodarske diplomacije predstavlja *Svet za internacionalizacijo*, ki ga skupaj vodita Ministrstvo za zunanje zadeve in Ministrstvo za gospodarstvo, turizem in šport. Gre za letna ali polletna srečanja, na katerih se deležniki slovenske gospodarske diplomacije srečujejo in razpravljajo o zadevah in izzivih, povezanih s programom internacionalizacije. Drugo raven predstavlja operativna koordinacija. Ta je v veliki meri prepuščena posameznikom (Smole, 2022SI-a, f) ter se odvija tako vertikalno (MZZ v odnosu do podpornih institucij) kot horizontalno (podporne institucije usklajujejo svoje programe in aktivnosti). Odvija se na podlagi osebnega zaupanja, poprejšnjega sodelovanja, pozitivnih izkušenj in tudi prijateljskih stikov, ki so jih uradniki in drugi vzpostavili skozi leta delovanja slovenske gospodarske diplomacije (Udovič, 2023).

V Srbiji je zaradi nerazvite gospodarske diplomacije še vse prepuščeno sprotnim aktivnostim različnih deležnikov. Formalno vlogo za pobude ima

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[14] *Članstvo v Privredni komori Srbije je obvezno.*

[15] *V Srbiji je treba na področju gospodarske diplomacije omeniti še en organ, in sicer Razvojno agencijo Srbije, ki skrbi predvsem za privabljanje investicij.*

njihovo zunanje ministrstvo, a dejansko se institucije po načelu »ko rabiš, pokliči«, same usklajujejo med sabo. Je pa Srbija malce posebna v tem oziru, saj si – za razliko od Avstrije in Slovenije – bolj prizadeva za vhodne investicije, sama pa veliko manj časa namenja področju spodbujanja izhodne internacionalizacije in diverzifikacije svojega gospodarstva (prim. Bellina, 2019; Smole, 2022XS-a, b, d; Golubović, 2020: 243).

Pričakovanja do gospodarske diplomacije oz. vidik povpraševanja

Kot ugotavlja že Jakličeva (2011: 751–775), je za uspešno delovanje gospodarske diplomacije samo njen dober ustroj premalo. Pri ustroju in storitvah, ki jih gospodarska diplomacija ponuja, mora priti do preseka s potrebami podjetij, še posebej majhnih in srednje velikih, ki pri svoji internacionalizaciji najbolj potrebujejo delovanje gospodarske diplomacije države. Da pa bi do preseka med ponudbo in povpraševanjem prišlo, morajo uporabniki uslug gospodarske diplomacije najprej poznati strukturo gospodarske diplomacije, nato pa tudi instrumente, ki jih slednja lahko uporablja.

Po raziskavi, ki jo je opravil Smole (2022AT-a, c, e), večina avstrijskih podjetij pozna ustroj avstrijske gospodarske diplomacije in tudi ve, kaj lahko od tega ustroja pričakujejo. Zadeva je malce drugačna v Sloveniji in Srbiji. V Sloveniji je v zadnjih letih[16] zaznati napredek pri prepoznavnosti gospodarske diplomacije, še posebej med gospodarstveniki. Ti so namreč ozavestili, da gospodarska diplomacija kot struktura v MZZ obstaja, seznanjeni so tudi s tem, kakšne usluge jim gospodarska diplomacija ponuja. Ni najbolj jasno, kdo konkretno znotraj sistema (bodisi MZZ bodisi podporne organizacije) so tisti akterji, ki lahko določenemu podjetju pomagajo ali *ex-ante* ali *ex--post*. Pri tem nejasnost pooblastil v javni službi in pretekle izkušnje (npr. v preteklosti je GZS delala za vsa podjetja, imela celo svojo mrežo predstavništev; dandanes dela samo za naročnike ali plačnike) ustvarjajo nekak občutek občasne zmedenosti majhnih in srednje velikih podjetij, na koga naj se v primeru svojih potreb obrnejo. Glede na to, da v Srbiji gospodarsko diplomacijo šele vzpostavljajo, je ta slabo razumljena in prepoznana (Smole, 2022XS-a, b, c, d, f), predvsem pa mora najprej dobiti večjo vlogo znotraj diplomacije. Ob tem ne gre prezreti pomena promocije gospodarske diplomacije kot aktivnosti *per se*, ki jo morajo nosilci gospodarske diplomacije opraviti, da bi gospodarska diplomacija lahko sploh delovala, kot bi morala.

[16] Zanimiva je Smoletova (ibid.) ugotovitev, da so podjetja, ki so usluge gospodarske diplomacije v slovenskem ministrstvu za zunanje zadeve uporabljala (v Sloveniji so to bila predvsem velika podjetja, ki so te storitve uporabljala predvsem ex-post), zaznala napredek v kakovosti storitev gospodarske diplomacije; podjetja, ki uslug gospodarske diplomacije niso uporabljala, pa so menila, da slednja ni koristna. Presenečа tudi, da je bilo nekaj nekdanjih ekonomskih svetovalcev, ki niso več v ustroju državne uprave, zelo kritičnih do organizacije in delovanja slovenske gospodarske diplomacije.

V Avstriji je promocija dela gospodarske diplomacije (in njenih uspehov) integralni del aktivnosti gospodarske diplomacije; v Sloveniji je tovrstna promocija relativno šibka, kar pomeni, da je nepoznavanje glavni razlog, da se podjetja gospodarske diplomacije sploh ne poslužujejo. Podobno je v Srbiji, kjer je gospodarska diplomacija še v povojih, izjemo predstavlja *Razvojna agencija Srbije* (RAS).[17]

Seveda je z vidika povpraševanja po storitvah gospodarske diplomacije nujno vedeti, kaj boš vprašal oz. kako boš pristopil k ponudniku in izvajalcu gospodarske diplomacije. Če v Avstriji velja, da se podjetja načeloma bolje pripravijo na izhodno internacionalizacijo, so povpraševanja po storitvah gospodarske diplomacije v Sloveniji izhodiščno bolj problematična, saj so slovenska podjetja, predvsem majhna in srednje velika, za gospodarsko diplomacijo nezainteresirana in slabo pripravljena. Posledično so vprašanja in prošnje, ki jih napotujejo na ekonomske svetovalce doma ali na tujem, presplošne, pogosto se nanašajo na pridobivanje informacij, dostopnih v javno dostopnih virih in mnogokrat poslanih na različne naslove (Smole, 2022GDS-i, k, t, ž, ac).

Kadrovska politika snovanja gospodarske diplomacije

Omenili smo že, da so za uspešno gospodarsko diplomacijo ključni predvsem ljudje, ki delujejo tako doma ali v tujini (prim. Naray, 2015: 161; Svetličič, 2011a). V Sloveniji, kjer je hrbtenica gospodarske diplomacije Ministrstvo za zunanje zadeve, je večina ljudi, ki deluje v gospodarski diplomaciji, s tega ministrstva, nekateri so v sistem gospodarske diplomacije prišli z Ministrstva za gospodarstvo, turizem in šport. Prehajanja med javno upravo in gospodarstvom v slovenskem sistemu skorajda ni. Poleg tega je v slovenskem sistemu tudi težava, da se v gospodarski diplomaciji znotraj ministrstva za zunanje zadeve od diplomatov, ki to nalogo opravljajo, nasploh »pričakuje več aktivnosti in delovanja, kar povzroči, da se jih mnogo odloči, da gredo delat drugam, v druge sektorje ali direktorate« (Udovič, 2014).

V Srbiji klasičnih gospodarskih diplomatov sicer še nimajo, se pa zavedajo, da bodo morali na tem področju narediti smele korake, če bodo želeli

[17] Zanimiv članek z naslovom "Ekonomska diplomatija pogrešna ideja" je bil leta 2009 objavljen v srbski reviji Blic. V članku avtor pojasnjuje, da je delovanje gospodarske diplomacije metanje denarja proč, saj tuje naložbe privlačijo dobri zakoni in manj korupcije, ne pa več gospodarskih svetovalcev. Poleg tega so po njegovem mnenju informacije danes prosto dostopne in jih tuji vlagatelji dobijo prej, kot če bi vprašali gospodarskega svetovalca, ki deluje na veleposlaništvu ali predstavništvu države pošiljateljice. Avtor članek sklene z mislijo, da Srbija zato ne potrebuje gospodarske diplomacije, ampak evropsko, saj se v Bruslju gradi javna podoba in prihodnost, ter dodaja »to, z gospodarskimi diplomati je zastarelo razumevanje diplomacije in nerazumevanje interesov Srbije«.

biti uspešni. Eden takih korakov je, da bodoče kadre, ki bi lahko delovali v gospodarski diplomaciji, iščejo tudi med izstopajočimi študenti srbskih univerz (Smole, 2022SI-a). Poleg številčne okrepitve gospodarske diplomacije namenjajo pozornost tudi neprestanemu izobraževanju, ki naj bi pripomoglo k širini in dvigu kompetenc posameznika (Golubović, 2020: 250; Smole, 2022XS-a).

V Avstriji so na podlagi svojih dolgoletnih izkušenj oblikovali stalno in stabilno politiko upravljanja s človeškimi viri v gospodarski diplomaciji. Pri tem ima ključno vlogo izbor kadrov, njihovo usposabljanje in motiviranje. Vse tri faze delovanja gospodarske diplomacije zagotavljajo tudi diplomatski status, ki ga ekonomski svetovalci dobijo, četudi so del WKÖ in ne ministrstva za zunanje zadeve. Ta jim namreč »daje težo in lajša mreženje« (Smole, 2022AT-c). Napredovanje v sistemu *Advantage Austria* je postopno, in sicer lahko posameznik šele po šestih letih neprekinjenega delovanja v sistemu *Advantage Austria* v tujini prevzame mesto direktorja tega predstavništva (Smole, 2022AT-a).

Situacija je v Sloveniji drugačna. Ministrstvo za zunanje zadeve je izobraževanja v gospodarski diplomaciji zasnovalo predvsem znotraj t. i. diplomatskega in višjega diplomatskega izpita, pri čemer je eden od modulov v zelo skromnem obsegu pokrival tudi delovanje gospodarske diplomacije. Podobna struktura se je vzpostavila tudi spomladi 2023, ko so bili pripravljeni učni načrti prenovljenega predmetnika Diplomatske akademije, ki so predvidevali prav tako predavanje o gospodarski diplomaciji na osnovni in višji ravni. Ostala izobraževanja niso strukturno organizirana, ampak so sporadična in prepuščena zanimanju posameznika, ki na tem področju deluje.

Druge značilnosti delovanja gospodarske diplomacije Avstrije, Slovenije in Srbije

Čeprav so si obravnavane države v mnogočem različne, pa vse tri države gospodarsko diplomacijo postavljajo visoko na listi prioritet. Razlika, ki se opazi, je v udejanjanju deklarativnih zavez v praksi, ki peša predvsem v Srbiji, v Sloveniji pa na žalost še vedno zaostaja. Ali gre tu predvsem za vprašanje organizacije ali pa le delovanja deležnikov, je dilema, ki jo bo še treba osvetliti, a za naš primer je pomembno poudariti, da se je avstrijski model, ki je mešan, izhodiščno resda interesen, a z močnimi državocentričnimi konturami, izkazal za najboljšega. Tam, kjer je potrebno, vstopi »formalna« država. V tej točki se model približa bolj državocentričnemu, tam, kjer te potrebe ni, pa se gospodarska diplomacija odvija načeloma po klasičnih poslovnih običajih.

Če avstrijski model izhaja predvsem iz potreb avstrijskih podjetij, slovenski in srbski gospodarsko diplomacijo razumeta veliko bolj državocentrično, kar pomeni, da se »država« odloča, kje, kako in zakaj. To se kaže tudi npr. v odločitvah, da se v izvajanje gospodarske diplomacije vse bolj vključuje izseljence in zdomce, hkrati pa tudi, da se v zadnjih mesecih odločamo za odprtje novih veleposlaništev na podlagi interesa podjetij oz. širše – gospodarskega interesa države.[18] Slovenija si pri izvajanju svoje gospodarske diplomacije pomaga formalno tudi z mrežo slovenskih častnih konzulov, premalo pa po mnenju nekaterih izkorišča mrežo tujih častnih konzulov (Esih, 2023), ki bi lahko pomagali predvsem v državah, kjer nimamo stalnega rezidenčnega predstavništva.

Pomembna razlika med obravnavanimi oblikami gospodarske diplomacije je tudi podjetniška kultura oz. delovanje podjetij. Če pogledamo npr. pomen povratnih informacij za uspešno delovanje gospodarske diplomacije, lahko ugotovimo, da avstrijska podjetja svojim institucijam pogosto pošiljajo povratne informacije o (ne)uspelih poslih, izzivih in težavah. Drugačna je situacija v Sloveniji, kjer velja pregovorna *omertà*, ko se podjetja oglasijo običajno takrat, ko so z delom državnih organov nezadovoljna, na drugi strani pa se gospodarski svetovalci pogosto pritožujejo, da od podjetij ne dobijo informacij o tem, kaj se je zgodilo z določenim poslom, ki so ga pomagali pripravljati, saj se podjetja na povpraševanje o tem ne odzovejo ali pa se celo izgovorijo na poslovno skrivnost.[19] Podobno je tudi v Srbiji, kjer zaradi začetkov ne ena ne druga stran ne pričakuje informacij in posredovanja le-teh. A to ni pomembno samo z vidika poslovne kulture, ampak tudi merjenja učinkovitosti in uspešnosti gospodarske diplomacije.

Vprašanje, ki ostaja nerazrešeno in se pojavlja v zvezi z gospodarsko diplomacijo, je tudi, ali gospodarska diplomacija upravičuje svoj obstoj in sredstva, ki jih za svoje delovanje porabi. Gre za nerešljivo dilemo, saj je nemogoče ugotoviti, koliko gospodarska diplomacija *odnese* iz proračuna in koliko vanj *prinese*, prav tako je nemogoče ugotoviti, koliko (ne)uspešno delovanje gospodarske diplomacije *prinese* ali *odnese* z vidika rasti bruto domačega proizvoda.[20] A ker je gospodarska diplomacija tudi izpostavljena

[18] Tak primer je npr. Alžirija, kjer sta novembra 2022 ministrica za zunanje in evropske zadeve Tanja Fajon in minister za infrastrukturo Bojan Kumer podpisala sporazum o dobavi plina Sloveniji.

[19] Seveda poslovna skrivnost ni neki nebodigatreba, ampak je z njo potrebno ravnati zelo previdno. Nezaupanje do državnih uradnikov, da bi lahko kakšno poslovno skrivnost »predali« konkurenci, hromi tudi komunikacijo med podjetji in ponudniki gospodarske diplomacije.

[20] Na tem mestu bi rada spomnila na anekdoto, ki se je zgodila pred leti na Slovenskem, ko je eden od ministrov od svojega ministrskega kolega terjal, da mu pojasni, koliko gospodarska diplomacija doda k rasti bruto domačega proizvoda. Zahteva je bila neresna, saj je bilo vsakomur jasno, da se tega ne da realno izračunati, in je imela predvsem politično ozadje. Da bi rešili zagonetko, so uradniki z enega od ministrstev poklicali profesorja na eni od slovenskih fakultet, ki se je delno spoznal na področje gospodarske diplomacije, ter ga vprašali, kako bi izračunali doprinos gospodarske diplomacije k rasti bruto domačega proizvoda. Profesor jih je najprej skušal prepričati, da je to jalovo početje, a ni uspel. Ko je videl stisko uradnikov, je kot iz topa ustrelil: »Gospodarska diplomacija prinese k rasti BDP 17 %.« Nejeverni uradniki so ga nato vprašali, kako je to tako hitro izračunal, če je še maloprej vztrajal, da se to ne da izračunati.

javnosti in tudi vprašanjem o njeni uspešnosti, je smiselno o njej razmišljati tudi skozi oči njene promocije. In to ne samo med zainteresirano javnostjo – podjetji, ampak tudi v širši javnosti, ki običajno kroji javno mnenje glede razreza proračuna. Hitreje kot bo usidrano v splošno zavest, da je gospodarska diplomacija nujna in potrebna državna dejavnost, manj bo nepotrebnih vprašanj o tem, koliko stane ter koliko doprinese k proračunu in k rasti bruto domačega proizvoda.

Slika 3: FORMULAR ZA VSEBINSKO POROČANJE EKONOMSKIH SVETOVALCEV V SLOVENSKI GOSPODARSKI DIPLOMACIJI

VSEBINSKO POROČILO EKONOMSKEGA SVETOVALCA (v nadaljevanju ES) NA VELEPOSLANIŠTVU (IME VELEPOSLANIŠTVA)

IME ES (TERMIN POROČILA NPR JAN-JUNIJ 2023)

1. **Storitve za slovenska podjetja (vrsta storitve, katera slovenska podjetja, sektor, proizvod, katera podjetja na trgu so bila kontaktirana v zvezi s tem, povratna informacija s strani podjetja glede nudene pomoči)**

Podjetje/proizvod	Opis povpraševanja	Aktivnost

Servisiranje povpraševanja tujih podjetij (katera podjetja so se obrnila na ES, katera podjetja v zvezi s tem so bila kontaktirana v Sloveniji, opis storitve, posredovanje na Izvozno okno)

Podjetje/proizvod	Opravljena storitev	Kontakti v Sloveniji	Rezultat aktivnosti	Mnenje glede realnosti povpraševanja	Posredovanje informacije na Izvozno okno

2. **Srečanja s slovenskimi podjetji, ki vstopajo na trge**

Vir: Ministrstvo za zunanje in evropske zadeve, interno gradivo (n. d.).

Nasmejal se je in dejal: »Začutil sem. Pa naj ta drugi minister dokaže, da je odstotek, ki sem ga povedal, nepravilen.«

Razprava in sklep

Namen članka je bil s pomočjo primerjalne analize gospodarske diplomacije v majhnih državah z različno gospodarsko-politično strukturo ugotoviti, če obstajajo »naddržavne« značilnosti gospodarske diplomacije, ter s to ugotovitvijo dodati kamenček v mozaik preučevanja diplomacije znotraj diplomatskih študij. Pri tem nas je vodilo raziskovalno vprašanje, osredinjeno na modele gospodarske diplomacije znotraj teorije diplomatskih študij, ter kako se te značilnosti kažejo v konkretnih analiziranih primerih. Na podlagi analize smo prišli do štirih ugotovitev.

Prvič, v diplomatskih študijah se vse bolj oblikuje kanonsko razumevanje o treh modelih gospodarske diplomacije – državocentričnemu, interesnemu in mešanemu. Nekateri avtorji sicer druga dva modela še natančneje delijo na njihove podoblike, a to je bolj preferenca posameznih avtorjev, ki z večjo fragmentacijo modelov morda želijo bolje prikazati le določene poudarke. Dodana vrednot te delitve je tudi vprašanje prednosti in slabosti vsakega od modelov. V Tabeli 1 smo to zelo natančno prikazali, a na tej točki želimo poudariti – kar je z vidika diplomatskih študij izjemnega pomena –, da je tudi pri oblikovanju pomena gospodarske diplomacije pomembna simbolna komponenta (več o tem prim. Arbeiter in Udovič, 2017; Arbeiter, 2019), ki se morda za gospodarsko diplomacijo *prima facie* ne zdi logična. Pomen simbolike se v gospodarski diplomaciji pojavlja predvsem v dveh primerih: (1) ko podjetja vstopajo na trge, kjer ima država pomembno vlogo; tam se tudi interesni modeli bolj približujejo državocentričnim, saj tako podjetniki lažje pridejo do najvišjih funkcij in lažje sklepajo posle; (2) ko pride do težav na določenih trgih ali pri izvedbi določenih poslov (torej v primerih *ex-post*) in je roka interesnega modela prekratka oz. je potrebna pomoč države (morda tudi kar klic kakšnega ministra ali celo višjega funkcionarja v prestolnico druge države). V obeh primerih se tudi interesni ali mešani modeli zelo močno približajo državocentričnemu.

Druga ugotovitev, ki smo jo prikazali v članku, je, da je gospodarska diplomacija *nad* politično-gospodarskimi značilnostmi države. Vse obravnavane države se namreč soočajo z enakimi vprašanji, le rešitve, ki jih oblikujejo, so morda drugačne. Tu delno izstopa Srbija, kjer so aktivnosti v gospodarski diplomaciji šele na začetku, zato je na tej točki težko ocenjevati, kako se bo ta razvila. Kar zadeva rešitve ključnih vprašanj, bi lahko rekli, da so te pogojene z zgodovinskim razvojem gospodarske diplomacije v državi in njeno tradicijo. V Avstriji, kjer je družbeno uveljavljen in sprejet korporativen in regionalen sistem upravljanja družbe, se odgovori na vprašanja gospodarske diplomacije (finance, kadri, struktura, izobraževanje) tudi oblikujejo na teh ravneh. Podobna je situacija v Sloveniji, le z drugačnimi rezultati. Ker je naš družbeni sistem nagnjen k centralizaciji in državocentričnosti, so tudi aktivnosti v gospodarski diplomaciji izvedene predvsem v okviru državnega udejstvovanja v njej. To je še posebej res po ukinitvi obveznega članstva v Gospodarski zbornici Slovenije, ki je iz paradržavnega združenja postala interesno združenje (le) svojih članov. Sedemnajst let po tej reformi lahko ocenimo, da je bilo to preoblikovanje za razvoj gospodarske diplomacije v Sloveniji škodljivo.

Tretja ugotovitev izhaja iz razmišljanja Jakličeve (2011) ter Jakličeve in Šešuma (2019) o pomenu *preseka* med ponudbo in povpraševanjem za delovanje gospodarske diplomacije. Morda se ta ugotovitev nanaša še najbolj na vprašanje ocenjevanja učinkovitosti in uspešnosti gospodarske diplomacije. Teh dveh dejavnikov namreč ne moremo meriti v odstotkih doprinosa k bruto domačemu proizvodu ali zaposlenosti na kratki rok, lahko pa učinke gospodarske diplomacije merimo na daljši rok, in sicer prek tega, koliko poslov, ki so jim bila odprta vrata, je bilo izvedenih, kakšen je njihov izplen, koliko ljudi je dodatno zaposlenih, kakšna je dodana vrednost teh poslov itd. A za to je treba imeti povratne informacije podjetij, ki morajo jasno povedati, kdaj jim je gospodarska diplomacija pomagala, kdaj samo do določene mere, pa tudi, če jim je kdaj škodovala. Razmere v mednarodni skupnosti so namreč vse bolj zapletene in tudi aktivnosti držav, kot je npr. gospodarska diplomacija, ni treba razumeti kot edino zveličavne. Dejstvo je, da se tudi mnoge podjetniške ideje »sfižijo«, da se le nekatere od mnogih uspešno uresničijo. Povratna informacija je tako ne samo želena, ampak nujno potrebna, če želimo, da se delo gospodarske diplomacije najbolje izkoristi.

Četrta ugotovitev se nanaša na področje izobraževanja. Ugotovimo lahko, da so na področju izobraževanja za delovanje v gospodarski diplomaciji ključne tri točke: (a) izobraževanje mora biti stalno in na podlagi najnovejših podatkov. Svet postaja zelo nepredvidljiv (Raškovič, 2022), gospodarstvo pa je najbolj volatilno področje, tako da je pomembno, da so gospodarski svetovalci karseda najbolje opremljeni s potrebnimi kompetencami – ne samo za mednarodno poslovanje, ampak tudi za vnaprejšnje zaznavanje morebitnih tveganj (kombinacija *ex-post* in *ex-ante* gospodarske diplomacije); (b) izbor kadrov za gospodarsko diplomacijo je izredno pomemben, veliko bolj kot *struktura*. *Agent* in *akter* sta tako zlasti v oddaljenih državah tista, ki nosita odgovornost za (ne)uspešnost državne gospodarske diplomacije; (c) poleg izbora je ključno motiviranje kadrov, ki jih pošiljamo v gospodarsko diplomacijo. Ti so namreč pogostokrat izpostavljeni številnim dodatnim obremenitvam in preverjanjem (prim. slika 3), kar v napačnem uokvirjanju pošilja tudi napačen signal, da je treba v gospodarski diplomaciji delati več za enako plačilo. To pa je pot v pogubo.

Končno, ugotovitev članka je tudi ta, da je kljub več kot dvajsetletnem aktivnem preučevanju gospodarske diplomacije kot pohladnovojnega koncepta v diplomatskih študijah treba še veliko postoriti. Odpirajo se vprašanja pomena novih akterjev v gospodarski diplomaciji, njihovega dosega ter zmožnosti; postavljajo se dileme odnosa med spodbujanjem gospodarstva z režimi, ki kršijo mednarodno pravo; vznikajo premisleki o tem, kaj je še gospodarska diplomacija in kaj je vojno dobičkarstvo. In gospodarska diplomacija seveda postaja vse bolj tudi del odnosov z javnostmi. Pa še bi se našlo dilem, konceptualizacij in odprtih raziskovalnih vprašanj, na katere ta članek ne daje odgovora. Daje pa izhodišča za raziskovanje v prihodnje.

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PRISOTNOST DEPRESIJE V IZBRANIH KRITIČNIH POKLICIH V OBDOBJU PANDEMIJE V SLOVENIJI: PRIMER ZDRAVSTVENEGA OSEBJA, PRIPADNIKOV IN PRIPADNIC SLOVENSKE VOJSKE TER POLICISTOV IN POLICISTK **

Povzetek. *Pandemija, ki jo je povzročil virus SARS-CoV-2, Sloveniji ni prizanesla, nasprotno, terjala je dolgotrajen in izčrpavajoč odziv zaposlenih v nekaterih kritičnih poklicih. Ti so bili v obdobju pandemije, upoštevajoč omejitve in potrebe po povečanem obsegu dela, izpostavljeni vrsti dejavnikov, ki so zaznamovali njihovo zdravstveno počutje in splošno dobrobit. V članku predstavljamo – s pomočjo kvantitativnega merskega instrumenta pridobljene – samoocene zaposlenih v kritičnih poklicih (zdravstveno osebje, policisti/-ke, pripadniki/-ice Slovenske vojske) glede njihovega občutenja stresa, obremenitev in depresije, in sicer v izbranem obdobju pandemije, t.j. med marcem 2020 in junijem 2022. Raziskava pokaže, da je 30 % anketirancev/-k v kritičnih poklicih občutilo depresijo. Nadalje, rezultati kažejo povezanost med depresijo in dejavniki pandemije (r = .567, p = < 0.01) pri vseh preučevanih poklicih.*
Ključni pojmi: *kritični poklici, pandemija, depresija, stres, dobrobit*

Uvod

Svetovna zdravstvena organizacija (SZO) je bila 31. decembra 2019 obveščena o primerih pljučnice neznanega vzroka v mestu Vuhan na Kitajskem. Zelo hitro se je pojavilo nenadzorovano širjenje okužb po svetu. SZO je 31. januarja 2020 razglasila izredne razmere na področju javnega zdravja. 11. marca 2020 je zaradi hitrega povečanja števila primerov okužb zunaj Kitajske generalni direktor SZO napovedal, da bi lahko izbruh označili kot

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pandemijo (Bhargava, 2021). Virus SARS-CoV-2 se je zelo hitro razširil po različnih državah po vseh delih sveta, npr. v Italiji je bil prvi uradni primer odkrit 21. februarja 2020, že mesec prej (21. januarja 2020) je bil potrjen prvi primer v Združenih državah Amerike (ZDA), v Sloveniji pa smo prvi primer okužbe potrdili 4. marca 2020 (Mlakar, 2020; AJMC, 2021). Kot navaja Worldometer (2023), je virus SARS-CoV-2 v močnem obsegu prizadel našo državo, do marca 2023 je namreč zaradi covida-19 umrlo več kot 7.074 ljudi.

V takšnih izjemnih okoliščinah kompleksne krize so še posebej obremenjeni zaposleni in zaposlene v tako imenovanih kritičnih poklicih, ko pride do izrazito povečanega obsega dela, dela v negotovih okoliščinah, hitrega sprejemanja odločitev brez vseh vnaprej znanih podatkov, potrebni sta prilagodljivost in predanost. V teh poklicih je delo zahtevnejše in terja veliko odrekanja, medtem ko v kriznih razmerah delo postane še bolj naporno, stresno, urniki so neredni in zaposleni se srečujejo z življenje ogrožajočimi situacijami ter smrtjo. Vse to lahko pripelje do izčrpanosti in zdravstvenih težav. Namen članka je raziskati prisotnost depresije in povezavo med depresijo ter izbranimi samoporočanimi znaki obremenitev v času pandemije (marec 2020–junij 2022) pri zaposlenih v kritičnih poklicih, in sicer pripadnikih/-cah Slovenske vojske, policistih/-kah in zdravstvenem osebju.

Duševno zdravje zaposlenih v kritičnih poklicih v obdobju pandemije

Duševno zdravje se predvsem nanaša na kognitivno, vedenjsko in čustveno dobro počutje, ki posamezniku/-ici omogoča uspešno soočanje z vsakdanjim življenjem. Pomembno je v vseh življenjskih obdobjih, od otroštva do odraslosti (U. S. Department of Health & Human Services, 2022), in vpliva na vsakdanje življenje ter odnose tako v družini kot tudi na delovnem mestu in v širši skupnosti. Ustrezno duševno zdravje je temelj zdravja na splošno in posledično družbene, družinske in gospodarske stabilnosti, socialne blaginje in kakovosti življenja ljudi. Pomembno je, da se zavedamo, da je vsakdo izmed nas dovzeten za tveganje in razvoj motenj duševnega zdravja, ne glede na starost, spol, dohodek ali etnično pripadnost (Felman, 2020; U. S. Department of Health & Human Services, 2022). Po podatkih IHME (International Health Management Associates) je imelo leta 2019 v EU 15,34 % prebivalstva duševne motnje, kar pomeni približno 75 milijonov ljudi. Med najpogostejšimi diagnozami pri splošnem prebivalstvu je bila tudi depresija (4,60 %).[1] Nedavni podatki kažejo, da je pandemija poslabšala duševno zdravje in z delom povezana bremena – več študij (Mental Health

[1] *Več na: http://ghdx.healthdata.org/gbd-results-tool?params=gbd-api-2019-permalink/b6dce4dc-7359fa30ac20b63cc265f1fc.*

America, 2020; Tehrani, 2022; Guo in drugi, 2020) je namreč pokazalo, da je pri poklicih, ki so bili ključnega pomena za odzivanje na pandemijo (t. i. kritični poklici), povečano tveganje za težave z duševnim zdravjem in izgorelost. Poleg tega je z izpostavljenostjo krizam povezana tudi uporaba psihoaktivnih substanc. Nedavna študija NIJZ (Nacionalni inštitut za javno zdravje) je pokazala, da so strokovnjaki na področju duševnega zdravja v Sloveniji zaradi narave dela in s tem povezanih dejavnikov sami izpostavljeni povečanemu tveganju za duševne stiske in samomorilnost, ampak praviloma ne posegajo po pomoči, s katero bi lahko blažili tovrstne stiske (Roškar et al., 2022).

V nadaljevanju se bomo osredotočili na depresijo kot eno od pogostejših težav v duševnem zdravju, ki se pojavlja tudi med zaposlenimi v kritičnih poklicih.

Depresija

Depresija negativno vpliva na posameznikovo/-ičino počutje, način razmišljanja in ravnanje ter med drugim povzroča občutke žalosti in/ali izgubo zanimanja za delo. Ta duševna stiska je pomemben dejavnik pri opravljanju dela tudi med zaposlenimi v kritičnih poklicih, saj so, po podatkih SZO, med diagnosticiranimi tudi zdravstveni delavci/-ke, policisti/-ke in pripadniki/-ce oboroženih sil. Tako kot pri drugih duševnih motnjah (anksioznost, PTSM itd.) tudi na razvoj depresije vplivajo različni dejavniki tveganja in zaščite, na primer sodelovanje v oboroženem boju, daljša odsotnost od družine oz. ljubljenih oseb, travmatične in stresne situacije, stalna nevarnost in ogroženost, zahtevna usposabljanja itd. (Inoue in drugi, 2021). Leta 2021 so ameriške vojaške zdravstvene ustanove poročale o povečanju depresije med ameriškimi vojaki/-njami z »običajnih« 11,4 % na 15 % (Inoue in drugi, 2021). Tudi zdravstveno osebje se srečuje s travmatičnimi in stresnimi situacijami, nerednimi delavniki, pomanjkanjem spanja, delom v zaščitni opremi, z zahtevnimi pacienti/-kami in obiskovalci, s trpljenjem in smrtjo pacientov/-k itd. (Fang in drugi, 2017).[2] Izpostaviti je treba tudi navzočnost depresije med pripadniki/-cami policije, saj narava njihovega dela, povezana s stresnimi in travmatičnimi dogodki (priče kriminalnih dejanj, smrti, oboroženih bojev, sledenje osumljencev itd.), lahko negativno vpliva na razvoj depresije. Pri tem pa je pomembno, da so nekatere raziskave (npr. Husein in drugi, 2014) pokazale večjo prisotnost depresije med policistkami, medtem ko je med policisti v večji meri prisotna anksioznost. Pri merjenju stresa tovrstnih razlik ni bilo zaznati.

[2] Kitajska raziskava (Fang in drugi, 2017) je pokazala, da je kar 57,2 % anketiranih oseb poročalo o simptomih depresije.

Depresija v obdobju pandemije

Članek smo osredinili na samoocenjeno navzočnost depresije in stresa med nosilci/-kami kriznega odziva v slovenski družbi (t. i. *first responders*), torej med zaposlenimi v kritičnih poklicih, in sicer med zdravstvenim osebjem, pripadniki in pripadnicami Slovenske vojske ter slovenskimi policisti in policistkami.

V nadaljevanju predstavljene raziskave namreč kažejo, da se je v mednarodnem prostoru med pandemijo pojavnost depresije v preučevanih skupinah povečala. SZO je v znanstvenem poročilu 2. marca 2022 (*Scientific brief: Mental Health and COVID-19: Early evidence of the pandemic's impact*) pojasnila, da se je v prvem letu pandemije covida-19 globalna razširjenost anksioznosti in depresije povečala za kar 25 %. SZO (2022) je na podlagi opravljene raziskave ugotovila, da je pandemija povzročila kar 27,6-odstotni porast depresije.

Neprofitna organizacija Duševno zdravje Amerika je v obdobju pandemije beležila več anksioznosti, depresije, osamljenosti in drugih duševnih težav, pri čemer ugotavlja, da je pandemija negativno vplivala zlasti na duševno zdravje tistih, ki so bili vključeni v krizno odzivanje med pandemijo (Mental Health America, 2020). Med zdravstvenim osebjem so v obdobju junij–september 2020 merili prisotnost nekaterih duševnih težav (n = 1.119), pri čemer so ugotovili, da jih je 93 % doživljalo stres, 86 % jih je poročalo o anksioznosti, 77 % o frustracijah, 76 % o izčrpanosti in izgorelosti ter 75 % o preobremenjenosti. Prav tako je 76 % zdravstvenih delavcev/-k poročalo, da jih skrbi in jih je strah, da bi okužili svojega otroka, polovica jih je poročala, da jih skrbi, da bi ogrozili svojega partnerja/-ko, in 47 % jih je bilo zaskrbljenih, da bi izpostavili starejše odrasle družinske člane. Raziskava je med drugim tudi razkrila, da je čustvena izčrpanost najpogostejši opis sprememb v počutju zdravstvenih delavcev/-k (82 %), sledile so težave s spanjem (70 %), fizična izčrpanost (68 %) in strah, povezan z delom (63 %). Več kot polovica je poročala o spremembi apetita in utrujenosti od sočutja ter povečani zavesti ali pozornosti do izpostavljenosti (Mental Health America, 2020). Raziskava »*The psychological impact of COVID-19 on police officers*« iz leta 2022, v kateri je sodelovalo 3.863 policistov/-k je pokazala, da je 13,7 % anketiranih policistov/-k poročalo o depresiji, 4,6 % pa jih je kazalo simptome duševnih motenj in so potrebovali ustrezno obravnavo (Tehrani, 2022). Omenimo lahko tudi navzočnost depresije v času pandemije med pripadniki/-cami oboroženih sil. Na tej točki moramo poudariti, da so raziskave, opravljene po različnih delih sveta, prikazale tudi različne rezultate, odvisno od tega, v kolikšni meri so bile OS (oborožene sile) vključene v krizno odzivanje v času pandemije. Pripadniki/-ice OS, ki so opravljali delo v bolnišnicah, so poročali o podobnih težavah kot zdravstveno osebje, in sicer o anksioznosti (29,44 %) in depresiji (36,45 %) (Guo in drugi, 2020).

Na podlagi predstavljenih raziskav na področjih zdravstva, policije in vojske lahko na tej točki predpostavimo, da obstaja povezanost med pandemijo in občutenjem depresije. Prav tako lahko predpostavimo, da se je število oseb z depresijo v času pandemije povečalo.

Zdravstvo

Eno izmed ključnih vlog pri obvladovanju epidemiološke krize v povezavi s covidom-19 v Sloveniji in ravno tako tudi drugod po svetu je imel zdravstveni sistem. Zdravstveno osebje se je v času obvladovanja epidemije (marec 2020–junij 2022) srečevalo z vrsto dodatnih nalog, pri čemer pa zdravstveni delavci/-ke praviloma niso usposobljeni za upravljanje s kompleksnimi krizami z družbenimi učinki, kakršne povzroči pandemija. Izpostavljeni so bili povečanemu obsegu dela, delu v nevarnih okoljih, prisoten je bil strah pred okužbo in prenosom okužbe na družinske člane in kolege/-ice, delo so opravljali na drugih deloviščih, redno so se testirali, obvezno so nosili zaščitno opremo, kot so maske, očala, ščitniki za obraz in sredstva za zaščito rok in dezinfekcijo (Šinkovec, 2020). Med pandemijo je do izraza prišla tudi občutna kadrovska podhranjenost javnega zdravstvenega sistema (zasebni del se namreč ni v tolikšni meri vključeval v skrb za bolnike), primanjkovalo je okoli 30 odstotkov zaposlenih (Čeh, 2020). Posledično v javnem zdravstvenem sistemu ni bilo in še vedno ni dovolj osebja, tisti, ki pa so, so zelo hitro postali preobremenjeni in utrujeni. Prihajalo je tudi do okužb s covidom-19 ter posledično karantenskih odločb med zdravstvenimi delavci (Čeh, 2020; Jurjevčič Tržan, 2021).

Prav tako so bili zdravstveni delavci/-ke med pandemijo občasno priča verbalnemu nasilju nad zaposlenimi (Čeh, 2020). Med zdravstvenimi delavci/-kami je bilo čutiti tudi nezaupanje vase in v svoje znanje glede obvladovanja neznane okužbe; soočali so se tudi s številnimi etičnimi dilemami glede obravnave in zdravljenja obolelih (npr. etična dilema glede razporejanja ventilatorjev). Vladala sta bila tudi velika negotovost in strah v povezavi z morebitno okuženostjo svojih najbližjih in svojih sodelavcev/-k. Zelo obremenjujoče je bilo tudi vzdrževanje socialne razdalje do družinskih članov. Delovnik zdravstvenega osebja med pandemijo je bil neurejen, neprilagodljiv, dolg in posledično naporen. Zahteval je veliko število nadur, prilagajanja in neprekinjenega dela. Takšen delovnik je eden izmed ključnih dejavnikov stresa in dodatno povečuje možnost za razvoj duševnih motenj (Jurjevčič Tržan, 2021).

Policija

Med pandemijo (marec 2020–junij 2022) so pripadniki/-ce slovenske policije (zaradi kompleksnosti le-te) nacionalni red, mir in stabilnost zagotavljali ob rednem delu – tudi s kopico dodatnih nalog, mednje spadajo zagotavljanje varnosti na nenapovedanih protestih, nadzorovanje policijske ure, ukrepanje pri nezakonitih migracijah in nadzorovanje »starih« državnih meja, tudi tistih, na katerih je bil zaradi schengenskega območja nadzor odpravljen. Sektor za odnose z javnostmi SGDP GPU (2020) navaja, da so določeni policisti (predvsem prometni) opravljali različne dodatne naloge (spremstvo konvojev, prisotnost na notranjih mejah, izvajanje ukrepov za omejitev gibanja in združevanja na javnih krajih), velikokrat na robu zmogljivosti in pogosto tudi sami izpostavljeni tveganju za zdravje. Policisti/-ke so skladno s sprejetimi odloki, ki so se med pandemijo spreminjali, preverjali in izvajali nadzor po vsej Sloveniji. Še več dodatnega dela policiji pa je naložil odlok, ki je prepovedoval prehajanje občinskih meja, saj so policisti/-ke morali določeno časovno obdobje dodatno izvajati še nadzor na mejah občin po celotnem ozemlju Slovenije. Prav tako so bili policisti/-ke izpostavljeni zelo različnim dejavnikom tveganja (povečani obseg dela, delo v nevarnih okoljih, prisoten je bil strah pred okužbo in prenosom okužbe na družinske člane in kolege/-ice) (Sektor za odnose z javnostmi SGDP GPU, 2020).

Poleg rednih zadolžitev so policisti/-ke čez ozemlje Slovenije v samo prvih dveh mesecih epidemije v letu 2020 organizirano pospremili skoraj 67.000 tovornih vozil v matične države in samo aprila in maja 2020 izvedli približno 190.000 kontrol na krajih, kjer so se pred epidemijo običajno zbirali ljudje (Sektor za odnose z javnostmi SGDP GPU, 2020). Policisti/-ke so morali pri opravljanju svojega dela obvezno in dosledno upoštevati navodila NIJZ (nošenje zaščitnih mask in očal, razkuževanje, varnostna razdalja, prezračevanje itd.) (Kovačič, 2020). Srečevali so se tudi z zahtevnimi tehničnimi in logističnimi nalogami, pravnimi vprašanji, kadrovskimi izzivi, saj so se s covidom-19 okužili tudi zaposleni v policiji in so tako morali ostajati v karanteni. Nekateri izmed policistov/-k so se srečevali tudi s prilagoditvami za opravljanje službene obveznosti od doma in izobraževanja na daljavo (Sektor za odnose z javnostmi SGDP GPU, 2020). Zaradi številnih klicev na tel. številko 113 v povezavi z pandemijo (RS MNZ, b.d.) je slovenska policija 3. aprila 2020 vzpostavila dodatni klicni center, v katerem so odgovarjali državljanom na vprašanja o pandemiji. Klicev je bilo v povprečju 500 na dan (Sektor za odnose z javnostmi SGDP GPU, 2020).

Slovenska vojska (SV)

Tudi pripadniki/-ce SV so se, zaradi pandemije (marec 2020–junij 2022), srečevali z vrsto dodatnih nalog. Kovač (2021) navaja, da je SV leta 2020 postavila premično bolnišnico Role 2 v Ljubljani s kapaciteto do 140 bolniških postelj, namenjenih za oskrbo obolelih prebivalcev/-k. SV je med drugim tudi pomagala državljanom Slovenije pri vrnitvi v domovino ter pri transportu obolelih pripadnikov/-ic SV z mednarodnih operacij in misij (MOM) (Kovač, 2021). Skladno z aktiviranim načrtom državne zaščite in reševanja ob epidemiji je SV pomagala predvsem z materialnimi sredstvi in logistično podporo ter kadrovskimi zmogljivostmi. Vojaške zdravstvene enote (VZE) so tako vzpostavile sistem sledenja visoko tveganih stikov, preventivnih testiranj ter pravočasnih napotitev v karanteno. Pripadniki/-ce SV so med pandemijo sodelovali tudi z zdravstvenimi delavci/-kami, in sicer pri selitvi laboratorija v UKC, premiku in vzpostavitvi delovanja vojaškega rentgena na lokaciji UKC Ljubljana, selitvi oddelka iz bolnišnice dr. Petra Držaja v UKC Ljubljana, selitvi in opremljanju novonastalega oddelka (selitev MOBSTAC v UKC) (Bjelan, 2020).

Kljub pandemiji so se pripadniki/-ice SV udeleževali MOM (mednarodne operacije in misije), skrbeli so za temeljne vojaške naloge, kot je vzdrževanje reda, miru in stabilnosti, ter vzdrževali stopnjo pripravljenosti in usposabljanja. Pomembno je omeniti tudi vojaško vajo Preskok 2020, ki je potekala od konca aprila do 19. junija 2020 in jo je SV izpeljala kljub pandemiji in zaprtju države *(lock down)* (Kovač, 2021). Vaja Preskok 2020 sodi med največje vojaške vaje v zgodovini SV; vključevala je 2.500 vojakov/-inj SV, pri čemer lahko domnevamo, da bila vaja zaradi pandemije za pripadnike/-ice stresna (npr. strah pred okužbo in prenosom v družinsko okolje). Vojaške zdravstvene enote so ves čas trajanja vaje Preskok 2020 skrbele za izvajanje zdravstvene oskrbe, redno testiranje na okužbo s covidom-19 ter dezinfekcijo prostorov in uporabljene opreme (Kovač, 2021). Kot smo že omenili, so pripadniki/-ce SV tudi med pandemijo delovali na različnih MOM. [3]

Metoda in opis raziskave

Ključni raziskovalni cilj je bil raziskati prisotnost depresije in povezavo med depresijo pri zaposlenih v kritičnih poklicih, in sicer pripadnikih/-cah oboroženih sil, policistih/-kah in zdravstvenem osebju ter nekaterimi znamenji obremenitev v času epidemije covida-19, o katerih so sami poročali (marec 2020–junij 2022).

[3] Na primer: na Kosovo so odšle veterinarske enote (VETE) z namenom temeljite dezinfekcije vozil in prostorov. Zaradi sprejetih strogih epidemioloških ukrepov vlade RS leta 2020 se je prekinil rotacijski krog na misiji EUTM Mali (Training Mission), sledil je tudi preklic dopusta članov/-ic misije. Tako so pripadniki/-ce SV, ki so bili takrat nastanjeni v Maliju, nadaljevali svoje delo (Kovač, 2021).

Raziskovalni vprašanji in hipoteze

Iz raziskovalnega cilja je izpeljano naslednje raziskovalno vprašanje z izvedenim podvprašanjem, pri čemer se obe vprašanji nanašata na obdobje pandemije covida-19 med marcem 2020 in junijem 2022.

RV1: Kako se delo v kriznih razmerah v času pandemije odraža na zdravju/počutju zaposlenih v kritičnih poklicih (to so pripadniki/-ce SV, policisti/-ke in zdravstveno osebje)?

RV1.1: Kakšna je povezava med depresijo in obremenitvami v času pandemije covida-19 v kritičnih poklicih?

Na raziskovalni vprašanji bomo odgovorili s pomočjo naslednjih hipotez:

H1: Med zaposlenimi v preučevanih kritičnih poklicih se je v času pandemije covida-19 kazala depresija.

H2: Med zaposlenimi v preučevanih kritičnih poklicih obstaja povezanost med depresijo in pandemijo.

H3: Med zaposlenimi v preučevanih kritičnih poklicih se je pokazala povezava med samooceno stresa v času pandemije in depresijo.

Opis raziskave

Ključna raziskovalna metoda je retrospektivno kvantitativno merjenje s spletno anketo in bivariatna statistična analiza podatkov (Lobe, 2006), pri čemer pa se zavedamo omejitev glede objektivnosti pri raziskovanju človekovega vedenja, čustev in duševnih težav. Predhodna teoretična in empirična spoznanja so bila operacionalizirana in oblikovali smo merski instrument za preučevanje depresije in občutka stresa ter obremenitev med pripadniki/-icami SV, policisti/-kami in zdravstvenim osebjem v Sloveniji v času pandemije (marec 2020–junij 2022).

Anketni vprašalnik je anonimen in sestavljen iz 21 vprašanj, od tega je pet demografskih vprašanj (spol, starost, poklic, število otrok in zaposlitev partnerja/-ice). Sledita vprašanji, ki se nanašata na občutke stresa, in sicer na stres doma in stres v službi.

Nadalje je indeks pandemije sestavljen iz naslednjih vprašanj: stres na delovnem mestu, stres doma, strah pred okužbo, strah pred prenosom okužbe, povečani obseg dela, plačilo in volja po dodatnih aktivnostih (neodvisne spremenljivke). [4]

Depresija je bila izmerjena z lestvico CES-D (Radloff, 1977; Boisvert in drugi, 2003), pri čemer smo uporabili prevedeno in slovenskemu okolju

[4] *Pri vseh vprašanjih za izračun indeksa pandemije je bila uporabljena petstopenjska Likertova lestvica.*

prilagojeno lestvico za izračun indeksa depresije (Vuga Beršnak in drugi, 2020; Cronbach a = 0,908).[5] Indeks depresije smo izračunali po smernicah avtorjev vprašalnika CES-D (Radloff, 1977; Boisvert in drugi, 2003).[6]

S pomočjo statistične metode korelacije smo torej analizirali povezanost med odvisno spremenljivko (depresija) in zgoraj opisanimi neodvisnimi spremenljivkami (dejavniki tveganja: stres in pandemija).

Vprašalnik smo oblikovali s pomočjo orodja 1KA (Center za družboslovno informatiko, b. d.). Pridobljene podatke smo analizirali s pomočjo računalniškega programa IBM SPSS, ki je namenjen statističnim obdelavam.

Formalni in neformalni postopek pridobivanja dovoljenj za izvedbo raziskave

Da bi lahko izvedli spletno anketo, smo morali pridobiti uradno dovoljenje za izvajanje anketiranja policistov in policistk, pri čemer je bila prošnja za podatke policije v raziskovalne ali študijske namene obravnavana na Policijski akademiji v Centru za raziskovanje in socialne veščine. Za raziskovanje v zdravstveni stroki smo prek e-naslovov in telefonskih klicev stopili v stik s številnimi zdravstvenimi domovi, domovi za starejše občane/-ke in urgentnimi kliničnimi centri. V vseh omenjenih ustanovah so se po preučitvi prošnje prostovoljno odločili, ali bodo anketni vprašalnik posredovali svojim zaposlenim, o čemer so nas obvestili. Za izvedbo ankete v SV nam ni bilo dodeljeno posebno dovoljenje, smo pa v stik s SV in Generalštabom SV stopili prek telefona in e-pošte.

Opis vzorca

Anketni vprašalnik je bil namenjen zdravstvenem osebju, policistom/-kam in pripadnikom/-cam oboroženih sil SV. Raziskava je bila anonimna in sodelovanje prostovoljno. Vzorčili smo namensko, saj smo želeli pridobiti odgovore točno določenih posameznikov in posameznic v izbranih poklicih, ki so med epidemijo opravljali delo, povezano z upravljanjem s posledicami le-te. Ugotovitev raziskave ne moremo posplošiti na celotno populacijo.

Anketa je potekala od 28. aprila do 15. julija 2022; v tem obdobju je v raziskavi sodelovalo 1022 oseb, vendar je bilo zaradi prekinitve ali neustrezno izpolnjenega vprašalnika na koncu ustrezno izpolnjenih 587 anket. Od

[5] *Uporabljena je bila pri projektu Vojaško specifični dejavniki tveganja za dobrobit in zdravje vojaških družin.*

[6] *Vprašalnik, namenjen izračunu indeksa depresije, je sestavljen iz desetih vprašanj, merjenih na petstopenjski lestvici (1. redko ali nikoli, 2. včasih ali malokrat, 3. občasno ali srednje pogosto, 4. zelo pogosto in 5. ves čas).*

tega je v raziskavi sodelovalo 60 % moških (352), 39 % žensk (228) in 1 % oseb, ki se ni želel opredeliti po spolu (7). Povprečna starost sodelujočih anketirancev/-k je bila 42,6 let. V raziskavi je sodelovalo 16 % (94) zdravstvenih delavcev/-k, od tega 14 % (13) moških in 86 % (81) žensk, 9 % (50) je bilo pripadnikov/-ic oboroženih sil, od tega 76 % (39) moških in 22 % (11) žensk ter 47 % (278) pripadnikov/-ic policije, od tega 74 % (207) moških in 24 % (67) žensk. 19 % (112) oseb pa je v času pandemije opravljalo drugi poklic, zato smo jih iz analize izločili. 17 % (16) anketirancev/-k, ki so zaposleni v zdravstveni stroki, ima tudi partnerja/-ico zaposlenega/-o v enem izmed preučevanih poklicev. Prav tako ima partnerja/-ico v preučevanih poklicih zaposlenih 14 % (7) pripadnikov/-ic SV in 28 % (74) policistov/-k.

Rezultati in analiza

H1: Med zaposlenimi v preučevanih kritičnih poklicih se je v času pandemije covida-19 kazala depresija.

Med vsemi anketiranimi jih 30 % (75) kaže znake depresije, od tega 42,5 % žensk in 21,6 % moških. Iz pridobljenih analiziranih podatkov (Tabela 1) lahko ugotovimo, da je indeks depresije pozitiven pri 38 % (5) zdravstvenih delavcih in 43 % (36) zdravstvenih delavkah, 10,6 % (22) policistih in 11,9 % (8) policistkah. Indeks depresije je pozitiven tudi pri 7,6 % (3) pripadnikih SV in 9 % (1) pripadnici SV.

Sklenemo lahko torej, da znake depresije kaže več žensk kot moških. Pri tem pa je treba upoštevati spolno strukturo preučevanih organizacij. Primerjalno med vsemi tremi vzorci in tudi znotraj vzorca zdravstvenega osebja je največ depresivnih žensk, a je tudi v raziskavi v tem vzorcu sodelovala absolutna večina žensk (86 %). V SV in policiji je precej manj posameznikov/-ic kazalo znake depresije, a med njimi prevladujejo moški, pri čemer je treba upoštevati, da je v obeh organizacijah v raziskavi sodelovalo več kot dve tretjini moških. Razmerje med spoloma je povezano z ospoljenim karakterjem vseh treh organizacij.

Tabela 1: PODATKI ZA IZRAČUN INDEKSA DEPRESIJE, RAZDELJENI PO POKLICIH

	Poklic	Redko ali nikoli	Včasih ali malokrat	Občasno ali srednje pogosto	Zelo pogosto	Ves čas	Ne želim odgo.	Skupaj
1. Motile so me stvari, ki me običajno ne motijo.	zdrav. osebje	13 (16 %)	15 (19 %)	32 (40 %)	19 (24 %)	1 (1 %)	/	80 (100 %)
	pripadnik/-ica SV	12 (29 %)	9 (21 %)	12 (29 %)	7 (17 %)	2 (5 %)	/	42 (100 %)
	policist/-ka	50 (23 %)	52 (24 %)	63 (29 %)	40 (19 %)	9 (4 %)	1 (0 %)	215 (100 %)
2. Stežka sem ostal/-a osredotočen/-a na to, kar sem počel/-a.	zdrav. osebje	22 (28 %)	23 (29 %)	22 (28 %)	11 (14 %)	2 (3 %)	/	80 (100 %)
	pripadnik/-ica SV	18 (43 %)	14 (33 %)	5 (12 %)	4 (10 %)	1 (2 %)	/	42 (100 %)
	policist/-ka	79 (37 %)	50 (23 %)	49 (23 %)	32 (15 %)	4 (2 %)	1 (0 %)	215 (100 %)
3. Počutil/-a sem se depresivno.	zdrav. osebje	30 (38 %)	17 (21 %)	21 (26 %)	11 (14 %)	1 (1 %)	/	80 (100 %)
	pripadnik/-ica SV	22 (52 %)	12 (29 %)	2 (5 %)	4 (10 %)	2 (5 %)	/	42 (100 %)
	policist/-ka	93 (43 %)	47 (22 %)	41 (19 %)	24 (11 %)	9 (4 %)	1 (0 %)	215 (100 %)
4. Za vse, kar sem počel/-a, je bil potreben napor.	zdrav. osebje	18 (23 %)	20 (25 %)	24 (30 %)	13 (16 %)	5 (6 %)	/	80 (100 %)
	pripadnik/-ica SV	18 (43 %)	11 (26 %)	10 (24 %)	2 (5 %)	1 (2 %)	/	42 (100 %)
	policist/-ka	76 (35 %)	54 (25 %)	45 (21 %)	33 (15 %)	6 (3 %)	1	215 (100 %)
5. Čutil/-a sem upanje glede prihodnosti.	zdrav. osebje	5 (6 %)	10 (13 %)	15 (19 %)	30 (38 %)	19 (24 %)	1 (1 %)	80 (100 %)
	pripadnik/-ica SV	4 (10 %)	8 (19 %)	12 (29 %)	9 (21 %)	9 (21 %)	/	42 (100 %)
	policist/-ka	27 (13 %)	36 (17 %)	50 (23 %)	52 (24 %)	49 (23 %)	1 (0 %)	215 (100 %)
6. Občutil/-a sem strah.	zdrav. osebje	18 (23 %)	19 (24 %)	24 (30 %)	16 (20 %)	3 (4 %)	/	80 (100 %)
	pripadnik/-ica SV	18 (43 %)	10 (24 %)	5 (12 %)	7 (17 %)	2 (5 %)	/	42 (100 %)
	policist/-ka	77 (36 %)	55 (26 %)	39 (18 %)	31 (14 %)	12 (6 %)	1 (0 %)	215 (100 %)
7. Spal/-a sem nemirno.	zdrav. osebje	16 (20 %)	22 (28 %)	20 (25 %)	17 (21 %)	5 (6 %)	/	80 (100 %)
	pripadnik/-ica SV	19 (45 %)	10 (24 %)	6 (14 %)	6 (14 %)	1 (2 %)	/	42 (100 %)
	policist/-ka	67 (31 %)	54 (25 %)	40 (19 %)	41 (19 %)	12 (6 %)	1 (0 %)	215 (100 %)

	Poklic	Redko ali nikoli	Včasih ali malokrat	Občasno ali srednje pogosto	Zelo pogosto	Ves čas	Ne želim odgo.	Skupaj
8. Bil/-a sem srečen/-na.	zdrav. osebje	7 (9 %)	15 (19 %)	33 (41 %)	18 (23 %)	5 (6 %)	2 (3 %)	80 (100 %)
	pripadnik/-ica SV	1 (2 %)	9 (21 %)	14 (33 %)	11 (26 %)	6 (14 %)	1 (2 %)	42 (100 %)
	policist/-ka	21 (10 %)	48 (22 %)	75 (35 %)	51 (24 %)	18 (8 %)	2 (1 %)	215 (100 %)
9. Počutil/-a sem se osamljeno.	zdrav. osebje	34 (43 %)	17 (21 %)	18 (23 %)	10 (13 %)	1 (1 %)	/	80 (100 %)
	pripadnik/-ica SV	18 (43 %)	11 (26 %)	9 (21 %)	3 (7 %)	1 (2 %)	/	42 (100 %)
	policist/-ka	92 (43 %)	51 (24 %)	47 (22 %)	16 (7 %)	7 (3 %)	2 (1 %)	215 (100 %)
10. Nisem se mogel/-la »spraviti v pogon«.	zdrav. osebje	18 (23 %)	28 (35 %)	17 (21 %)	13 (16 %)	3 (4 %)	1 (1 %)	80 (100 %)
	pripadnik/-ica SV	15 (36 %)	15 (36 %)	5 (12 %)	6 (14 %)	1 (2 %)	/	42 (100 %)
	policist/-ka	77 (36 %)	45 (21 %)	36 (17 %)	43 (20 %)	11 (5 %)	3 (1 %)	215 (100 %)

Vir: lastni prikaz.

Na podlagi zgornjih podatkov lahko potrdimo hipotezo, da pripadniki/-ce SV, policisti/-ke in zdravstveno osebje nakazujejo razvoj depresije (30 %), pri čemer so se kot najbolj zaskrbljujoči pokazali podatki glede depresivnosti med zdravstvenimi delavkami.

H2: Med zaposlenimi v preučevanih kritičnih poklicih obstaja povezanost med depresijo in pandemijo.

Treba je poudariti, da smo Pearsonov koeficient korelacije izračunali za vsak preučevani poklic posebej. Najprej smo se posvetili indeksu depresije, ki smo ga opazovali v odnosu z vsemi neodvisnimi spremenljivkami (1 – stres na delovnem mestu, 2 – stres doma, 3 – strah pred okužbo, 4 – strah pred prenosom okužbe, 5 – povečani obseg dela, 6 – plačilo in 7 – volja po dodatnih aktivnostih), v nadaljevanju pa smo vse neodvisne spremenljivke v programu IBM SPSS povezali v eno in jo poimenovali »pandemija covida-19« ter ugotavljali njeno povezanost z depresijo.

Iz izračunov korelacij med indeksom depresije z različnimi neodvisnimi spremenljivkami (Tabela 2), kjer smo stres raziskovali v povezavi z drugimi dejavniki v luči širšega konteksta v povezavi z depresijo, lahko izpostavimo, da smo pri vseh preučevanih poklicih, torej pri zdravstvenem osebju, policistih/-kah in pripadnikih/-cah SV, ugotovili srednje močno povezanost med indeksom depresije in: a) stresom na delovnem mestu, ki izhaja iz nalog povezanih z obvladovanjem pandemije; b) s stresom, ki so ga anketiranci/-ke občutili/-e doma; c) z voljo, željo in energijo, ki so jo imeli anketiranci/-ke v času pandemije za sodelovanje pri družinskih obveznostih ali opravljanju svojih hobijev. V vseh obravnavanih vzorcih pri vseh omenjenih izračunih se je pokazala statistično pomembna in značilna povezava ($p < 0.01$), kar nakazuje na to, da obstaja korelacija med navedenimi neodvisnimi spremenljivkami in depresijo. V vseh obravnavanih vzorcih se je pokazala statistično značilna povezava ($p < 0.01$) med depresijo in strahom pred okužbo ter strahom pred prenosom virusa v domače okolje.

Tabela 2:KORELACIJA MED DEJAVNIKI TVEGANJA V ČASU EPIDEMIJE COVIDA-19 IN INDEKSOM DEPRESIJE ZDRAVSTVENEGA OSEBJA, POLICISTOV/-K IN PRIPADNIKOV/-IC SV

PREUČEVANE SKUPINE		Zdravstveno osebje		Policisti/-ke		Pripadniki/-ice SV	
Duševna motnja	**Dejavnik tveganja**	**r**	**P**	**r**	**p**	**r**	**p**
Depresija	Stres na delovnem mestu	.497	< 0.01	.496	< 0.01	.493	< 0.01
	Stres doma	.537	< 0.01	.524	< 0.01	.574	< 0.01
	Strah pred okužbo	.341	< 0.01	.337	< 0.01	.486	< 0.01
	Strah pred prenosom okužbe	.306	< 0.01	.302	< 0.01	.417	< 0.01
	Povečani obseg dela	154	> 0.05	0.85	> 0.05	.178	> 0.05
	Plačilo	137	> 0.01	- 0.74	> 0.01	-0.63	> 0.01
	Volja, želja in energija	.499	< 0.01	.548	< 0.01	.620	< 0.01
	Epidemija covida-19	.534	< 0.01	.548	< 0.01	.620	< 0.01

Vir: lastni prikaz.

Korelacije med indeksom depresije in dodatnimi delovnimi urami v času pandemije nismo uspeli ugotoviti. Prav tako v nobenem vzorcu nismo uspeli ugotoviti korelacije oz. povezanosti med indeksom depresije in plačilom za opravljanje dodatnega dela. Kljub temu da povezava ni statistično značilna, pa lahko povzamemo, da je r v vzorcu pripadnikov/-cah SV in slovenskih policistov/-kah negativen ($r = -.063$ in $-.074$). Ta ugotovitev nakazuje, da bi se pri policistih/-kah in pripadnikih/-cah SV depresivnost lahko znižala, če bi bila njihova finančna situacija ugodnejša, medtem ko pri zdravstvenem osebju tega ne opazimo.

Med pandemijo in depresijo pripadnikov/-ic SV, policistov/-k in zdravstvenim osebjem obstaja srednja povezanost, zato lahko drugo hipotezo potrdimo.

H3: Med zaposlenimi v preučevanih kritičnih poklicih se je pokazala povezava med samooceno stresa v času pandemije in depresijo.

Za namen raziskovanja H3 smo se posvetili izoliranemu razmerju povezanosti med stresom, ki so ga anketiranci/-ke občutili na delovnem mestu, in stresom doma v času covida-19 ter epidemijo.

Iz opravljene in predstavljene analize ter izračunov Pearsonovih koeficientov korelacij med depresijo in delovnim stresom in stresom, ki so ga anketiranci/-ke občutili doma v času pandemije, obstaja srednje močna povezanost pri vseh preučevanih poklicih, in sicer, pri zdravstvenem osebju je $r = .497$ med depresijo in delovnim stresom ter $r = .537$ med depresijo in stresom doma, pri policistih/-kah je $r = .496$ med depresijo in delovnim stresom ter $r = .524$ med depresijo in stresom doma, pri pripradnikih/-cah SV pa je je $r = .493$ med depresijo in delovnim stresom ter $r = .574$ med depresijo in stresom doma.

V vseh obravnavanih vzorcih pri vseh omenjenih izračunih se je pokazala statistično pomembna in značilna povezava ($p < 0.01$), kar nakazuje na to, da obstaja korelacija med delovnim stresom in stresom doma ter depresijo.

Razprava in sklep

Kot smo ugotovili, je bil v času pandemije (marec 2020–junij 2022) pomembno povečan obseg dela in spremenjene (poslabšane) delovne razmere, pri čemer predhodno niti ni bilo poskrbljeno za ustrezno usposobljenost zaposlenih v kritičnih poklicih za primer odziva na pandemijo z vajami niti ni bil posodobljen načrt odziva na epidemijo. Kot primer lahko navedemo veliko dodatnega in spreminjajočega se dela, naloge, ki so jih ti poklici opravljali prvič, so bile nepoznane, tudi delo v maskah je bilo za nekatere skupine (policisti in SV) novo in nepoznano, prav tako tudi vzdrževanje varnostne razdalje in razkuževanje opreme in rok. Dodatne obremenitve so bile neredni in spreminjajoč urnik ter napotitve v karanteno. Zagotovo pa sta bila navzoča tudi strah pred okužbo in prenosom le-te na družinske člane.

Raziskava je pokazala pozitiven indeks depresije pri 30 % anketiranih zaposlenih v preiskovanih poklicih, in sicer pri 42,5 % žensk in pri 21,6 % moških. Ugotovili smo torej, da delo v kriznih razmerah, kar je bila tudi pandemija, lahko povzroči porast depresije med zaposlenimi v kritičnih poklicih v Sloveniji. Podobno ugotavljajo tudi nekatere druge sorodne raziskave, na primer v raziskavi »*Mental Health Care for Military Personnel in the COVID-19 Epidemic*« je bila izmerjena povišana stopnja anksioznosti (29 %) in depresije (36 %) v času pandemije (Guo in drugi, 2020), v oboroženih silah ZDA so prav tako prepoznali anksioznost (17 %) in depresijo (17 %) med pandemijo (raziskava *US soldiers and the role of leadership: COVID-19, mental health, and adherence to public health guidelines* (2022).

Pri vseh preučevanih poklicih, torej pri zdravstvenem osebju, policistih/-kah in pripadnikih/-cah SV, smo ugotovili, da obstaja srednje močna in značilna povezanost med indeksom depresije ter pandemijo, kar nakazuje na to, da lahko dejavniki tveganja, ki spremljajo pandemijo, prispevajo k razvoju ali h krepitvi duševnih težav med zaposlenimi v preučevanih kritičnih poklicih. Srednje močno povezanost smo prepoznali med indeksom depresije in: a) stresom na delovnem mestu; b) s stresom, ki so ga anketiranci/-ke občutili/-e doma; c) z voljo, željo in energijo, ki so jo imeli anketiranci/-ke v času pandemije za sodelovanje pri družinskih obveznostih.

Pandemija in z njo povezana tveganja ter obremenitve so trajali približno dve leti, kar je povzročilo krepitev stresa med prebivalstvom, tudi med zaposlenimi v kritičnih poklicih. Klinika Mayo (2018) navaja, da lahko dlje časa trajajoča izpostavljenost stresnim situacijam pripelje tudi do razvoja duševnih stisk. Poudariti je treba, da se je predvsem zdravstveno osebje srečevalo s travmatičnimi dogodki, saj so na intenzivni negi v najbolj kritičnih epidemioloških razmerah vsak dan skrbeli za nekaj sto ljudi, pri čemer so nekateri tudi izgubili življenje. Tudi policisti/-ke ter pripadniki/-ce SV so bili, kot smo videli, priča stresnim in travmatičnim situacijam, le da na drugih področjih.

Za konec lahko poudarimo, da smo med pripravo članka ugotovili, da so pripadniki/-ice SV, policisti/-ke in zdravstveni delavci/-ke med pandemijo opravili zelo veliko dodatnega dela, v neznani situaciji, ob spreminjanju delavnika, v strahu pred okužbo in prenosom virusa SARS-Cov-2. Vse to je povzročalo nelagodje, stres, strah in je bilo povezano z razvojem duševnih motenj, kot je depresija.

Zaključimo lahko, da obstaja tveganje za razvoj duševnih težav v času kompleksne krize, kar je bila tudi pandemija, pri zaposlenih v kritičnih poklicih, torej je treba posebno pozornost nameniti preventivni krepitvi duševne odpornosti zaposlenih v kritičnih poklicih, njihovi odpornosti, pripravam, usposabljanjem, vajam idr. ter podpori v času kompleksne krize, ko so ti posamezniki/-ice podvrženi nadpovprečnim psihičnim ali/in fizičnim obremenitvam.

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*Brina MALNAR**

UVODNIK: ISKANJE POTI OD OKOLJSKE OZAVEŠČENOSTI DO PODPORE OKOLJSKIM POLITIKAM. KAJ NAM POVEDO PODATKI DRUŽBOSLOVNIH ANKET?

Čas, ko se človeštvo sooča z vse bolj oprijemljivimi negativnimi posledicami podnebnih sprememb, postavlja okoljske politike pred velik izziv. Za njihovo uspešno oblikovanje in izvajanje je treba razumeti zapleten odnos med dogajanjem v naravnem okolju in dejavniki, ki vplivajo na stališča in zaznave prebivalstva o njem. Odziv javnosti po eni strani določa meje možnega javno političnega ukrepanja, po drugi pa je tudi učinek tega ukrepanja, pa tudi številnih drugih dejavnikov, kot so vrednote, osebna izkustva, politična in medijska krajina in drugi. Vse te dejavnike v svoje modele združujejo družboslovni analitiki, ki s pomočjo različnih vrst podatkov raziskujejo večplastne družbene posledice okoljskih vprašanj.

Vir podatkov za opazovanje dinamike stališč javnosti do okoljskih vprašanj so praviloma velike družboslovne ankete, kakršne se v slovenskem prostoru že več kot pet desetletij izvajajo v okviru programa Slovensko javno mnenje (Malnar, 2021). Pričujoči tematski sklop tako združuje pet prispevkov avtorjev s področij sociologije, psihologije in obramboslovja, ki temeljijo na okoljskih mnenjskih kazalnikih tega programa ter njegovih domačih in tujih partnerjev. Splošna podmena petih študij so izsledki številnih raziskav, ki kažejo, da je obstoj podnebnih sprememb, ki jih povzroča človek, in njihovih negativnih posledic v javnostih evropskih držav postal večinsko sprejeto dejstvo (Poortinga et al., 2019; Kácha et al., 2022). Tematski sklop se zato osredini na naslednji korak, torej na vprašanje, ali oziroma pod kakšnimi pogoji se to zavedanje prevede v okoljska ravnanja in podporo okoljskim politikam. Rdeča nit prispevkov je empirično raziskovanje »realnega«, torej vedenjskega in političnega dometa okoljske ozaveščenosti, saj se na prvi pogled zdi, da je bil s prevlado teh stališč v javnosti dosežen ključen preboj za podporo okoljskim politikam in ravnanjem. Vendar pa je iz prispevkov razvidno, da gre pri tem le za nujen, ne pa tudi zadosten pogoj.

S teoretično razlago tega dejstva se sistematično ukvarja prvi prispevek (Malnar), ki temelji na strnitvi ugotovitev 64 študij s podatki ankete European Social Survey. V njem avtorica razvije splošni teoretični model in izriše povezave med ključnimi individualnimi in institucionalnimi dejavniki, ki vplivajo na okoljska stališča, ravnanja in odnos do okoljskih politik.

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Model izpostavi nujnost in hkrati nezadostnost okoljske ozaveščenosti, ki sama po sebi ne privede do okolju prijaznega ravnanja prebivalstva, pač pa se to zgodi le hkrati z večjim številom posredujočih dejavnikov. Čustvena angažiranost, predvsem pa občutek individualne odgovornosti, zaupanje soljudem in politično zaupanje so nekateri ključni elementi, ki zavedanje okoljskih problemov pretvorijo v ravnanja in podporo politikam. Ker gre za kompleksne dejavnike, na katere nosilci odločanja ne morejo enostavno vplivati, ti predstavljajo pomembno oviro oblikovanju politik in uveljavljanju ukrepov za blažitev podnebnih sprememb. Ena od rešitev je lahko fleksibilnost na strani javnih politik, torej prilagajanje okoljskih strategij konkretnemu družbenemu, ekonomskemu in političnemu kontekstu držav.

Splošne ugotovitve o razkoraku med stališči in ravnanji, s katerim se srečujejo odločevalci, na primeru Slovenije potrdi študija javnomnenjske podpore različnim scenarijem rabe obnovljivih virov energije (Kurdija in Bevk). Kot ugotavljata avtorja, se slovenska javnost v večinskem deležu zaveda obstoja antropogeno povzročenih podnebnih sprememb in je na načelni ravni večinsko naklonjena obnovljivim virom energije, kot so vetrne ali sončne elektrarne. Te igrajo ključno vlogo v zelenem prehodu in izraženo nasprotovanje njihovemu umeščanju v prostor je v slovenski javnosti nižje kot v tujih raziskavah. Vendar pa drugi kazalniki nakazujejo potrebo po relativizaciji teh ugotovitev, saj ob omembi konkretnejših okoljskih ukrepov, npr. davka na fosilna goriva, naklonjenost anketirancev hitro preide v večinsko zadržanost ali nasprotovanje. Avtorja kot bistven problem v slovenskem prostoru vidita nizko stopnjo političnega zaupanja ter, glede na druge države, še izrazitejši pesimizem glede smiselnosti in učinkovitosti osebnega okoljskega ravnanja. Ob tem izpostavita, da je za uspeh okoljskih politik potrebna širša družbena preobrazba, ki bi ob energetski preobrazbi zagotovila pravično porazdelitev koristi in tveganj za vse družbene skupine.

Razpravo o tem, kako globoko dejansko seže zavedanje okoljske problematike na individualni ravni, nadaljujeta naslednja dva članka. Študija Poliča in Svetine se osredini na povezavo med odnosom do okoljskih vprašanj in zadovoljstvom z življenjem. Avtorja izhajata iz pričakovanja, da široko prisotno zavedanje problema okoljskih tveganj v javnosti postaja dejavnik, ki že vpliva na zadovoljstvo z življenjem. A temu ni tako, saj podatki kažejo, da imajo tradicionalni dejavniki, kot sta zaznana materialna blaginja in zdravje, pričakovano še vedno vodilno vlogo, medtem ko statistično značilne povezave med zadovoljstvom z življenjem in odnosom do okoljskih vprašanj ni. Pokaže se torej, da je okoljska problematika v kontekstu vsakdanjega življenja še vedno abstrakten, neoprijemljiv problem, oddaljen od »realnejših« življenjskih izzivov. Ob tem je potrebno opozoriti, da so bili podatki zbrani leta 2020, zato obstaja možnost, da so ekstremni vremenski pojavi v Sloveniji medtem okrepili zaznavo okoljskih tveganj tudi v vsakdanjem življenju, kar bodo potrdile ali ovrgle naslednje meritve.

Podoben zastavek ima četrta študija (Malešič), ki analizira ali oziroma v kolikšni meri javnost povezuje okoljska tveganja, kot so vremenske katastrofe, okoljski terorizem ali pojav okoljskih imigracij, z vidikom osebne in širše varnosti. Študija z medčasovno analizo najprej znova razkrije vse večjo načelno občutljivost javnosti v Sloveniji za okoljske probleme, kar je trend, ki ga bo zanimivo spremljati v prihodnjih letih. Obenem pa, podobno kot v prejšnjem primeru, podatki kažejo, da javnost okoljska varnostna tveganja obravnava kot oddaljena od vsakdanjega življenja in jih na individualni ravni ne zaznava kot potencialne varnostne grožnje. Tudi pri varnostnem vidiku se torej načelna ozaveščenost glede globalnih okoljskih tveganj ne prevede v spoznanje, da okoljske grožnje lahko »vdrejo« v vsakdanjo življenjsko rutino in jo porušijo. Spet pa obstaja možnost, da je zaradi širše izkušnje s pojavi, kot so poplave, neurja, plazovi in podobno, v času od meritve prišlo do premika stališč oziroma okrepljenega zavedanja varnostnih groženj, ki jih lahko prinašajo okoljski problemi.

Peti članek (Bezjak in Štebe), ki zaokroži tematski sklop, vrne razpravo na splošne vidike raziskovanja okoljske problematike. Tu imajo – poleg raziskovalne infrastrukture, kakršna je program Slovensko javno mnenje – ključno vlogo tudi arhivi družboslovnih podatkov. Avtorja na primeru vzpostavljanja interdisciplinarne baze okoljskih podatkov v Sloveniji prikažeta strateško vlogo tematskih zbirk pri spodbujanju uporabe podatkov, saj tovrstne zbirke predstavljajo odgovor na raziskovalne in družbene potrebe po informacijah, kar še zlasti velja za področje okolja. Večplastna medsebojna povezanost družbe in naravnega okolja namreč zahteva pridobivanje širokega spektra podatkov, od javnomnenjskih do baz o porabi energije v gospodinjstvih in globalnih baz podatkov o emisijah toplogrednih plinov, proizvodnji in porabi nafte, plina, električne energije itd. Poleg tega da omogočajo prost dostop do kakovostnih podatkov, arhivi in tematske zbirke predstavljajo tudi platformo za interdisciplinarno sodelovanje in povezovanje proizvajalcev podatkov ter ponujajo vpogled v obstoječo pokrajino podatkov, s čimer nakažejo morebitne vrzeli v raziskovanju.

V luči zaostrovanja problematike podnebnih sprememb v Sloveniji v zadnjih letih bi bilo dobrodošlo, da bi pričujoči sklop analiz in nastajajoča tematska zbirka podatkov spodbudila širši val interdisciplinarnega raziskovanja teh pojavov. To bi prispevalo dodatna spoznanja o medsebojni povezanosti okoljskih vprašanj z družbenimi vidiki, kot so socialne in regionalne neenakosti, vrednote, državljanska odgovornost, politični in ekonomski interesi in drugi. Dobrodošla bi bila tudi strnitev spoznanj obstoječih izsledkov z različnih znanstvenih področij, s čimer bi odločevalci dobili bolj celovito informacijsko podlago za načrtovanje okoljskih politik in ukrepov v okviru specifičnih možnosti in omejitev slovenskega družbenega prostora. Prav tako dobrodošle bi bile študije primerov lokalnih okoljskih odločitev (denimo umeščanja obnovljivih virov v prostor), saj se lokalna logika odločanja pogosto povsem razlikuje od logike odgovarjanja na načelni ravni.

V tem smislu rezultati tematskega sklopa poleg raziskovalnih vprašanj odpirajo tudi vprašanja o informacijskih in komunikacijskih strategijah, saj na primer premostitev razkoraka med okoljskimi vprašanji in gospodarsko realnostjo zahteva kulturno in lokalno prilagojene pristope, ki pritegnejo različne družbene skupine v izvajanje trajnostnih okoljskih praks (npr. Choi in Hart, 2021; Davidovic in Harring, 2020). Seveda pa mora za to v idealnem scenariju obstajati aktivna angažiranost vseh deležnikov, vključno z akademsko skupnostjo, političnimi odločevalci, gospodarstvom in lokalnimi skupnostmi, ki bodo soustvarjali in implementirali sprejemljive rešitve v luči vedno nujnejših podnebnih izzivov.

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INFORMING CLIMATE MITIGATION POLICIES: A SCOPING STUDY BASED ON 64 ARTICLES USING THE 2016 EUROPEAN SOCIAL SURVEY ROTATING MODULE

Abstract. *The article presents a meta-analysis of academic articles using the European Social Survey Climate Change module. It summarises the key individual and country-level factors that shape climate beliefs, behaviours, and policy support, aiming to mitigate the problem of the fragmentation of findings when informing policymakers. The results, depicted in a heuristic model, underscore the significance of awareness, trust, and socio-political contexts, illustrating the intricate interplay of climate change beliefs, emotional engagement and policy preferences. By consolidating the scattered research through a meta-analytical approach, the study efficiently identifies key obstacles encountered by European decision-makers while implementing climate mitigation measures and policies.*

Keywords: *climate change, climate action, climate policy, European social survey*

Introduction: The distinct role of comparative surveys in informing policies

Comparative social research is widely recognised as a core branch of empirical research in the social sciences, with some authors describing it as the "lifeblood" of these disciplines (Smith, 2011). One of the key data sources in comparative research are multi-purpose comparative surveys, specialized programmes that provide quantitative data for secondary analysts in various social science fields. Notable examples include the World Values Survey, the European Values Study, the International Social Survey Programme and the European Social Survey. According to Andreß et al. (2019), comparing tendencies between countries and following up within them would not be possible without the existence of these survey programmes.

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The epistemic advantage of comparative surveys is the added dimension of cross-national comparisons, which is important not only for academic research, but for public policy-making as well. Studies based on comparative surveys often employ macro-societal factors as explanatory variables, utilising multi-level modelling to explore cross-level interaction (Esser, 2017). They allow comparisons of the effects of alternative (policy) interventions in various institutional and societal contexts (Norris, 2009; Bryan and Jenkins, 2015), i.e., by studying the ways in which country contexts shape and condition the relationships between individual-level variables (Kroneberg, 2019). They offer the possibility to compare the outcomes of different policy solutions, examining macro-level structural elements otherwise difficult or impossible to manipulate. Cross-national surveys provide an ideal research format to assess policy effects. Some scholars have even postulated that country-level comparisons are the closest substitute for experimental research in the social sciences (Smelser, 1976).

Large quantitative surveys are usually publicly funded and costly exercises. As such, they face external and internal expectations to demonstrate both academic and societal relevance to funders, researchers and the public (Molas-Gallart, 2015; Benneworth, 2015; Martin, 2011). This may be interpreted as forming part of the ongoing 'accountability trend' where science is expected to contribute something in return to society and its public funds for research, i.e., to generate knowledge that benefits society as a whole, stimulate new approaches to social issues or inform public debate and policy-making (Penfield et al., 2014; Bornmann, 2012, Donovan, 2011). While publicly funded multi-purpose comparative surveys remain under academic control, governments expect general 'policy returns' from them (Hakim, 1982) and most researchers seem to respond to this expectation. A global study of research activity in modern universities conducted among 12,379 academics in 15 countries (Bentley et al., 2015) found that analysts overwhelmingly combine basic and applied research. According to the authors, this is not only linked to funding and university strategies but also, more significantly, to individual norms concerning academics' obligations where researchers have internalised the duty to generate returns to policy.

The aim of this article is to reassert these hybrid practices and capitalise on them by extracting policy-directed content from academic articles generated using the European Social Survey (ESS) 2016 Climate Change module, conducted in 23 countries (for details, see ESS ERIC 2018). The ESS, now a European Research Infrastructure Consortium, is an academically driven multi-purpose, cross-national survey that measures the attitudes, beliefs and behaviour patterns of diverse populations across Europe. In addition to producing scientific findings and promoting higher standards of rigour in cross-national research, its third main goal is to inform policies. As noted by Kropp (2017), the biannual setup of ESS enables it to address pressing political issues more effectively and positions it closer to the policy area than other similar surveys. This orientation is reflected in ESS module selection procedures where policy relevance is one of the key criteria, as well as in thousands of academic ESS publications where policy-oriented content is present in 79% of the texts, especially those addressing welfare, climate change, immigration, and work–life balance. (Malnar, 2022: 27).

Research goals: Addressing the issue of the fragmentation of findings

Our study is motivated by the combination of the ESS' policy-friendly format and content, along with the significant efforts made by analysts to consistently generate 'policy returns'. The bibliographic database of European Social Survey academic publications is extensive, currently totalling nearly 10,000 units[1]. In principle, this should provide a valuable policy resource, a trend also observed with other comparative survey programmes experiencing similar publication growth.

Paradoxically, the growing volume of academic publications has become a challenge for social science research. Many scholars are concerned that findings from the exponentially rising number of scientific articles are not adequately integrated into theory-building. Comparative research, although praised for establishing causality, is not exempt from this issue. Despite the vast number of articles being published, they often go unread as the focus is primarily on publish for the sake of publishing (Fernandez-Cano, 2020). Some point to overspecialisation due to which sociology has retreated into safe niches of fellow thinkers, with dense networks and their own journals (Turner, 2016). According to Blaikie, research practice has tended to become ritualised in the testing of isolated or trivial hypotheses (Blaikie, 2010) and, while variable-based quantitative comparative research is an inexhaustible source of causal propositions, this does not mean that these propositions form a theory in the sense of a logically connected system (Kroneberg, 2019). Similarly, Lagos believes the perverse effect of having so much individual data available is the production of the partial interpretation and atomisation of analysis, which may be delaying rather than accelerating the development of theory (Lagos, 2008).

According to these authors, multi-purpose comparative surveys are contributing to the problem of fragmented findings rather than serving as a solution for theory-building. This issue could pose legitimacy problems for research infrastructures in relation to funders and the public. In the case

[1] *Accessible at https://bibliography.europeansocialsurvey.org.*

of the ESS, the majority of its resources are allocated to data provision and methodological issues, with only a fraction dedicated to findings-related concerns (see ESS ERIC, 2022). Although the ESS requires questionnaire design teams to publish 'topline results,' offering comprehensive cross-data analysis from rotating modules for various audiences, these efforts do not address the problem of fragmented findings. The compiling and digesting of results continue to rely entirely on user communities. In our perspective, the lack of systematic efforts by research programmes to summarise findings based on their data might be the missing link in better connecting and accumulating knowledge from scattered publications within academic and policy communities. Our study aims to explore and demonstrate the benefits of a meta-analytical approach for offering 'general policy returns' in the context of widespread academic publishing, while focusing on climate change mitigation research.

Methodological approaches to summarising the outcomes of numerous studies can be broadly categorised into quantitative and qualitative ones. Among quantitative methods, the systematic review stands out, having gained prominence in medical research as a solution to information overload. A systematic review's specific objectives may include assessing the effectiveness of a policy, offering the policy-making context, identifying risk factors, guiding primary research in understudied areas etc. Another aim can be to review the theories, typologies, data or methods in a certain field (Petticrew and Roberts, 2006; Schlosser, 2006; Thomson, 2013; Harden, 2010). It is based on the entire relevant scientific literature, allowing for a comprehensive and unbiased review. This approach empowers research users, including researchers and decision-makers, to organise and prioritise information effectively.

Unlike medicine, research approaches in the social sciences lack standardisation, making a narrow systematic review nearly impossible. Instead, various non-systematic review methods are often employed. These methods do not yield a common final quantitative effect size estimate, such as a correlation coefficient between variables, but serve other purposes, such as summarising findings across different topic areas and acting as sources of ideas or information. One of the most commonly used non-systematic review formats is the scoping study, which investigates the scope, range and nature of findings in a given field, provides a summary, identifies gaps in primary research (Arksey and O'Malley, 2005: 21–22) and offers a synthetic narrative evaluation of the findings. The aim is to enable a new or higher level of interpretation and a deeper understanding of the phenomenon under investigation (Harden, 2010; Smit and Van Der Graaf, 2012).

This article is a scoping study that utilises all available ESS English-language articles based on the Climate Change module as its framework.

The focus on this topic is twofold. First, with the increasing frequency of extreme weather events, climate change mitigation has become a top priority on policy agendas. Still, it poses significant challenges for policymakers due to the substantial costs and necessary lifestyle changes involved. Interestingly, while the environment has been widely recognised as a policy ‘grand challenge’ for at least a decade or two, the ESS did not comprehensively include this topic until 2016. This was largely due to its bottom-up policy of module selection and strict evaluation procedures. However, after publication of the first dataset from the new module in 2017, academic publications quickly emerged, showing the steepest increase for any module to date (Malnar, 2021: 21). This suggests that the topic was highly anticipated and filled a significant gap in the ESS thematic landscape. The article aims to explore how a scoping study, focused on recent and ‘compact’ academic publications in terms of thematic focus and data source, can help overcome various policy implementation obstacles and obstacles to policy change (Šinko, 2014). The second reason is practical and pertains to the ESS’ rich and systematic bibliographic resources. The ESS collects continuous and detailed information about its academic use to evaluate its impact, inform questionnaire design, and guide outreach and communications efforts. These resources enable scholars to robustly identify and access relevant publications based on the Climate Change module.

The specific research focus of our scoping study is to harvest knowledge and findings that would help address the key policy challenge faced by climate change mitigation policies: how to achieve the transition from climate change awareness and concern, which now seem widespread among the general public, to climate change mitigation behaviour and policy support, which are much less so. In other words, how to explain and address the fact that the considerable of public concern is not adequately reflected in actual behaviour and policy support.

After outlining our empirical sources (articles) and their analytically relevant attributes, the article proceeds to the results section, cataloguing individual- and country-level parameters associated with climate change attitudes, mitigation behaviour, and support for climate change policies, along with their essential interactions. The results section culminates in a descriptive meta-model outlining the conditions needed for climate change awareness to translate into action and policy support. The discussion section provides a narrative summary of relevant policy findings, drawing lessons and implications for policymaking, while noting some limitations of this research format. The conclusion briefly reflects on the future role of research infrastructures in light of the findings concerning fragmentation issues, suggesting they should consider taking a more active role in summarising academic knowledge.

Data and methods

The study is based on all available English-language articles utilising the ESS Climate Change module. The selection framework is the ESS official bibliographic database acquired through the Google Scholar search platform, covering the period 2004–2022. An ESS-based publication is defined as any academic publication in the English language with at least one ESS item used in primary analysis (Malnar, 2022). The publications were coded for various bibliographic variables, including the use of items from ESS modules, as established by reviewing publication texts obtained through open-access and university subscription-access schemes. While there was a total of 112 academic publications using items from the Climate Change module, including reports, book chapters, theses etc., we narrowed our study to journal articles (64) to ensure sufficient analytical quality, subject to the peer review process.

The Climate Change module was fielded in 2016 in 23 countries, and its first data file was issued by the ESS in 2017. This means that all publications are relatively recent, covering the period between 2018 and 2022: 2018 (2 articles), 2019 (8 articles), 2020 (20 articles), 2021 (16 articles) and 2022 (18 articles). The authorship structure follows typical publication patterns, with the majority of first authors coming from Western Europe (39) and Nordic Europe (22), while 8 articles were authored by researchers in Southern-Mediterranean and 8 in post-socialist Europe. This article does not address issues of regional bias in academic publishing, a well-researched phenomenon (e.g., Lundgren, 2015; Krause, 2016), albeit it should be considered since it may influence the content of publications in terms of focus and interpretation. The picture is more balanced in terms of country data use where all European regions are well represented. The average number of countries included was 18.9, there were 5 single country studies. With respect to academic domain, the majority of articles (37) was published in journals in the area of environment, energy and space, 8 in sociological journals, 7 in economic journals, 6 in political journals, 3 in psychological journals and 3 in other journals, which provides a variety of theoretical perspectives.

The 64 articles underwent content analysis using the scoping study review format (Arksey and O'Malley, 2005; Harden, 2010; Smit and Van Der Graaf, 2012), a qualitative analysis method that provides a synthetic narrative evaluation of the findings. Relevant content was identified, organised and summarised through a reviewing process guided by three research aspects: 1) major determinants of climate change attitudes, behaviour, and policy support; 2) key implications and recommendations for climate change policy; and 3) analytical limitations. The research results are presented through a narrative synthesis and visually with a scheme depicting the key concepts and their associations. The aim is to enable a new or higher level of interpretation and a deeper understanding of the phenomenon under study.

Empirical results

Individual-level determinants

The first goal of the scoping study was to map key determinants of climate change attitudes, behaviour, and policy support. Overall, 15 analytical concepts or constructs were found to be influential for climate change behaviour and policy support, 12 of them on the individual-level and 3 on the country-level.

Beliefs about climate change. Beliefs are essential for predicting climate actions and policy support, serving as a necessary precondition. Accepting the fact that climate change is happening, is partly caused by humans, and brings negative impacts is crucial for individuals to engage in mitigation behaviour and support policies. The findings from the 64 articles generally indicate that this precondition is largely fulfilled as an overwhelming majority of the European population believes that climate change is happening. Scepticism about it ranged from 2.3% in Iceland to 16.5% in the Russian Federation (Poortinga et al., 2019). The public is more divided on the issue of the causes where a significant share of people attributes climate change equally to human influences (anthropogenic) and natural processes (Lübke, 2021a). People doubtful about anthropogenic climate change are more unlikely to feel responsibility and support costly policies (Levi et al., 2020), which creates a challenge. On the other hand, the perceived impacts of climate change were seen to be negative in all participating countries (Poortinga et al., 2019).

Worry and concern about climate change. Worry signals that an individual is actively and emotionally engaged with the topic of climate change and more likely to engage in climate action and support climate policies. Worry was found to be positively related to feelings of personal responsibility to reduce climate change which, in turn, is linked to climate policy support, as well as to personal climate mitigation behaviours (Bouman et al., 2020). The scope of worry was found to be associated with attribution beliefs, i.e., the more people believe that climate change is caused by human actions, and the more they believe that it has negative impacts, the more they worry about it (Verschoor et al., 2020). On the other hand, trend and attribution denial has the opposite effect and reduces 'eco-anxiety', particularly in regions and countries with higher levels of climate change exposure (Hadarics, 2020). Worry about climate change also appears to be rooted in biospheric values, i.e., caring about nature and the environment (Bouman et al., 2020).

Human values. ESS-based studies repeatedly find that individuals who prioritise self-transcendence over self-enhancing values are less likely to have trend or attribution sceptical views, to have a stronger concern with climate change and engage more in energy-reducing behaviours (Poortinga et al., 2019), being oriented to endorsing or supporting collective benefits and the provision of public goods (Nezlek, 2022; Welsch, 2021). There is also a country-level effect with larger shares of post-materialists in affluent countries making these countries more climate conscious. One study found that in France, Germany and the United Kingdom self-transcendent values play a key role in driving preferences for solar energy (Pagliuca et al., 2022), albeit values are comparatively less effective in shaping support for increased fossil fuel taxes.

Socioeconomic attributes. Analysts consistently find that ecological concerns are driven by more privileged segments of society, specifically those with a tertiary education and higher economic status. Educated individuals tend to be more aware of climate change, recognise its human-induced origins, perceive it as a serious issue, exhibit more reported saving behaviour, and express greater support for relevant policies (Poortinga et al., 2019). The impact of income is less straightforward. ESS-based studies indicate that individuals with a higher income are more likely to invest in energy-efficient appliances but less likely to limit their energy use. In contrast, lower-income groups tend to limit energy use more, possibly due to the relatively higher economic benefits they derive from reduced energy consumption (Umit and Schaffer, 2020). Self-interest is one of the determining factors.

Demographic attributes. Analysts find that older respondents are more likely to hold trend or attribution sceptical views and lower levels of concern. For example, in Spain and Lithuania the youngest respondents are found to be the most aware, blame climate change on human activity most intensely, are the most concerned and the most willing to act (Foncubierta-Rodríguez et al., 2021; Vaznonienė, 2022). Nevertheless, the situation is complex. ESS-based studies indicate that millennials, raised in an individualistic culture and facing frustration due to precarious employment opportunities and the 2008 economic crisis, are less likely than other generations to feel responsible for reducing climate change (Gómez-Román et al., 2021; Georghiou et al., 2019). Surprisingly, the older Generation X was found to feel the most responsible. Another challenging group comprises vulnerable NEETs (not in education, employment or training) who experience social exclusion. Their unhappiness associated with the NEET condition mediates their willingness to adopt pro-environmental attitudes (Bonanomi and Luppi, 2020).

Gender was not identified as one of the strongest predictors of climate change concepts. Nevertheless, men across the 23 countries are more likely to hold trend and attribution sceptical beliefs and generally exhibit lower levels of concern about climate change compared to women (Poortinga et al., 2019). In the USA, this trend is particularly noticeable among politically conservative men, a phenomenon often referred to as the 'white male effect'. Analysts theorise that differences in socialisation, such as the motherhood mentality or a stronger ethic of care, might explain this disparity (Verachtert, 2022).

Social trust. A large number of ESS-based studies identified social trust as the key factor explaining the well-known concern–behaviour gap, i.e., the fact that respondents' environmental awareness is not adequately reflected in their actual behaviour. What they find is that pro-environmental behaviour is influenced not only by intrinsic motivation and external economic incentives, but also by how people perceive the likelihood of others' actions (Lübke, 2021). The concern–action relationship is stronger in high-trust countries, while in low-trust countries strong concern is paired with a low level of feeling personal responsibility and climate policy support (Bodor et al., 2020). Pro-environmental behaviour seems to depend on one's perception that a large number of people are willing to make an effort to help mitigate climate change and not take a 'free ride' while the costs are being paid by the global collective (Davidovic and Harring, 2020). People need to trust their fellow citizens and other actors to comply with policies and will only take on the costs for climate action if others do so as well. One study established that a tipping point must be reached for the social-norm effect to dominate the rational-choice, free-rider effect (Welsch, 2022). Once individuals believe that a large enough percentage of the population is engaging in mitigation behaviour, they are subject to conformity bias and switch from free-rider to mitigation behaviour, which is perceived as a social norm. In this way, a group with a pro-environmental orientation will continuously incentivise each other to act in ways that reduce energy consumption, such as the well-known trend of imitation in purchasing solar panels (Caferra et al., 2021). However, ESS-based studies show that most people structurally underestimate the willingness of others to contribute, i.e., doubt that many other people will limit their energy use to help mitigate climate change (Bouman and Steg, 2019; Lübke, 2021). This high level of distrust in others' pro-environmental behaviour contrasts with the generally high level of self-reported energy conservation behaviour.

Perceptions of responsibility, efficacy and outcome expectancy. ESS-based studies find that a sense of personal responsibility to reduce climate change is essential for translating worry into energy-saving behaviour. Climate concern is a necessary, yet insufficient condition for climate responsibility, which can be a combination of factors such as personal beliefs and social pressures (Pohjolainen et al., 2021). The feeling of personal responsibility, or lack thereof, is also the most important condition for predicting both opposition to carbon taxes and attitudes to other climate policies (Levi, 2021).

Nonetheless, worry and personal responsibility may not be sufficient for people to engage in energy-saving behaviours. Another factor are perceptions of self-efficacy (the belief that one is able to use less energy) and personal outcome expectancy (the belief that limiting one's own energy use will help reduce climate change; Dirksmeier and Tuitjer, 2022). Efficacy beliefs have been identified as a core psychological component that influences climate change engagement (Choi and Hart, 2021). Yet studies find that while people's belief in their ability to limit their own energy use is high, their positive outcome expectancy is low, i.e., most were pessimistic about how much difference their individual actions make. The situation is the opposite for the societal level. While perceptions of collective efficacy are low, perceptions of collective outcome expectancy are high. That is, although respondents believe that collective action by large numbers of people would successfully reduce climate change (Žigienė et al., 2021), they do not believe this is likely to happen. People's motivation to limit energy use is therefore diminished by the low expected effect of their personal actions and lack of belief in the collective action, an issue closely related to social trust. Efficacy beliefs thus modify the effect of worry about climate change in shaping behavioural responses. Worrying translates into energy saving behaviour more for those with high levels of personal and collective outcome expectancy (ibid.).

Political position, ideology. In line with previous research, ESS-based studies find that political orientation alters the relationship between climate change beliefs and worry. Believing that climate change is caused by humans and will have a negative impact across the world is a more potent source of worry for left-leaning than right-leaning individuals (Gregersen et al., 2020). Not only Populist-Right but also mainstream Conservative party-family voters are less worried about climate change and less in favour of higher fossil fuel taxation. Political ideology also modifies the effects of education. For those on the political left, education is related to pro-climate change beliefs and support for climate change policy, whereas for those on the political right, these effects are weak or negative (Czarnek et al., 2020). The exception is post-communist Europe where the left–right ideological divide is understood differently. For example, a study finds that attitudes to fossil fuel taxation are relatively independent from the left–right political orientation in many of these countries (Sivonen, 2020). In these countries, climate change attitudes did not become as entrenched within the party system as in the West (Fisher et al., 2022), with the exception of the Czech Republic (Čermák and Potančoková, 2020).

The effect of left–right ideological positioning in (Western) Europe (and even more so in the USA) is due to the fact that climate change attitudes are part of a wider cluster of political orientations and affiliations. During the second half of the twentieth century, parties on the left reoriented to include environmentalism as well as other "new politics" issues (ibid.). In contrast, studies find the congruence of anti-immigrant and anti-ecological attitudes in extreme populist right voters. ESS-based studies confirm these congruencies. There is an association between attitudes to refugees and attitudes to the environment across 20 European countries, with pro-environmental party voters being more positive regarding immigrants and refugees (Puskarova and Dancakova, 2018; Ilmarinen et al., 2020; Parsons, 2021). Next, people who hold attitudes consistent with a nationalist ideology are generally more likely to be sceptical about climate change and oppose policies that increase taxes on fossil fuels (Kulin et al., 2022). Nationalism prioritises national interests over supra-national agendas and the transfer of some national competences to the supranational level may make climate action less appealing to communitarian Europeans (Weko, 2021). Analysts also find synergy between attitudes to redistribution and environmental attitudes. Support for reducing income differences was positively connected to supporting all three climate policy instruments (Sivonen and Koivula, 2020a).

Spatial placement, urban–rural residence. Studies reveal that climate change scepticism and concern exhibit urban–rural differences. Living in a country village is associated with greater climate scepticism and lower concern compared to living in a big city (Weckroth and Ala-Mantila, 2022) and individuals in small towns and rural areas are also more likely to oppose climate change measures (Arndt et al., 2022). Analysts maintain that for people who live in rural areas the economic cost of energy-based taxes is likely to be higher, and thus the self-interest is one of the determining factors. Poorer regions are generally more sceptical of climate change measures and more likely to be rural. Another aspect is that carbon-intensive industries, especially coal mining and coal-based power generation, are often concentrated in a few regions and decarbonisation actions will affect those regions especially strongly (Yazar et al., 2022). The second explanation is ideological and refers to anti-establishment attitudes in more peripheral and declining regions. In the light of intergroup conflict or the core–periphery thesis, the opposition is between progressive, egalitarian, metropolitan wealthy middle classes concerned about climate change, and the 'left behind' low-income individuals residing in poorer regions, the 'losers' of globalisation (Arndt et al., 2022). The latter have no incentive to support policies that hurt them financially. This is the basis for new political alliances where populist right-wing parties increasingly align with the periphery and the countryside and green parties with the metropolitan centres.

(Social) media and Internet use. Previous studies indicate that climate change perceptions interact with how climate change is portrayed in the news, which is today increasingly accessed via social media platforms. Media representations can affect both climate change perceptions and perceived efficacy. On the individual level, an ESS-based study found that daily Internet use as well as the amount of time spent online correlate negatively with perceived climate change efficacy particularly in Germany, Finland, the UK, the Netherlands and France (Tuitjer and Dirksmeier, 2021). On the national level, Facebook usage negatively correlates with perceived climate change efficacy.

Extreme weather exposure. Analysts maintain that individuals use first-hand weather experience to form climate opinions, although this could depend or be modified by news exposure as media enable those experiences to be viewed in light of the climate change issue (Damsbo-Svendsen, 2020). One ESS-based study found that when objective temperatures increase, climate opinions are strengthened, comparable to the effect of a full step to the left on a 0–10 political ideology scale. Another found that a significantly bigger share of support for the tax-and-subsidy policy is present when interviews are conducted during the hottest months (seasonal effect), suggesting that consensus on decisions about climate change policies is stronger in the hottest months (Becchetti and Conzo, 2022). Findings suggest that extreme weather experiences 'automatically' foster some level of support for pro-mitigation attitudes, but it is only an extremely warm climate that increases the awareness and focus on climate change and not the increase or decrease in temperature in colder months.

Political trust. The last individual-level determinant is political trust, a 'heavy weight' predictor for explaining attitudes to carbon taxes. For economists, carbon taxes are the most effective means for discouraging carbon consumption, yet they encounter strong public opposition. For example, researchers highlight instances like Australians voting out a government that had introduced a carbon tax, and in France, large protests by the 'gilets jaunes' led the government to cancel a proposed increase in fuel taxes (Otto and Gugushvili, 2020). ESS-based studies consistently demonstrate that attitudes to carbon and other environmental taxes are shaped not only by people's beliefs and concerns about the issues these taxes address, but also by their trust in their country's politicians and political system. Positive expectations lead individuals who trust their government and institutions to be more cooperative and willing to accept risks or sacrifices (Fairbrother et al., 2019). Analysts find that on aggregate nations most supportive of higher taxes on fossil fuels are not those that are more aware and concerned about climate change, but those with the highest levels of political trust. Support for carbon taxation is highest in Sweden, which is unremarkable in terms of beliefs about the dangers of anthropogenic climate change. On the other hand, climate concern is exceptionally high in Spain where support for new carbon taxes is very low. People who worry about climate change are substantially more likely to support climate policies if they live in a society with high political trust, while in countries with low levels of political trust, being aware and concerned about the climate is at most weakly associated with support for taxes on fossil fuels (Kulin and Sevä, 2020). In countries with more corruption, any money people pay in as public revenues could be stolen, be spent in wasteful ways, or disappear through corruption. Studies also find that while political trust strongly predicts carbon tax opposition, it does not (so much) affect attitudes to subsidies and bans (Davidovic and Harring, 2020).

Country-level determinants

As noted in the introduction, manipulating country-level determinants of climate change variables is a specific advantage of comparative research. ESS-based studies identified three key country-level factors:

Democratic legacy and quality of governance significantly influence climate change concerns, with lower levels observed in Eastern Europe than in the West. One explanation is the persistence of "sticky" values from the communist era (Sivonen, 2020), shaping citizens' political perspectives differently from other regions. Post-materialist values, common in advanced industrial societies, are less prevalent in post-communist societies (Marquart-Pyatt et al., 2019). In addition, the political and economic uncertainties following the collapse of communist regimes have left citizens in former socialist states (FSS) with mixed reactions, struggling to prioritise environmental protection over personal economic security, reflecting a cultural lag in their attitudes (Poortinga et al., 2019).

The second explanation is the increased level of policy performance risk in FSS countries, i.e., the heightened probability that a given policy initiative will underperform or fail. This relates to the concept of government quality, encompassing bureaucratic effectiveness, the rule of law, and absence of corruption (Davidovic and Harring, 2020), influencing political trust. Perceptions that the state can deliver on its promises increase tolerance of taxation, while scepticism about the state's ability to carry out policies effectively erodes the willingness for sacrifices. As policy performance risk rises, the positive relationship between concern and policy support weakens, potentially the case in former socialist nations. Moreover, FSS countries heavily rely on fossil fuels and the jobs the fossil fuel industry produces, potentially increasing the size and complexity of policy programmes, opening up further opportunities for mistakes and, potentially, corruption. In high-policy-risk contexts, concern about climate change becomes a poor predictor of policy preferences (Campbell, 2022). The quality of government nevertheless does not affect support for subsidies and bans, most likely because these two policies involve much less risk in terms of cost and regulations. ESS-based studies show that higher levels of national affluence, typically measured as gross domestic product per capita, strengthen the link between perceived climate responsibility and climate policy support (Pohjolainen et al., 2021), which makes national affluence another explanation for FSS specifics. Namely, economic development may itself be a condition for lowering policy risk.

Welfare and tax regime. Welfare regime is another institutional factor closely linked to political and social trust, especially relevant for the legitimacy of high-cost policy instruments such as taxation (Sivonen and Kukkonen, 2021; Otto and Gugushvili (2020).

The principle of universality and relatively impartial and objective policy instruments, such as taxation, may partly explain why people trust comprehensive welfare states more. Attitudes in countries with social-democratic and conservative welfare regimes are the most supportive of sustainable welfare and eco-social policies, contrasting with attitudes in liberal countries like the UK and Ireland, as well as Eastern European countries. ESS-based studies show that welfare regime type strongly influences taxation attitudes rather than attitudes to subsidising or banning. Support for higher fossil fuel taxes was notably high in Nordic regimes (ibid.). This supports the idea that taxation is not simply about tax payments but also about the distribution of tax revenues. People in more universal and generous welfare states may perceive they get better value for their tax revenues.

Existing energy policies and energy sources. According to the policy feedback perspective, the current domestic energy context and policies shape the possibilities and preferences for future policies among citizens (Stadelmann-Steffen and Eder, 2020). Research indicates that in countries with a substantial share of renewable energy individuals accepting anthropogenic climate change are more inclined to support policies promoting renewable energy. On the contrary, in countries heavily reliant on fossil fuels (such as Hungary, Lithuania, Israel, Russia), there is a stronger preference for fossil energy, leading to a rejection of climate policies (Fritz and Koch, 2019). Transitioning away from fossil fuels would entail substantial costs, making it challenging to implement such policies. Policies consequently hold the potential to transform both structural factors and the attitudes and behaviours of specific groups or entire populations. Notably, individuals with strong climate change attitudes and high levels of political trust experience positive feedback effects, where the existing energy policy context reinforces their preferences for policies aligned with this context. Still, this feedback mechanism also has its downsides. In countries where the fossil energy sector remains a significant economic factor, even individuals sensitised to climate issues are more reluctant to accept taxes on fossil fuels compared to their counterparts in other countries (Stadelmann-Steffen and Eder, 2020). Further, a country's dependency on fossil fuels may alter the relationship between political ideology and attitudes to fossil fuel taxation (Sivonen, 2020).

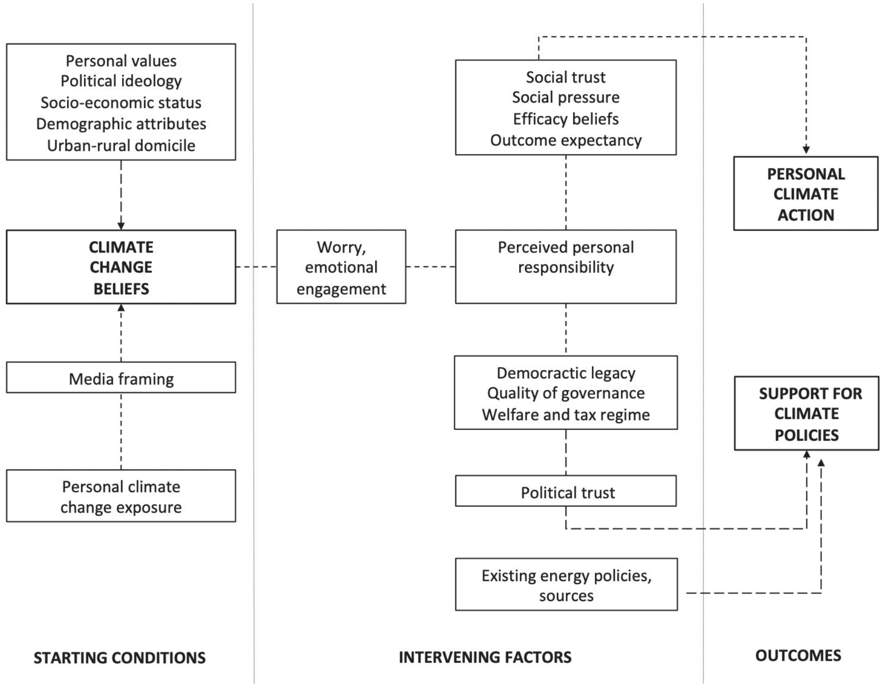
The awareness to action model

Based on the mapping of key determinants of climate change attitudes, behaviour and policy support in the 64 academic articles, we developed a heuristic conceptual model illustrating the complex relationship between climate change awareness and climate action or policy support (Figure 1). The model comprises three main components: starting conditions, intervening factors, and outcomes.

The focus of the left panel is on the generation of climate change attitudes and the factors that determine the essential starting condition: climate change beliefs. Believing that climate change is occurring, is human-caused, and has negative consequences is a necessary precondition for action. According to our scoping study, awareness is influenced by a range of moral, political, socio-economic, socio-demographic and climate-related factors.

The middle panel presents intervening factors that need to align for climate change awareness to translate into mitigation behaviour and policy support, which are our key outcomes concerning the research question. Guided by our scoping study, the model illustrates that awareness first needs to be coupled with emotional engagement (worry) and then with the sense of personal responsibility. Once these factors are established, additional conditions come into play, depending on the type of outcome. For worry to successfully translate into personal climate action, high social trust and strong efficacy and outcome expectancy beliefs are necessary. When it comes to translating worry into climate policy support, high political trust is crucial. Political trust, in turn, is influenced by various country-level conditions, including democratic legacy, characteristics of the welfare system, and the quality of governance. In addition, a policy feedback loop and low dependency on fossil fuels play separate roles in this process.

Figure 1: HEURISTIC CONCEPTUAL MODEL OF THE LINK BETWEEN CLIMATE CHANGE AWARENESS, CLIMATE ACTION AND POLICY SUPPORT



Source: author's compilation.

The presented model is a condensed version, simplifying the relationships as awareness determinants often also directly influence worry and responsibility. Further, the policy side of the model is more strongly aligned with fossil fuel taxation measures and less so for subsidies and bans. Despite these simplifications, the aim was to depict the relationships in the clearest way possible, even if some details were lost in the process.

Discussion: Lessons and implications for policymaking

In our discussion, we aim to focus on the second goal of our scoping study: to chart and summarise key implications and recommendations for climate change policy. Climate change, as noted, is one of the ESS topics with the strongest policy-oriented content in its publications. We follow our heuristic model to summarise the policy advice provided by analysts based on their results. The main challenge addressed in this discussion is how to achieve the desired outcomes of climate change mitigation behaviour and policy support.

First, the findings emphasise the crucial role of awareness and concern as prerequisites for action. Renewable energy policies frequently struggle to engage social groups less sensitised to climate change (Stadelmann-Steffen and Eder, 2020). Analysts recommend that governments persist in informing the public about the risks linked to the ongoing global warming and its potential consequences. They should develop climate change awareness policies and programmes that are accessible to all segments of the population (Roberts, 2022). Effective communication efforts are best initiated by individuals or groups with whom many people can identify (Bouman and Steg, 2019). Increased awareness can be facilitated by promoting online media literacy, enabling individuals to better assess the credibility of media sources (Tuitjer and Dirksmeier, 2021). Analysts also highlight the seasonal effect and recommend focusing on environmental policy decisions during the hotter months. High summer temperatures are more likely to lead to extreme weather events and greater media coverage about climate change, making public opinion more sensitive to these issues (Becchetti and Conzo, 2022). In addition to informing people on climate change, it seems critical to encourage them to take personal responsibility in order to increase climate policy support and action (Pohjolainen et al., 2021).

A significant portion of policy analysis examines climate change measures in relation to social inequalities and well-being, identifying this link as one of the key policy challenges. Many policies that are environmentally sound, such as imposing heavy taxes on fossil fuels, disproportionately impact the poor and may introduce a new ecological dimension to existing social conflicts (Otto and Gugushvili, 2020; Mayer and Smith, 2019). The fear of rising costs is likely to reduce support for increasing energy taxation, especially among people who do not consider climate change a major risk, and among lower income groups (Sivonen and Koivula, 2020). The suggested solution is to develop welfare policies along with climate policies to facilitate a "just transition" to a sustainable energy model (Weko, 2021). Environmental policies need to be aligned with social as well as regional policies, for example, establishing progressive tax and subsidy schemes. On the European level, mechanisms like the Just Transitions Fund could help level out differences between countries given that the lower average support in Eastern Europe is also linked to economic development.

Analysts also suggest policy diversification because policies based on efficient measures hold greater potential to be successful among higher-income groups, while lower-income individuals are more likely to save energy (Umit et al., 2019). They also recommend framing diversification to overcome public scepticism across countries. For instance, in affluent countries, key environmental messages should emphasise the lower cost of climate change consequences if necessary measures are taken sooner, whereas in countries with a higher incidence of poverty the key message should focus on the fact that impoverished people are more likely to bear the brunt of environmental degradation (Otto and Gugushvili, 2020). Studies also suggest that resistance to climate policies is likely to be concentrated in specific local communities, the potential 'losers' of these processes (Arndt et al., 2022).

Highlighting the role of social and political trust is another prominent topic in informing policymakers since trust in both institutions and peers improves pro-social behaviour, in this case leading to more responsible energy consumption (Caferra et al., 2021a). Analysts suggest that in order to improve their effectiveness, environmental policies must be shaped by thinking on the group rather than the individual level, i.e., be perceived as a social dilemma situation (Lübke, 2021). Policy should promote the 'desirable norm', sanction free-rider behaviour, and reward cooperation in individuals and organisations. For instance, legislators should push companies toward the adoption of environmental practices, even if they are seen as economically detrimental, to bring about system-wide changes (Rintala et al., 2021). Decision makers should strive to increase trust in others' cooperative efforts, highlight the prevalence of virtuous behaviour among peers, and enhance individuals' beliefs in their own capabilities and the effectiveness of their actions (Choi & Hart, 2021). In addition, policies should work on enhancing belief in the effectiveness of collective actions. Analysts point out that in low-trust contexts policies which heavily depend on trust, such as fossil fuel taxes, can pose an inextricable challenge (Kulin and Sevä, 2020). They also warn that increased efforts to raise people's awareness about the reality and dangers of climate change are likely to have little impact on people's support for carbon taxes, which strongly depends on political trust (Fairbrother et al., 2019). They suggest increasing political trust by reducing policy performance risk through the increased transparency of public administrations, enabling people to have a clear understanding of how their money is being managed (Caferra et al., 2021). More specific suggestions include sharing critical information regarding the effectiveness of carbon taxes or earmarking revenues for green spending (Pohjolainen et al., 2021) and implementing a highly visible revenue recycling mechanism, such as direct transfer schemes (Levi, 2021). Others suggest shifting the policy focus from carbon taxation to subsidies on renewable energy given that these policies are associated less with trust in political institutions and more with trust in impartial institutions, such as the legal system and the police, which is considerably higher (Kulin and Sevä, 2020). They also do not directly affect the affordability of energy, making them less costly for individuals.

Another set of recommendations concerns political and ideological divisions. Some suggest that climate policy could benefit from framing carbon taxes in ways that do not resonate with ideological orientations, by avoiding the term "tax" and instead using "carbon fee and dividend", "pollution reduction scheme" or "climate contribution", which could meet with less public opposition (Levi, 2021). Others suggest the opposite, proposing that policies should target various political groups in a way that appeals to them. For example, targeting individuals with a right-leaning political orientation in a manner that appeals to communitarian priorities rather than global framings, emphasising in-group benefits and focusing on the possible economic or local consequences of climate change (Gregersen et al., 2020).

The final set of recommendations relates to the role existing policies play in shaping public preferences for energy sources. The good news for policymakers is that renewable energy policies have the potential to reinforce themselves (Stadelmann-Steffen and Eder, 2020) through the policy feedback loop. However, this is also true for carbon-based policies and carbon prices, which are less frequently implemented in countries that rely on a high proportion of fossil fuels to generate electricity. Analysts therefore caution that the feedback mechanism involves a risk of greater polarisation as both types of energy policies reinforce themselves. Studies focusing on energy security perceptions also caution that individuals who are more worried about energy supply interruptions may hold stronger preferences for energy sources that are programmable, such as fossil fuels and hydroelectric power, as opposed to wind and solar power, which are intermittent (Casamassima et al., 2022; Demski et al., 2018).

Analysts also place their findings within an epistemic and methodological context by discussing the study's limitations, which was the final goal of the review. While consistently acknowledging the quality of ESS data, analysts warn that the module was fielded in a relatively small number of countries (n = 23), and those countries tend to be relatively affluent (Poortinga et al., 2019). It would be advantageous to include a more geographically, economically and culturally diverse set of countries, ideally encompassing lower-income countries outside of Europe, since attitudes and their determinants there could differ from those in the ESS dataset. Several analysts also point out the module's limited thematic scope, such as the absence of more detailed survey data about individual Internet use and online practices (Tuitjer and Dirksmeier, 2021). To address the geographical and conceptual limitations, they recommend conducting more in-depth case studies to identify unique patterns within countries and exploring the role of other contextual factors, such as media influence, climate vulnerability and sociopolitical histories in greater detail (Smith and Hempel, 2022). In addition to this key epistemic criticism, which to some extent relativises the findings of the 64 articles, analysts mention specific methodological issues. These include the cross-sectional nature of the data, limiting the establishment of causal associations (Lübke, 2021; Welsch, 2020; Levi et al., 2020; Kácha et al., 2022), the use of single-item measures (Gregersen et al., 2021; Ilmarinen et al., 2020), potential social desirability bias due to self-reported items (Gómez-Román et al., 2021; Syropoulos and Markowitz, 2022) along with concerns about low construct reliability and the low percentage of explained variance (Ilmarinen et al., 2020).

To summarise, analysts emphasise the significant challenges and 'obstacles' faced by policymakers while implementing climate change mitigation policies and promoting desired behaviours in European countries. When providing recommendations, analysts mostly offer general strategies rather than specific solutions. A more focused policy evaluation effort is called for in the next steps to effectively implement these recommendations.

Conclusion

Our objective was to conduct a comprehensive summary of findings from the ESS Climate Change module to identify general policy implications that social science research can contribute and address the challenge of fragmented findings. We aimed to illustrate how a meta-analysis of results can offer a more efficient method for communicating insights from multiple studies to diverse audiences by identifying the common determinants of climate beliefs, behaviours, and policy support, along with their main associations. The heuristic meta-model derived from our scoping study highlights essential risk factors that policymakers encounter while implementing climate goals. The scoping study also offers an overview of different scenarios suggested by analysts to help decision-makers address public opposition to climate policies.

Similar exercises could be conducted for ESS topics such as immigration, welfare or family work, all of which are highly policy-oriented. Considering the benefits of summarising findings, a critical point for future discussion is whether survey research infrastructures like ESS ERIC and similar programmes should continue to leave the task of summarisation solely to academic endeavours or gradually expand their operations to provide resources that encourage the summarising of findings. This dilemma, which might pose legitimacy issues for research infrastructures concerning funders and the public, is relevant for survey management teams, funders, and science policymakers alike.

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*Slavko KURDIJA, Tadej BEVK**

PODNEBNE SPREMEMBE IN ODNOS JAVNOSTI DO RABE OBNOVLJIVIH VIROV ENERGIJE**

Povzetek. *Članek predstavlja ugotovitve raziskave o odnosu javnosti do obnovljivih virov energije – OVE (SJM 2019/1) in jih postavlja v kontekst mednarodne primerjave stališč o podnebnih spremembah, kot se kažejo iz podatkov Evropske družboslovne raziskave ESS 2016 (modul: Climate Change). Rezultati kažejo na splošno visoko stopnjo soglašanja javnosti s podnebno paradigmo, pri konkretnejših okoljskih ukrepih pa je (tudi evropsko) javno mnenje nekoliko bolj zadržano. Podobne ugotovitve najdemo v študiji OVE. Ta pokaže izrazito favoriziranje vetrnega in sončnega scenarija, ki sta s stališča javnosti podrobneje predstavljena s prednostmi in slabostmi. Pri obravnavi konkretne prostorske umestitve pa se kaže, kako javnomnenjski razmislek počasi drsi iz polja okoljske v polje ekonomske, tržne miselnosti. Primerjalna analiza podatkov ESS kaže podobno sliko, še posebej, ko opazujemo razlike med okoljsko razvitejšimi zahodnoevropskimi in nordijskimi državami ter državami srednje in vzhodne Evrope. Avtorja v zaključku poudarita, da okoljska transformacija (tudi z implementacijo OVE) ne bo uspešna brez širše družbene transformacije, ki bo zagotovila pravično porazdelitev koristi in tveganj.*

Ključni pojmi: *podnebne spremembe, obnovljivi viri energije, ESS, javno mnenje, vetrna elektrarna, sončna elektrarna, prostorski učinki*

Uvod

Blaženje podnebnih sprememb je eden izmed najpomembnejših izzivov sodobnega časa. Te spremembe po mnenju večine znanstvenih in strokovnih deležnikov predstavljajo vedno večjo grožnjo za okolje in povečujejo tveganje za izgubo kakovosti življenja oziroma življenja samega. Hude

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posledice vse pogostejših skrajnih vremenskih pojavov in njihova vse večja intenzivnost so se dodobra pokazale tudi v Sloveniji med več zaporednimi katastrofalnimi poplavami v kratkem časovnem obdobju. Da bi preprečili nadaljnje škodljive vplive predvsem človekovega vpliva na ozračje, bi bilo v razmeroma kratkem času potrebno doseči značilna zmanjšanja emisij toplogrednih plinov, na kar opozarja več pomembnih mednarodnih institucij (IPCC, 2023)[1].

Za dosego tega cilja je potrebno narediti pomembne korake na več področjih. Od razvoja in uporabe novih nizkoogljičnih tehnologij do splošnega preoblikovanje načina proizvodnje in zmanjšanja njene porabe, kar vključuje tudi zahtevo po spremembi življenjskih navad. Vse to naj bi uokvirjale nove okoljske politike. Eden ključnih ukrepov za zmanjšanje ogljičnega odtisa je predvsem prehod na rabo obnovljivih virov energije (OVE), o čemer bomo podrobneje govorili v drugem delu članka.

Preden preidemo na konkretno analizo podpore javnosti pri različnih scenarijih rabe obnovljivih virov energije (OVE) v Sloveniji, poglejmo, kakšen je vrednotni, mnenjski okvir slovenske javnosti glede podnebnih sprememb, vključno s sprejemanjem tega dejstva, razumevanjem vzrokov in oceno posledic. Uvodni pregled bo zajel predvsem mednarodni kontekst, kar bo: prvič, omogočilo umeščanje Slovenije v evropski vrednotni prostor pri teh vprašanjih in drugič, omogočilo boljše razumevanje konkretnih stališč, ki jih v povezavi z OVE izrekajo prebivalci Slovenije.

Odnos do klimatskih sprememb

Sprejetost podnebne paradigme[2] v mednarodnem okolju odraža vso kompleksnost tega vprašanja, ki se kaže v različnih stopnjah pripoznanja podnebnih sprememb kot znanstvenega dejstva in s tem povezanih posledic. Z večanjem stopnje nezaupanja v znanost, ki je izrazito porasla predvsem v obdobju pandemije, se v različnih družbeno kulturnih okoljih, političnih kontekstih, pa tudi raznih omrežij v okviru spletnih platform izkazuje različna stopnja zanikanja podnebne paradigme, bodisi v obliki skepticizma (znanost nima dovolj zanesljivih podatkov, gre za naravna klimatska nihanja ipd.) bodisi prek teorij zarot (podnebna znanost je politično motivirana, za tem stojijo ekonomski lobiji, ki poskušajo prevzeti nadzor nad družbo in

[1] The Intergovernmental Panel on Climate Change (IPCC). Medvladni odbor za podnebne spremembe (IPCC) je organ Združenih narodov za ocenjevanje znanstvenih dognanj v zvezi s podnebnimi spremembami. Climate Change 2023 Synthesis Report.

[2] S pojmom podnebna paradigma mislimo na prevladujoča stališča, prepričanja in razumevanje glede podnebnih sprememb ter njihovih vplivov na okolje in družbo. Gre za celosten okvir razumevanja, ki vključuje znanstvene, družbene, politične in ekonomske vidike podnebnih vprašanj, ki se nanašajo na odgovornost in potrebo po zmanjševanju emisij toplogrednih plinov na globalni ravni.

energetskimi viri). Velika večina javnosti, še posebej pa znanstvene skupnosti kot celote, pa jasno podpira stališče, da podnebne spremembe so in da so te v večji ali manjši meri zanesljivo tudi posledica človeških dejavnosti (Powell, 2019). Podatki Evropske družboslovne raziskave (European Social Survey – ESS)[3], ki jo bomo vzeli za vir merjenja stališč med Evropejci, pokriva evropske države vključno z Izraelom. V evropskem okviru (kjer je skepticizma generalno gledano sicer manj kot denimo v ZDA), pa vseeno obstaja nekaj značilnih razlik. V različnih družbeno kulturnih okoljih z različnimi ekonomskimi tradicijami in različnimi energetskimi zapuščinami nastajajo vrednotne klime, ki se skozi stališča različno odzivajo na povpraševanje o odnosu do podnebnih sprememb (Stern, 2000). Medtem ko nekatere države aktivno in zavzeto ozaveščajo svoje javnosti o teh spremembah in možnih posledicah, druge izkazujejo večjo zadržanost ali celo dvome.

V okviru 8. vala Evropske družboslovne raziskave – ESS 2016-2017 (ESS Round 8, 2016; Kurdija, 2018) je bil v več kot dvajsetih državah, poleg jedrnega dela raziskave, vključen tudi posebni tematski modul o odnosu javnosti do podnebnih sprememb in rabe energije (Public Attitudes to Climate Change, Energy Security, and Energy Preferences). Modul se osredotoča na dileme v povezavi s podnebnimi spremembami in rabo energetskih virov, ki so ga oblikovali različni strokovnjaki s področij okoljske psihologije, politične sociologije in družboslovne metodologije. Njegova relevantnost je bila poleg vsesplošne aktualnosti vezana tudi na dogajanja ob bok Pariškega sporazuma, ki se je oblikoval ravno v letih 2015 in 2016 ter je postavljal temelje globalnih smernic za obvladovanju podnebnih sprememb, trajnostnega razvoja – s posebnim poudarkom na rabi obnovljivih virov energije.

Da bi ponazorili splošni vrednostni kontekst o podnebnih spremembah, poglejmo, kakšna prepričanja imajo prebivalci evropskih držav o treh izhodiščnih vprašanjih modula: (A) Verjetno ste že slišali za trditev, da se podnebje na Zemlji spreminja zaradi zviševanja temperature v zadnjih 100 letih. Kakšno je vaše osebno mnenje o tem? Ali menite, da se podnebje na Zemlji spreminja? (*odgovori: 1 – zagotovo se spreminja, 2 – verjetno se spreminja, 3 – verjetno se ne spreminja, 4 – zagotovo se ne spreminja*); (B) Ali menite, da so vzrok za podnebne spremembe naravni procesi, človekova dejavnost ali oboje? (*odgovori: 1 – v celoti naravni procesi, 2 – predvsem naravni*

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[3] ESS je bil zasnovan s podporo Evropske znanstvene fundacije in je eden najbolj zanesljivih družboslovnih instrumentov za sistematično spremljanje stališč in subjektivnih zaznav prebivalcev evropskih držav. Metodologija ESS je dosegla najvišjo raven standardizacije v primerjalnih družboslovnih raziskavah. Za svoje dosežke pri zagotavljanju doslednosti in metodološke ekvivalence na mednarodni ravni je ESS prejel Descartesovo nagrado – najvišje evropsko priznanje na področju raziskovanja. Od začetka, leta 2002, se raziskava ESS izvaja tudi v Sloveniji (v okviru programa Slovensko mnenje). Center za raziskovanje javnega mnenja in množičnih komunikacij na Fakulteti za družbene vede (UL) je partner v projektu (predstavnika v mednarodni koordinaciji: dr. Brina Malnar in dr. May Doušak) ter izvajalec raziskave na nacionalni ravni (nacionalni koordinator: dr. Slavko Kurdija).

procesi, 3 – približno enako naravni procesi in človekova dejavnost, 4 – predvsem človekova dejavnost, 5 – v celoti človekova dejavnost, 6 – menim, da podnebnih sprememb ni); (C) Kaj menite, kako dober ali slab vpliv bodo imele podnebne spremembe na ljudi po vsem svetu? Ocenite na lestvici od 0 do 10, pri čemer 0 pomeni izredno slab vpliv, 10 pa izredno dober vpliv.

Tabela 1: DELEŽ ODGOVOROV O ODNOSU DO PODNEBNIH SPREMEMB PO DRŽAVAH (%)

Države	**(A) Podnebne spremembe so**	**(B) Spremembe povzroča človek**	**(C) Posledice sprememb bodo slabe**
	%	%	%
Avstrija	92,5	91,8	74,0
Belgija	96,4	94,0	66,3
Češka	88,9	89,5	68,0
Estonija	91,3	88,8	59,7
Finska	94,0	93,9	67,2
Francija	96,3	93,8	73,7
Nemčija	95,4	94,8	77,4
Madžarska	91,4	92,7	77,0
Islandija	97,7	94,6	81,6
Irska	96,1	91,1	63,2
Izrael	86,3	85,4	58,1
Italija	94,8	93,6	69,0
Litva	88,7	82,7	73,7
Nizozemska	96,2	91,8	61,6
Norveška	92,9	87,8	71,9
Poljska	92,6	89,6	70,4
Portugalska	97,0	93,6	81,1
Rusija	82,2	83,8	61,8
Slovenija	**96,5**	**93,0**	**71,4**
Španija	95,8	95,7	87,9
Švedska	96,8	92,4	81,2
Švica	96,4	94,4	74,0
Velika Britanija	93,6	91,0	66,0
povprečje	93,5	91,3	71,1

Vir: Evropska družboslovna raziskava – ESS 8. val (2016–2017); za analizo deležev na ravni držav so bile uporabljene poststratifikacijske uteži.[4]

[4] *Dostopno tudi na spletnih straneh ESS Topline Series »European Attitudes to Climate Change and Energy« https://www.europeansocialsurvey.org/findings/topline-series.*

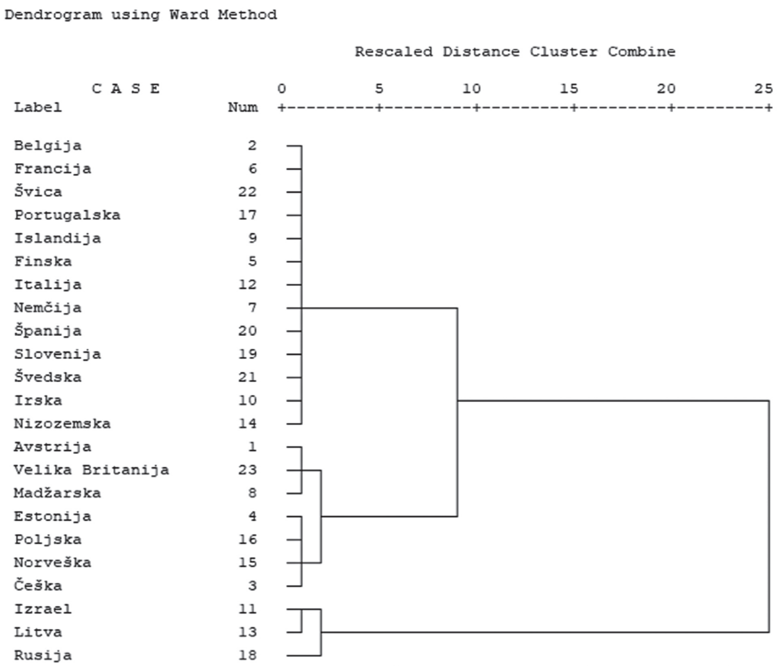
V tabeli 1 so prikazani deleži sprejemanja podnebne paradigme po državah pri vprašanjih A, B in C. Pri vprašanju A je naveden seštevek na odgovorih 1 (zagotovo) in 2 (verjetno); pri vprašanju B seštevek na odgovorih 3 (narava in človek enako) 4 (predvsem človek) in 5 (v celoti človek); pri vprašanju C, kjer je uporabljena 11-stopenjska lestvica, pa je prikazan seštevek pri odgovorih med 0 in 4 – levo od sredine lestvice, kar pomeni, da bodo posledice slabe.

Že na prvi pogled vidimo, da prebivalci večine držav pritrjujejo, da podnebne spremembe so (A). To se kaže v deležu pritrjevanja, ki skorajda pri vseh presega 90 %. Nekaj razlik sicer opazimo, vendar tudi v skupini tistih držav, kjer je ta delež nižji (Rusija, Litva, Češka in Izrael), gre še vedno za izrazito večino. V drugem stolpcu (B), kjer je prikazana stopnja soglašanja z uveljavljeno znanstveno podmeno, da so vzroki podnebnih sprememb antropogene narave, prav tako vidimo visoko stopnjo pritrjevanja. Razlike (z nižjo stopnjo soglašanja) se pojavljajo med prej omenjenimi državami, pri čemer je več skepse zaznati tudi še med Norvežani in Estonci. Ne glede na to tudi v tem primeru lahko ugotovimo, da gre za izrazito večinsko strinjanje z navedeno predpostavko. V zadnji koloni, v kateri so navedeni deleži strinjanja s tem, da bodo posledice podnebnih sprememb slabe, pa vidimo, da je konsenza manj. Tudi razlike po državah so nekoliko bolj očitne. Največ soglašanja z negativnim posledicam najdemo v državah Islandija, Španija, Portugalska, tudi Švedska; obratno, najmanj soglašanja s tem pa je v Izraelu, Estoniji in Rusiji, tudi na Irskem, Nizozemskem, v Belgiji in Veliki Britaniji.

Če bi 23 držav razvrščali po izraženi stopnji javnomnenjske sprejetosti podnebne paradigme, bi videli, da se Slovenija pri prvem vprašanju (A) uvrsti visoko na 4. mesto, medtem ko se pri drugem in tretjem pomakne precej navzdol, na 10. in 12. mesto od skupaj 23 držav. Glede na število držav in uvrstitve le-teh je Slovenija umeščena v polje z relativno visoko stopnjo ozaveščenosti o obstoju in posledicah podnebnih sprememb. Še posebej, če vzamemo v ozir prvi dve[5] vprašanji, ki v čisti obliki zastavljata miselni okvir sprejetosti podnebne paradigme (Poortiga et al., 2011). Umestitev držav lahko še posebej nazorno prikažemo z dendrogramom, s pomočjo metode hierarhičnega razvrščanja v skupine, kjer se enote opazovanja (države) razvrstijo v skupine (grozde) na podlagi podobnosti. Združevanje je prikazano postopno, v več korakih. Z namenom, da bi videli razmerja bolj pregledno, sta bili za kriterij združevanja izbrani spremenljivki A (pripoznanje obstoja) in B (antropogenost), ki najbolj jasno kažeta idejno izhodišče javnomnenjskega sentimenta v odnosu do podnebnih sprememb.

[5] *Vprašanje C je nekoliko bolj specifično, tako z vidika merjenja (11-stopenjska lestvica) kot še posebej z vidika pričakovanj do respondenta, ki mora pri odgovoru vpliv sprememb kvantificirati.*

Slika 1: IZID RAZVRŠČANJA V SKUPINE (WARDOVA METODA)



Vir: Lastni izračun; podatkovni vir: ESS Round 8, 2016; za analizo deležev na ravni držav so bile uporabljene poststratifikacijske uteži.

Dendrogram prikazuje proces združevanja med državami, pri čemer se v prvem koraku med sabo povežejo najbolj podobne (dolžina linije, ki jih povezuje je najkrajša), čemur sledi pridruževanje najbolj sorodnih v naslednjem koraku. Slika nazorno prikazuje določene regionalne vzorce oz. vzorce, ki izhajajo iz zgodovinskih in družbeno-ekonomskih okoliščin. V izhodišču vidimo dva veliki grozda, enega manjšega s samo tremi državami (Rusija, Litva in Izrael) – tega lahko opredelimo kot skupino z nižjo podnebno ozaveščenostjo – in drugo, ki je precej bolj številčna in heterogena in v kateri so države z manj izraženega podnebnega skepticizma. Razlike drugega grozda razpadejo na dve podskupini: manjšo, v kateri so Avstrija, Madžarska in Velika Britanija ter Estonija, Poljska, Češka in Norveška. V večji podskupini drugega grozda, ki jo lahko opredelimo kot skupino držav z višjo stopnjo splošne podnebne ozaveščenosti, pa so vse ostale države, med drugim tudi Islandija, Švica, Belgija, Nemčija; mednje sodi tudi Slovenija.

Uvrstitev Slovenije se, vsaj kar zadeva »ideološko« podlago okoljskih nazorov, zdi dobra in s stališča nadaljnjih usmeritev ustrezna. Podobno kot velika večina evropskih držav načelno sprejemamo opozorila okoljske stroke in mednarodnih okoljskih institucij. Več vprašanj se odpira v kontekstu okoljskih smernic, kjer se pričakuje bolj konkretna podpora okoljskim politikam in kjer bi usmeritve morale najti odsev v dejanskih dejanjih, vključno z nekaterimi načeli samoomejevanja. Načelno visoka podpora v večjem delu Evrope počasi drsi v zadržke in nepodporo določenim konkretnim politikam, celo v okoljih, kjer je načelno sprejemanje podnebne paradigme izrazito večinsko. Nadaljnje analize modula ESS »Climate change«, ki jih zaradi omejitve prostora enega prispevka v obliki kvantitativnih prikazov ne bomo podrobneje predstavljali, omogočajo vpogled v nekatere vzorce, ki to potrjujejo.

V smislu splošne ocene se posvetimo tudi podpori, ki so jo Evropejci izkazovali pri treh vrstah konkretnih ukrepov: subvencije za naložbe v obnovljive vire energije (OVE), uveljavitev zakona, ki prepoveduje prodajo energetsko manj učinkovitih gospodinjskih naprav, ter povečanje davkov na fosilna goriva.[6] Najbolj priljubljen ukrep je uporaba javnih sredstev za različne modele subvencioniranja, saj jo podpira kar tri četrtine (75 %) evropskega prebivalstva, medtem ko ji nasprotuje le manjšina (10 %); ta ukrep je med drugim izrazito visoke podpore deležen tudi v Sloveniji. Manjši delež, vendar še vedno značilnih 60 % Evropejcev podpira uveljavitev zakona o prepovedi prodaje energetsko manj učinkovitih gospodinjskih aparatov, proti čemur se izreče 17 % vprašanih. Po pričakovanju pa je izrazito najmanj priljubljen ukrep, ki predpostavlja povečanje davkov na fosilna goriva (za nafto, plin in premog). Pri tem ukrepu je več nasprotnikov (44 %) kot podpornikov (30 %). Davek na fosilna goriva največjo podporo uživa v nekaterih zahodnoevropskih državah, zlasti nordijskih, medtem ko je najmanj priljubljen na Poljskem, v Rusiji ter v nekaterih drugih vzhodno- in tudi južnoevropskih državah (Španija, Portugalska). Podrobna analiza razkriva, da višja obdavčitev fosilnih goriv, ki jo stroka ocenjuje kot enega izmed učinkovitejših ukrepov, dosega višjo podporo (večinsko pa le na Švedskem in Finskem) v okoljih z visoko stopnjo zaupanja v sistemske institucije (Otto & Gugushvili, 2020), kar pa, glede na podatke, velja predvsem za nekatere nordijske države in tiste zahodnoevropske, ki zgodovinsko in politično izkazujejo socialnodemokratsko tradicijo, kjer gredo progresivni okoljski ukrepi z roko v roki s skrbjo za pravično družbo (Fritz & Koch, 2019).

Pogled na mednarodne podatke modula Climate change Evropske družboslovne raziskave (ESS Round 8, 2016) tudi v nadaljevanju pokaže nekatere vzorce, ki jih lahko opazimo v shemi razvrščanja držav v skupine. Tudi pri opredelitvah glede energetskih preferenc in odnosu do obnovljivih virov se ti v mogočem prekrivajo. Pokažejo se nekatere tipične regionalne in zgodovinsko politične formacije, ki kažejo na to, da so obstoječi režimi energetske

[6] *Povzeto po ESS Topline Series »European Attitudes to Climate Change and Energy«: https://www.europeansocialsurvey.org/findings/topline-series.*

preskrbe, njihova infrastrukturna zapuščina, pa tudi naravni resursi po državah močne determinante oblikovanja okoljskih pogledov ljudi (Balzekiene & Telesiene, 2016). Za nadaljevanje razprave, ki bo šla v smeri podrobnejše analize odnosa prebivalcev Slovenije do OVE, je to lahko izhodišče, ki kaže, kam se pri vprašanju energetskih preferenc v mednarodni prostor umešča Slovenija. To vprašanje je od začetka vojne v Ukrajini, ob naraščajočih cenah energije in vztrajni odvisnosti od fosilnih goriv postalo še posebej pereče.

Če pogledamo generalno sliko podpore različnim virom energije, vidimo, da približno dve tretjini Evropejcev na splošno misli, da mora biti velika večina električne energije proizvedena v hidroelektrarnah ali vetrnih elektrarnah in celo tri četrtine iz sončne energije (obnovljivi viri). V nadaljevanju bomo podrobneje videli, da je tudi v Sloveniji ta podpora izrazita in da s časom še narašča. Nekoliko drugačna je bila podpora hidroelektrarnam, ta med ostalimi evropskimi državami v poprečju kaže znatno podporo (66 %), medtem ko je bilo v Sloveniji leta 2016 (Kurdija, 2018) te podpore manj (59 %); še opazneje pa je ta podpora upadla do leta 2019 (51 %) (Hafner, 2021). V nasprotju s tem je zelo očitno, da sta premog in jedrska energija v povprečju med Evropejci izrazito nepriljubljena vira. Premog in zemeljski plin imata največ zagovornikov v Izraelu ter v več vzhodnoevropskih državah, kjer je višje podpore deležna tudi jedrska energija (Rusija, Litva, Madžarska). Skladno s tem je tudi podpora obnovljivim virom v teh državah značilno nižje izražena, še posebej v Rusiji.

Odnos do obnovljivih virov energije v Sloveniji – izhodišče

Uveljavitev OVE velja za enega ključnih javno političnih ukrepov za blaženje podnebne krize. Ključen del zelenega prehoda – glavne razvojne paradigme EU je večanje deleža energije, pridobljene iz obnovljivih virov energije (OVE). Tako EU kot države članice izvajajo in krepijo politike, ki stremijo k hitrejši implementaciji rabe OVE. EU je tako nedavno sprejela t. i. Direktivo RES (Direktiva EU/20232413), ki med drugim državam članicam nalaga, da opredelijo prednostna območja za gradnjo naprav na OVE, Slovenija pa je sprejela Zakon o uvajanju naprav na obnovljive vire energije (2023), ki to uveljavlja tudi v našem pravnem redu.

Medtem ko se zakonodajna podpora večanju rabe OVE krepi, pa se v splošni javnosti pogosto pojavlja nasprotovanje temu, zlasti ob izgradnji konkretnih projektov. Wustenhagen in sodelavci (2007) so v modelu družbene sprejemljivosti rabe OVE izpostavili, da je ta zgrajena iz tržne sprejemljivosti, politične sprejemljivosti in sprejemljivosti v lokalnih skupnostih. Raziskave kažejo, da javnost na splošno podpira rabo OVE. V EU 92 % ljudi podpira večjo rabo OVE (Evropska komisija, 2019), zato se lahko sprva zdi, da je uspešnost energetskega prehoda bolj ali manj tehnično vprašanje iskanja pravih potencialov in tehnoloških rešitev. A izvedba konkretnih projektov kljub temu pogosto naleti na neodobravanje lokalne in širše javnosti. Prehod na OVE ni le tehnični problem, temveč širši družbeni izziv (Pasqualetti, 2011; Otto & Gugushvili, 2020), ki zahteva tako usklajevanje različnih strok kot tudi širše javnosti. Na to kažejo tudi navedbe v Nacionalnem energetskem in podnebnem načrtu (NEPN, 2020: 48), ki kot eno od omejitev hitrejšega razvoja rabe OVE navaja nasprotovanja splošne javnosti.

Ključne razloge za odpor proti projektom OVE so raziskovalci sprva iskali predvsem v simptomu »NIMBY« (*not in my backyard* oz. *ne na mojem dvorišču*), danes pa se kot glavni razlogi navajajo navezanost na prostor ter skrb za lokalno identiteto in kakovost življenja (Bevk & Golobič, 2020; Devine-Wright, 2009; Wolsink, 2000). Čedalje pomembnejše postaja tudi vprašanje lastništva objektov OVE ter delitve koristi in škode med deležniki (Goedkoop & Devine-Wright, 2016; Wustenhagen et al., 2007), saj so z razvojem rabe OVE povezani številni zunanji učinki, kot so izguba estetske vrednosti krajine, hrup, padec vrednosti nepremičnin ipd., ki zadevajo tako lokalno kot tudi širšo javnost (Krekel & Zerrahn, 2017; Droes & Koster, 2016).

Opisana izhodišča kažejo na kompleksnost energetske tranzicije, ki sega prek različnih meril – od naddržavnega in državnega z oblikovanjem politik in strategij prek lokalnega do ravni posameznika z vplivi na okolje in kakovost življenja. Takšno razumevanje problematike zahteva celovit pristop k raziskovanju možnosti za smotrno implementacijo rabe OVE, ki upošteva čim več opisanih dejavnikov in sledi hierarhiji meril – od oblikovanja in primerjave scenarijev razvoja OVE na državni ravni do pogledov posameznikov na umeščanje objektov za rabo OVE. V nadaljevanju članka bodo predstavljeni rezultati raziskave, ki kaže to kompleksnost in sega od vprašanja splošne podpore rabe OVE, izhajajoč iz državnih scenarijev, do konkretne ravni posameznega projekta, s poudarkom na raziskovanju odnosa javnosti do prostorskih posledic večanja rabe OVE. Raziskava poskuša zaobjeti podporo javnosti rabe OVE na abstraktnem, nacionalnem in, konkretno, lokalnem nivoju. Cilj je bil preveriti javnomnenjske učinke treh različnih scenarijev rabe OVE (vetrni, sončni in hidro scenarij) in ugotoviti njihove zaznane prednosti in slabosti ter vpliv različnih kompenzacijskih ukrepov na sprejemljivost rabe OVE.

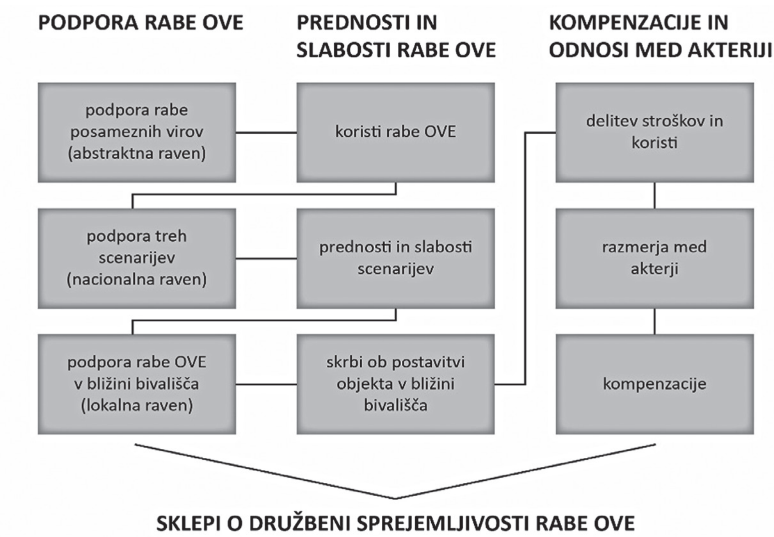
Metoda

Kljub družboslovno zastavljenemu izhodišču raziskave sta tema in pristop izrazito interdisciplinarni. Zato so pri izvajanju projekta Družbena sprejemljivost prostorskih učinkov v scenarijih rabe OVE (Golobič, 2018) sodelovale štiri inštitucije, ki vsaka na svojem področju izkazujejo vrhunske reference:

Biotehniška fakulteta (Oddelek za krajinsko arhitekturo), Inštitut Jožef Stefan (Center za energetsko učinkovitost), Filozofska fakulteta (Oddelek za psihologijo) in Fakulteta za družbene vede (Center za raziskave javnega mnenja). Oblikovan je bil poseben modul o družbeni sprejemljivosti rabe OVE v obsegu približno 120 spremenljivk, ki je bil vključen v izvedbeni okvir raziskave Slovensko javno mnenje SJM19/1.[7] Pripravo instrumenta in zbiranje podatkov (anketiranje) je koordiniral Center za raziskovanje javnega mnenja in množičnih komunikacij (CJMMK) na Fakulteti za družbene vede.[8]

Vsebino anketnega vprašalnika so spremljale grafične in foto priloge, ki so bile uporabljene pri izvedbi intervjuja. Poleg preučevanja sprejemljivosti posameznih tehnologij in scenarijev rabe OVE v Sloveniji smo v anketi preverjali tudi razloge za podporo določenemu scenariju, njegove negativne vplive na okolje, vpliv pomena kompenzacijskih dejavnikov na njegovo sprejemljivost ter poglede na razmerja med različnimi deležniki pri njegovem načrtovanju.

Slika 2: ZASNOVA VPRAŠALNIKA DRUŽBENA SPREJEMLJIVOST SCENARIJEV RABE OBNOVLJIVIH VIROV ENERGIJE



Vir: lastni prikaz.

[7] *Raziskava Slovensko javno mnenje (SJM) je izvirni slovenski empirično raziskovalni projekt z najdaljšo podatkovno zgodovino (od 1968 dalje), kar daje raziskavi veliko medčasovno primerjalno vrednost. Njena izjemna tematska širina pokriva polje številnih družboslovnih disciplin (Malnar, 2021; Malnar & Šinko, 2012), pri čemer ima tudi raziskovanje okoljskih vsebin pomembno mesto.*

[8] *Naloge CJMMK so zajemale koordinacijo in svetovanje pri pripravi vprašalnika, pripravo vzorčnega načrta, pripravo programskih in drugih orodij za zbiranje podatkov ter pripravo kvantitativne analize (nosilec naloge: dr. Slavko Kurdija, nadzor kakovosti podatkov in pregled podatkov: mag. Tina Vovk).*

Splošno podporo smo poleg OVE merili tudi za druge vire energije (premog, zemeljski plin, jedrska energije). Za ta namen smo prevzeli isti sklop vprašanj, ki je bil uporabljen v Evropski družboslovni raziskavi v okviru modula Climate Change iz leta 2016 (ESS Round 8). To je omogočilo medčasovno primerjavo med letoma 2016 in 2019. Merili smo sprejemljivost treh različnih scenarijev rabe OVE, pri čemer je vsak temeljil na različni kombinaciji sončne, vetrne in hidro energije. Pomembno je poudariti, da smo scenarije oblikovali na podlagi obstoječih dokumentov, predvsem Akcijskega načrta za obnovljive vire energije (2017). Sončni scenarij je temeljil na obsežni gradnji sončnih elektrarn, vetrni na večjem obsegu vetrnih elektrarn ter hidro na izkoriščenju večine potencialnih lokacij za hidro elektrarne. Za vsak scenarij smo izdelali prostorski model, ki je prikazoval, kje v Sloveniji bi se posamezen vir izkoriščal (Priloga 1). Lokacije za vetrne in hidroelektrarne smo povzeli iz osnutka AN-OVE, medtem ko smo sončne elektrarne razporedili glede na območja poselitve (strešne elektrarne) in model letnega kvaziglobalnega obseva tal po Sloveniji (Rakovec et al., 2008). Modeli so bili izdelani izključno z namenom vključitve v javnomnenjsko raziskavo, zato so bili temu primerno poenostavljeni. Za vsak scenarij smo z izbirnim vprašanjem ugotavljali tudi njegovo ključno prednost in pomanjkljivost, kjer je bil nabor možnih odgovorov pripravljen na podlagi pregleda najpogosteje izpostavljenih prednosti in slabosti posameznega vira v literaturi.

Sprejemljivost sončnih in vetrnih elektrarn je bila izmerjena tudi na konkretni, lokalni ravni, v primeru, da bi se ena ali druga postavila v bližino respondentovega bivališča. Za pomoč pri odgovarjanju smo za vsako tehnologijo pripravili fotomontažo, ki je prikazovala osnovne vizualne značilnosti posega. Osnovo za fotomontažo smo izbrali v obliki fotografije, pri kateri smo presodili, da prikazuje relativno anonimno slovensko krajino, v katero smo nato v enem primeru vstavili vetrne turbine ter talno sončno elektrarno v drugem (Priloga 2). Čeprav strateške usmeritve zagovarjajo izgradnjo sončnih elektrarn na strehah, gradnja na tleh ni izključena. V raziskavi smo se odločili izpostaviti namestitev na tla, saj nas je zanimalo mnenje o izvedbi s potencialno večjimi prostorskimi posledicami. Pri vsaki konkretni rešitvi smo anketirance spraševali o njihovi skrbi glede možnih negativnih vidikov vsake od rešitev, pa tudi o njihovem stališču glede delitve koristi in škode med različnimi akterji. V zaključnem delu vprašalnika pa smo preučili še vpliv različnih oblik kompenzacij ter razmerja med različnimi akterji pri odločanju o postavitvi vetrne ali sončne elektrarne.

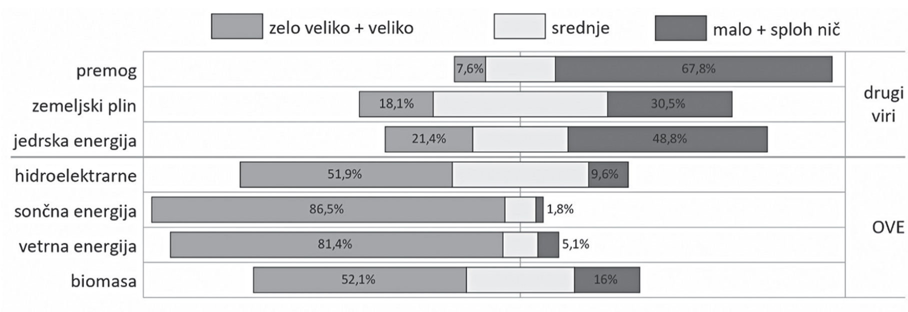
Osnovni instrument raziskave je bil standardizirani vprašalnik (s pretežno 5-, 7- in 11-stopenjskimi Likertovimi lestvicami), ki je bil prilagojen za zbiranja podatkov s pomočjo računalniško podprtega osebnega anketiranja (CAPI). Metodologija izvedbe raziskave je v celoti sledila principom izvedbe raziskave Slovensko javno mnenje, ki za vzorčni okvir uporablja

Centralni register prebivalstva in metodo dvostopenjskega verjetnostnega vzorčenja. Na prvi stopnji smo uporabili skupine osnovnih popisnih okolišev (ki se uporabljajo za potrebe vzorčenja) in so bili predhodno stratificirani z upoštevanjem 12 statističnih regij in 6 tipov naselij (kmečka do 2.000 prebivalcev, nekmečka do 2.000 prebivalcev, naselja z 2.000 do 10.000 prebivalcev, naselja z 10.000 do 100.000 prebivalcev ter ločeni kategoriji Ljubljana in Maribor). Na drugi stopnji je bilo znotraj izbranih popisnih okolišev po postopku sistematičnega naključnega izbora določeno fiksno število ciljnih oseb z osnovnimi kontaktnimi podatki. Velikost izhodiščnega vzorca je bila n = 2000. Do zaključka raziskave je anketo izpolnilo 1079 oseb (stopnja odzivnosti: 54 %).

Prikaz rezultatov

Po mnenju večine vprašanih bi iz obnovljivih virov energije (hidro, vetrne in sončne elektrarne ter biomasa) morali proizvesti *veliko* do *zelo veliko* energije, saj se je v povprečju za ta dva odgovora odločilo skoraj 68 % vprašanih. Pri tem izstopajo predvsem sončne (86,5 %) in vetrne elektrarne (81,4 %). Večji delež odgovorov za neobnovljive vire (jedrska energija, zemeljski plin, premog) se zvrsti med *sploh nič* do *srednje*, v zadnjem prevladujeta jedrska energija (24,9 %) in premog (29,2 %). Razvidni sta visoka podpora obnovljivim virom energije, predvsem sončnim in vetrnim elektrarnam, in značilno nižja podpora neobnovljivim virom (Slika 2).

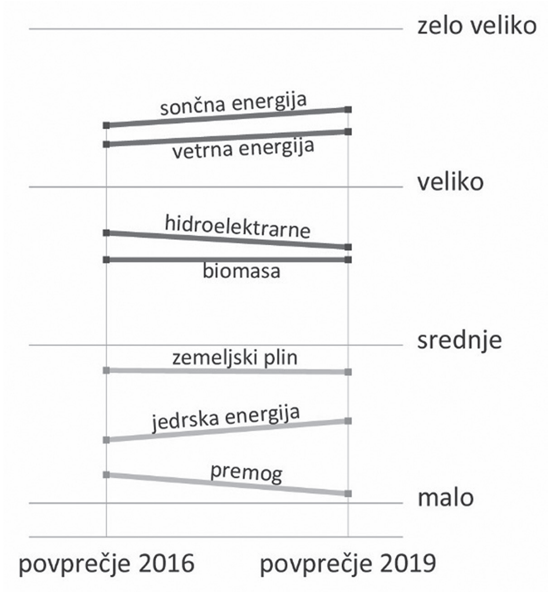
Slika 3: RAZPOREDITEV ODGOVOROV NA VPRAŠANJE: KOLIKO ELEKTRIČNE ENERGIJE, PORABLJENE V SLOVENIJI BI PO VAŠEM MNENJU MORALI PROIZVESTI IZ VSAKEGA OD TEH VIROV



Vir: Lastni izračun; podatkovni vir: SJM 2019/1.

Primerjava z enakim vprašanjem v modulu podnebne spremembe v sklopu Evropske družboslovne raziskave 2016 (Kurdija et al. 2018) pokaže podobno razporeditev odgovorov. Z izjemo hidroelektrarn se je povprečna ocena podpore vseh obnovljivih virov energije povečala (slika 3). Hidroelektrarnam je podpora nekoliko padla (- 7,5-odstotne točke oz. 12,6 % za odgovore *zelo veliko* in *veliko* skupaj). Prav tako je povprečna ocena padla za premog in zemeljski plin, medtem ko se je podpora rabi jedrske energije nekoliko dvignila (+ 4,9-odstotne točke oz. 29,7 % za odgovore *zelo veliko* in *veliko* skupaj). Večji je tudi delež odgovorov *ne vem* za vse vire energije. Statistično značilni sta razliki povprečij ocen za premog in sončno energijo.

Slika 4: PRIMERJAVA POVPREČIJ NA ENAKO VPRAŠANJE O SPLOŠNI PODPORI RAZLIČNIM VIROM ENERGIJE V LETIH 2016 IN 2019



Vir: Lastni izračun; podatkovni vir: SJM 2016/2 (ESS val 8.); SJM 2019/1.

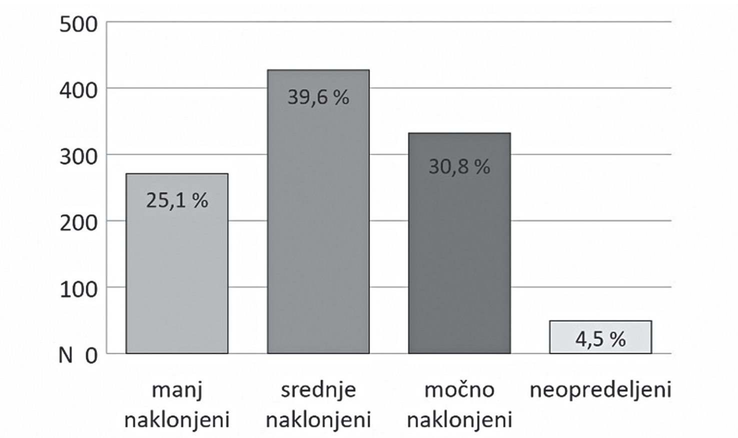
Glede na dovoljene odgovore smo za vsakega anketiranca izdelali indeks naklonjenosti OVE. Indeks je bil izdelan na način točkovanja, pri čemer smo posameznim odgovorom, ki kažejo podporo OVE ali zavračanje fosilnih goriv, pripisali določeno število točk (Tabela 2) in jih sešteli. Višje število točk pomeni večjo naklonjenost OVE. Anketirance smo glede na seštevek razdelili v tri razrede: manj naklonjeni (seštevek od 1 do 6), srednje naklonjeni (od 7 do 9), močno naklonjeni (od 10 do 15). Tisti, ki se v indeks niso uvrstili (49 oseb), so bili označeni kot neopredeljeni. Največ anketirancev je bilo razporejenih v razred srednje naklonjenih (39,6 %), tem sledijo močno naklonjeni (30,8 %), četrtina pa je manj naklonjenih (25,1 %, Slika 5).

Tabela 2: TOČKOVANJE ODGOVOROV ZA IZDELAVO INDEKSA NAKLONJENOSTI OVE

	zelo veliko	veliko	srednje	malo	sploh nič
premog				1	2
zemeljski plin				1	2
jedrske energija				1	2
hidroelektrarna	2	1			
sončne energija	3	2			
vetrne energija	3	2			
biomasa	1	1			

Vir: lastni prikaz.

Slika 5: RAZVRSTITEV ANKETIRANCEV V INDEKS NAKLONJENOSTI OVE



Vir: podatkovni vir: SJM 2019/1.

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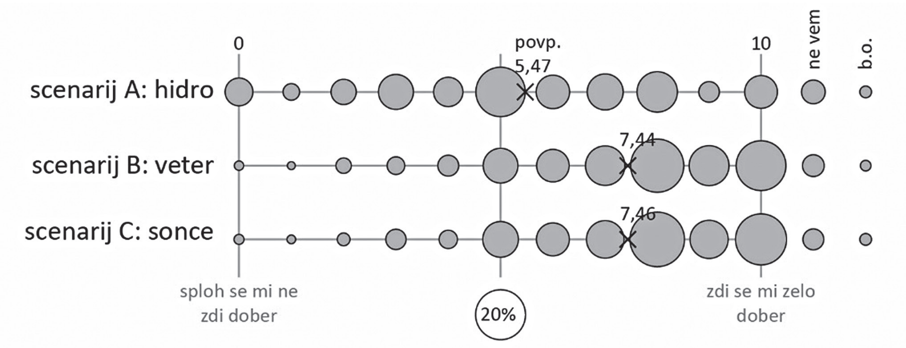
Na vprašanje o največjih koristi rabe OVE izstopata odgovora *manj izpustov toplogrednih plinov* (37,3%) in *ti viri so neomejeni, obnovljivi* (22%). Nadalje sta s 15,3% in 12,2% zastopana odgovora *ti viri so bolj prijazni za rastline in živali* ter *boljša energetska samooskrba*. Poleg odgovora *ne vem* je najmanj anketirancev izbralo odgovor *ta energija je cenejša* (8,4%).

Primerjava ocenjevanja scenarijev, ki so si jih anketiranci lahko ogledali na kartah (Priloga 1), pokaže, da se scenarija, ki temeljita na vetrni in sončni energiji, vprašanim zdita podobno dobra, s povprečno oceno 7,44 oz. 7,46 (na lestvici od 0 do 11, kjer višja ocena pomeni boljši, Slika 6). Njuno podobnost kažeta tudi frekvenčni porazdelitvi, ki se skorajda prekrivata. Scenarij, ki temelji na hidroenergiji, pa je prejel povprečno oceno 5,47 (Slika 6). Pri njem se kaže tudi opazno več odgovorov na skrajnem negativnem polu lestvice (*sploh se mi ne zdi dober)*, kar kaže na večjo polariziranost stališč pri tej tehnologiji.

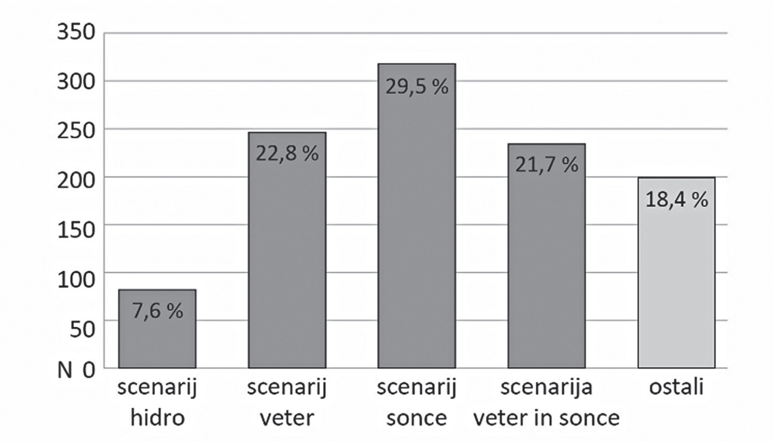
Slika 6: PRIMERJAVA PODPORE SCENARIJEM OVE V SLOVENIJI



Vir: Lastni izračun; podatkovni vir: SJM 2019/1.

Podobno kot indeks naklonjenosti OVE smo izdelali tudi indeks preferenčnih scenarijev, ki je nastal z razvrščanjem ocen scenarijev. Razporeditev kaže, kateri scenarij je bil za posameznega anketiranca najboljši (slika 7). Zaradi pogostih podobnih odgovorov za vetrni in sončni scenarij en razred opisuje tudi tiste anketirance, ki sta se jim zdela vetrni in sončni podobno dobra in obenem boljša od hidro scenarija. Anketirancev, ki ne izkazujejo jasne preference in jih zato ni bilo možno zanesljivo razporediti v posamezen opisan razred (ostali), je 18,4 %.

Slika 7: RAZPOREDITEV ANKETIRANCEV V INDEKS PREFERENČNIH SCENARIJEV



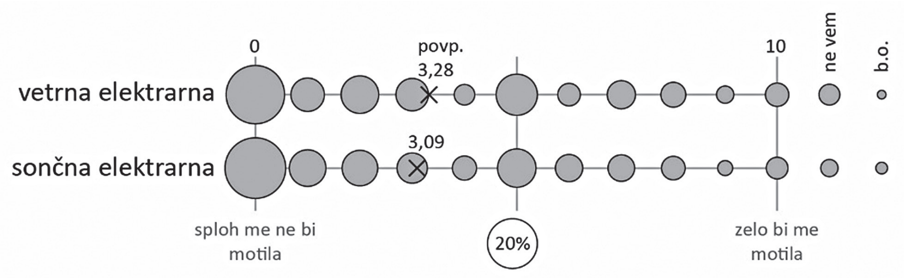
Vir: SJM 2019/1.

In kje anketiranci vidijo ključne prednosti in slabosti navedenih scenarijev? Med glavnimi prednostmi hidro scenarija so vprašani izpostavili *zanesljivost vira* (27,1 %) in *višanje ravni energetske samooskrbe države* (23,9 %). Glavna slabost hidro scenarija je bilo največkrat mnenje, da *so hidroelektrarne škodljive za okolje* (31,3 %). Naslednji najbolj pogost vsebinski odgovor je, da *hidroelektrarne niso na ustreznih lokacijah* (17,6 %). V kategoriji *drugo* (6,1 %) so bili izpostavljeni predvsem okoljski vidiki, kot so *vplivi na ekosisteme*, *poplavljanje* ter *preobremenjenost določenih rek*. Tako za vetrni kot sončni scenarij prevladuje mnenje, da je glavna prednost *prijaznost do okolja* (vetrni 34,1 %, sončni 32,7 %). Temu sledi odgovor, da je *ta energija poceni* (vetrni 25,1 %, sončni 20,7 %). Med slabostmi pa je v obeh primerih največ odgovorov prejela izjava da *vetrne/sončne elektrarne niso zanesljiv vir energije* (vetrni 29,2 %, sončni 23,7 %). 13,4 % vprašanih je menilo, da *vetrne elektrarne niso na ustreznih lokacijah*. 15,2 % vprašanih pa je za sončni scenarij ocenilo, da je *ta energija draga*. Delež odgovorov drugo je znašal 8,4 % pri vetrnem in 10,7 % pri sončnem scenariju. V tej kategoriji so se pojavili predvsem odgovori, da *v scenariju ne vidijo slabosti,* pri vetrnem scenariju pa so navedli še vpliv na ptice, hrup in vizualni vpliv na okolje, medtem ko so pri sončnem scenariju izpostavili odpadke in nevarnost požara.

Visoka podpora vetrnim in sončnim elektrarnam je izkazana tudi na lokalni ravni. Anketiranci so ob vizualnem prikazu sončne in vetrne elektrarne (Priloga 2) ocenjevali, kako močno bi jih poseg motil v bližini njihovega bivališča. Izkaže se, da večine vprašanih ne bi pretirano motil ne en ne drugi objekt. 59,8 % respondentov je svoj odgovor pri vetrni elektrarni umestilo v levo polje lestvice *sploh me ne bi motila*, kjer je celo največji delež dobil skrajni pol lestvice (27,5 %). Odziv v primeru sončne elektrarne je bil podoben, 62,8 % anketiranih se nagiba v smer odgovora *sploh me ne bi motila*, skrajni pol je dobil 29,7 % odgovorov. Povprečni oceni (na lestvici od 0 do 10) sta 3,28 za vetrno elektrarno in 3,09 za sončno elektrarno (Slika 8). Tudi v teh dveh rezultatih se odraža visoka podpora vetrnim in sončnim elektrarnam, kar je konsistentno s prejšnjimi vprašanji.

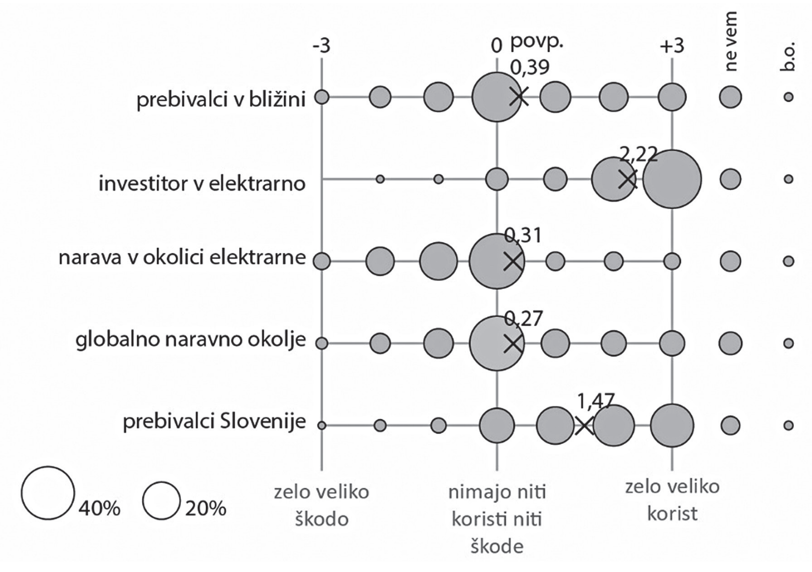
Med razlogi za skrbi ob bivanju v bližini vetrne ali sončne elektrarne nobeden od vidikov ni pretirano izstopal. Pri vetrnih elektrarnah bi bili vprašani najmanj zaskrbljeni o tem, da gre za *nepotrebno porabo denarja in prostora* (povprečje: 1,74) ter z *migetanjem senc* (povprečje: 1,78, na lestvici od 1-*sploh me ne bi skrbelo* do 5- *zelo bi me skrbelo*). Najbolj zaskrbljeni bi bili zaradi *hrupa* (povprečje: 2,44) in *vrednosti nepremičnin* (povprečje: 2,25). Nasprotno pa bi bili pri sončnih elektrarnah najmanj zaskrbljeni zaradi hrupa (povprečje: 1,34), *vpliva na zdravje ljudi* (povprečje: 1,84) in z *nepotrebno porabo denarja in prostora* (povprečje: 1,87). Najbolj zaskrbljeni bi bili pri sončnih elektrarnah zaradi *bleščanja* (povprečje: 2,50) in *izgleda krajine* (povprečje: 2,42).

Slika 8: KAKO MOČNO BI VAS MOTILA PRISOTNOST VETRNE ALI SONČNE ELEKTRARNE V BLIŽINI VAŠEGA BIVALIŠČA?



Vir: SJM 2019/1.

Slika 9: POVPREČJA ODGOVOROV O ŠKODI IN KORISTI ZA RAZLIČNE AKTERJE PRI IZGRADNJI VETRNE ELEKTRARNE (VE)



Vir: SJM 2019/1.

Tudi strukturi odgovorov glede koristi posameznih akterjev sta si pri vetrni (VE) in sončni elektrarni (SE) zelo podobni (Slika 9). Prevladuje mnenje, da ima investitor elektrarne *zelo veliko korist* (povprečje 2,22 za VE oz. 2,33 za SE; na sedemstopenjski lestvici od -3 do 3). Prebivalci v bližini objekta pa *nimajo niti koristi niti škode* (povprečje 0,39 za VE oz. 0,53 za SE), medtem ko se za prebivalstvo Slovenije na splošno mnenje nagiba proti *koristi* (povprečje: 1,41 za VE oz. 1,47 za SE). Tako mnenje o koristi in škodi za naravo v okolici (povprečje 0,31 za VE oz. 0,29 za SE) kot globalno naravno okolje (povprečje: 0,27 za VE oz. 0,25 za SE) se giblje okoli sredine lestvice – *nima niti koristi niti škode*. Koristi so torej pripisane predvsem investitorjem in delno tudi prebivalstvu Slovenije.

Med ponujenimi kompenzacijami za podporo gradnje sončne ali vetrne elektrarne je največji delež (dobra polovica vprašanih) izbrala *vlaganje lastnika elektrarne v lokalni razvoj* (53,8 %). Temu sledi z 20,8 % odgovor: *neposredna finančna izplačila (v obliki enkratnega zneska ali mesečne rente). Soudeležbo pri delitvi dobička* pa je izbralo 15 % vprašanih.

Razprava in sklep

Skozi celotno serijo indikacij, ki jih je pokrivala študija, se konsistentno odraža visoka podpora obnovljivim virom energije, predvsem vetrnim in sončnim elektrarnam, kar nakazuje na sklep, da je družbena sprejemljivost rabe OVE v Sloveniji visoka.

Prepoznane prednosti obnovljivih virov energije se nanašajo predvsem na njihove okoljske vplive – najpogosteje gre za manjše izpuste toplogrednih plinov, čemur sledita obnovljivost vira in prijaznost do rastlin in živali. Energetski vidiki (samooskrba in cena) so, zanimivo, na dnu te lestvice. Pri tem velja dodati, da bi ponovitev študije v času po nastopu energetske krize (ki sovpada z začetkom vojne v Ukrajini) najbrž pokazala drugačna razmerja. To kaže na to, da sta samooskrba in cena hitro pozabljeni, ko ljudje živijo v času družbene in ekonomske stabilnosti.

Prednosti in slabosti sončnega in vetrnega scenarija kažeta podobno sliko, hidro scenarij pa nekoliko drugačno. Konkretno za sončni in vetrni scenarij je najpogosteje izbrana prednost *prijaznost do okolja*, čemur sledi trditev, da je *ta energija poceni*. Slabosti pa večina vprašanih vidi v *nezanesljivosti vira*. Na vprašanje o slabostih scenarija je dobršen delež vprašanih odgovoril tudi z *ne vem*. Ob prevladujočem mnenju, da ključne prednosti sončnih in vetrnih elektrarn izhajajo iz okoljskih vidikov, je presenetljivo, da se odgovori o koristih in škodah, ki jih ta dva objekta sicer prineseta globalnemu naravnemu okolju, koncentrirajo okoli odgovora *nimajo niti koristi niti škode*. To bi lahko razumeli, da gre pravzaprav za »še najmanj slabe rešitve«, kjer se sončne in vetrne elektrarne kažejo kot edina objektivno dostopna alternativa za pridobivanja energije, pri čemer pa to okolju vseeno ne koristi prav posebej, zgolj zada najmanj škode.

Podobno lahko izpeljemo iz ugotovitve, da ima očitno največjo korist od elektrarne investitor, da respondenti v elektrarnah na osnovi OVE prepoznajo predvsem podjetniški vidik. Vidiki družbene koristi pa so nekoliko manj prepoznani. Očitno gre pri razumevanju koristi predvsem za ekonomske vidike, kjer večina anketirancev ni toliko razmišljala o okoljskih dejavnikih. Nekoliko drugačen vtis dajejo odgovori pri hidroelektrarnah, kjer vprašani menijo, da so sicer zanesljiv vir, ki omogoča boljšo samooskrbo Slovenije, a so obenem bolj škodljive za okolje. To je povezano tudi z jasno izraženim mnenjem, da (v prikazanem scenariju) niso na ustreznih lokacijah. Predpostavimo lahko, da je na tovrstna stališča vplivala razprava v medijih, ki je prikazala nasprotovanje nekaterim projektom HE (Mura, Mokrice), pri katerih so nasprotniki v ospredje izrazito postavljali njihove negativne vplive na okolje.

Visoka podpora sončnim in vetrnim elektrarnam se kaže tudi na lokalni ravni. Življenje v bližini vetrne ali sončne elektrarne se večini vprašanih ne zdi problematično. Največ skrbi zaradi bližine vetrne elektrarne vzbuja hrup, pri sončni elektrarni pa bleščanje, v primeru obeh pa je naveden še padec vrednosti nepremičnin v njuni okolici. Ti vidiki so pogosto izpostavljeni tudi v literaturi. Zanimivo je tudi, da bi bilo več ljudi zaskrbljenih glede videza krajine pri sončnih kot pri vetrnih elektrarnah. To je lahko tudi posledica uporabe fotomontaže talne sončne elektrarne (glej prilogo), ki je bila uporabljena pri vprašalniku, saj ta zavzame več prostora kot vetrne elektrarne (na drugem prikazu).

Medtem ko je visoka podpora na splošni in nacionalni ravni skladna z rezultati večine drugih podobnih študij, je visoka podpora na lokalni ravni po svoje presenetljiva, saj pogosto zasledimo poročanje o lokalnem nasprotovanju izgradnji tovrstnih objektov. Možnih razlag za to je več. Prvič, gre lahko za vpliv konteksta zaradi strukture vprašalnika, ki sega od splošne do lokalne ravni, kar (zaradi družbeno zaželenega načina odgovarjanja, ki ga prej beležimo na splošni ravni) lahko vpliva na način presojanja projektov v lokalnem okolju, saj so ti postavljeni v kontekst splošnih, nacionalnih ciljev. Poleg tega anketiranci znotraj istega vprašalnika tendirajo k temu, da načeloma odgovarjajo konsistentno (ne v nasprotju z lastnimi odgovori). Drugič, lokalni kontekst je bil še vedno relativno abstrakten in se anketiranci niso povsem identificirali s predstavljeno lokacijo kot njihovo, ampak je ta »nekje drugje«. To bi bil lahko eden od vzrokov, da so mu manj nasprotovali. Tretjič pa, v nasprotju s tem kar vsekakor tudi velja, da nasprotovanje lokalnim projektom, ki se odraža v literaturi (Segreto et al., 2020), izhaja pogosto iz t. i. »glasne manjšine«, medtem ko večina tovrstne projekte morda vseeno podpira oz. jim vsaj ne nasprotuje. V zagovor zadnjemu argumentu gre vsekakor dejstvo, da je bila raziskava s katero smo podatke zbirali (Slovensko javno mnenje 2019/1) zasnovana na reprezentativnem vzorcu.

Če se ozremo še na nekatere ugotovite iz širšega konteksta – odnosa javnosti do podnebnih sprememb in umestitev Slovenije v evropski okoljski vrednotni okvir, lahko potegnemo nekaj sklepov, ki so podobni tistim iz raziskave o obnovljivih virih energije iz leta 2019. Velika večina prebivalcev Evrope sicer priznava obstoj podnebnih sprememb in razloge za njihov nastanek. Večinsko mnenje o tem najdemo tudi v nekaterih bolj skeptičnih državah. A opazen je vzorec šibkejše sprejetosti podnebne paradigme in nekaterih konkretnejših ukrepov za razogljičenje v vzhodni in srednji Evropi. Slovenija se v tem oziru najde nekje na razpotju. Pri načelnem soglašanju se tendenčno pomikamo proti skupini zahodnoevropskih držav, v nekaterih konkretnejših ozirih in prepričanjih pa ostajamo v polju skepticizma. Pri podpori obnovljivim virom energije in politiki subvencij (v smislu: odgovornost naj prevzame država) prednjačimo, pri vprašanju občutka okoljske opolnomočenosti pa se znajdemo na repu. Tu mislimo na nivo posameznikovega občutka, da bo z osebnim prizadevanjem tudi sam lahko prispeval k reševanju podnebne krize. Najbolj resignirano stališče se v tem smislu pokaže predvsem v državah, ki imajo tudi sicer več zadržkov do soglašanja s podnebnimi spremembami, kamor pa sicer po podatkih Slovenija ne sodi. Da bi se znašli ob boku bolj razvitih držav, bi torej morali izkazati nekaj več družbenega zaupanja, ki se kaže (kot bo v svojem članku v tej ediciji pokazala B. Malnar) kot eden pomembnejših vzvodov do lažjega uveljavljanja ukrepov. Posameznika namreč ne sme prevevati dilema, da je v svoji skrbi za okolje osamljen, medtem ko drugim za to ni mar.

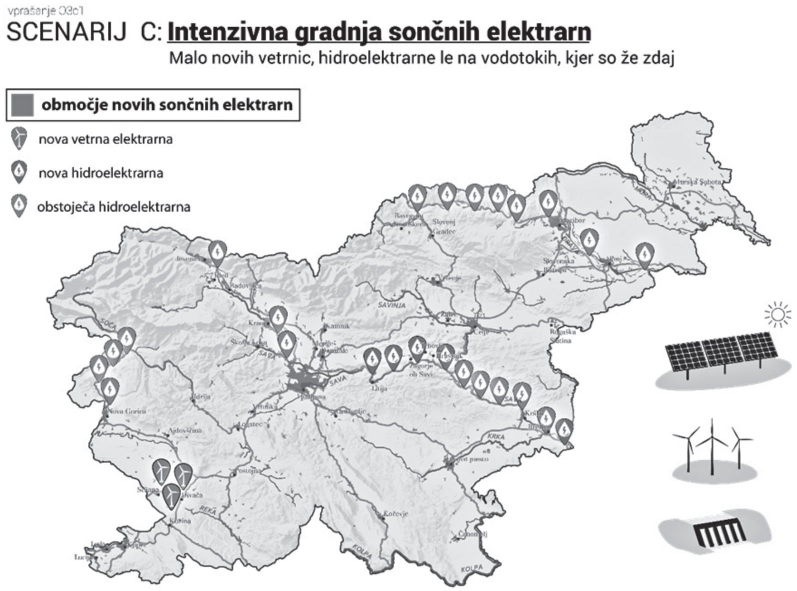
Ekonomski vidik se (tako kot večini Evropejcem) tudi Slovencem zdi najpomembnejši. Po podatkih iz modula Climate Change (ESS 2016) je skrb za cenovno dostopnost energije pri Slovencih trikrat višje izražena kot denimo skrb za zanesljivo dobavo vira in skrb zaradi podnebnih sprememb. To kaže na močno materialno pogojenost oblikovanja stališč javnosti v povezavi z energetsko politiko. Podobno kot se kaže tudi v raziskavi o družbeni sprejemljivosti OVE. Pri tem velja opozoriti, da sta bili obe meritvi izvedeni pred nastopom energetske krize v letu 2022. Ne glede na to pa je prej kot ne jasno, da – če bomo kot družba izkazovali predvsem načelno podporo, ravnanjem, ki predstavljajo tudi določeno materialno samoomejevanje, pa ne bomo izkazovali podpore – bomo (čeprav v krogu razvitih držav) pristali v zgodbi Norveške, kot tipične države, ki izrazito pritrjuje okoljskim vrednotam, na ravni prakse pa še vedno ustvarja visok ogljični odtis (Fritz & Koch, 2019).

Po drugi strani pa moramo nujno upoštevati tudi, da ukrepi za učinkovito razogljičenja nikakor niso enoznačni. Gre za spremembe, ki zahtevajo tehtno presojo, tudi v kontekstu spremljajočih ekonomskih in socialnih posledic, ki bodo vsekakor nastale z uveljavitvijo novih okoljskih politik. Okoljska transformacija bo uspešna le, če bo nastajala v okviru širše družbene transformacije, ki bo povezana tako s pravično distribucijo virov kot tudi tveganj. Ne glede na zahtevnost naloge pa gotovo velja, da bo vsako prelaganje odločitev v nedoločeno prihodnost prinašalo samo še več posledic, katerih sprotno blaženje bo ostala prevladujoča oblika okoljske politike. Taka pa bo bolj kot ne nemočna za vsakršno dolgoročnejše reševanje podnebne krize.

Priloga 1:


vprašanje 03a1
SCENARIJ A: Intenzivna gradnja hidroelektrarn
Malo novih vetrnic, sončne elektrarne le na strehah
nova hidroelektrarna
obstoječa hidroelektrarna
nova vetrna elektrarna
območje novih sončnih elektrarn


vprašanje 03b1
SCENARIJ B: Intenzivna gradnja vetrnih elektrarn
Sončne elektrarne le na strehah, hidroelektrarne le na vodotokih, kjer so že zdaj
nova vetrna elektrarna
območje novih sončnih elektrarn
nova hidroelektrarna
obstoječa hidroelektrarna



Vir: lastni prikaz.

Priloga 2:

Vir: Fotografije in fotomontaža Tadej Bevk, 2019.

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*Marko POLIČ, Matija SVETINA**

POMEN OKOLJSKIH VPRAŠANJ PRI ZADOVOLJSTVU Z ŽIVLJENJEM**

Povzetek. *V članku skušava z analizo podatkov SJM iz dveh časovnih obdobij, 2011 in 2020, ugotoviti, kako je odnos do okoljskih vprašanj povezan s subjektivnim blagostanjem/zadovoljstvom z življenjem. Analize podatkov SJM v omenjenem obdobju nakazujejo, da se ljudje okoljske problematike zavedamo, vendar ta vprašanja zaznavamo kot abstraktna, »nekje drugje«, zato se nam zdijo za oceno zadovoljstva s svojim življenjem manj pomembna kakor konkretna življenjska vprašanja, kot je zdravje ali materialno stanje. Ugotovitve komentirava v kontekstu teorije sestavljenih ravni in tudi okoljskih težav v letih 2022 in 2023, ko so nas pestile vročina, suša in poplave, ki utegnejo to zaznavanje spremeniti.*

Ključni pojmi: *blagostanje, ekosistemske storitve, okoljska psihologija, podnebne spremembe, pozitivna psihologija, teorija sestavljenih ravni*

Uvod

V zadnjih desetletjih se je zanimanje psihologije v veliki meri preusmerilo s proučevanja psiholoških primanjkljajev in nezmožnosti na področje človeškega blagostanja, odpornosti in obnove (Carr, 2004). Pojavilo se je novo področje raziskovanja in delovanja, t. i. pozitivna psihologija, ki se ukvarja s proučevanjem človeških odlik in sreče ter dejavnikov, ki spodbujajo blagostanje. Še sredi prejšnjega stoletja se je psihologija začela ukvarjati s človeškim odnosom in izmenjavami z okoljem, saj se je vse bolj krepilo spoznanje, da je kakovost življenja tesno povezana z značilnostmi okolja, pa tudi, da ljudje pomembno vplivajo na samo okolje, žal v veliki meri v smeri njegovega uničevanja. Zato se zastavlja pomembno vprašanje, kaj na tako škodljivo vedenje vpliva in kako ga spremeniti (Steg in sod., 2013).

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** *Izvirni znanstveni članek.*
DOI: 10.51936/tip.60.4.717

Obe področji, okoljska in pozitivna psihologija, se tudi v raziskavah vse bolj povezujeta (La Placa in sod., 2013), saj se nedvomno kaže tesna povezanost med lastnostmi okolja in blagostanjem. V tem članku skušamo z analizo podatkov raziskav javnega mnenja v dveh obdobjih, 2011 in 2020 (Hafner-Fink et al., 2013, 2021), ugotoviti, ali na subjektivni ravni obstaja povezanost med zadovoljstvom z življenjem in stališči do nekaterih okoljskih vprašanj. Zanima nas torej relativni pomen okoljskih vprašanj v primerjavi z drugimi (npr. vprašanj glede materialnega stanja, zdravja itn.).

Pojem subjektivnega blagostanja je v psihologijo vpeljal Diener leta 1984 (Diener et al., 2018), nanaša pa se na posameznikovo celovito oceno lastnega življenja. Obravnava obseg, do katerega oseba meni ali čuti, da ji življenje dobro poteka. Ta ocena je subjektivna, povezana pa je z objektivnimi dejavniki. Različni ljudje lahko objektivne življenjske okoliščine različno ocenjujejo, odvisno od svojih ciljev, vrednot in kulture, zato subjektivno blagostanje odraža kakovost življenja z vidika danega posameznika. Kljub temu da so te ocene subjektivne, pa praviloma zajemajo različne vidike življenja, od spoznavnih do čustvenih, socialnih in drugih. Winefield in soavtorji (2012) psihološko blagostanje pojmujejo kot kombinacijo čustvenih in spoznavnih stanj ter učinkovitosti posameznikovega delovanja v socialnem okolju. Med čustvenimi dejavniki avtorji omenjajo npr. srečo, žalost in druga čustva, med spoznavnimi stanji pa je tudi ocena zadovoljstva. V Sloveniji je o tem pisal Musek (2008) in opozoril na stabilno dimenzionalno strukturo dejavnikov višjega reda, ki tvorijo kontinuum od negativnega k pozitivnemu splošnemu počutju.

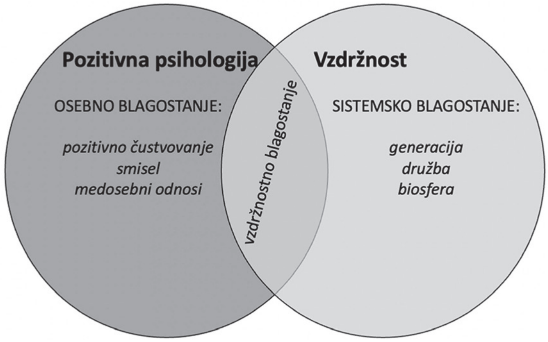
Raziskav zaznave in zavedanja okoljskih problemov je vse več, saj so slednji postali globalni in jih občuti vse več ljudi (na primer suše, poplave, vročina). Uzzell (2003) zaznavanje okoljskih problemov klasificira skozi različne ravni; višje okoljske oz. sistemske ravni predstavljajo probleme na globalni ravni, nižje ravni pa v tem kontekstu predstavljajo posameznikovo konkretno okolje, povezano z njegovimi vsakodnevnimi življenjskimi izkušnjami. V zvezi s tem ugotavlja, da ljudje probleme na globalni ravni zaznavamo kot resnejše v primerjavi s tistimi na nižjih ravneh, pri tem pa nastane zanimiv paradoks. Podatki so pokazali, da je zaznana osebna odgovornost za okolje največja na ravni soseske in se z oddaljenostjo zmanjšuje: čeprav se ljudje čutijo najbolj odgovorne za okolje na lokalni ravni, je to tudi raven, na kateri zaznavajo najmanj težav. Raven, kjer so težave najresnejše, je hkrati tista, za katero čutijo najmanj odgovornosti in možnosti vpliva (Uzzell, 2003). Težava nastane v tem, da z različnimi intervencijami, izobraževanjem in ozaveščanjem praviloma skušamo povečati okoljsko zanimanje in delovanje prav na ravni, ki se zdi ljudem najmanj problematična, s tem pa se zmanjša učinkovitost teh posegov.

V zadnjih letih je vse več govora o t.i. *ekosistemskih storitvah*. Gre za neposredne in posredne koristi, ki jih družbi ponuja ekosistem in ki ljudem omogočajo življenje ter dajo življenju vrednost. V tem kontekstu so zanimivi podatki, pridobljeni v okviru mednarodnega projekta *Milenijska ekosistemska presoja* (Ried et al., 2005), ki je skušal zbrati širok spekter informacij o povezavah med ekosistemskimi spremembami in človeškim blagostanjem. Avtorji so ugotovili, da med ljudmi in ostalimi deli ekosistema obstaja dinamična interakcija, pri kateri spremenjene bivalne razmere neposredno ali posredno povzročajo spremembe v ekosistemih, s tem pa tudi spremembe blagostanja ljudi. Odnos ljudi do okolja v tem kontekstu opisuje rek »*Daleč od oči, daleč od srca*«. Ljudi začne skrbeti onesnaženje, opustošenje okolja ali izginjanje naravnih virov, šele ko problem postane viden in moteč (npr. ko ozračje postane vidno onesnaženo in ima neprijeten vonj ali ko se stroški za ogrevanje močno povišajo).

Mednarodna komisija za podnebne spremembe v svojem zadnjem poročilu (IPCC, 2023), ugotavlja, da je človeški vpliv na podnebne spremembe jasen in naraščajoč ter ga je mogoče opaziti povsod na Zemlji. Poročilo navaja vrsto težav, ki preprečujejo učinkovito ukrepanje. Da bi posameznik sprejel odločitev o spremembi svojega vedenja, povezanega z okoljskimi vprašanji, mora pred tem iti skozi zaporedje psiholoških procesov: posameznik mora najprej zaznati spremembo, jo prepoznati kot problem, problem mora biti zaznan kot ogrožajoč, kar šele navede posameznika k nameri o spremembi vedenja. V zvezi s tem je bila v Sloveniji izvedena raziskava, ki je nakazala nekatere od teh korakov. V raziskavi odnosa do podnebnih sprememb na kvotnem vzorcu 1311 prebivalcev slovenskih statističnih pokrajin so raziskovalci (Polič et al., 2014) ugotovili, da se ljudje podnebnih sprememb zavedajo, da jih pripisujejo človeški dejavnosti ter so zaradi njih zaskrbljeni. O posledicah podnebnih sprememb so imeli udeleženci bolj splošno sliko. Podnebne spremembe so v manjši meri povezovali s svojim lokalnim okoljem, kar potrjuje predpostavke teorije sestavljenih ravni (Liberman in Trope, 2008).

Glede podnebnih sprememb se ljudje ne vedemo dosledno, kar skladno s teorijo sestavljenih ravni pojasnjujemo s tem, da podnebne spremembe psihološko zaznavamo kot oddaljen problem, ki prizadeva druge kraje in druge ljudi ter tiste v prihodnosti. Teorija sestavljenih ravni, ki sta jo razvila Liberman in Trope (2008), tako govori o štirih ključnih razsežnostih zaznavanja psihološke razdalje: *prostorska* ali geografska razdalja, *časovna* razdalja, razdalja *med opazovalcem in socialno tarčo* (npr. zaznavanje psihološke razdalje do drugega posameznika ali skupine, ki se je problem neposredno tiče) in *negotovost* (kakšna je naša zaznava verjetnosti, da se bo dogodek, npr. poplava, res zgodil). Podnebne spremembe naj bi bile oddaljene na vseh štirih razsežnostih. Po tej teoriji naj bi bila psihološka razdalja do nekega objekta ali dogodka neposredno povezana s tem, kako ljudje dogodek razumejo oz. si ga *reprezentirajo*. Psihološko oddaljeni dogodki so reprezentirani kot abstraktni konstrukti na visoki ravni, ki jih sestavljajo splošne (dekontekstualizirane) lastnosti. Psihološko bližnji dogodki so zastopani s konkretnimi konstrukti na nizki ravni in jih sestavljajo posebne kontekstualne podrobnosti oz. posameznikove vsakodnevne izkušnje. Tako (psihološko) oddaljeni kot bližnji dražljaji so zastopani v istem miselnem prostoru, vse razsežnosti razdalje pa so med seboj prepletene, tako da sprememba na enem vidiku razdalje lahko vpliva na vse druge (Liberman in Trope, 2008). Skladno s to teorijo bi lahko pričakovali, da bi vodna ujma v avgustu 2023 zaznavo okoljskih tveganj preusmerila iz splošnega na konkretno lokalno okolje.

Slika 1: KOMPONENTE VZDRŽNOSTNEGA SUBJEKTIVNEGA BLAGOSTANJA



Vir: prirejeno po Ronen in Kerret, 2020.

Pojavljajo se tudi raziskave, ki neposredno povezujejo blagostanje in vzdržni razvoj[1] (Slika 1, Ronen in Kerret, 2020) in opredeljujejo t. i. vzdržno blagostanje, ki je v presečišču pozitivne psihologije in vzdržnosti (sustainability). Nekateri drugi avtorji, npr. Gillis in Gatersleben (2015), povezujejo blagostanje z biofiličnim pristopom, tj. pojmovanjem, ki spodbuja uporabo naravnih materialov, sistemov in procesov pri načrtovanju grajenega okolja.

V pričujočem članku smo raziskovali povezanost med spoznavnim vidikom subjektivnega blagostanja in ocenami drugih vidikov kakovosti življenja (npr. materialnimi razmerami, zdravjem) ter zaznavo okoljskih vprašanj. Podatke smo črpali iz arhiva SJM (2023) v dveh časovnih obdobjih (leta 2011 in 2020), s čimer smo skušali zajeti tudi časovno dimenzijo sprememb zaznavanja okoljske problematike, ki je bila ob obeh merjenjih povezana tudi s specifičnimi socialnimi konteksti, gospodarsko krizo v letu 2011 in epidemijo covida-19 v letu 2020.

[1] *Pojem vzdržni razvoj v članku uporabljamo kot sopomenko pojmu trajnostnega razvoja.*

Metoda

Evropsko družboslovno raziskavo je na reprezentativnem vzorcu udeležencev (N_{2011} = 1095 in N_{2020} = 1082) v Sloveniji, prek spleta, izpeljal Center za raziskavo javnega mnenja pri FDV UL. V tem članku obravnavamo podatke iz let 2011 in 2020 za Slovenijo. Vprašanja v obeh anketah niso bila povsem enaka, saj jih raziskovalci na osnovi pridobljenih podatkov posodabljajo, tj. izločajo tista, ki ne ponudijo kakovostnih informacij in jih nadomestijo z aktualnejšimi in ustreznejšimi. To seveda lahko do neke mere oteži primerjave, vendarle pa daje dovolj dobro splošno podobo stališč in njihovih medsebojnih povezav, v tem primeru zadovoljstva z življenjem in stališč do okolja – vsaj v tem smislu, da pokaže relativno težo stališč do okoljskih vprašanj pri pojasnjevanju zadovoljstva z življenjem. Vprašanja so zahtevala bodisi nominalne odgovore bodisi so ponujala 5- ali 10-stopenjske lestvice Likertovega tipa in so podrobneje opisana na drugem mestu (Hafner-Fink et al., 2013, 2021; SJM, 2023).

Rezultati in razprava

Rezultati so sestavljeni iz treh delov. V prvem primerjamo odgovore, povezane z okoljskimi dejavniki v letih 2011 in 2020, ki so predstavljeni s frekvencami. V drugem delu predstavljamo rezultate multiple regresijske analize, v kateri smo ocenjevali relativno pomembnost okoljskih problemov glede na druge pomembne probleme v Sloveniji. V tretjem delu smo s pomočjo razvrščanja z metodo voditeljev (K-means) iskali profile udeležencev glede na njihova stališča do okoljskih vprašanj.

Tabela 1: ODSTOTEK ODGOVOROV V LETIH 2011 IN 2020 ZA PRVA DVA IZBORA NAJBOLJ ŽGOČIH VPRAŠANJ V SLOVENIJI

Katera od navedenih tem je danes v Sloveniji najbolj žgoča?	SJM 2011 (%)	SJM 2020 (%)
zdravstveno varstvo	35	70
gospodarstvo	25	47
revščina	50	28
priseljevanje	2	12
izobraževanje	7	11
okolje	10	10
kriminal	26	8
terorizem	2	1

Vir: Hafner-Fink et al., 2013, 2021

Odgovori na vprašanje o najbolj žgočih temah v Sloveniji kažejo troje:

1. Med vsemi težavami so najbolj pereči problemi zdravstveno varstvo, revščina in gospodarstvo.
2. Problemi zaradi zdravstva, priseljevanja in gospodarstva so se po mnenju vprašanih v zadnjem desetletju povečali, problemi zaradi kriminala in revščine pa zmanjšali.
3. Okolje se med ostalimi težavami zdi relativno majhen problem. Mnenje glede tega se v zadnjem desetletju ni spremenilo – problemi okolja se zdijo (izmed naštetih težav) najbolj ali drugi najbolj žgoč problem le vsakemu desetemu udeležencu teh dveh raziskav SJM.

Tabela 2: ODSTOTEK ODGOVOROV V LETIH 2011 IN 2020 NA VPRAŠANJE O POMEMBNOSTI POSAMEZNIH OKOLJSKIH PROBLEMOV

Kateri od navedenih problemov (če sploh kateri) je po vašem mnenju najbolj pomemben za Slovenijo kot celoto?	SJM 2011 (%)	SJM 2020 (%)
onesnaženje zraka	24	17
podnebne spremembe	8	16
onesnaženje vode	14	15
odlaganje gospodinjskih odpadkov	15	15
kemikalije in pesticidi	18	13
gensko spremenjena hrana	6	9
izraba naravnih virov	4	7
drugo (nič od navedenega, ne vem, ni odgovora)	4	4
radioaktivni odpadki	3	3
pomanjkanje vode	2	1

Vir: Hafner-Fink et al., 2013, 2021.

Med vprašanji, povezanimi z okoljskimi problemi, najbolj izstopajo onesnaženje zraka, tal, vode, odlagališča odpadkov. Prepričanja glede teh vprašanj se v zadnjem desetletju niso močno spremenila, spremenilo pa se je prepričanje glede podnebnih sprememb. Kljub temu da se podnebne spremembe med vsemi ostalimi okoljskimi težavami vprašanim niti leta 2011 niti 2020 niso zdele problematične, pa se je relativna pomembnost podnebnih vprašanj v zadnjem desetletju podvojila (z 8 na 16 %). Rezultati odpirajo več novih vprašanj in pomislekov; med drugim so se Slovenci po letu 2020 soočili z več vremenskimi ujmami (suša v letu 2022 in poplave v letu 2023) in se je lahko prepričanje glede podnebnih sprememb zaradi tega po letu 2020 spremenilo.

Tabela 3: STRINJANJE S TRDITVIJO (V ODSTOTKIH), TJ. OCENA 4 ALI 5 NA 5-STOPENJSKI LIKERTOVI LESTVICI OZ. 8–10 NA 10-STOPENJSKI

Vprašanje	SJM 2011 (%)	SJM 2020 (%)
Če govorimo na splošno, koliko vas skrbijo problemi okolja?	74	80
Naredim, kar je dobro za okolje, tudi če zato porabim več denarja ali mi vzame več časa.	68	66
Okoljski problemi neposredno vplivajo na moje vsakdanje življenje.	47	43
Kako pogosto se odločite, da določenih proizvodov ne boste kupili zaradi okoljskih razlogov?	30	39
Kako zelo bi se bili pripravljeni odpovedati svojemu življenjskemu standardu z namenom varovanja okolja?	32	38
Skoraj vse, kar sodi k modernemu življenju, škodi okolju.	47	37
Preveč nas skrbi prihodnost našega okolja, premalo pa vse, kar se danes dogaja v zvezi s cenami in zaposlitvijo.	45	33
Kako zelo bi bili pripravljeni plačevati dosti višje cene z namenom varovanja okolja?	27	28
Za nekoga, kot sem jaz, je pretežko, da bi kaj dosti naredil za okolje.	32	25
V življenju obstajajo pomembnejše stvari, kot je varovanje okolja.	34	25
Nobenega smisla nima, da po svojih najboljših močeh skrbiš za okolje, če tega ne počnejo tudi drugi.	34	25
Težko presodim, ali s svojim načinom življenja koristim ali škodujem okolju.	22	19
Kako zelo bi bili pripravljeni plačevati dosti višje davke z namenom varovanja okolja?	17	18
Ljudje so preveč zaskrbljeni zaradi škode, ki jo okolju prizadene človeški napredek.	34	16
Mnoge trditve o ogroženosti okolja so pretirane.	26	14
Moderna znanost bo rešila naše probleme v zvezi z okoljem, ne da bi se zato naš način življenja kaj dosti spremenil.	15	11

Vir: Hafner-Fink et al., 2013, 2021.

Rezultati kažejo, da se relativna pomembnost okoljskih vprašanj v zadnjem desetletju ni močno spremenila, odgovori, povezani z vedenjskimi namerami (Tabela 3), pa kažejo, da se vedenje ljudi verjetno kljub vsemu postopoma spreminja. Vprašani se npr. vse manj strinjajo s trditvami, kot so npr. »Zaradi okoljskih vprašanj smo preveč zaskrbljeni.«, »V življenju so pomembnejše reči, kot so okoljska vprašanja.«, »Nima se smisla truditi glede okolja, če tega ne počnejo tudi drugi.«, »Skrbi zaradi okolja so pretirane.«; tako so se – v primerjavi z letom 2011 – leta 2020 pogosteje odločali, da okoljsko problematičnih izdelkov ne bodo kupili.

Tabela 4: REZULTATI REGRESIJSKE ANALIZE ZA POJASNITEV ZADOVOLJSTVA Z ŽIVLJENJEM (SJM 2011)

R = 0,471 R^2 = 0.221 Prilagojeni R^2 = 0.218 Std. napaka ocene = 0,79			
SPREMENLJIVKE	**b**	**t**	**P**
Zadovoljstvo z materialnim stanjem družine.	-0,217	-7,389	0,000
Kaj bi na splošno rekli, ali je vaše zdravje ...	0,301	10,23	0,000
In kako zelo bi bili pripravljeni plačevati dosti višje davke za varovanje okolja?	0,057	1,987	0.047
Za nekoga, kot sem jaz, je pretežko, da bi kaj dosti naredil za okolje.	-0,133	-4,739	0,000

Vir: lastni izračun.

Podobne rezultate kaže tudi regresijska analiza (Tabeli 4 in 5), v kateri smo prek problematike družbenih vprašanj modelirali zadovoljstvo z življenjem. V regresijsko analizo smo vključili spremenljivke, povezane z okoljskimi vprašanji (pregled teh spremenljivk je v Tabelah 2 in 3), zadovoljstvo z osebnimi razmerami, kot so posameznikovo zdravje, finančno stanje ipd., ter družbena vprašanja (zadovoljstvo s stanjem glede zdravstva, gospodarstva, šolstva, demokracije). V prikazanih analizah so upoštevane samo tiste spremenljivke, ki so pomembno pojasnjevale splošno zadovoljstvo z življenjem. Analiza podatkov iz leta 2020 je tako pokazala, da zadovoljstvo s socialnimi vprašanji, kot so zdravstvo, šolstvo, demokracija in okolje, ter osebno zadovoljstvo z zdravjem in materialnimi razmerami pojasnijo 45% variance splošnega zadovoljstva z življenjem. Med njimi so najpomembnejši osebni dejavniki, kot sta zadovoljstvo z materialnimi razmerami in zdravje, kot pomembno pa se je pokazalo tudi vprašanje demokracije v Sloveniji. Pri razlagi teh podatkov moramo biti pozorni na to, da je anketiranje leta 2020 potekalo v obdobju pandemskih ukrepov, ki so lahko vplivali tudi na relativno pomembnost teh vprašanj.

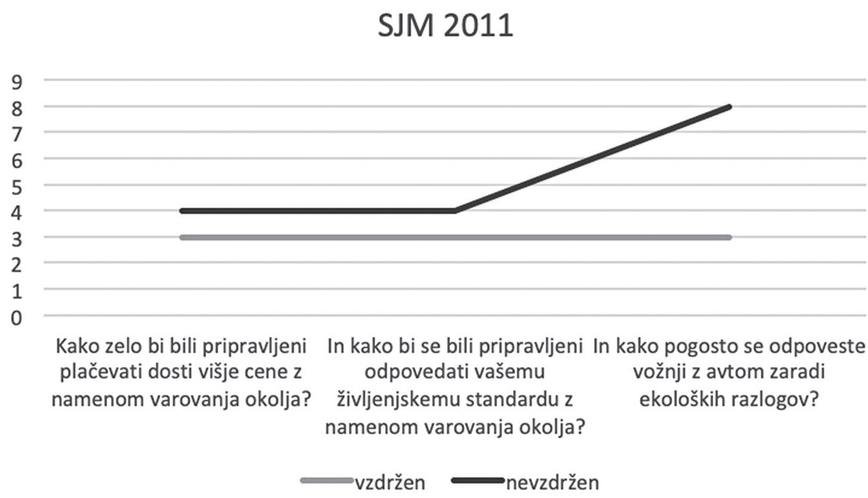
Tabela 5: REZULTATI REGRESIJSKE ANALIZE ZA POJASNITEV ZADOVOLJSTVA Z ŽIVLJENJEM (SJM 2020)

R = 0,671 R2 = 0.45 Prilagojeni R2 = 0.448 Std. napaka ocene = 1.441				
SPREMENLJIVKE	**b**	**t**	**p**	
Konstanta.			4.237	0,000
Zadovoljstvo z materialnimi razmerami.	0.553	21.703	0,000	
Ocena zdravja.	-0.126	-4.986	0,000	
Kako slabi ali dobri bodo vplivi podnebnih sprememb za Slovenijo?	0.073	2.98	0.003	
Koliko uživate v tem, da ste zunaj v naravi?	0.097	4.005	0,000	
Zadovoljstvo z delovanjem demokracije v Sloveniji.	0.118	4.772	0,000	

Vir: lastni izračun.

Oglejmo si še rezultate analize z metodo voditeljev (K-means), v katerih smo iskali možne tipologije udeležencev glede na zadovoljstvo z življenjem in odnos do okolja. Spremenljivke v obeh analizah se razlikujejo, saj smo vsakič izbrali le tiste, po katerih so se udeleženci razlikovali. V obeh primerih poteka razlikovanje glede na bolj ali manj vzdržen odnos do okolja.

Graf 1: ANALIZA Z METODO VODITELJEV GLEDE NA ODNOS DO OKOLJA ZA PODATKE IZ LETA 2011

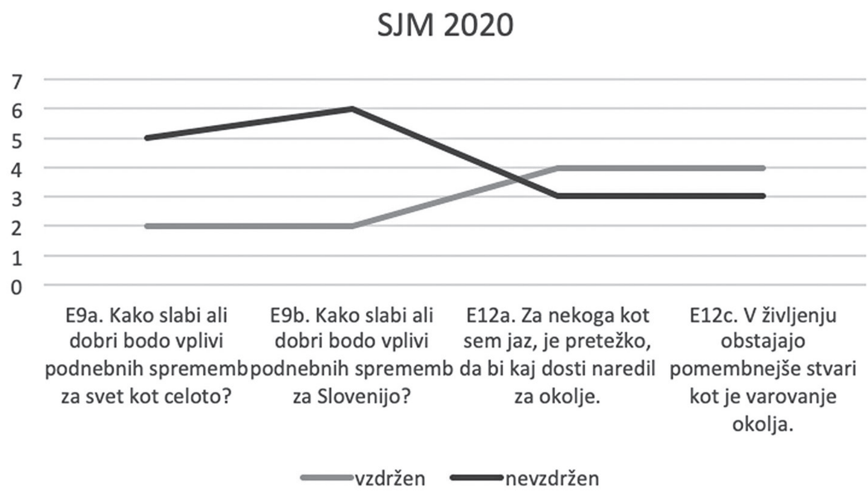


Vir: lastni izračun.

Analiza podatkov SJM 2011 in SJM 2020 z metodo voditeljev je glede na odnos do okolja nakazala obstoj dveh profilov udeležencev, ki se razlikujeta po prijaznosti do okolja in smo ju poimenovali »vzdržni« in »nevzdržni«. Po podatkih iz leta 2011 se udeleženci razlikujejo glede na pripravljenost, da se odpovedo nekaterim ugodnostim (npr. življenjskemu standardu), medtem ko ostale okoljske spremenljivke ne prispevajo k razlikovanju skupin. Skupini se najbolj razlikujete glede omejitev uporabe avtomobila, verjetno zato, ker najbolj neposredno in konkretno zadeva vsakdanje življenje, ostali dve vprašanji pa sta bolj hipotetični.

Pri SJM 2020 se pojavljajo štiri okoljske spremenljivke, po katerih se udeleženci razlikujejo. Vzdržni menijo, da bodo vplivi podnebnih sprememb za svet in za Slovenijo slabi, manj kot nevzdržni pa se strinjajo s tem, da je pretežko kaj narediti za okolje in da obstajajo pomembnejše stvari, kot je varovanje okolja. Rezultati niso v celoti skladni s teorijo sestavljenih ravni (Liberman in Trope, 2008), saj pri vzdržnih ni razlik v oceni vpliva podnebnih sprememb na svet in na Slovenijo, pri nevzdržnih pa so te razlike majhne. V celoti gledano zaznava okoljskih vprašanj glede na zadovoljstvo z življenjem ponuja bolj razlike v stopnji kot pa v smeri odgovorov.

Graf 2: ANALIZA Z METODO VODITELJEV GLEDE NA ODNOS DO OKOLJA ZA PODATKE IZ LETA 2020



Vir: lastni izračun.

Sklep

Analiza podatkov SJM za leti 2011 in 2020 je pokazala – deloma tudi zaradi sprememb v sestavi vprašalnikov –, da se odgovori in odnosi med spremenljivkami v različnih obdobjih lahko deloma tudi razlikujejo. Odgovori kažejo zanimivo dvojno sliko glede okoljskih vprašanj. Po eni strani udeležence okoljski problemi skrbijo (npr. tri četrtine vprašanih tako v letu 2011 (74 %) kot v letu 2020 (80 %) poroča, da jih okoljska vprašanja skrbijo ali zelo skrbijo), po drugi strani pa so okoljska vprašanja med vsemi ostalimi življenjskimi skrbmi (npr. za zdravje, materialne razmere) relativno nepomembno povezana z zadovoljstvom z življenjem. Glede na subjektivno zaznano blagostanje oz. zadovoljstvo z življenjem odnos do okoljskih vprašanj nima velike teže; v pojasnjevanju zadovoljstva prevladujeta klasični temi zaznanih materialnih razmer in zdravja. Leta 2020 se pojavlja tudi vpliv ocene stanja demokracije, kar je glede na družbeno polarizacijo ob epidemiji covida-19 verjetno pričakovano. Žal vprašanje o stanju demokracije leta 2011 v anketo ni bilo vključeno, zato ostaja vprašanje, ali so njen pomen za zadovoljstvo z življenjem sprožili tedanji dogodki ali pa gre za značilen odnos, kar nakazujejo nekatere druge raziskave (Voukelatov in sod., 2021).

Vsekakor se kaže, da okoljska vprašanja v spoznavnem prostoru v obravnavanih obdobjih niso bila bistveno povezana z zadovoljstvom z življenjem, kar bi nakazovalo, da se ljudje sicer okoljske problematike zavedajo, je pa ne povezujejo neposredno s svojim blagostanjem. Okoljske težave »so nekje drugje« in ne pri nas, kar je skladno s teorijo sestavljenih ravni. Družbeni in okoljski dogodki, kot je covid-19 ali vremenske ujme leta 2023, zelo verjetno utegnejo te zaznave spremeniti.

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*Marjan MALEŠIČ**

JAVNOMNENJSKA ZAZNAVA OKOLJSKE VARNOSTI V SLOVENIJI**

Povzetek. *Dejstva, ki dokazujejo povezanost okoljskih in varnostnih problemov sodobne družbe, so neizpodbitna, na kar opozarjajo številne znanstvene analize. Vprašanje je, ali se tudi slovenska javnost zaveda te povezanosti in če da, v kolikšni meri, kar proučujemo prek analize podatkov o njenem odnosu do okoljske problematike. Ključna metoda je analiza podatkov raziskav »SJM 2020/3 Odnos do okolja« in »SJM 2011/1 Okolje«. Ugotavljamo, da postaja slovenska javnost vse bolj občutljiva za okoljske probleme, vendar pa skrbi zaradi le-teh niso tako izrazite, kot bi predpostavili na podlagi argumentov in podatkov o pogostosti in intenzivnosti podnebnih nesreč, okoljskega terorizma in kriminala, nasilja ob državljanskih nemirih, okoljskih migrantov ter oboroženih spopadov, ki so tudi okoljsko pogojeni. Nekateri od teh pojavov namreč že močno vplivajo na varnost Slovenije in njenih prebivalcev. Ugotavljamo tudi, da okoljske probleme javnost sicer zaznava, da jo skrbijo do določene mere, vendar njihovih posledic ne povezuje v zadostni meri s svojim vsakdanjim življenjem, vključno z varnostjo.*

Ključni pojmi: *okolje, okoljski problemi, viri ogrožanja, okoljska varnost, javnost, zaznava*

Uvod

Okoljski in varnostni problemi sodobne družbe so močno prepleteni. Podnebne spremembe, demografsko stanje, pretirano izkoriščanje naravnih virov, vključno z vodo, dezertifikacija, deforestacija, dvigovanje morske gladine, erozija prsti in drugi okoljski pojavi marsikje povzročajo revščino, lakoto in bolezni. Okoljski problemi imajo tudi globalne varnostne implikacije v obliki podnebnih nesreč (ang. *climatological disasters*), okoljsko pogojenih migracij, državljanskih nemirov, okoljsko pogojenega terorizma

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in kriminala, hkrati pa prispevajo k razvoju in izbruhu (oboroženih) konfliktov. Povezava med okoljem in varnostjo je postopno postala predmet teoretične obravnave in empiričnega proučevanja. V šestdesetih letih prejšnjega stoletja so se okoljske razprave ukvarjale predvsem z vprašanji rasti prebivalstva, onesnaževanja narave, zasaditve parkov v mestih ipd. Sedemdeseta leta so prinesla spoznanja o omejenosti virov in mejah rasti, v osemdesetih letih je bil poudarek na trajnostnem razvoju oziroma solidarnosti in pravičnosti med bogatimi in revnimi ter med generacijami. Tedaj so se začele tudi razprave o varnostnih implikacijah okoljskih problemov. V devetdesetih letih so znanstveniki poglobili premislek o povezavah med okoljem in varnostjo ter uveljavili koncept okoljske varnosti. V 21. stoletju v razpravah prevladujejo podnebne spremembe in njihove vsestranske negativne družbene posledice, tudi varnostne (Malešič, 2012).

V članku obravnavamo splošen odnos slovenske javnosti do okoljske problematike, zaznavo pomena različnih okoljskih problemov, še posebej podnebnih sprememb in njihovega vpliva na svet in Slovenijo. Koliko so ljudje zaskrbljeni zaradi okoljskih problemov? Zanima nas tudi ocena javnosti glede stopnje nevarnosti, ki jo za okolje predstavlja višanje temperature na Zemlji, prizadetost bivalnega okolja anketirancev z ekstremnimi vremenskimi pojavi, poslabšanjem kakovosti zraka in vode v zadnjem obdobju ter njihova presoja o (ne)varnosti jedrskih elektrarn. Ključna metoda je analiza podatkov raziskav »SJM 2020/3 Odnos do okolja« in »SJM 2011/1 Okolje«. Interpretacija podatkov temelji na teoretičnem premisleku o povezavah med okoljem in varnostjo, razmerju med dejansko in zaznano ogroženostjo ter posamičnih virih ogrožanja, ki se močno navezujejo na okoljske probleme.

Teoretična izhodišča o povezanosti okolja in varnosti

Raziskovalci nacionalne in mednarodne varnosti so začeli negativne procese v okolju in njihov vpliv na varnost pogosteje omenjati v osemdesetih letih prejšnjega stoletja. Tako je na primer Brown (1982: 21–22) opozoril, da je treba poleg tradicionalnih vojaških virov ogrožanja nacionalne varnosti upoštevati tudi okoljske in ekonomske vire ogrožanja. Mathews (1989: 162) je poudaril, da okoljski in demografski procesi ter usihanje naravnih virov predstavljajo vir ogrožanja nacionalne varnosti. Loske (1991: 25) je temu razmišljanju dodal pomembno ugotovitev, da ogrožanje varnosti ne izvira zgolj iz odnosa med državami, ampak tudi iz odnosa med človekom in naravo. Pomembna je tudi njegova trditev, da okoljski problemi ogrožajo varnost prek meja držav, saj ne upoštevajo suverenosti nacionalnih držav in potemtakem zahtevajo intenzivno in temeljito mednarodno sodelovanje. V svojem konceptu (svetovne) družbe tveganja je tudi Beck (1982; 2008) prepoznal okoljske nevarnosti, najprej jedrsko in kemično onesnaženje, kasneje tudi podnebne spremembe.

Kot je ugotavljal Levy (1995), je bilo moč razpravo, ki je začela opozarjati na povezavo med okoljem in varnostjo, opazovati prek treh argumentov. Eksistenčni argument je zatrjeval, da so določeni vidiki globalnega okolja tako tesno povezani z nacionalnimi vrednotami, da predstavljajo varnostni interes. Uničevanje okolja[1] ogroža najbolj temeljne vidike človekove varnosti, saj spodkopava naravno podporo sistemom, ki so ključni za človekovo dejavnost in obstoj. Fizični argument k povezavi med okoljem in varnostjo pristopa bolj selektivno, saj meni, da uničevanje okolja postane neposredni vir ogrožanja varnosti, takrat ko povzroča izgubo življenj in blagostanja državljanov ali na kak drug način ogroža temeljne družbene vrednote. Skladno s tem argumentom nimajo vsi okoljski pojavi takega značaja oziroma obsega. Politični argument si zastavi vprašanje, ali lahko uničevanje okolja na območjih, kjer postaja absorbcijska zmožnost okolja, da zagotovi preživetje ljudem, omejena, povzroči nasilne državljanske nemire in množične migracije, ki bi prerasli v konflikt in oboroženi spopad.

Za interpretacijo javnomnenjskih podatkov o zaznavi ogroženosti je pomemben koncept okoljske varnosti, ki pomeni ohranjanje lokalne in planetarne biosfere kot temeljnih sistemov, na katerih temeljijo vse človekove dejavnosti (Buzan, 1991), ali kot stanje ekosistemov, ki predstavlja temelj za ohranjanje dosežene stopnje civilizacije (Buzan, Wæver in de Wilde, 1998; Dalby, 2009). SIPRI (1992: 27) pa okoljsko varnost opredeli kot stanje, v katerem so vlade same ali s pomočjo mednarodne skupnosti sposobne obvladovati družbene in politične učinke usihanja naravnih virov. Chalecki (2001: 2) meni, da je okoljska varnost sposobnost države in družbe, da se spoprime z okoljskimi tveganji in škodljivimi posledicami ter nasprotji ali konflikti, ki so povezani s stanjem v okolju. White (2014: 836) pa obrne zorni kot gledanja in opredeli okoljsko nevarnost, in sicer kot »akcije in razmere, ki spodkopavajo sposobnost uporabe narave v meri, ki bi omogočala zadovoljiti človekove potrebe«. Uničevanje okolja in posledično pomanjkanje virov se po njegovem mnenju povezujeta s »človekovim konfliktom« (ang. *human conflict*)[2] na individualni, skupinski in državni ravni. Dalby (2017: 237) meni, da je v zadnjem času razpravo o okoljski varnosti zamenjala razprava o podnebni varnosti. Razumemo jo kot del okoljske varnosti, torej kot povezavo med varnostjo in podnebnimi spremembami, ki so segment okoljske problematike.

[1] Uničevanje okolja razumemo kot pospešeno rabo naravnih virov, onesnaženje ozračja (podnebne spremembe, ki jih povzroča učinek tople grede, tanjšanje ozonske plasti, kisli dež), usihanje vodnih virov, zastrupljanje okolja s kemikalijami, uničevanje prsti in izgubo biološke raznovrstnosti.

[2] Verjetno White »človekov konflikt« uvede v razpravo, da bi opozoril na antipod konceptu »človekove varnosti« (ang. human security).

Dejansko in zaznano ogrožanje varnosti

Različni viri ogrožanja varnosti družbe imajo svojo realno, *objektivno razsežnost*, ki se kaže v vojaških in političnih razmerah v okolju določene skupnosti, ekonomskem in socialnem položaju ljudi, konfliktnosti znotraj družbe, stopnji kriminala, verjetnosti teroristične dejavnosti, zdravstveno-epidemiološkem stanju, stanju v fizičnem okolju, pogostosti in intenzivnosti naravnih, antropogenih in tehnoloških nesreč, ter *zaznavno razsežnost*, ki ponazarja, kako pripadniki določene skupnosti subjektivno zaznavamo navedene vire ogrožanja, pri čemer se lahko med seboj zelo razlikujemo, kar je opaziti v družbenem diskurzu in posledično v javnem mnenju. To v bistvu pomeni, da varnostni sistem deluje v dveh okoljih, v dejanskem in zaznanem okolju: prvo je domena prakse, skozi katero želi varnostni sistem na učinkovit način zagotoviti varnost, obrambo in zaščito skupnosti pred različnimi viri, ki ogrožajo življenje in zdravje ljudi, njihove kulturne, naravne in materialne vrednote in interese, drugo pa je domena zaznav virov ogrožanja, odnosa do varnostnega sistema in občutkov v zvezi z varnostjo oziroma nevarnostjo, ki preti skupnosti. Varnostni sistem torej deluje v prostoru, ki ga oblikuje interakcija med dvema okoljema: okoljem notranjega in zunanjega ogrožanja varnosti, ki je izviren razlog za oblikovanje, strukturiranje in organiziranje varnostnih mehanizmov in instrumentov, ter okoljem varnosti kot vrednote, v katerem občutek ogroženosti in imidž varnostnega sistema vplivata na javno zaznavo varnosti in na zaupanje v varnostni sistem in njegove podsisteme. Pomeni, da varnost ni samo stanje strateških zadev, ampak tudi stanje duha: države, družbe, skupine in posamezniki potrebujemo dejansko varnost in občutek varnosti.

Treba pa je opozoriti tudi na povezanost nekaterih virov ogrožanja varnosti, ki jo označimo kot »kompleksno« ali »prepleteno« ogroženost, saj na primer uničevanje okolja in prekomerno izčrpavanje naravnih virov lahko povzročita socialno-ekonomske probleme, zdravstveno-epidemiološke izzive, politične napetosti in tudi množične migracije, vse našteto pa lahko posledično pripelje do konflikta in celo oboroženega spopada. Na drugi strani pa vsak oborožen spopad v neki državi ali regiji povzroči tudi potencialne nevojaške vire ogrožanja varnosti, kot so nenadzorovani množični beg ljudi, poslabšanje socialno-ekonomskih razmer, tihotapljenje orožja in mamil ter prekupčevanje z njimi, povečana verjetnost teroristične dejavnosti, razvrednotenje okolja in splošno poslabšanje življenjskih razmer. Tudi finančni viri ogrožanja, kot je pokazal primer krize v letih od 2008 do 2014, se širijo po različnih območjih (iz ZDA po skoraj celotnem svetu) in področjih (s finančnega na preostale dele gospodarstva, socialo, politiko, varnost, demografsko področje in še bi lahko naštevali) (Malešič, 2014). Kompleksne učinke je imela tudi kriza, ki jo je v letih 2020–21 povzročil virus covid-19, ki je zahteval številna življenja po vsem svetu in je dolgoročno ogrozil javno zdravje.[3] Generiral je negativne politične in ekonomske učinke, vplival na psihološko stanje posameznikov, skupin in družbe v celoti, hkrati pa spremenil naravo družbenega diskurza, omejeval človekove pravice, vplival na umetnost, kulturo, izobraževanje in šport ter imel velik učinek na odnose med ljudmi (Malešič, 2021). Prav tako je virus vsaj začasno marginaliziral okoljske teme.

Tveganja, viri ogrožanja in skrbi pogojeni s stanjem v okolju

Splošni premislek o povezanosti okolja in varnosti nadaljujemo *z operacionalizacijo in s prepoznavanjem dejanskih, konkretnih virov ogrožanja varnosti*, ki se napajajo v okoljskih problemih sodobne družbe. Kajfež Bogataj (2006) navaja, da so posledice negativnih okoljskih pojavov vsestranske, kar zadeva varnost pa avtorica izpostavi večjo frekvenco in intenzivnost nekaterih naravnih nesreč, vojaške posege in boj za naravne vire, migracije in konflikte, kar vse ima vpliv na varnost posameznika, družbe, države in mednarodne skupnosti. Okoljevarstveni problemi lahko torej sprožajo politične, ekonomske, socialne, migracijske in zdravstveno-epidemiološke krize.

Dalby (2017: 237) se strinja, da človekovo poseganje v okolje in njegovo preoblikovanje prinaša različne oblike nevarnosti. Meni (2017: 233), da so nesreče in človeška ranljivost vse bolj umetne zadeve v urbanizirani biosferi.[4] Po drugi strani pa segrevanje ozračja prinaša potencialno nove okoljske nesreče, katerih posledic še ne poznamo. Problemi, ki jih Dalby (2017) identificira v povezavi s stanjem v okolju, so negativen vpliv na svetovno gospodarstvo, finančne krize, težave v kmetijstvu, različne nevarnosti in nesreče, skrajna revščina ipd. Tudi Dalby (2017: 236) meni, da so spremembe v okolju in njihove številne družbene posledice novi vzrok za vojskovanje.

White (2014) trdi, da vztrajanje na preživetih vzorcih delovanja človeka v okolju spodbuja globalni kriminal, prispeva k širjenju specifičnih konvencionalnih okoljskih kriminalnih dejanj in zavira uveljavljanje pravičnosti. Neprimeren odnos do okolja se (re)konstruira na individualni, lokalni, državni in regionalni ravni, pri čemer gre za stanje duha in materialno stvarnost. V duhu eksistenčnega argumenta si postavi vprašanje, zakaj je toliko subjektov kolektivno vključenih v uničenje določenega načina življenja.

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[3] *Po podatkih spletne strani Worldometer Corona je do konca leta 2023 po svetu zaradi virusa covid-19 umrlo skoraj 7 milijonov ljudi, od tega 7.100 v Sloveniji (Covid 19 virus pandemic, 2023).*

[4] *Kot primer navaja kompleksno krizo na Japonskem leta 2011, ko je potres povzročil cunami, ta pa jedrsko nesrečo v Fukušimi, kar pomeni, da je tehnološka inovacija (jedrska energija) povečala posledice naravne nesreče.*

Beck (2008) opozarja, da so za okoljsko ogroženost značilne delokalizacija (njihovi vzroki in posledice niso omejeni na eno geografsko območje, ampak so vseprisotni), neizračunljivost posledic (posledice so načeloma neizračunljive, saj gre poleg znanih tudi za hipotetična tveganja, ki temeljijo na znanstvenem nepoznavanju in normativnem nesoglasju) in nezmožnost kompenzacije (v preteklosti je bilo mogoče posledice tveganj kompenzirati, pri tveganjih, ki jih povzročajo podnebne spremembe, pa se zdi, da je kompenzacija praktično nemogoča). Poglejmo podrobneje.

Oboroženi spopadi. Svetovna komisija za okolje in razvoj je že leta 1987 opozorila, da bosta degradacija okolja in pomanjkanje virov vodila v politično nestabilnost in konflikt, zato bi bilo treba po njenem mnenju na globalni ravni nujno sprejeti koncept trajnostnega razvoja, ki bi uveljavil solidarnost med generacijami svetovnega prebivalstva ter med bogatimi in revnimi državami (Bruntland Report, 1987). Kaplan (1994) je okolje označil za nacionalnovarnostno vprašanje 21. stoletja. Okoljski problemi sprožajo konflikte, vojne za vire so realnost. Deudney (1992) je tezo o oboroženih konfliktih in okolju zavrnil, saj je menil, da mešanje okoljskih in vojaških zadev prinaša konceptualne težave; če okoljske zadeve imajo varnostne implikacije, so zgolj še en vzrok vojskovanja, če ne pa tako razmišljanje prinaša zmedo v varnostno razpravo. Homer-Dixon (1994) pa se je vprašal, kako okoljske spremembe vodijo v konflikt? V nekaterih okoliščinah so okoljske zadeve verjetno povezane s konfliktom, malo pa je dokazov, da so v preteklosti povzročale vojne, in zakaj bi verjeli, da bo v prihodnje drugače, se sprašuje. Gleditsch (1998) pa celo statistično dokazuje, da ni povezave med okoljskimi problemi in vojnami.

Gulden (2009) nasprotno meni, da mora mednarodna skupnost uravnovešeno obravnavati dva povezana in soodvisna problema, torej oborožene spopade in globalne podnebne spremembe. Lahko mu pritrdimo, saj se zdi, da z nekaj intuitivnega razmišljanja in imaginacije lahko prepoznamo okoljske probleme kot vzrok različnih konfliktov, tudi oboroženih spopadov. Probleme, kot so revščina, nerešena ozemeljska vprašanja med državami, slabe zdravstveno-epidemiološke razmere, verske in etnične napetosti ipd., lahko neugodne okoljske razmere še dodatno zaostrijo. To pomeni, da lahko okoljski problemi, če že niso primarni vzrok za razvoj in pojav oboroženih spopadov, zaostrijo njihove druge potencialne vzroke na sekundarni ravni. Tradicionalne vojaške napetosti so tako vse bolj prepletene z okoljskimi problemi.

Po našem mnenju lahko povezanost oboroženih spopadov s stanjem v okolju opazujemo ne zgolj na ravni *vzrokov*, o čemer smo razpravljali zgoraj (ali okoljski problemi prispevajo k razvoju in izbruhu oboroženih spopadov?), ampak tudi na ravni poteka oboroženih spopadov (ali so objekti, ki so potencialno nevarni za okolje, prepoznani kot tarča in del vojaške strategije?) ter na ravni posledic (v kolikšni meri oboroženi spopadi in priprave nanje škodijo okolju?). V *poteku* oboroženih spopadov namreč lahko prepoznamo akcije namernega uničevanja, izrabljanja ali spreminjanja okolja kot strategije med oboroženim spopadom. Na primer defolianti, ki jih je uporabila ameriška vojska v vietnamski vojni, zažiganje naftnih vrelcev s strani iraške vojske ob umiku iz Kuvajta v času prve zalivske vojne;[5] po Bennettovem mnenju (2023) pa je zelo realna možnost, da bi civilne jedrske zmogljivosti tudi med rusko-ukrajinsko vojno postale orožje.[6]

Prav tako je uničenje okolja, ki ga za seboj puščajo vojne, očitno in ima daljnosežne negativne *posledice*. Omeniti pa je treba še vpliv priprav na oboroženi spopad na okolje, saj gre v tem procesu za dodatno izkoriščanje naravnih, materialnih, finančnih in drugih virov. Kot onesnaževalec okolja se pojavlja obrambna industrija, onesnaževanje okolja poteka tudi med urjenjem vojakov za bojevanje, in sicer v vojaških objektih, prometu in na poligonih. Priča smo izpustom nevarnih snovi v zrak, prst in vodo. Enormna je tudi rast vojaških izdatkov, čeprav bi denar lahko namenili za zagotavljanje varnosti na drugih področjih, na primer okoljskem.[7] Postavlja se namreč vprašanje, kaj pomeni domnevno visoka stopnja vojaške varnosti države, v svetu, v katerem ljudje množično umirajo zaradi negativnih učinkov podnebnih sprememb.

Ekološki terorizem. Stanje v okolju na različne načine omogoča oziroma spodbuja izvajanje terorističnih napadov. Te lahko razdelimo na dve vrsti, in sicer na napade, ki jih izvajajo radikalni okoljevarstveniki (ekoterorizem), in na napade konvencionalnih teroristov, ki uporabljajo vire in objekte v okolju (okoljski terorizem). Domjanič in Dobovšek (2014: 16) ekoterorizem razumeta kot taktiko, ki jo uporabljajo radikalni okoljevarstveniki. Ekoterorizem opredelita kot uporabo nasilja za opozarjanje javnosti na okoljske probleme in doseganje sprememb okoljske politike. Eagan (1996: 1) je ekoterorizem opredelil kot uporabo nasilja kriminalne narave s strani podnacionalnih okoljskih skupin proti nedolžnim žrtvam ali lastnini, ki ima za cilj pridobiti javnost. Ekoteroristi želijo svojim žrtvam povzročiti čustveno in fizično stisko, če verjamejo, da bo to pripomoglo k uresničitvi njihovih okoljskih ciljev. Doslej so bili motivi za uporabo nasilja pretirana sečnja v gozdovih, pretirano ribarjenje, uporaba jedrske energije, lovljenje kitov,

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[5] *Pomembno je poudariti, da Rimski statut Mednarodnega kazenskega sodišča takšno spreminjanje ali uničevanje okolja obravnava kot vojni zločin.*

[6] *Bennett (2023) se v svoji analizi opira na Ramberga (1985), ki je postavil, da bi lahko v prihodnji regionalni ali svetovni vojni ena od sprtih strani izrabila civilne jedrske zmogljivosti, še posebej jedrske elektrarne, kot orožje, ter s tem pridobila politično nadvlado nad nasprotnikom in nevtralizirala sile nasprotnika pri manevriranju na bojišču.*

[7] *SIPRI poroča, da je vojaška poraba po svetu v letu 2022 rasla osmo leto zapored in je dosegla 2240 milijard ameriških dolarjev. Največja rast, ki jo generira agresija Ruske federacije na Ukrajino, je bila v letu 2022 v Evropi, in sicer 13-odstotna (SIPRI, 2023).*

gradnja avtocest, nošenje krzna ipd. Največkrat je tarča njihovega delovanja premoženje. S svojimi dejanji želijo te teroristične skupine preprečiti ali posredovati v dejavnostih, ki so domnevno škodljive okolju.

Napade, ki jih izvajajo konvencionalni teroristi za uresničevanje svojih ciljev, pogojno poimenujemo okoljski terorizem, ki lahko povzroči neslutene posledice, na primer ob napadih na jedrske objekte, kemične tovarne, tovarne za proizvodnjo umetnih gnojil in škropiv, skladišča nevarnih snovi, jezove ipd. Chalecki (2003) tovrstni okoljski terorizem opredeli kot nezakonito uporabo nasilja proti okoljskim virom, da bi prebivalstvo prikrajšali za njegove dobrine in uničili drugo lastnino. Gre za uničenje ali grožnjo z uničenjem okolja s strani držav, skupin ali posameznikov, da bi zastrašili oziroma prisilili vlade ali državljane v določena dejanja. Posebej ranljivi viri so voda, kmetijstvo, rudnine, nafta ter prostoživeče živali in rastline. Napadi na te vire lahko povzročijo bistveno večje uničenje kot konvencionalni terorizem[8]. Verjetnost, da bodo teroristi izbrali take cilje napadov, je velika, saj je način dostopen, objekti pa so ranljivi.

Kriminal. V zadnjih desetletjih je pomemben delež globalnega kriminala povezan z okoljsko problematiko. White (2014: 835) meni, da lahko pomanjkanje hrane, pitne vode in neobnovljivih virov, ki je posledica podnebnih sprememb, sproža moralno in legalno sporne dejavnosti, ki vključujejo skupine organiziranega kriminala, transnacionalne korporacije in oblasti na različnih ravneh organiziranja države. Te dejavnosti lahko zajemajo nezakonito in pretirano ribarjenje, nespoštovanje pravil o odlaganju nevarnih odpadkov, krajo vode in zemlje, prevare pri pridobivanju subvencij za obnovljive vire energije, prevoz strupenih in kontaminiranih proizvodov prek nacionalnih meja, tihotapljenje ogroženih živalskih in rastlinskih vrst ipd. Posledica teh kriminalnih dejavnosti je še bolj grobo izkoriščanje naravnih virov, dodatno onesnaževanje zraka, prsti in vode, kar povečuje tekmovanje posameznikov, skupin in držav za preostale vire.

Kriminalna dejanja izvajajo tudi okoljski aktivisti, ki pripadajo gibanju »Zadnja generacija« in uničujejo umetniška dela. Znani so primeri napadov na eksponate v galerijah in muzejih, na primer obarvanje vode v rimski fontani Trevi v črno, prilepitev aktivistov na steklo pred Botticellijevo stvaritvijo v galeriji Uffizi v Firencah ali polivanje van Goghove slike z juho v Nacionalni galeriji v Londonu. S temi dejanji želijo okoljski aktivisti opozoriti na podnebne spremembe in nujnost odločnejšega ukrepanja držav in mednarodne skupnosti.

Priča smo bili tudi grobim kriminalnim dejanjem, ki so bila uperjena proti okoljskim aktivistom. Nevladna organizacija Global Witness poroča,

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[8] *Porušitev jezu ali zastrupitev vode ima bistveno hujše posledice kot samomorilski bombni teroristični napad.*

da je bilo v letu 2022 po svetu ubitih najmanj 177 okoljskih aktivistov. Umori so bili zagrešeni v 18 državah, 88 odstotkov vseh ubitih pa je bilo v Latinski Ameriki, največ v Kolumbiji (60 žrtev), sledita pa Brazilija in Mehika. Umori so bili največkrat povezani z opozarjanjem žrtev na sporne prakse v kmetijski proizvodnji, rudarstvu in pri izsekavanju gozdov. V obdobju med letoma 2012 in 2022 pa je bilo ubitih 1910 okoljskih aktivistov, kar pomeni povprečno po en umor na vsaka dva dneva. Več kot tretjina vseh žrtev je bila med pripadniki domorodnih skupin (Almost 2.000 land and environmental defenders killed ..., 2023).

Podnebne nesreče. V zadnjem času je vse več dokazov, da se zaradi podnebnih sprememb nekatere naravne nesreče pojavljajo pogosteje in so tudi bolj intenzivne.[9] Znanstveniki, zbrani pod okriljem IPCC, ugotavljajo nedvoumno korelacijo med globalnim povečanjem hidrometeoroloških in podnebnih dogodkov na eni ter antropogenimi podnebnimi spremembami na drugi strani (IPCC Sixth Assessment Report, 2022). Mednarodni odbor Rdečega križa in rdečega polmeseca (IFRC, 2023) med podnebne nesreče uvršča sušo, ekstremno vročino oziroma vročinski val in ekstremen mraz oziroma val hladnega zraka. Thomas in Lopez (2016) med intenzivne podnebno pogojene nesreče prištevata poplave, neurja, suše in vročinske valove. Ameriški center za okoljske informacije med podnebnimi nesrečami prepoznava sušo, poplave, zmrzal, huda neurja, tropske ciklone, požare v naravnem okolju in zimska neurja (American Center for Environmental Information, 2023).

Kaj pa ti pojavi pomenijo v vsakdanjem življenju ljudi? Globalno gledano so v zadnjih letih znani pogosti in uničujoči orkani, cikloni in tajfuni v Aziji ter Severni in osrednji Ameriki, požari v naravnem okolju v Avstraliji, Kanadi in na jugu ZDA, suša v Afriki, Srednji Ameriki in drugod ter ne nazadnje poplave v Aziji, Evropi in drugod. V Evropi smo samo poleti leta 2023 utrpeli številne požare v naravnem okolju (v Grčiji, Španiji, na Portugalskem ...), poplave (v Franciji, Sloveniji...), najbolj uničujoč pa je bil ciklon Daniel, ki je pustošil po Grčiji, Bolgariji in Turčiji. Pustošil je tudi na območju mesta Derna v Libiji, kjer je podrl dva jezova in domnevno povzročil prek dvajset tisoč smrtnih žrtev (Euronews, 2023).

Svetovna meteorološka organizacija poroča o nesrečah, povezanih z vremenom, podnebjem in vodami. Statistično gledano so te nesreče v obdobju 1970–2019 v povprečju po svetu vsak dan povzročile 115 smrti in za 202 milijona dolarjev škode. Zanimiv pa je podatek, da se je število smrtnih žrtev zaradi teh dogodkov (poročali so o 11.000 dogodkih) po letu 2010

[9] *Iz podatkov CRED (Centre for Research on the Epidemiology of Disasters) Katoliške univerze v Louvainu lahko razberemo, da je bilo v letu 2022, v primerjavi s povprečjem v obdobju 2002–2021, več primerov suš, poplav, neurij in požarov v naravnem okolju, medtem ko je bilo primerov ekstremne temperature manj (2022 Disasters in numbers, 2023).*

v primerjavi s 70-timi leti prejšnjega stoletja zmanjšalo za trikrat, kar pripisujejo sistemom za zgodnje opozarjanje na nesrečo, medtem ko se je ekonomska škoda povečala za sedemkrat (World Meteorological Organisation, 2021). Ameriški center za okoljske informacije ugotavlja, da je v ZDA časovni interval med velikimi podnebnimi nesrečami vse krajši, kar pomeni več odzivov sistema varstva pred nesrečami ter posledično usihanje virov in skrajšanje časa za odziv na nesreče, obnovo in priprave na naslednji dogodek (American Center for Environmental Information, 2023).

Svetovna meteorološka organizacija ocenjuje, da se bo zaradi podnebnih sprememb število vremenskih, podnebnih in vodnih skrajnih pojavov povečevalo in da bodo vse hujši. To pomeni več vročinskih valov, suš, poplav in gozdnih požarov, kot smo jim bili nedavno priča v Evropi in Severni Ameriki. V ozračje izhlapeva vse več vode, kar pospešuje ekstremne padavine in smrtonosne poplave. Segrevanje oceanov povzroča vse več tropskih neurij, na čedalje širšem območju (World Meteorological Organisation, 2021).

V kontekstu onesnaževanja in segrevanja planeta bi lahko zastavili tudi vprašanje o njegovih implikacijah na zdravje ljudi. Se bo zaradi teh sprememb povečalo število rakavih in drugih obolenj? Lahko zaradi spremenjenih življenjskih razmer pričakujemo razvoj novih virusov in posledično neznanih nalezljivih bolezni?

Okoljsko pogojene migracije. Okoljski begunec še ni mednarodnopravna kategorija,[10] čeprav so se akademske opredelitve pojavile že pred desetletji (gl. na primer El Hinnawi, 1985, Kent in Myers, 1995, ter Jacobsen, 1996). Opredelitev, ki jo Mednarodna organizacija za migracije uporablja na aktivistični ravni, pravi, da gre za osebo, ki je zaradi nenadnih ali postopnih sprememb v okolju prisiljena začasno ali trajno zapustiti svoje bivališče in se nahaja znotraj ali zunaj svoje države (IOM, 2017).

Vzročno-posledične povezave med stanjem v okolju in migracijami so pogosto dokaj zapletene, saj se okoljski vzroki bega prepletajo z osebnimi, ekonomsko-socialnimi, političnimi, varnostnimi in drugimi vzroki. Jasnejša je slika, ko gre za beg zaradi nenadnih dogodkov, kot so različne nesreče. V grobem bi lahko okoljske begunce kategorizirali na tiste, ki bežijo zaradi dezertifikacije, dviga morske gladine, ali so žrtve okoljskih konfliktov ali okoljskih nesreč[11]. Premislek gre tudi v smeri, da bi lahko množične okoljske migracije povzročale konflikte med državami in družbenimi skupinami z jasnimi varnostnimi implikacijami. Gre za domnevo, ki jo je treba preverjati od primera do primera.

[10] Konvencija ZN o beguncih iz leta 1951 okoljskih beguncev ne zajema. Čeprav je zaradi podnebnih sprememb okoljskih beguncev vse več, doslej še niso prejeli uradnega statusa ali pravne zaščite.

[11] Zaradi posledic ciklona Nargis v Mjanmaru leta 2008 se je z območja nesreče umaknilo 800.000 ljudi, zaradi jedrske nesreče v Černobilu leta 1986 400.000 ljudi, zaradi deževja in poplav v Braziliji leta 2008 pa 80.000 ljudi.

Nasilje ob državljanskih nemirih. Tradicija nasprotovanja dela civilne družbe okoljski politiki in praksi, ki jo oblikujejo oziroma izvajajo države, mednarodne organizacije, korporacije in drugi akterji, je zelo obsežna in konfliktna. Gibanje Atlas okoljske pravičnosti je prepoznalo prek 3100 primerov. Večina teh konfliktov se razrešuje na miren način, nekateri pa spodbudijo nasilje, bodisi da protestniki postanejo nasilni bodisi da nasilne skupine ali celo varnostne sile napadajo protestnike, kar nedvomno povzroča varnostne skrbi. S seznama konfliktnih protestov lahko razberemo, da se ti dogajajo zaradi podnebnih sprememb, rudarjenja, fosilnih goriv, obnovljivih virov, gozdarstva in kmetijstva, strupenih odpadkov, prevoza nevarnih snovi, infrastrukture in urbanističnega razvoja, jezov in voda, jedrske energije, nesreč, ohranjanja naravne dediščine ter turizma (Environmental Justice Atlas, 2023).

Svet Evrope opozarja, da v zadnjem času proteste, na katerih aktivisti zahtevajo bolj odločno vladno akcijo za zaščito narave in okolja, zdravja ter za preprečevanje negativnih učinkov podnebnih sprememb, spremlja vse več nasilja. V prvi polovici leta 2023 se je protestna dejavnost naravovarstvenikov in aktivistov v Evropi intenzivirala, kar se kaže v številu, obsegu in raznolikosti oblik javnega protesta. Na Danskem, v Italiji, na Nizozemskem in v Združenem kraljestvu so protestniki na primer blokirali ceste, avtoceste, železnice, gradbišča in letališke steze. V različnih evropskih državah so protestniki motili umetniške in športne prireditve (Council of Europe, 2023).

Izvajanje nasilja vsekakor ni primerno sredstvo za reševanje socialnih in političnih vprašanj, vendar pa so kljub temu protestniki soočeni s policijskim fizičnim nasiljem, preventivnim priporom in procesom kriminalizacije. Tako so proti okoljskim aktivistom v Avstriji uporabili solzivec, v Franciji so številne protestnike policijske sile ranile, v Gruziji so jih nasilno razgnale, na Finskem, Nizozemskem in v Srbiji so jih aretirali in priprli. Tridesetdnevni pripor in preiskovanje njihovih stanovanj so nekateri okoljevarstveniki izkusili tudi v Nemčiji. V Franciji, Španiji in Združenem kraljestvu so bili žrtve nasilja tudi novinarji, ki so o protestih poročali: aretirali in preiskovali so jih, nekatere so kazensko ovadili. Očitna je tudi stigmatizacija protestnikov, saj njihovo dejavnost del politike in javnosti v nekaterih državah označuje kot ekoterorizem, ekovandalizem in nezakonito delovanje.

Javna zaznava okoljskih problemov in varnost

V luči zgornje razprave lahko ugotovimo, da uničevanje okolja nedvomno generira številne varnostne skrbi in kaže na jasno povezanost okolja in varnosti. Na tej točki se nam postavlja vprašanje, kako vez med okoljskimi problemi in različnimi varnostnimi pojavi zaznavajo in razumejo politične, uradniške in vojaške strukture v Sloveniji. O tej zaznavi in razumevanju lahko posredno sklepamo iz pregleda ustave, nekaterih zakonov in nacionalnovarnostnih dokumentov, kjer je mogoče preveriti, kakšen pomen se daje okoljskim problemom v povezavi z njihovimi varnostnimi implikacijami. Pregled pokaže, da slovenska ustava daje državljankam in državljanom pravico do zdravega življenjskega okolja in tudi pravico do pitne vode. Zakon o zaščiti okolja zagotavlja namen, sistem, cilje in načela okoljske zaščite. Tudi v nacionalnovarnostnih dokumentih (strategije, doktrine, resolucije) zasledimo zavedanje o povezavi med stanjem v okolju in varnostjo. Tako na primer Resolucija o strategiji nacionalne varnosti Republike Slovenije med viri ogrožanja varnosti prepoznava podnebne spremembe, naravne in druge nesreče ter omejenost naravnih virov in degradacijo življenjskega okolja (Resolucija o strategiji nacionalne varnosti, 2019).

Nič manj pomembno pa ni vprašanje, kako okoljske probleme zaznava in razume javnost, kar pa je razvidno iz interpretacije javnomnenjskih podatkov v nadaljevanju članka. White (2014: 835) se ukvarja s političnim, ekonomskim in ekološkim kontekstom okoljske nevarnosti in se sprašuje, kako ta vpliva na oblikovanje »miselnosti utrdbe«. Gre za položaj, v katerem ljudje menijo, da so »napadeni« in ne poslušajo nobene kritike oziroma ne sprejemajo pogledov, ki se ne ujemajo z njihovimi stališči in cilji, s čimer se osamijo od preostanka družbe. Giddens (2010: 2) namreč pravi, da se mnogi ljudje še vedno ne zavedajo razsežnosti problemov, povezanih s podnebnimi spremembami, čeprav nekateri avtorji menijo, da bo spoprijemanje z njimi podobno »vojskovanju«, ne glede na to, da v tem primeru sovražnika ni moč jasno prepoznati in se mu zoperstaviti. Zapostavljanje varnostnih učinkov podnebnih sprememb gre pripisati predvsem dejstvu, da se zdijo nekako nerealne. Na drugi strani pa je vsakdanje življenje, z vsem, kar nam prinaša, privlačno; tega pa ne želimo opustiti. Politika podnebnih sprememb se bo morala soočiti s t. i. Giddensovim paradoksom: nevarnosti, ki jih prinaša globalno segrevanje ozračja, niso oprijemljive, takojšnje in vidne v vsakdanjem življenju in ne glede na to, kako škodljive se zdijo, mnogi ne bodo naredili nič konkretnega, da bi jih preprečili. Po drugi strani pa velja, da je, ko te nevarnosti postanejo vidne in izrazito ogrožajoče, že prepozno, da bi uspešno ukrepali (ibid.).

Na podlagi teoretične obravnave povezanosti okolja in varnosti, razmerja med dejansko in zaznano ogroženostjo ter okoljskih virov ogrožanja smo oblikovali dve podmeni. Prva postavi, da je na področju okoljskih virov ogrožanja moč opaziti veliko neskladje med dejansko in zaznano ogroženostjo družbe, saj so skrbi slovenske javnosti zaradi okoljskih problemov v primerjavi z njihovimi oprijemljivimi varnostnimi implikacijami sorazmerno majhne. Druga podmena je, da javnost okoljskih problemov ne obravnava holistično in jih posledično ne povezuje v zadostni meri s svojo varnostjo. V luči javnomnenjskih podatkov hkrati preverjamo veljavnost Whitove »miselnost utrdbe« (ang. *fortress mentality*) in Giddensovega paradoksa ter teze o avantgardnosti mlade populacije pri zaznavanju in reševanju okoljske problematike, o trajnostnem razvoju in o mobilizacijskem naboju okoljskih tem v politiki.

Metoda

Temeljna vira podatkov, na katera se opira analiza, sta raziskavi javnega mnenja, ki ju je na temo odnosa do okolja izvedel Center za proučevanje javnega menja in množičnih komunikacij pri Fakulteti za družbene vede Univerze v Ljubljani (Slovensko javno mnenje 2011/1, 2011; Slovensko javno mnenje 2020/3, 2021). Prva raziskava je potekala med 9. marcem in 15. junijem 2011 in je bila izvedena z metodo anketiranja na terenu (ang. *face to face*), s pomočjo standardiziranega vprašalnika na reprezentativnem vzorcu polnoletnih prebivalcev Slovenije. Vzorčni načrt je zajemal 1.800 oseb, realizacija vzorca je bila 60-odstotna in je zajela 1.082 respondentov. Druga raziskava je potekala med 10. novembrom 2020 in 31. januarjem 2021 in je bila izvedena z metodo samoizpolnjevanja s pomočjo spletnega standardiziranega vprašalnika ali samoizpolnjevanja s pomočjo pisemskega standardiziranega vprašalnika. Potekala je na reprezentativnem vzorcu polnoletnih prebivalcev Slovenije. Vzorčni načrt je zajemal 2.500 oseb, realizacija vzorca je bila 44,1-odstotna, kar pomeni, da sta na anketna vprašanja odgovorila 1102 respondenta.

Raziskavi sta zajeli večje število odvisnih spremenljivk, v tej analizi pa nas najbolj zanima, katere teme so v Sloveniji najbolj pereče in kam je med njimi po pomembnosti uvrščeno okolje, kolikšna je zaskrbljenost ljudi zaradi okoljskih problemov, ocena o pomembnosti okoljskih problemov za Slovenijo kot celoto, ocena o posledicah zvišanja temperature na Zemlji in ocena nevarnosti jedrskih elektrarn. Iz raziskave Slovensko javno mnenje 2020/3 smo analizirali še podatke o vzrokih za spremembe v okolju, vplivu podnebnih sprememb na svet in Slovenijo ter o zaznavanju prizadetosti sosesk, v katerih anketiranci živijo, zaradi onesnaženja vode in zraka ter zaradi ekstremnih vremenskih pojavov. Obe raziskavi sta zajeli tudi večje število neodvisnih spremenljivk, kot so spol, starost in stopnja izobrazbe respondentov ter vrsta njihovega bivališča, zaposlitveni status, dohodek ipd., kar je pomembno z vidika križanja odvisnih in neodvisnih spremenljivk.

Rezultati

Do katere mere slovenska javnost zaznava okoljske probleme kot vprašanje njene varnosti? Podatki v Tabeli 1 pokažejo,[12] da so bile za sloven-

[12] Zaradi večje preglednosti bomo vse številke ob interpretaciji podatkov zaokrožili navzgor oziroma navzdol.

sko javnost v letu 2020 zelo pereče zgolj tri teme: zdravstveno varstvo, gospodarstvo in revščina, sorazmerno malo pozornosti pa javnost namenja kriminalu, okolju in priseljevanju, še manj pa izobraževanju in terorizmu (anketiranci so izbirali najbolj perečo temo in naslednjo najbolj perečo temo). V letu 2020 je bila za anketirance najbolj pereča tema zdravstveno varstvo, ki je v skoraj petdesetih odstotkih prvi izbor, v 21 odstotkih pa drugi izbor. Gre za očiten vpliv epidemije virusa covid-19 na mnenje ljudi, saj enaka raziskava v letu 2011 pokaže, da je zdravstveno varstvo na prvo mesto postavilo le 16 odstotkov, na drugo pa 19 odstotkov vprašanih.

Ta sprememba v zaznavi zdravstvenega varstva v javnosti pa ni vplivala na oceno okolja kot potencialno pereče tematike, saj je tako v letu 2011 kot letu 2020 okolje pri treh odstotkih vprašanih prvi, pri sedmih odstotkih pa drugi izbor. Iz Tabele 1 je tudi razvidno, da sta kot pereči temi v primerjavi z letom 2011 v letu 2020 največ pozornosti izgubila gospodarstvo in revščina.

Tabela 1: NAJBOLJ PEREČA TEMA V SLOVENIJI DANES IN DRUGA NAJBOLJ PEREČA TEMATIKA

			prvi izbor	drugi izbor
			E1a	E1b
1 –	zdravstveno varstvo	$SJM11_1$	16,1	19,3
		$SJM20_3$	49,2	20,9
2 –	izobraževanje	$SJM11_1$	2,3	4,8
		$SJM20_3$	2,5	8,3
3 –	kriminal	$SJM11_1$	10,7	15,0
		$SJM20_3$	2,8	5,5
4 –	**okolje**	$\mathbf{SJM11_1}$	**2,9**	**6,8**
		$\mathbf{SJM20_3}$	**2,7**	**7,0**
5 –	priseljevanje	$SJM11_1$	0,8	1,5
		$SJM20_3$	4,9	7,1
6 –	gospodarstvo	$SJM11_1$	40,9	19,8
		$SJM20_3$	17,8	29,2
7 –	terorizem	$SJM11_1$	0,3	1,6
		$SJM20_3$	0,3	0,8
8 –	revščina	$SJM11_1$	24,0	25,7
		$SJM20_3$	12,5	15,7
9 –	nič od navedenega	$SJM11_1$	1,0	1,5
		$SJM20_3$	4,1	1,7
88 –	ne vem	$SJM11_1$	0,9	3,6
		$SJM20_3$	2,9	1,7
99 –	b. o.	$SJM11_1$	0,1	0,5
		$SJM20_3$	0,4	2,0

Vir: Slovensko javno mnenje 2011/1 in Slovensko javno mnenje 2020/3.

Treba pa je ugotoviti, da je stanje v okolju povezano tako z zdravjem ljudi, njihovo gospodarsko dejavnostjo, revščino in priseljevanjem, tako da moramo ob razmišljanju o podatkih razumeti prepletenost teh spremenljivk in njihove vzročno-posledične povezave. Analiza podatkov raziskave iz leta 2020 razkrije, da spol, starost, izobrazba in vrsta naselja, v katerem živijo anketiranci, praktično nimajo vpliva na njihov odnos do okolja kot pereče družbene teme.

Tabela 2: SKRB ZARADI PROBLEMOV OKOLJA

	splohme ne skrbijo			zelo me skrbijo		ne vem	b.o.
	1	2	3	4	5	8	9
SJM11/1	1,8	3,7	20,1	34,4	39,6	0,3	0,0
SJM20/3	1,8	3,0	15,0	28,4	51,2	0,2	0,4

Vir: Slovensko javno mnenje 2020/3.

Podatki v Tabeli 2 razkrijejo, da se je skrb ljudi zaradi okoljskih problemov v letu 2020 v primerjavi z letom 2011 povečala, saj je število zaskrbljenih in zelo zaskrbljenih (seštevek ocen 4 in 5) povečalo s 74 na 80 odstotkov, pri čemer je v podatku za 2020 bistveno večji delež »zelo zaskrbljenih«. Analiza podatkov, pridobljenih leta 2020, pokaže, da so ženske zaradi stanja v okolju rahlo bolj zaskrbljene kot moški in da zaskrbljenost občutno raste s starostjo, medtem ko izobrazba in vrsta naselja nimata opaznega vpliva.

Tabela 3: NAJPOMEMBNEJŠI OKOLJSKI PROBLEM ZA SLOVENIJO KOT CELOTO

		SJM11/1	SJM20/3
1 –	onesnaženje zraka	24,5	17,3
2 –	kemikalije in pesticidi	18,1	13,2
3 –	pomanjkanje vode	1,6	1,2
4 –	onesnaženje vode	14,5	14,8
5 –	radioaktivni odpadki	3,2	2,6
6 –	odlaganje gospodinjskih odpadkov	15,3	15,5
7 –	podnebne spremembe	8,4	15,9
8 –	gensko spremenjena hrana	6,1	8,7
9 –	izraba naravnih virov	4,0	6,6
10 –	nič od navedenega	1,3	1,5
88 –	ne vem	1,8	2,1
99 –	b. o.	1,2	0,5

Vir: Slovensko javno mnenje 2011/1 in Slovensko javno mnenje 2020/3.

Iz Tabele 3 razberemo, da so okoljski problemi, ki so po oceni anketiranih v letu 2020 najpomembnejši za Slovenijo kot celoto, onesnaženje zraka (17 odstotkov), podnebne spremembe (16), odlaganje gospodinjskih odpadkov (16), onesnaženje vode (15) in prisotnost kemikalij in pesticidov (13). V primerjavi z letom 2011 se je občutno povečala skrb ljudi zaradi podnebnih sprememb, in sicer z 8 na 16 odstotkov. Analiza podatkov iz leta 2020 po demografskih kategorijah razkrije, da ljudje z nižjo izobrazbo bolj zaznavajo problem zaradi onesnaženosti zraka kot druge izobrazbene skupine, da problem kemikalij in pesticidov bolj zaznavajo starejše kategorije prebivalstva, da mlade bolj kot starejše skrbi onesnaženost vode in da je problem onesnaženosti zraka bolj zaznan v urbanem kot v ruralnem okolju. Primerjava med prebivalci Maribora in Ljubljane pokaže, da je zaznavanje problema onesnaženosti zraka v obeh mestih sorazmerno visoko in primerljivo, medtem ko Ljubljančani bolj zaznavajo problem kemikalij in pesticidov, Mariborčani pa bolj problem gospodinjskih odpadkov.

Iz podatkov raziskave, izvedene leta 2020, je razvidno, da večina anketiranih (56 odstotkov) meni, da se svetovno podnebje spreminja predvsem zaradi delovanja ljudi, kar pritrjuje ugotovitvam IPCC o prevladujočem vplivu človeka na podnebne spremembe (cit. po Vogler, 2011). Več kot tretjina (38 odstotkov) vprašanih meni, da gre v enaki meri za vpliv naravnih procesov in človeka, medtem ko štirje odstotki vprašanih menijo, da gre pri podnebnih spremembah predvsem za vpliv naravnih procesov. Analiza podatkov pokaže, da ženska populacija rahlo bolj kot moška, mlajša populacija rahlo bolj kot starejša in prebivalci prestolnice rahlo bolj kot drugi prebivalci verjamejo v prevladujoč vpliv človeka na podnebne spremembe (Slovensko javno mnenje 2020/3, 2021).

Vplive podnebnih sprememb na svet kot celoto javnost ocenjuje kot slabe, in sicer je vrednost malo manj kot 3 na lestvici od 1 (izredno slabi vplivi) do 10 (izredno dobri vplivi), medtem ko naj bi bili ti vplivi na Slovenijo rahlo manj neugodni: 3,5 na enaki lestvici. To je v nasprotju z ugotovitvami znanstvenikov, da se v Sredozemlju, katerega del je tudi Slovenija, ozračje v povprečju segreva bolj izrazito kot v drugih delih sveta (gl. Žabkar in Malešič, 2014: 5). Iz podatkov medletnih primerjav (Slovensko javno mnenje 2020/3, 2021) je tudi razvidno, da ljudje vse manj sprejemajo trditev, da nas »preveč skrbi za prihodnost našega okolja, premalo pa vse, kar se danes dogaja v zvezi s cenami in zaposlitvijo«. Če je s to trditvijo v devetdesetih letih prejšnjega stoletja močno soglašalo ali soglašalo okoli polovica, je v letu 2020 takih le še manj kot tretjina vprašanih. Prav tako v letu 2020 skoraj dve tretjini ljudi ne bi bilo pripravljeno sprejeti zmanjšanja obsega zaščitenih naravnih območij v Sloveniji v dobro gospodarskega razvoja na njih.

V enakem duhu lahko ocenimo tudi soglašanje anketirancev z nekaterimi drugimi trditvami, ki zadevajo okolje. Če je bilo na prehodu v novo tisočletje »močno soglašanje« in »soglašanje« s trditvijo »v življenju obstajajo pomembnejše stvari, kot je varovanje okolja« na ravni 43 odstotnih točk in leta 2011 32 odstotnih točk, je bilo leta 2020 pri zgolj 19 odstotnih točkah.

S trditvijo »mnoge trditve o ogroženosti okolja so pretirane« je leta 2000 in 2011 močno soglašalo in soglašalo 27 oziroma 26 odstotkov vprašanih, leta 2020 pa le še 14 odstotkov vprašanih. Prav tako je vse večji delež anketirancev, ki menijo, da je zvišanje temperature na Zemlji kot posledica podnebnih sprememb »izjemno nevarno« in »zelo nevarno« za okolje. V seštevku jih je bilo leta 2000 58, leta 2011 63 in leta 2020 72 odstotkov. Da je to srednje nevarno, jih je v letih 2000 in 2011 menila četrtina vprašanih, leta 2020 pa petina. Delež tistih, ki so menili, da zvišanje temperature na Zemlji kot posledica podnebnih sprememb »ni zelo nevarno« ali sploh »ni nevarno« za okolje, je bil v letu 2000 v seštevku 5, v letu 2011 6 in v letu 2020 4 odstotke. S trditvijo, da »okoljski problemi neposredno vplivajo na moje vsakdanje življenje«, pa se je v letu 2011 (47 odstotkov) strinjalo celo več anketirancev kot leta 2020 (43 odstotkov) (Slovensko javno mnenje 2020/3, 2021).

Ministrstvo za infrastrukturo je sredi leta 2021 družbi Gen energija izdalo energetsko dovoljenje za drugi blok jedrske elektrarne Krško. Po pojasnilu Ministrstva v tem primeru naj ne bi šlo za dokončno odločitev o projektu, ampak o začetku upravnih postopkov in pripravi dokumentacije, kar je nujna podlaga za kasnejšo dokončno odločitev in preverjanje družbenega soglasja o projektu. V tistem času je bila sprejeta tudi Resolucija o dolgoročni podnebni strategiji Slovenije 2050, ki načrtuje uporabo jedrske energije na daljši rok, s čimer bi do leta 2050 dosegli energetsko nevtralnost oziroma neto ničelne emisije (MMC RTV SLO, 2021). Zaradi pričakovanja, da bomo o gradnji drugega bloka jedrske elektrarne Krško odločali na referendumu, je koristno poznavanje javnega mnenja o tej temi. Podatki naših raziskav kažejo, da je vse več ljudi prepričanih, da jedrska energija ni nevarna za okolje, vendar pa je delež tistih, ki menijo nasprotno, še vedno prevladujoč. Tako je leta 2011 v seštevku 72 odstotkov vprašanih menilo, da so jedrske elektrarne »izjemno nevarne« ali »zelo nevarne« za okolje. Leta 2020 je bil ta delež 47-odstoten. Delež tistih, ki menijo, da so jedrske elektrarne »srednje nevarne«, se je povečal s 16 na 29 odstotkov, delež tistih, ki menijo, da »niso zelo nevarne« ali »sploh niso nevarne« za okolje, pa se je v seštevku več kot podvojil, in sicer z 9 na 21 odstotkov. Ob primerjavi teh podatkov je nujno upoštevati dejstvo, da se je nekaj dni po začetku raziskave leta 2011 na Japonskem zgodila velika jedrska nesreča (Fukušima, 11. marec 2011), ki je medijsko odmevala v celotnem obdobju izvajanja raziskave, kar je nedvomno imelo velik vpliv na odgovore anketirancev.

Podrobnejša analiza podatkov iz leta 2020 sugerira, da ženska populacija bistveno bolj kot moška zaznava nevarnost jedrskih elektrarn, da je ta nevarnost bolj zaznana v starostni skupini 31 do 45 let in manj v naseljih od 2.000 do 10.000 prebivalcev. Zanimivo je, da zaznava nevarnosti jedrskih elektrarn pada s stopnjo izobrazbe anketirancev, se pravi, da višja, kot je njihova izobrazba, manjša je zaznana nevarnost. Analiza podatkov po slovenskih regijah pa potrjuje, da se nevarnosti jedrskih elektrarn najmanj bojijo v regiji, kjer imajo izkušnjo z jedrsko elektrarno, torej v Posavju. Da so jedrske elektrarne izjemno ali zelo nevarne, tam meni le tretjina vprašanih, medtem ko v poudarjanju njihove nevarnosti prednjačijo v Pomurski (59 odstotkov), Podravski (58 odstotkov) in Obalno-kraški regiji (56 odstotkov). Da jedrske elektrarne »sploh niso nevarne«, v Posavju meni 15 % anketirancev, kar je v povprečju približno štirikrat več kot v drugih regijah.

Tabela 4: PRIZADETOST ZARADI NAŠTETIH STVARI V ZADNJIH DVANAJSTIH MESECIH V NJIHOVI SOSESKI

		sploh nič 1	malo 2	do neke mere 3	precej 4	zelo 5	ne vem 8	(b.o.) 9
a)	onesnaženje zraka	18,6	28,6	31,2	10,6	3,9	6,7	0,5
b)	onesnaženje vode	29,9	30,1	21,1	8,6	1,9	7,8	0,6
c)	ekstremni vremenski pojavi (močne nevihte, suše, poplave, vročinski valovi, močne ohladitve ipd.)	13,4	28,3	30,3	18,9	5,8	2,8	0,4

Vir: Slovensko javno mnenje 2020/3.

Iz Tabele 4 je razbrati, da ljudje v vsakdanjem življenju v svoji soseski pretirano ne zaznavajo onesnaženja vode, zraka ali ekstremnih vremenskih pojavov, kot so močne nevihte, suše, poplave, vročinski valovi, močne ohladitve ipd. V seštevku je onesnaženje zraka do neke mere, precej in zelo močno v letu 2020 zaznalo 46 odstotkov, onesnaženje vode 32 odstotkov ter ekstremne vremenske pojave 55 odstotkov vprašanih. Z drugimi besedami, povprečne ocene na lestvici od 1 (sploh nič me niso prizadele) do 5 (zelo so me prizadele) so 2,49, 2,15 oziroma 2,75. Analiza podatkov pokaže, da so bili v zadnjih dvanajstih mesecih pred izvedbo ankete ekstremni pojavi rahlo bolj zaznani med starejšimi kot med mlajšimi, med nižje izobraženimi kot višje, najbolj v kmečkih naseljih in najmanj v Ljubljani.

Razprava

Lukšič (2011, 423) je pred dobrim desetletjem ugotavljal da je okoljska kriza postala planetarna, zavest ljudi o tem pa je bila še šibka. Malnar in Šinko (2012: 471) sta v tistem času poudarila, da longitudinalni empirični podatki pri slovenski javnosti razkrivajo pomemben obrat v zaznavi okoljskih skrbi, kar je predvsem povezano z zunanjimi dejavniki, kot je bila na primer jedrska nesreča v Černobilu leta 1986. Podatkovni trend je pokazal ciklično gibanje, saj so bile okoljske skrbi leta 2011 na ravni, ki je primerljiva s tisto v sedemdesetih letih, medtem ko je bil vrhunec v devetdesetih letih prejšnjega stoletja. Med posameznimi vrstami okoljskih problemov pa ni bilo zaznati značilnih vzorcev. Analiza je pokazala, da so razlike v odnosu do okoljskih problemov glede na izobrazbeno raven prebivalstva in njegovo starost postopno izginjale.

Podatki o ogroženosti v raziskavah SJM Nacionalna in mednarodna varnost v obdobju 1999–2012 kažejo, da prebivalci Slovenije uničevanje okolja kot vir ogrožanja varnosti Slovenije v povprečju postavljajo za skupino socialno-ekonomskih virov ogrožanja, kriminalom in korupcijo ter vštric s prometnimi nesrečami in zlorabo psihoaktivnih substanc. Vojaške in teroristične grožnje Sloveniji so po zaznavi javnosti na dnu lestvice virov ogrožanja naše države (Malešič, 2014: 12–15).

Pričujoča analiza pa pokaže, da je v letu 2020 – v primerjavi z letom 2011 – zaznava okolja kot pereče družbene teme v javnosti ostala na enako nizki ravni, saj sta pred dobrim desetletjem kot pereči temi prevladovala gospodarstvo in revščina, v letu 2020 pa pod vplivom epidemije covida-19 zdravstvo in gospodarstvo. Skrb ljudi zaradi okoljskih problemov se je v letu 2020 kljub temu povečala, kar potrjuje zgoraj omenjeno cikličnost gibanja, niso pa vzroki nujno več zunanji. V primerjavi z letom 2011 se je občutno povečala skrb ljudi zaradi podnebnih sprememb. Narašča tudi spoznanje, da ima pri podnebnih spremembah prevladujočo vlogo človek s svojimi posegi v naravo. Ženske so zaradi stanja v okolju rahlo bolj zaskrbljene kot moški, zaskrbljenost občutno raste s starostjo, medtem ko izobrazba in vrsta naselja, v katerem bivajo respondenti, nimata opaznega vpliva, kar v veliki meri potrjuje ugotovitve Malnarjeve in Šinka (2012: 471) o usihanju razlik pri različnih demografskih skupinah.

White (2014: 835) je izpostavil problem »miselnosti utrdbe«. Če jo apliciramo na okoljsko področje, pomeni, da človeštvo skozi desetletja, kljub vse bolj alarmantnim podatkom, informacijam in izkušnjam, v temeljnih značilnostih (izčrpavanje naravnih virov, način proizvodnje, poraba energije, potrošništvo ipd.) vztraja pri zelo podobnih vedenjskih vzorcih in s tem odnosu do okolja. Na to tematiko se navezuje tudi »Giddensov paradoks«, ki opozarja, da so okoljski problemi manj oprijemljivi in vidni, zato ne storimo nič ali premalo, ko pa se manifestirajo v vseh svojih razsežnostih, je za ukrepanje že prepozno. Tudi Beck (2008) meni, da je za nova tveganja, med njimi tudi okoljska, značilno, da so manj vidna in oprijemljiva od prejšnjih, so prikrita in jih je treba znanstveno dokazovati, kar pomeni, da odgovorov nanje še nimamo. Morebiti bi na podlagi podatkov za slovensko javnost lahko rekli, da v zadnjem desetletju opažamo prve manjše razpoke v miselnosti utrdbe in da vidnost problemov (spremenjena zaznava) ter njihova rastoča oprijemljivost (na primer že omenjeni suša, požar, poplave in zemeljski plazovi) nakazujejo možnost realnejšega zaznavanja okoljskih problemov in njihovih varnostnih implikacij v javnosti? Še posebej, ker Lukšič (2011: 423) ugotavlja, da je lokalna in regionalna okoljska problematika bistveno bolj zasidrana v zavesti ljudi, kar je mogoče razbrati iz njihovega angažiranja, ko hoče kdo poseči v njihovo neposredno življenjsko okolje in jim s tem znižati kakovost bivanja.

Attenborough (2019) postavi, da imajo rast prebivalstva, tehnološki razvoj, razvoj podjetništva, gospodarska rast, produktivnost, način prehrane, kakovost življenja, pričakovana življenjska doba ipd. svojo ceno. Izguba je zdaj vidna in začeli smo se zavedati vrednosti okolja, saj smo blizu točke, s katere ni vrnitve. Attenborough (ibid.) meni, da se ta zavest še najbolj spreminja pri mladih in da je za njih smisel gospodarske dejavnosti boljša družba in ne zgolj dobiček. Križanje odvisnih in neodvisne spremenljivke (starost) na naših podatkih razkrije, da se v Sloveniji splošen odnos do okolja pri mladih bistveno ne razlikuje od odnosa drugih starostnih kategorij. Med vsemi okoljskimi problemi mlade bolj kot starejše skrbi le onesnaženost pitne vode. Mladi v večji meri priznavajo negativen vpliv človeka na stanje v okolju in se manj kot starejši bojijo negativnih učinkov jedrskih elektrarn. Na podlagi podatkov ne moremo trditi, da v Sloveniji mladi predstavljajo avantgardo pri zaznavanju okoljskih problemov in njihovemu razreševanju.

Izsledki teoretične analize pričajo, da so številni avtorji (na primer Brown, 1982, Mathews, 1989, Buzan, 1991, in Loske, 1991) že pred desetletji opozarjali na varnostne implikacije okoljskih sprememb, s čimer so prispevali k razvoju koncepta okoljske varnosti. Postopno so prepoznavali, kako različni okoljski problemi vplivajo ali se povezujejo z varnostnimi pojavi, kot so oboroženi spopadi, nasilni državljanski nemiri, okoljsko pogojeni terorizem, kriminal, migracije in podnebne nesreče. Slovenska javnost se vse bolj zaveda negativnih učinkov različnih okoljskih problemov, še posebej podnebnih sprememb, vendar te rahlo bolj zaznava kot globalni problem, in ne toliko nacionalni, čeprav podatki o segrevanju ozračja kažejo, da je območje Sredozemlja, katerega del je tudi naša država, bolj izpostavljeno od svetovnega povprečja in lahko posledično na tem območju pričakujemo bolj negativne družbene, tudi varnostne, implikacije.

Podatek, da je javnost večinoma »precej« in »zelo« nepripravljena, da bi zaradi gospodarskega razvoja zmanjšali obseg zaščitenih naravnih območij v Sloveniji (Natura 2000), je eden od indikatorjev, ki lahko kaj pove o prisotnosti koncepta »trajnostnega razvoja« v zavesti ljudi. Celota predstavljenih podatkov pa kaže, da mobilizacijski naboj okoljskih tem (gl. na primer Beck, 2008), v slovenskem javnem, predvsem političnem življenju, ni pretirano močan in težko je verjeti, da bi se na tej podlagi lahko kmalu razvilo množično okoljevarstveno gibanje ali »zelena« politična stranka, ki bi tudi z opozarjanjem na varnostne implikacije okoljskih problemov dosegla volilni uspeh.

Sklep

V izhodišče empirične analize smo postavili dve podmeni. Prva izpostavlja veliko neskladje med dejansko in zaznano ogroženostjo družbe zaradi okoljskih problemov. Znanstvene analize prepričljivo dokazujejo povezanost med stanjem v okolju in varnostjo posameznika, družbenih skupin, države in mednarodne skupnosti. Ali gre tudi zaznava slovenske javnosti v to smer? Iz analiziranih podatkov je razvidno, da slovenska javnost postaja vse bolj občutljiva za okoljske teme in probleme, o čemer priča primerjava podatkov iz let 2011 in 2020. Okolje kot družbena tema je sicer med manj perečimi, vendar pa se skrb zaradi okoljskih problemov povečuje, podnebne spremembe postajajo vse pomembnejše, zavedanje o tem, da človek vpliva na podnebne spremembe, raste, njihov vpliv na družbo je negativen. Vendar pa skrbi zaradi okoljskih problemov niso tako izrazite, kot bi predpostavili na podlagi podatkov o pogostosti in intenzivnosti podnebnih nesreč, rasti okoljskega terorizma in kriminala, rasti nasilja, ki ga prožajo državljanski nemiri in odzivi represivnih organov nanje, številu okoljskih beguncev ter vplivu stanja v okolju na tradicionalne vzroke za razvoj in pojav oboroženih spopadov. Nekateri od teh virov ogrožanja že močno vplivajo na varnost Slovenije in njenih prebivalcev.

Druga podmena poudarja, da slovenska javnost okoljskih problemov ne obravnava holistično in jih posledično ne povezuje v zadostni meri s svojo varnostjo. Kljub zgoraj orisanemu spodbudnemu trendu glede zaznave okoljskih problemov in skrbi zaradi njih, pa ravno pri trditvi »okoljski problemi neposredno vplivajo na moje vsakdanje življenje« opažamo, da je bilo soglašanje z njo leta 2011 na višji ravni kot leta 2020, kar je presenetljiv podatek. Pomeni, da okoljske probleme javnost sicer zaznava, da jo skrbijo do določene mere, vendar njihovih posledic ne povezuje v zadostni meri s svojim vsakdanjim življenjem, torej s kakovostjo bivanja, prehrano, zdravjem, zaposlitvijo, varnostjo ...

Prihodnje raziskovanje na področju odnosa slovenske javnosti do okolja bi lahko bilo pod močnim vplivom dveh nasprotujočih si trendov. Na eni strani pričakujemo, da se bo občutljivost za okoljske probleme v tem desetletju v javnosti povečala, saj smo že doslej izkusili največjo sušo v Evropi v zadnjega pol tisočletja (2022), izmerili najvišje povprečne temperature ozračja, bili priča največjemu požaru v zgodovini na ozemlju Slovenije (na Krasu leta 2022) ter največjim poplavam in zemeljskim plazovom (v večjem delu države leta 2023). Na drugi strani pa oboroženi spopadi (na primer aktualna agresija Ruske federacije na Ukrajino ter teroristični napad Hamasa na Izrael in izraelski povračilni oboroženi napad na Gazo), veliki teroristični napadi, izraziti ekonomsko-socialni problemi in možnost pojava novih nalezljivih bolezni, marginalizirajo pomen okoljskih tem in jih izrivajo iz žarišča zavesti ljudi.

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*Sonja BEZJAK, Janez ŠTEBE**

INTERDISCIPLINARNE TEMATSKE ZBIRKE PODATKOV KOT PLATFORMA POVEZOVANJA RAZISKOVALCEV: PRIMER RAZISKAV O OKOLJU V SLOVENIJI**

Povzetek. *Podatki o okolju so lahko pomemben gradnik v napredovanju spoznanj za reševanje izzivov in iskanju odgovorov na vprašanja, s katerimi se srečujemo v začetku 21. stoletja. Pričujoči članek je razmislek o tem, kako konceptualizirati zbirko podatkov o okolju in kaj vanjo vključiti, da bo k sodelovanju pritegnila različne akterje in prispevala k oblikovanju široke skupnosti zainteresiranih. V podatkovno intenzivni dobi arhivi podatkov predstavljajo platformo povezovanja producentov podatkov in uporabnikov podatkov, raziskovalcev, raziskovalnih infrastruktur, javnih služb, občanskih znanstvenikov in drugih. Dostopni in pregledni podatki ter druge s podatki povezane storitve prispevajo k interdisciplinarnemu sodelovanju in uresničevanju vključujoče odprte znanosti.*

Ključni pojmi: *podnebne spremembe, okolje, podatkovni arhivi, raziskovalni podatki, občanska znanost, družboslovni koncepti*

Uvod

Če so okoljska in naravovarstvena vprašanja nekoč bila stvar redkih ozaveščenih posameznikov in posameznic, ki so spodbudili nastanek gibanj za rešitev akutnih problemov, kot so onesnaženje, uničenje, izumrtje vrst ipd., in so iz njih kasneje izšle tudi prve t. i. zelene stranke, so dandanes videti del običajnega, skorajda vsakdanjega govora in so del političnih dokumentov Evropske komisije. Raziskovalni temi »Okolje in podnebje« sta v Strategiji 2022–2024 za raziskave in inovacije v EU uvrščeni med prednostne raziskovalne teme, Evropska komisija pa v razpisih opredeli, katere podteme naj raziskovalci raziskujejo, npr. podnebje, energijo in mobilnost, hrano,

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** *Pregledni znanstveni članek.*

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bioekonomijo, naravne vire, kmetijstvo in okolje (glej grozda 5 in 6 finančnega okvira Obzorje 2020, obdobje financiranja 2021–2027).[1]

Neodvisno od raziskovalnih prioritet se soočamo s procesi informatizacije, digitalizacije in upodatkovljenje številnih segmentov posameznikovega in družbenega življenja (Bezjak in Masten, 2021). Ti prinašajo vse več podatkov o posameznikih, skupinah in družbi nasploh, pa tudi o okolju. Med novejšimi izzivi je vprašanje, kako dostopati do raznovrstnih in množično nastajajočih podatkov s ciljem, da bi jih obdelovali za različne namene. V raziskovalni sferi je eden od odgovorov izgradnja podatkovnih storitev in infrastrukture, ki je skladno z načeli FAIR[2] ter omogoča kakovostno in hitro obdelavo velikih količin raznorodnih podatkov in z njimi povezane dokumentacije. Pomemben del razvoja predstavljajo že delujoče ali šele nastajajoče nacionalne infrastrukture, povezane v področne evropske velike podatkovne infrastrukture, ki v znanosti prinašajo nove načine raziskovanja in sodelovanja. Za znanstveni razvoj je pomembno, da podatkovne storitve in infrastruktura, namenjene raziskovanju, in uporabniki le-teh sodelujejo pri razvojnih izzivih, da raziskovalci poznajo in uporabljajo razpoložljive napredne storitve in infrastrukturo in da se slednje odzivajo na potrebe raziskovalcev, zagotavljajo usposabljanja in uporabnikom prijazne rešitve.

Ker so podatki lahko zbrani na sistematične ali nesistematične načine in raziskovalci pri tem uporabljajo različne metode, se področne raziskovalne infrastrukture, zadolžene za podatke, srečujejo s precejšnjimi izzivi pri standardizaciji in t. i. FAIR-ifikaciji podatkov.[3] Dodatne izzive prinašajo teme, s katerimi se ukvarjajo različne discipline. Okolje je že takšno področje, kjer je interdisciplinarno sodelovanje pri reševanju okoljskih težav smiselno in so spodbude za (iz)rabo raznolikih podatkovnih virov še posebej utemeljene (Zhao in Hellström, 2020; Clare in Barker, 2023).

Na sociološkem srečanju 2022 je Arhiv družboslovnih podatkov (ADP) kot področna podatkovna infrastruktura in izvajalec podatkovnih storitev za družboslovje v Sloveniji nastopil s pobudo oblikovanja posebne tematske zbirke raziskovalnih podatkov za Slovenijo, osnovane na širokem polju raziskovalnih vprašanj, povezanih z okoljem. V članku predstavljamo nabor tem, ki bi lahko sodile v zbirko podatkov o okolju, seznam obstoječih raziskav, povezanih z raziskovanjem okolja, ki so s svojimi podatki že dostopne v ADP, skupaj z glavnimi mednarodnimi raziskavami, v katere je vključena Slovenija. S primeri razvoja podobnih tematsko opredeljenih podatkovnih storitev v ADP in drugih evropskih podatkovnih arhivih so prikazane

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1 Dostopno prek https://research-and-innovation.ec.europa.eu/strategy/strategy-2020-2024_en.

2 Načela FAIR v središče ravnanja s podatki postavljajo naslednje vidike: Findability – najdljivost, Accessibility – dostopnost, Interoperability – povezljivost in Reusability – ponovna uporabnost. Za več glej: https://www.go-fair.org/fair-principles/.

3 Za več glej: https://www.go-fair.org/fair-principles/fairification-process/.

podlage za zasnovo okoljske zbirke podatkov v Sloveniji in pričakovani učinki njene izgradnje. Ob tem pa je pripravljen pregled izzivov, s katerimi se soočajo podatkovni repozitoriji pri razvoju storitev, ki bi prinesle pregled nad okoljskimi podatki, enostaven dostop do njih in njihovo informirano rabo za reševanje okoljskih izzivov ob podpori na podatkih utemeljenih ugotovitev.

Pristop k oblikovanju tematske zbirke: primera obstoječih tematskih zbirk iz ADP

Oblikovanje tematske podatkovne zbirke o okolju sledi nekaterim splošnim načelom. Prvi pogoj za smiselnost oblikovanja zbirke je, da med uporabniki obstaja zadostno zanimanje za tematiko. Drugo je, da je mogoče pričakovati zadosten obseg podatkov in da jih je smiselno razporediti v ločeno novo skupino oz. zbirko. Iz tega sledi potreba po ustrezni dokumentaciji, to pomeni, da se podatkom dodajo informacije, s katerimi jih je lažje najti, opisani pa so tako, da je jasen in razumljiv njihov pomen in možna uporaba za nadaljnje raziskovanje.

V katalogu ADP je objavljenih več kot 750 družboslovnih raziskav, ki so dostopne za ponovno uporabo. V letih 2020 in 2021 sta nastali prvi dve tematski zbirki: *Zbirka podatkov COVID-19*[4] in *Zbirka podatkov s področja etničnih in migracijskih študij.*[5] Pobuda za oblikovanje prve je prišla iz poziva Konzorcija evropskih arhivov družboslovnih podatkov (CESSDA) v prvih tednih po razglasitvi pandemije.[6] Pri oblikovanju zbirke COVID-19 so bile članicam CESSDA v pomoč smernice združenja Research Data Alliance (RDA) s pozivom k zagotovitvi čim hitrejšega dostopa do podatkov, upravičenim zaradi urgentnosti reševanja pandemične situacije (RDA COVID-19 Working Group, 2020). Pandemija je pokazala nujnost interdisciplinarnega sodelovanja in povezovanja epidemioloških, medicinskih, zdravstvenih in družboslovnih podatkov.[7] Napori pri oblikovanju nacionalne tematske zbirke so bili upravičeni tudi zaradi prispevka k mednarodnemu pregledu podatkov o COVID-19.[8]

Temu ustrezen je bil dober odziv ustvarjalcev podatkov, ki so v tistem obdobju raziskovali vprašanja, povezana s pandemijo. Skladno z omenjenimi

4 https://www.adp.fdv.uni-lj.si/uporabi/covid-19/

5 https://www.adp.fdv.uni-lj.si/uporabi/etmig/zbirka_etmig/

6 V Konzorcij evropskih arhivov družboslovnih podatkov (CESSDA) so vključeni arhivi iz 22 držav članic EU in nekaterih drugih. Poslanstvo CESSDA je, da te arhive povezuje ter spodbuja harmonizacijo orodij, storitev in izobraževanj. Plod dolgoletnega mednarodnega sodelovanja arhivov je skupni katalog podatkov CESSDA (CDC), ki danes šteje okoli 43.000 družboslovnih raziskav (https://datacatalogue.cessda.eu/).

7 Primer takega sodelovanja je evropski projekt BY-COVID: https://by-covid.org/

8 https://www.cessda.eu/Covid-19

načeli FAIR so pripravili raziskovalne podatke in spremno dokumentacijo, ki je nujna za njihovo razumevanje. V tematski zbirki COVID-19 je v ADP trenutno objavljenih 20 raziskav, ki vsebujejo tako besedilne kot številske podatke, dostopne za ponovno uporabo. Na organiziranih dogodkih (spletni seminar ADP,[9] konferenca NIJZ[10]) se je pokazal potencial za oblikovanje skupnosti raziskovalcev z različnih družboslovnih področij (psihologija, sociologija, etnologija, pravo ...) in širše, saj so raziskave v zbirko prispevali tudi raziskovalke in raziskovalci s področja medicine in zdravstva (več o zbirki COVID-19 v Štebe in Bezjak, 2022).[11]

Drug primer je zbirka podatkov s kratico EtMig, katere namen je prispevati k večji preglednosti raziskav s področja etničnih in migracijskih študij in boljšemu dostopu do kakovostnih raziskovalnih podatkov s tega področja. Pobuda za oblikovanje zbirke je nastala zaradi aktualnosti teme. Pri snovanju in oblikovanju zbirke se je pokazalo, da se raziskovalci na različnih raziskovalnih organizacijah ukvarjajo z etničnimi in migracijskimi študijami, da nastajajo številne raziskave in z njimi povezani podatki, da pa ni celovitega pregleda nad njimi. Da bi preverili potencial, je ADP izvedel pogovore s predstavniki raziskovalnih organizacij, ki so med večjimi ustvarjalci raziskav s tega področja (Inštitut za narodnostna vprašanja, Inštitut za slovensko izseljenstvo in migracije pri Znanstvenoraziskovalnem centru Slovenske akademije znanosti in umetnosti, Inštitut za družbene vede ZRS Koper in drugi). Obsežnejše sodelovanje je steklo med ADP in Inštitutom za družboslovne raziskave ZRS Koper. V zbirki EtMig je ob koncu leta 2023 objavljenih dvanajst raziskav, ki jih je mogoče poiskati in najti v katalogu ADP in katalogu CESSDA ter uporabiti za različne nove namene.[12]

Oblikovanje tematske zbirke je lahko tudi odgovor na potrebe v širši družbi. Določene tematike lahko zaradi svojega pomena za družbo predstavljajo prednostna raziskovalna področja, kakor kaže zgled iz britanskega arhiva UKDS, kjer so raziskovalne podatke predstavili po sklopih aktualnih družbenih izzivov: staranje, COVID-19, kriminal, gospodarstvo, okolje in energija, izobraževanje, etničnost, hrana, zdravje, stanovanja, informacije in komunikacija, delo, politika in revščina.[13] Podobno so v Finskem arhivu družboslovnih podatkov (FSD) predstavili tematske sklope kot napotilo za

[9] Spletni seminar je potekal 17. novembra 2023, več o programu na: https://www.adp.fdv.uni-lj.si/dogodki/webinar_adp_covid-19_21/

[10] Konferenca v organizaciji Nacionalnega inštituta za javno zdravje je potekala 5. oktobra 2022, več o vsebini in programu: https://nijz.si/dogodki/drugo-obvestilo-konferenca-javno-zdravje-in-covid-19-5-oktober-2022/

[11] Ena od udeleženk s področja medicine se je zahvalila, saj pred tem ni poznala ADP in podatkovnih virov (vir: zapiski s spletnega seminarja dne 17. november 2021).

[12] Zbirka EtMig: https://www.adp.fdv.uni-lj.si/uporabi/etmig/novo_adp/

[13] https://ukdataservice.ac.uk/find-data/browse/

iskanje oz. kot predloge zanimivih raziskovalnih tem.[14] Potencial za opredelitev tematskih zbirk podatkov lahko predstavljajo tudi strateški dokumenti EU, v katerih so opredeljene raziskovalne teme, ki jih financira EU.[15]

Podatki o okolju v arhivih CESSDA in v ADP

Hiter pregled kataloga podatkov CESSDA kaže, da arhivi širom Evrope ponujajo mnogo podatkov s področja raziskovanja okolja. V podatkovnem katalogu CESSDA (CDC) je na voljo 42.188 raziskav (20. 7. 2022), v kategorijo »okolje« je uvrščenih 5864 raziskav, 57 raziskav je objavljenih v ADP. Pri podrobnejšem iskanju raziskav s področja »okolje« so lahko v pomoč pojmi iz tezavra ELSST (glej Preglednica 1: Raziskave o okolju v katalogu podatkov CESSDA, v prilogi 1). Ta preglednica ni popoln popis stanja, je pa lahko prikaz izziva, s katerimi se srečujejo podatkovni repozitoriji in posledično uporabniki takih raziskav; označevanje (klasifikacija) raziskav s koncepti namreč ni dosledno, npr. uporabljajo se različni koncepti za iste vsebine, o čemer deloma razpravljamo v nadaljevanju.

V katalog ADP so do sedaj podatke iz raziskav s področja »okolje« prispevali raziskovalci iz več kot 15 raziskovalnih centrov oz. organizacij. Največji ustvarjalec podatkov je Center za raziskovanje javnega mnenja in množičnih komunikacij na Inštitutu za družbene vede FDV. V okviru raziskave Slovensko javno mnenje so bodisi celotno raziskavo namenili temi okolja bodisi so se o tem spraševali v okviru drugih tem. Za ponazoritev predstavljamo nekaj ključnih besed, ki kažejo raznolikost spremenljivk: odnos do naravnega in bivalnega okolja, navezanost na kraj, odnos do načina bivanja, odseljevanje s podeželja (1969); odgovornost za odpadke, prostorsko umeščanje odpadkov, določanje lokacije odlagališč, pogoji za soglasje za odlagališča odpadkov v svojem kraju, druge rešitve za odpadke (1980); JE Krško, ekologija in napredek, plačevanje ekoloških stroškov, zaznave splošne in osebne ogroženosti okolja (1997); vloga moderne znanosti v okolju, pravice živali, odnos do poseganja človeka v naravo, odnos med naravo in gospodarsko rastjo, odnos med naravo in vero, osebna pripravljenost za ekološko obnašanje (2000); klimatske spremembe, odnos do okolja (2018).

Okoljske tematike so presečne za različne raziskovalne skupine, kar kaže pestrost organizacij in centrov, ki so objavili svoje podatke. Na FDV so jih poleg že omenjenega centra večkrat prispevali s Centra za prostorsko sociologijo in Centra za proučevanje družbene blaginje, po eno raziskavo tudi s Centra za teoretsko sociologijo, Obramboslovnega raziskovalnega

[14] *https://www.fsd.tuni.fi/en/data/by-theme/*

[15] *Evropska komisija je v finančnem okviru programa Obzorje Evropa (2021–2027) opredelila prednostne aktualne družbene izzive, za katere bo razpisala raziskovalna sredstva (https://www.gov.si/zbirke/projekti-in-programi/obzorje-evropa/o-programu-obzorje-evropa/).*

centra in Centra za politološke raziskave. Po eno raziskavo so objavili z Urbanističnega inštituta RS, Znanstvenega inštituta Filozofske fakultete UL, Geografskega inštituta Antona Melika ZRC SAZU, Gimnazije Jesenice, CRJM UP ZRS – Centra za raziskovanje javnega mnenja Univerze na Primorskem, Znanstveno-raziskovalnega središča Koper, še dve raziskavi sta z Ekonomske fakultete UL. Med financerji raziskav so tudi občine (npr. Nova Gorica, Koper), Stanovanjski sklad RS, Savske elektrarne in Zavod za gozdove ter različna ministrstva ali državni uradi. Omeniti velja še podatke, ki so nastali v sklopu velikih mednarodnih anketnih raziskav, kot so International social survey programme (ISSP), European social survey (ESS) in *Eurobarometer (EB)* ter podatke iz raziskav *Nacionalna evidenca funkcionalno degradiranih območij v Sloveniji* za leti *2017* in *2020.*

Potencial okoljskih podatkov javnega sektorja

Za razvoj družboslovne zbirke o okolju je pomembno upoštevati tudi podatke iz javnega sektorja in jih kolikor mogoče uporabiti za povezovanje z drugimi podatki (Cole in dr., 2020). Različne vrste registrov in zbirk podatkov o prostoru nastajajo in se vzdržujejo na Geodetski upravi RS, Geološkem zavodu RS, Agenciji RS za okolje in na Statističnem uradu RS. Na podlagi evropske direktive INSPIRE so vzpostavljeni metapodatkovni standardi in podlage za povezljivost podatkov.[16] Iskanje po metapodatkih o podatkih iz teh virov in dostopu do njih je mogoče prek portala OPSI – Odprti podatki Slovenija.[17] Dostopni so večinoma agregirani podatki, za dostop do mikropodatkov pa je potrebno izpolniti pogoje Statističnega urada RS za delo z ne polno anonimiziranimi podatki.[18]

Najdljivost in povezljivost podatkov: označevanje pojmovnih opredelitev vsebine podatkov

V podatkovno intenzivni dobi se večajo potrebe po razvrščanju in ovrednotenju podatkov ter predvsem po dobrem opisu, ki omogoča, da najdemo podatke, ki jih potrebujemo. To je tudi namen načel FAIR.[19] Podatki so v arhivih, združenih v konzorcij CESSDA, opisani in opremljeni z izčrpnimi metapodatki po shemi DDI, ki je namenjena za opis družboslovnih podatkov.[20] Ti vsebujejo bibliografske informacije o avtorjih in ustanovi, financerju ter kraju

[16] *https://inspire.ec.europa.eu/inspire-directive/2*

[17] *https://podatki.gov.si/*

[18] *https://www.stat.si/StatWeb/StaticPages/Index/for-researchers*

[19] *Za uresničevanje zastavljenih ciljev so pomembna vse bolj uveljavljena načela FAIR, glej: https://www.go-fair.org/fair-principles/*

[20] *Glej: https://ddialliance.org/*

in času nastanka podatkov in spremnih gradiv. V opisu raziskave so zajeti način zbiranja podatkov, informacije o populaciji in vzorcu in o dostopnosti podatkov, kadar so potrebne omejitve zaradi narave gradiv. Priloženi so tudi dokumenti o podrobnostih zbiranja podatkov in kopija ali opis merskega inštrumenta. Vse te informacije pomagajo uporabnikom najti in ovrednotiti podatke, vključno z oceno kakovosti in ustreznosti vsebinskega okvira za dani namen. K najdljivosti in povezljivosti podatkov pomembno prispeva t. i. preverjen nabor pojmovnih opredelitev (ang. *controlled vocabulary*), ki je uveljavljen znotraj določene znanstvene skupnosti. Arhivi CESSDA klasificirajo raziskovalne podatke s pomočjo t. i. vsebinskih področij[21] in s koncepti iz tezavra ELSST (*European Language Social Science Thesaurus*).[22] Podobno tudi na drugih področjih nastajajo klasifikacije, ki pa so izven področne skupnosti lahko malo znane in neuporabne. V okviru združenja RDA se je oblikovala pobuda za delovno skupino, ki bi imela nalogo poenotiti in urediti različne tezavre s sorodnih področij na globalni ravni. Pri uveljavljanju konsistentne rabe istih terminov za iste koncepte se pri opisovanju podatkov v družboslovju soočamo z velikimi izzivi (RDA working group, 2023).[23]

Okolje z vidika družbe: kaj sodi v zbirko podatkov o okolju

Pogled v globino: konceptualno označevanje spremenljivk

Do sedaj smo omenjali vsebinsko označevanje sklopov podatkov na ravni opisov raziskav, se pravi celih raziskav in njihovih poglavij, kadar so bile razdeljene v več vsebinsko ločenih delov. Konceptualno označevanje v tematski zbirki podatkov je lahko še veliko bolj podrobno, v kolikor se nanaša na dejansko uporabljene indikatorje posameznih konceptov, se pravi na spremenljivke v podatkih. V tem primeru se izboljša možnost identifikacije določene spremenljivke, ki bi jo nekdo lahko uporabil za svoje raziskovanje. Denimo, vprašanje o okoljskem političnem delovanju se lahko skriva v tematsko neodvisni raziskavi, v sklopu baterije splošnih vprašanj o sodelovanju na protestih, podpisovanju peticij ipd.

[21] *https://vocabularies.cessda.eu/vocabulary/TopicClassification*

[22] *https://thesauri.cessda.eu/elsst/en/*

[23] *Povedna je misel, ki jo je na nedavnem sestanku delovne skupine RDA podal George Alter iz Univerze v Michiganu: »Sodeloval sem pri oblikovanju preverjenega nabora pojmovnih opredelitev za demografijo. Obstaja veliko število slovarjev, v smislu načel FAIR je to velik problem. Če se koncept/spremenljivka pojavi v dveh podatkovnih nizih – kako veste, ali sta enaka. Načeloma bi lahko uporabili trajni identifikator FAIR. Če sta trajna identifikatorja enaka, je koncept enak. Kaj storiti, če se trajni identifikatorji pojavljajo v različnih preverjenih naborih pojmovnih opredelitev? Če med temi ni povezave, ne morete ugotoviti, ali sta pojma enaka ali različna. Prehajamo v svet z več deset preverjenimi nabori pojmovnih opredelitev, potem je nemogoče uporabiti trajne identifikatorje za primerjavo konceptov.« Glej: https://www.rd-alliance.org/groups/vocabulary-services-interest-group.html*

Zgled, ki ga bomo predstavili kot primer enega od možnih ciljev tematske zbirke, so pojmovno označene zbirke raziskovalnih instrumentov (anket) in anketnih vprašanj. Konzorcij CESSDA koordinira vzpostavitev Evropske banke vprašanj (ang. *European Question Bank,* EQB), kamor so bila na začetku poleg anketnih vprašanj iz serije mednarodne ankete Evropska raziskava vrednot (*European Values Survey*, EVS) vključena anketna vprašanja iz zbirke vprašalnikov *Ethnic and Migrant Minorities* (EMMs). EMM povezuje raziskovalce iz mednarodnega okolja po Evropi, da prispevajo in črpajo iz tematske zbirke vprašalnikov in z njimi povezanih raziskovalnih podatkov. EMM je bila ena od t. i. tematskih podatkovnih skupnostih, vključenih v pilotne projekte v evropskem projektu Social Sciences and Humanities Open Cloud (SSHOC) (Saji in Morales, 2020). Njihovo sodelovanje je bilo namenjeno preizkušanju pristopov, ki so jih razvili strokovnjaki v podatkovnih arhivih, pri znanstvenih projektih raziskovalcev z določenega tematskega področja. Med cilji je bila identifikacija anketnih vprašanj iz preteklih raziskav za namen ponovitve v novih raziskavah in vsaj v omejenem obsegu *ex post* harmonizacija spremenljivk za namen združevanja podatkov med državami in skozi čas (Morales et al., 2021a).

Pri izvedbi so se srečevali z različnimi izzivi, ki so relevantni tudi za zasnovo zbirke podatkov o okolju. Pilot izdelave evidence anketnih vprašanj o migracijah je pokazal na omejitve pri količini vprašalniških enot, ki jih lahko z danimi človeškimi viri in orodji obdelajo. Zato so za namen preizkusa pristopa s pomočjo skupnosti raziskovalcev, zbranih okoli zbirke EMM, določili tematske prioritete znotraj širšega nabora identificiranih tematik. V popisu vprašalnikov so zajeli 29 t. i. glavnih tematik, znotraj razdeljenih na podtematike (Morales et. al., 2021b).

Pri pregledu anketnih vprašanj v pilotu SSHOC so uporabili standard DDI3 – Lifecycle,[24] ki temelji na semantičnem modelu ISO/IEC 11179 (2023). Posameznim instancam vprašanj iz preteklih izvedb anket je pripisana konceptualna spremenljivka. Konceptualna spremenljivka tvori družino vprašanj, ki jim je skupna ista konceptualna spremenljivka, npr. da so to ponovitve vprašanja v različnih jezikih. V povezavi s konceptualno oznako je funkcionalnost, ki določeno vprašanje poveže z vsebinsko sorodnimi vprašanji, kar je v pomoč pri iskanju primernih spremenljivk za dani namen.

Banke anketnih vprašanj vzpostavljajo tudi drugi podatkovni centri po svetu.[25] Ker je, kot smo omenili, z beleženjem besedila in kategorij odgovorov veliko dela, so te banke vprašanj večinoma namenjene kontinuiranim

[24] *Na https://ddialliance.org/ so dostopne različne verzije standarda DDI.*

[25] *Glej pregled ponudnikov iz Velike Britanije in drugod po svetu na UKDS: https://ukdataservice.ac.uk/help/other-data-providers/question-banks/.*

anketnim raziskavam, ki več let sistematično ponavljajo določena vprašanja. Tovrstni pregled je lahko osnova za tvorbo preoblikovanj izvedenih spremenljivk v harmonizirano skupno osnovo. Tako ustrezno zabeleženi identifikatorji vprašanj na ravni koncepta – lahko je to kar ime pripadajoče spremenljivke, ki se ohranja skozi leta – omogočajo združevanje podatkov in so hkrati uporabni pri izvedbi novih ponovitev. Takšno napredno orodje za združevanje in harmonizacijo podatkov, ki imajo skupne »latentne konstrukte« oz. v naši terminologiji koncepte, so skonstruirali pri nemški družboslovni podatkovni infrastrukturi GESIS (Singh in Roth 2022). Uporabnik si lahko sposodi računalniško kodo oz. skripte v programskem jeziku R, tako kot je to zastavljeno v pristopu pri znanstvenih revijah za namen reproduktibilnosti (Koren et al. 2022), in si skonstruira ustrezne kombinacije podatkov za konkretni analitični namen.

Primeri označevanja spremenljivk o okoljskih vprašanjih

Pri globokem iskanju po podatkih so lahko v pomoč tematske oznake spremenljivk, kot so npr. prevzete iz omenjenega tezavra ELSST. Njegova nedvomna prednost je večjezičnost in tudi to, da je v osnovi nastal s kombinacijo vnaprej pripravljenih pojmovnih kategorij iz predhodnega družboslovnega tezavra UNESCO (Balkan in Bell, 2015), obenem pa so ga posodabljali skladno s potrebami po opisih obstoječih spremenljivk v podatkovnih virih. Tovrstne oznake bi v prihodnosti lahko generirala tudi orodja umetne inteligence, še vedno pa bi za pripravo podatkov za usposabljanje modelov (treniranje) potrebovali človeški prispevek.

Pri iskanju spremenljivk in anketnih vprašanj obstajajo tudi bolj tradicionalni pristopi, npr. v longitudinalnem projektu *Slovensko javno mnenje* vzdržujejo tematsko poindeksiran pregled anketnih vprašanj (Švara, 2023). Oznake vprašanj so generirane induktivno in z uporabo vsakdanjega jezika ter se tako približujejo neposrednemu pomenu, kakor je zajet v besedilu vprašanj. V pregledu ponudijo oznake EKOLOGIJA 25 izvirnih vprašanj, ODPADKI, RADIOAKTIVNOST nadaljnjih 40, OKOLJE, VAROVANJE OKOLJA 174 izvirnih vprašanj. Tu so še oznake, kot so NESREČE, DRUŽBENA GIBANJA, ENERGIJA, OBNOVLJIVI VIRI ipd., kjer se skrivajo nadaljnja anketna vprašanja v zvezi z ekologijo. Ta delitev nakazuje vsebinsko večplastnost ekoloških tematik, saj so lahko vezane na lokalne vidike posameznih onesnaževalcev (lokalna industrija, jedrski odpadki ...) ali pa globalne, kot so podnebne spremembe. Delitev gre tudi po črti področij ekoloških vprašanj, kot so dileme glede potreb po energiji in podpore ter pripravljenosti za uvajanje obnovljivih virov, varovanja narave in biološke pestrosti ipd. Posebna tema raziskav je pogosto tudi promet: tako so prisotne velike anketne raziskave podpore pri umeščanju avtocest (Toš, 1999;

Kos, 2000; Toš in Kos, 2000; Kos, 2004), pa tudi podatki o uporabi mestnega prometa (Kos et al., 2018).

Splošnejše oznake tipov spremenljivk na ravni konceptov v družboslovnih anketah bi lahko bile razdeljene na sociotropne ocene stanja okolja in na egotropne ocene samega posameznika. Primer za prvo je ocena razširjenosti onesnaženosti, tudi v smislu, koliko to ogroža posameznika. Na posameznika osrediščene ocene pa so lahko strah (npr. pred jedrskimi nesrečami), mnenja in stališča glede različnih problemov, pa vse do posameznikovega poročanja o lastnih navadah in angažiranosti v zvezi z okoljem (primerjaj Fabjančič, 1997). Vsako od teh nadalje lahko delimo po področjih, npr. ekonomski vidiki ekoloških vprašanj, vsakdanje navade, kot je pogostost sortiranja odpadkov, politično delovanje v smislu podpore družbenim gibanjem idr. Ali pa se iskanje izvaja prek prostega besedila vprašanj.[26]

Teoretsko podkrepljeni viri konceptualnih ozadij

Za iskanje in ovrednotenje podatkov so koristne tudi klasifikacije podatkov glede na tipe, kot so ocene stanja, dejanski podatki o okolju, prepričanja, stališča, navade in mnenja. Tako raziskovalci v svojih analizah ločujejo npr. med okoljskimi stališči, okoljskimi navadami, pripravljenostjo delovati v prid okolju finančno (v ang. *environmental attitudes; pro-environmental behavior; willingness to pay*) (Meyer in dr., 2022). Izčrpno dokumentirani podatki ponujajo poglobljen vpogled v koncepte, anketna vprašanja in spremenljivke ter z njimi povezana gradiva, vključno z objavami, ki so nastale na njihovi podlagi.

Vzemimo primer mednarodne ankete ISSP o okolju (ISSP Research Group, 2023). S tematskim modulom povezana dokumentacija se začne s poročilom o raziskovalnih izhodiščih za pripravo vprašalnika. Samo poročilo operira z dvema nivojema pojmovanj: katere raziskovalne tematike vključiti in kakšna naj bodo vprašanja, ki zajemajo določeno tematiko, se pravi njihova operacionalizacija. Tako npr. razpravljajo o vključitvi tematike prepričanj/skepticizma o podnebnih spremembah (ang. *beliefs*), v širšem smislu zaskrbljenosti zaradi okolja (ang. *environmental concern*), ki bi ga bilo zanimivo povezati s pripravljenostjo za ravnanja v prid okolju (ang. *pro-environmetal behaviour*). Predlagana operacionalizacija za prvo od tematik vključuje vprašanja, kot je prepričanje, čemu pripisati podnebne spremembe: *»Do you think climate change is caused by natural processes, human activity, or both?«* V podporo vključitvi posameznih tematik in njihovih operacionalizacij navajajo preteklo literaturo in pretekle izvedbe raziskave. Temu prvemu koraku k predlogu tematik, ki naj jih vsebuje modul,

[26] *Primer iskanja podatkov po besedilu vprašanj glej Štebe, 2016*

sledi skupinska presoja predstavnikov sodelujočih držav, ki vodi do končnega originalnega vprašalnika. Ta je podlaga za prevode v različne jezike.

Izvedena anketa privede do podatkov, ki so retrospektivno dokumentirani v poročilu o dejansko vključenih spremenljivkah (GESIS, 2023). V primeru anket ISSP, ki jih dokumentira GESIS, so v opisu vsebin, zajetih v podatkih, podrobno našteti posamezni koncepti na nižji ravni, na ravni vsebovanih spremenljivk, npr. v povezavi s podnebnimi spremembami: *attitude towards climate change (the world's climate has not been changing, the world's climate has been changing mostly due to natural processes, the world's climate has been changing about equally due to natural processes and human activity, the world's climate has been changing mostly due to human activity).* Sam opis raziskave vsebuje tudi seznam spremenljivk z angleškim besedilom vprašanj, po katerih je mogoče iskati. Priloženi pa so tudi vprašalniki v drugih jezikih. Dokumentacija na ravni spremenljivk in opis raziskave so skladni z že omenjenim uveljavljenim standardom za družboslovne podatke *Data Documentation Initiative* <*DDI*>. Človeško in strojno berljiv zapis dokumentacije spremenljivk – poleg besedila vprašanj in odgovorov ter dodatnih navodil za izpolnjevanje ankete – vsebuje imena spremenljivk in kratke oznake (ang. *labels*), kakor so vključene v podatkovno datoteko. V povezavi z informacijami o projektu ISSP je tudi pregled narejenih raziskovalnih poročil z uporabo podatkov, ki ima podoben pomen kot v zaključku prispevka omenjeni primeri študij z uporabo podatkov v UKDS. To je precej izčrpna bibliografija publikacij,[27] ki so nastale z uporabo podatkov serije raziskav ISSP, med njimi tudi štirih ponovitev modula Okolje (letnice izvedbe 1993, 2000, 2010 in 2020). Podana so tudi priporočila, kako citirati podatke (ISSP Research Group, 1995, 2003, 2019 in 2023), kar je pomembno tudi z vidika, da so objavljeni podatki še vedno premalo vidni in upoštevani kot samostojen znanstveni rezultat. K boljšemu pregledu in povezljivosti znanstvenih rezultatov GESIS prispeva s tekočim posodabljanjem informacij o znanstvenih objavah, ki uporabljajo podatke iz raziskav. Te v novejšem času identificira s pomočjo stalnega identifikatorja podatkovne objave, ki je vključen v citat v članku, v tem primeru je to DOI. Konkretni podatki raziskave ISSP o okolju so še zelo sveži, tako je med publikacijami, ki temeljijo na obravnavanih podatkih, trenutno samo Meyer et al. (2022).

Stalni enolični identifikatorji za verzije podatkov in za vsako spremenljivko omogočajo, da se avtor v članku sklicuje na določeno verzijo podatkovne datoteke oz. še bolj konkretno, v njej vsebovane spremenljivke. Spremenljivko v besedilu lahko navede z imenom, skupaj s stalnim

[27] *ISSP bibliography. Bibliografijo ureja Tom W. Smith, direktor US General Social Survey pri NORC, ki še naprej zbira informacije o publikacijah, v katerih nastopata vsaj dve državi.*

enoličnim identifikatorjem datoteke (npr. DOI), ki je del citatne navedbe. Na ta način prihrani prostor v članku, saj podrobnosti o uporabljeni spremenljivki ni potrebno ponovno prepisovati. Sklicevanje na istovetno spremenljivko, katere identifikator (npr. ime spremenljivke v določeni datoteki) je vsebovan v priloženi programski kodi za obdelavo podatkov (pripravo in analizo), poleg zagotavljanja reproduktibilnosti objavljenih rezultatov omogoča preverjanje in primerjavo, v katerih člankih so avtorji uporabili iste spremenljivke. Za potrebe metaanalize bi tako lahko generirali podatke iz rezultatov več študij. Še robustnejši sistem strojno berljivega okolja obstojnih referenc na spremenljivke predlagajo raziskovalci iz nemškega GESIS (Klas et al., 2022).

Interdisciplinarni viri

V kolikor se v tematski zbirki oblikuje pregled obstoječih podatkov po tipih in podtematikah, se lahko uporabniki odločijo za zbiranje novih podatkov, če ugotovijo, da kaj pomembnega z določenega področja manjka (Open Data Manchester, 2023). Prav tako pa je še zlasti za načrtovanje politik za reševanje raznih okoljskih problemov potrebno upoštevati različne tipe podatkov z različnih področij: prometa, podnebnih sprememb, zdravstvene in socio-ekonomske (primerjaj Lee in Sener (2020) za podatke o pešcih in kolesarjih). Glede na to, da so podatki z različnih področij pogosto dostopni pri različnih ponudnikih podatkovnih storitev, če sploh so dostopni, imajo oblikovalci politik težave z analizo in določanjem najboljših ukrepov. Tako da sta koristna nadgradnja in poenotenje obstoječih ločenih podatkovnih storitev različnih disciplinarnih področij, da bi bile dostopne z enega mesta.[28] Skupina, ki se ukvarja s kmetijskimi in okoljskimi podatki pri RDA, ugotavlja glavne izzive, kot so neenotnost standardov ob izredni raznolikosti podatkov, pomanjkljive usmeritve glede ravnanja s podatki po ustanovah in problemi lastništva in anonimnosti podatkov, ki jih lahko rešuje samo medpodoročno povezovanje in usklajevanje pristopov (Clare in Barker, 2023).

Za zgled je lahko še en primer s področja migracij: projekt Whole-COMM (Yilmaz, 2022) predstavlja inventorij statističnih podatkov. Pregledi obstoječih virov in podatkov so lahko v pomoč pri raziskovanju na podatkih utemeljenih ukrepov s področij politik integracije, ocen javnosti in družbene kohezivnosti. Ena od zanimivih ugotovitev je pomanjkanje oz. odsotnost podatkov na nivojih nižjih od nacionalnih, kar omejuje primerljivost.

[28] *Glej https://www.greatermanchester-ca.gov.uk/what-we-do/digital/case-studies/case-study-integrating-environmental-socioeconomic-and-health-data-to-address-policy-challenges/.*

Vrednost okoljskih podatkov za ponovno uporabo in prispevek v družbi

Promocija uporabe podatkov je pomemben del aktivnosti, ki jo velja upoštevati že pri zasnovi tematskih zbirk. Pomen zbirke o okolju in energiji v UKDS npr. utemeljujejo s potrebo po »razumevanju medsebojnih vplivov med družbo in naravnim okoljem na vseh ravneh, lokalni, regionalni, nacionalni in nadnacionalni, kar je ključnega pomena za razvoj trajnostnih družb, zato UKDS omogoča dostop do podatkov, od porabe energije v gospodinjstvih do globalnih zbirk podatkov o izpustih toplogrednih plinov, ohranjanju ter proizvodnji in porabi nafte, plina in električne energije po vsem svetu«.[29] Na krajši način in poljudno predstavljajo primere raziskav, v katerih so raziskovalci uporabili podatke, objavljene v UKDS.[30] Na ta način raziskovalce, študente in širšo javnost izobražujejo o pristopih sekundarne analize in izkoriščanja obstoječih podatkov.

Omeniti velja, da se raziskovalne organizacije v Veliki Britaniji sistematično posvetujejo z javnostmi, da ugotovijo interes in določijo teme raziskovanja glede na potrebe na nekem konkretnem področju. Npr. Univerza v Warwicku je leta 2021 ustanovila panuniverzitetno vozlišče za vključevanje javnosti v delo univerze. S ciljem demokratizacije znanosti skušajo raziskovalci ljudi pritegniti v vse faze raziskovanja, od zasnove raziskave do objave znanstvenih rezultatov.[31] Morda obroben, toda ilustrativen za razmišljanje o vlogi javnosti pri odprti znanosti je primer regulacije dostopa do občutljivih podatkov za raziskovalne projekte. V britanski Podatkovni banki SAIL (javno generirani zdravstveni podatki) vse predloge za projekte uporabe podatkov pregleda neodvisni *Panel za upravljanje informacij*, ki med drugim ocenjuje potencial projekta za obče družbeno korist.[32] V panelu so poleg predstavnikov različnih organizacij udeleženi tudi predstavniki širše splošne javnosti. Na ta način sledijo geslu organizacije: javni podatki za javno dobro (ang. Public data for public good).

Vključevanje zainteresirane javnosti v raziskovanje je ena od novejših nalog na področju znanosti. Evropska komisija je pripravila pregled in analizo izbranih projektov, v katerih sodelujejo občanski znanstveniki in znanstvenice. Rezultati kažejo, da se večina, 69 %, v analizo vključenih projektov občanske znanosti ukvarja z naravo in biotsko raznovrstnostjo, večinoma je šlo za opazovanje ali občasno poročanje o pojavnosti vrst. Temu sledijo projekti o naravnih virih (voda, zemlja, zrak), ki skupaj predstavljajo 16 % vseh

[29] Glej: https://ukdataservice.ac.uk/find-data/browse/environment-and-energy/

[30] Npr. študija primera uporabe podatkov iz serije Understanding Society z naslovom Sick and stuck at home? Does living with health challenges influence people's energy use? (Büchs et al. 2019).

[31] https://warwick.ac.uk/wie/aboutwie/

[32] https://saildatabank.com/governance/approvals-public-engagement/information-governance/

projektov. Projekti imajo večinoma nacionalni doseg ali obsegajo manjšo enoto znotraj države, večinoma jih vodijo nevladne (41 %) ali akademske organizacije (29 %). Med priporočili, ki so nastala na podlagi analize, je tudi, da naj se javne organizacije povezujejo z aktivnostmi občanske znanosti. Za boljše sodelovanje med različnimi akterji pa bi bile v pomoč točke oz. središča, ki bi zagotavljale centraliziran dostop do virov občanske znanosti (Turbe, 2019).[33]

Pred izzivom vključevanja zainteresirane javnosti v znanstvenoraziskovalno delo stoji tudi slovenska raziskovalna skupnost.[34],[35] Pravne podlage so lahko spodbuda, da tudi v razvejani in raznoliki znanstveno-raziskovalni skupnosti v Sloveniji iščemo priložnosti za nove oblike sodelovanja. Nekatere organizacije, ki so lahko podpora pri povezovanju občanskih znanstvenic in znanstvenikov z raziskovalnimi organizacijami, so že že izkazale interes, npr. splošna Mestna knjižnica Ljubljana je v program strokovnega posveta z naslovom *Knjižnica, srce mesta 2023: Občanska znanost*[36] vključila predstavitev Arhiva družboslovnih podatkov o možnostih povezovanja z občansko znanostjo, podobna predstavitev je potekala oktobra 2022 v sklopu Strokovnega posveta in razširjene seje mreže Slovenska univerza za tretje življenjsko obdobje z naslovom *Raziskovalno učenje na univerzah za tretje življenjsko obdobje*.[37] Da občanska znanost predstavlja široko polje in številne priložnosti za povezovanje raznolikih akterjev, kaže obsežen zbornik z naslovom Izzivi občanskega raziskovanja: Izkušnje in pričakovanja iz Žirov in od drugod (ur. Mlinar, 2022). Zbirka podatkov o okolju lahko postane platforma za sodelovanje raziskovalcev in raziskovalk iz različnih disciplin, pa tudi priložnost za sodelovanje z okoljskimi nevladnimi organizacijami, ljudmi, ki so izpostavljeni okoljskemu tveganju, in posamezniki, ki lahko prispevajo znanje, izkušnje ali obratno uporabijo podatke za iskanje rešitev (za več o tej temi glej Bezjak in Masten, 2021; Mlinar, 2021).

[33] Oblikovali so tudi priporočila za občanske raziskovalne projekte, namenjene za podporo okoljskim usmeritvam EU: https://data.jrc.ec.europa.eu/dataset/jrc-citsci-10004.

[34] Glej glej Zakon o znanstvenoraziskovalni in inovacijski dejavnosti, Uradni list RS, št. 186/21, šesti odstavek 2. člena: »Znanstvenoraziskovalna dejavnost temelji na načelih odprte znanosti, kar vključuje zlasti odprt dostop (po načelu odprt, kolikor je mogoče, zaprt, kolikor je nujno) do vseh raziskovalnih rezultatov, ki morajo biti najdljivi, dostopni, interoperabilni in vnovič uporabni, pa tudi uporabo odgovornih metrik za ocenjevanje znanstvenoraziskovalne dejavnosti ter vključevanje skupnosti in občanske znanosti.« (http://www.pisrs.si/Pis.web/pregledPredpisa?id=ZAKO7733).

[35] Glej Uredbo o izvajanju znanstvenoraziskovalnega dela v skladu z načeli odprte znanosti https://www.uradni-list.si/glasilo-uradni-list-rs/vsebina/2023-01-1828/uredba-o-izvajanju-znanstvenoraziskovalnega-dela-v-skladu-z-naceli-odprte-znanosti.

[36] Glej program dogodka: https://www.mklj.si/dogodek/knjiznica-srce-mesta-2023-obcanska-znanost/.

[37] Glej program dogodka: https://www.utzo.si/wp-content/uploads/2022/10/Program-posveta.pdf.

Sklep

Arhiv družboslovnih podatkov (ADP) s prispevkom daje pobudo za oblikovanje posebne tematske zbirke raziskovalnih podatkov s področja z okoljem povezanih vprašanj. Raziskovalce in druge ustvarjalce podatkov, javne službe, agencije za raziskovanje javnega mnenja, občanske znanstvenike in znanstvenice, predstavnike in predstavnice nevladnih in civilnodružbenih organizacij, snovalce okoljskih politik in drugo zainteresirano javnost vabimo k pripravi in objavi podatkov, ki bodo lahko prispevali k iskanju odgovorov za izzive, povezane z okoljskimi vprašanji. Obenem vabimo k iskanju in nadaljnji rabi že objavljenih raziskovalnih podatkov in povezanih gradiv, ne samo v slovenskem ADP, ampak nasploh v skupnem katalogu podatkov Konzorcija evropskih arhivov družboslovnih podatkov.

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Priloga 1:

Tabela 1: RAZISKAVE O OKOLJU V KATALOGU PODATKOV CESSDA

Število raziskav po izbranih pojmih iz ELSST	Arhivi CESSDA	ADP
ENVIRONMENT – okolje	5864	57
BIODIVERSITY – biodiverziteta	76	0
COUNTRYSIDE – podeželje	229	1
ENVIRONMENTAL AWARENESS – okoljska ozaveščenost	397	0
ENVIRONMENTAL CHANGES – okoljska sprememba	701	0
ENVIRONMENTAL CONSERVATION – varstvo okolja	807	3
ENVIRONMENTAL MANAGEMENT – okoljski management	552	2
ENVIRONMENTAL QUALITY – kakovost okolja	771	9
HABITATS – habitat	21	0
HUMAN ENVIRONMENT – človekovo okolje	1089	5
LANDSCAPE – pokrajina	226	1
NATURAL ENVIRONMENT – naravno okolje	1235	5
NATURAL HERITAGE – naravna dediščina	45	1
POLLUTION – onesnaževanje	1031	5
RURAL ENVIRONMENT – podeželsko okolje	897	6
SOCIAL ENVIRONMENT – družbeno okolje	5208	57
SUSTAINABILITY – trajnostni razvoj	257	2
URBAN ENVIRONMENT – urbano okolje	1100	5
WEATHER – vremenski pogoj	346	12
WILDLIFE – živalski in rastlinski svet	84	0
ENVIRONMENTAL SCIENCES – okoljske vede	2101	7
ENVIRONMENTAL ENGINEERING – okoljsko inženirstvo	81	0
HUMAN ECOLOGY – ekologija človeka	53	0

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THE WAR IN UKRAINE IN A COMPARATIVE PERSPECTIVE

Abstract. *The war in Ukraine is the biggest, bloodiest and longest war in Europe since 1945. Its initial stage holds similarities with several other armed conflicts and wars in the last 50 years on Cyprus and in the territories of the former Soviet Union and the Socialist Federal Republic of Yugoslavia (SFRY). Among the cases in ex-Yugoslavia, greatest similarity is seen with the war in Croatia (1991–1995). This conflict stemmed from two almost simultaneous breakdowns of multinational 'socialist federations' and their communist regimes that were similar in structure. The dissimilarity of the second stage of the war in Ukraine and the war in Croatia is primarily due to the processes of NATO and EU enlargement coupled with the USA's policy of using NATO enlargement and Ukraine as tools to harm and weaken Russia. The conflict about Ukraine and the promise of NATO membership given to it has become an indirect war between Russia and the US-led West, where Ukraine is the West's proxy and the main victim of the war. Like what occurred in Croatia in August 1995 and in Azerbaijan in September 2023, the final outcome of the war in Ukraine will be decided on the battlefield, not around a diplomatic table. Still, it will be very different from that in Croatia. Responsibility for the war in Ukraine and its consequences must be shared between the two direct belligerents, the co-responsible USA, and other NATO members.*

Keywords: *Ukraine, Russia, Croatia, USA, NATO, internal war, interstate war*

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Introduction

The purpose of this article is to shed light on the wider context in which the war in Ukraine erupted in 2014, its two distinct phases, along with its causes, main parameters and consequences. The war in Ukraine is compared with several other wars, particularly in its first phase when it was the most similar to the war in Croatia (1991–1995) and in its second phase when it was with the wars in Cyprus (1974) and in the Socialist Federal Republic of Yugoslavia (SFRY) (1999). Finally, the political responsibility for the wars in Ukraine and its likely outcome are also considered.

The war in Ukraine has, for good reason, recently attracted considerable international attention. This armed conflict is the biggest, bloodiest and longest war in Europe since 1945. It has also produced a strong impact on Europe and the broader international community.

According to two measures (at least), the war in Ukraine has been exceeded by a number of other wars since 1945, namely those occurring in Asia and Africa. In terms of mortality, it has been exceeded by the wars in Korea, Vietnam, Algeria, Sudan, Rwanda, Burundi and Iraq. In terms of duration, it is unlikely to be longer than the wars in Vietnam, Algeria, Sudan and Afghanistan. Among all these armed conflicts, the war in Ukraine may be sharply distinguished by the reverse ratio between military and civilian mortality.

In the European framework, the central trigger of the first stage of the war in Ukraine was similar to what caused the armed conflicts and outright war occurring between 1974 and 1999 on Cyprus, in Moldova, Georgia, the Russian Federation, Azerbaijan as well as the territory of the SFRY. Among the former, the early stage of the war in Ukraine most resembles the war in Croatia (1991–1995).

Separated by temporal and geographic distance, these two wars have several features in common. The causes of each war were tangibly related to profound geopolitical changes underway in Europe about 35 years ago. These changes entailed the slackening and termination of the Cold War between two military-political blocs and the wave of liberal-democratic transformation of political systems in Eastern Europe. Over the span of 3 years, about 30 different state entities declared their sovereignty in the area of 3 'socialist federations' (Yugoslavia, Soviet Union, Czechoslovakia). Of these, 23 entities survived and soon gained universal recognition as sovereign states, including Croatia and Ukraine. The war in Croatia, which started prior to its international recognition, and the war in Ukraine 22 years after its recognition as an independent state, display a number of similarities that not accidental.

The similarities

The wars involved two adversary pairs of neighbouring and partly overlapping Slavic nations. These wars unfolded in the territories of two defunct 'socialist federations' – the SFRY and the USSR. The causes of both wars were closely related to the almost simultaneous breakdowns of these two federations in 1991 and the demise of their communist regimes that had preceded and caused the breakdowns.

The institutional structure of the SFRY was modelled after and closely resembled the structure of the older 'socialist federation', the USSR. Shared features of the two included the division of each federation into full-fledged republics and autonomies. Most or all of these federal units were ethnically designated. The minorities of the biggest ethnic groups (Serbs and Russians) were not accorded autonomy within other republics. In both cases, war followed the declarations of 'sovereignty' and 'autonomy' and referenda organised by some members of the Serbian community in southwest Croatia and some members of the Russian and Russian-speaking community living in Eastern Ukraine. In each case, the central governments refused to negotiate with the insurgents and decided to suppress them militarily. The armed conflicts in Croatia and Ukraine developed into partly different combinations of civil and interstate wars. The civil war component referred to armed conflict between the nationalist regime in the former second-most populous republic on one hand, and part of the biggest national minority related to the largest ethnic group in the former federation, on the other. The civil war deepened the divisions based on loyalty within both the Serbian community in Croatia and the Russian community in Ukraine. Each war was fought almost exclusively on the territory of the former second-most populous republic, which suffered the most. In both wars, the two sides were responsible for gross violations of international humanitarian law. International sanctions were applied in these two wars.

Apart from these and other similarities, the two wars also reveal several important dissimilarities.

The specificity of the war in Ukraine

While the causes of both wars are closely related to the breakdowns of two multinational federations, its effects in Ukraine erupted on the surface with a delay of 20 years. For two and a half centuries, until 1917 part of the Russian empire named Ruthenia and later Malorossiya, in 1918 it briefly became an independent state under the new name Ukrainian People's Republic. The name Ukraine remained under the Bolsheviks and in 1922 Soviet Ukraine became a constituent republic of the Soviet Union. Over several decades, the territory of Soviet Ukraine was more than doubled by Moscow in several successive stages in 1920–1922, 1939–1940, 1945–1947 and 1954. This was accomplished by including into it the lands of Novorossiya, with millions of Russian and Russian-speaking people in the East and South, as well as annexed parts of Poland, Czechoslovakia, Romania and part of Moldova in the West. In all of these cases, this was done without their population's consent. In 1991, all these territorial gains became parts of the independent Ukraine within its internationally recognised borders, whereas the collective rights of the Russian and Russian-speaking population were left unprotected. The non-recognition of these rights by the Ukrainian authorities became a growing political problem with the rise of Ukrainian nationalism. Combined with divergent attitudes in Western and Eastern parts of the country concerning Ukraine's relations with Russia, EU and NATO language-related problems contributed tangibly to political explosions in Ukraine in February/March 2014.

Since 1991, two processes have altered the geopolitical map of Europe. These are the Eastward expansion of the US-dominated NATO along with the closely intertwined enlargement of the European Union. The first stage of these two processes in 1990–1991 – the absorption of Eastern Germany into both organisations – had no impact on the internal crisis in Yugoslavia, including the conflict in Croatia. Two decades later, however, the process of NATO expansion had already reached the borders of both Ukraine and Russia, thereby adding a very real extra-regional component to the conflict in and about Ukraine.

For over two decades, one of the USA's geostrategic goals has been to foster 'colour revolutions' to bring about regime change in the post-Soviet space, including Ukraine and also Russia. By using Ukraine as a tool, the USA has endeavoured to harm and weaken Russia. Under US pressure and notwithstanding German and French objections, at the NATO summit held in Bucharest in 2008 Ukraine was promised membership in the alliance, yet without stating a date. Openly and strongly opposed by Russia, this decision unleashed a chain of events, 6 years later leading to war in Ukraine. The European Union and its policy of Eastern neighbourhood materially contributed to these developments. The prospect of an association agreement with the EU deepened the internal political conflict in Ukraine, and also motivated a mass protest movement that was exploited in February 2014 to stage a US-guided coup d'état in Kyiv.

The combination of Ukraine's promised membership in NATO and the new regime in Kyiv fully dependent on the USA foretold that Russia would certainly lose its old, naval base in Sevastopol, for which it had paid high rent since 1992. Moreover, as a NATO naval and air base, Sevastopol would pose a direct threat to Russia's geopolitical position in the Black Sea and

Eastern Mediterranean area. To thwart this threat, lightly armed detachments of Russian marines, already legally stationed on Crimea, were ordered to move in unmarked uniforms to take control of the entire peninsula. They did so without facing any resistance, on Kyiv's strict orders, from the about 22,000 Ukrainian troops or inflicting any casualties. The Ukrainian officialdom then simply vacated Crimea. This takeover was soon followed by a very successful referendum accompanied by international observers on approving Crimea's legal separation from Ukraine and that it would rejoin Russia. Moscow thus took back Nikita Khrushchev's present to Ukraine on the occasion of the 300th anniversary of its unification with Russia.

First stage of the war in Ukraine

Closely related to the dramatic developments in Kyiv, there were uprisings in several Ukrainian cities and proclamations of 'sovereignty' and 'autonomy' in Lugansk and Donetsk. These uprisings largely featured protests against the discriminatory measures adopted by the new authorities against the Russian and Russian-speaking population. The ultranationalist regime in Kyiv responded on 13 April 2014 by branding the protesters terrorists, declaring a "wide anti-terrorist operation" and entrusting the Ukrainian Army to carry it out. This military operation launched the first stage of the war in Ukraine. In its attacks on the Donbas autonomists, the Ukrainian Army employed bombers, tanks, armoured vehicles and artillery while battalions of Ukrainian ultranationalist volunteers with neo-Nazi leanings and financed by Ukrainian oligarchs used artillery and light weapons. On the defending side, there were about 35,000 members of the territorial people's militias of the Donetsk and Lugansk People's Republics as well as Russian and other (including Serbian) volunteers. The Russian Federation offered multi-sided support to the two besieged republics, encompassing financial, material, humanitarian and military assistance. Russian professional military personnel were integrated into the local militias and did not operate as separate and regular units of the Russian Army. At the same time, the US and British armed forces offered very sizeable material and other military assistance to the Ukrainian Army, also involving thousands of advisors and instructors. In numbers, they were comparable to the Russian military personnel on the other side of the frontline.

By February 2022, this armed conflict had led to 14,000 and 20,000 dead. Two armistice agreements, Minsk 1 and Minsk 2, did not halt the Ukrainian shelling of Ukrainian territory, which was responsible for thousands of casualties among the civilian population in the two self-proclaimed republics. These attacks continued for more than 9 years, accompanied by gross violations of international humanitarian law.

In February 2015, Petro Poroshenko, the President of Ukraine signed the Minsk 2 agreement. It was co-signed by the leaders of Germany, France and Russia and unanimously adopted as a resolution by the UN Security Council, thereby becoming part of international law. The Minsk 2 agreement provided for the peaceful resolution of the conflict in Donbas. Nonetheless, Petro Poroshenko and his successor Volodimir Zelenski refused to implement most of Ukraine's 12 obligations, including the key provisions under which Ukraine was to grant constitutionally guaranteed autonomy to the Russian and Russian-speaking population in Donbas. In addition, Zelenski reneged on his pre-election promise that saw him win the election in 2019 and did not stop the war.

Second stage of the war in Ukraine

On 21 March 2021, Zelenski blatantly violated the Minsk 2 agreement and international law by ordering the Ukrainian Army to liberate the territories of the two republics and Crimea. The bulk of the Ukrainian Army was then relocated to their vicinity, clearly visible by Russian satellites. Instead of peaceful resolution of the conflict, Zelenski, no doubt with the USA's full approval, thus decided on full-scale military suppression of the Donbas autonomists and on reconquering Crimea, well aware that it would provoke a strong reaction from Russia. On 16 February 2022, upon his order the Ukrainian Army initiated the second and much more violent stage of the war. From that date on, the intensity of Ukrainian shelling started to grow from several tens to 1,500 explosions daily. Combined with movements of Ukrainian troops, this strongly indicated that a massive attack was coming as part of implementation of the March 2021 order and similar to the Georgian offensive against the self-proclaimed Republic of Southern Ossetia on 7 August 2008.

This escalation was no doubt coordinated with US President Joe Biden, who publicly predicted that Russia would invade on 16 February 2022. For the by far most frequent transgressor of international law, provoking Russia into an act of aggression fitted nicely with the USA's strategic goal. Russia's invasion of Ukraine provided a perfect occasion for demonising and isolating it internationally, to unite the West under the USA's guidance on imposing on Russia an unprecedented array of drastic economic and other sanctions. These punitive measures were expected to quickly ruin the Russian economy, hopefully bring down Vladimir Putin's regime, defeat Russia militarily without losing American lives, and cause the fragmentation of Russia into several states (as elaborated earlier publicly by Zbigniew Brzezinski and the RAND Corporation). However, these hopes have not materialised. Moreover, the effects of the Western sanctions were more harmful to the EU economies than to the Russia while in no way helping Ukraine.

Ukraine's stepping up the level of violence successfully provoked a predictable Russian response. On the political and legal levels, this entailed the Russian Federation's recognition of the two republics as independent states, signing two agreements on friendship, cooperation and mutual assistance, accepting their pleas for assistance and protection in line with Art. 51 of the UN Charter and invoking the Responsibility for Protect. On the military level, Putin was faced with the real prospect of Ukraine quashing the two client Russian-speaking parastates. This would have submitted their discriminated Russian and Russian-speaking majority population to retribution by the Ukrainian ultranationalist and assimilationist regime, causing it to flee en masse across the border. Putin could not, also for domestic reasons, afford a humiliating political defeat similar to that suffered by Slobodan Milosevic in Croatia in August 1995. Unlike in August 2008 in Georgia, he did not wait for an all-out Ukrainian attack. Putin knew full well that stronger Western sanctions than those currently in place would follow, even if Russia's response to the Ukrainian offensive were only moderate.

Probably on the basis of a faulty assessment of both Ukraine's capacity and determination to resist and the West's response, he precipitously and knowingly in violation of international law ordered a 'special military operation' in the form of an invasion of Ukraine by a limited contingent of Russian land forces. This step was combined with extensive destruction of the Ukrainian air force, the air defence system, and military infrastructure. Ignoring an axiom of military science, an invading force of some 90,000 Russian land troops was sent against the Ukrainian Army thrice superior in numbers. It was also grossly insufficient and unprepared to accomplish the officially declared task of "demilitarising" and "denazifying" Ukraine. In spite of its shortcomings, this force managed to swiftly occupy an additional 15% or so of Ukrainian territory (some as a diversion and only temporarily) and effectively protected the two republics. It additionally established and secured a land bridge between Crimea and Donbas, made the Azov Sea part of Russia's internal waters, took control of the largest European nuclear power station at Zaporizhie, and deprived Ukraine of its stocks of plutonium and uranium. These stocks would have been sufficient to make Ukraine the world's fourth-strongest nuclear power. The latter was an effective response to Zelenski's earlier declaration that Ukraine was intending to again acquire nuclear weapons. Preventing this dangerous prospect certainly served as an additional and important reason for Putin's decision.

By signing the Minsk 2 agreement in February 2015 in bad faith and then for 7 years allowing and encouraging, together with the USA, Poroshenko and Zelenski to sabotage any peaceful resolution of the Donbas conflict, the Western powers became co-responsible for the war in Ukraine transforming from a relatively limited internal war into a wider, much more lethal, bloody and destructive, predominantly interstate war. Two Western powers, the USA and Great Britain, twice prevented (in February and March 2022) the conclusion of an agreement on the ending of hostilities. By pouring in arms and munition and advocating the continuation of the war, the West has become partly responsible for Ukraine's tragedy.

The two wars compared

Still officially undeclared by the two direct belligerents, the war in Ukraine is already twice as long as the war in Croatia, and is still ongoing. There are also other important respective differences caused by the mismatch between Croatia and Ukraine in the size of their population and territory (approximately 1:10), and by the different configuration and extent of the theatres of war. Further, there are differences in the size and structure of the armed forces involved, in the disparities between Serbia's and Russia's military capabilities compared to the respective capabilities of Croatia and Ukraine. The war in Ukraine in its second stage is also unlike the war in Croatia due to the massive use of particular weapons systems (notably drones and missiles).

Vast differences also exist in the direct involvement of international organisations and other external actors in the two wars. In the autumn of 1991, the European Economic Community (EEC) sent Croatia its first mission of white-clad and unarmed observers who as impartial intermediaries tried unsuccessfully to stop the armed clashes between the Croatian police and Serbian insurgents. The United Nations established UNPROFOR (UN Protection Force) in February 1992, operating from Zagreb. It was followed by UNCRO (UN Confidence Restoration Operation in Croatia) in 1995–1998, UNTAES (UN Transitional Administration in Eastern Croatia) in 1996–1998, and UNMOP (UN Mission of Observers in Prevlaka) in 1996–1997. For several years, the UN-supported International Conference on Former Yugoslavia operating from Geneva was active. In comparison, there have been no UN or EU peacekeeping or observer missions in Ukraine. The OSCE had no observer missions in Croatia, although it deployed two such missions in Ukraine, notably the sizeable OSCE Special Monitoring Mission from 2015 until March 2022. In addition, the OSCE played an active role in preparing and concluding the Minsk 1 and Minsk 2 ceasefire agreements. It was the only peace-promoting international organisation during the war in Ukraine.

Extra-regional states were not openly involved in the war in Croatia. In 1991–1992, the Croatian forces included 456 foreign fighters (British, French, German et.al.) accompanied by about 2,000 private American military instructors. On the other hand, Ukraine has received huge support from several dozen foreign states, in particular the USA, other NATO and EU members in the form of heavy arms, ammunition, training, intelligence, economic and humanitarian assistance. In 2022, around 11,800 foreign fighters, mercenaries and volunteers joined the Ukrainian Army (Poles, Americans, Canadians and others, also some 300 Croatians). This strong external involvement transformed the local war into an extra-regional armed conflict between Russia and the US-led collective West, with Ukraine acting and sacrificing its soldiers and itself as the West's proxy.

The war in Croatia and its outcome were closely linked with the war in neighbouring Bosnia and Herzegovina, while there has been no similar regional linkage of the war in Ukraine or its spillover into Moldova. The war in Ukraine has also had by far a bigger international political and economic impact on other countries, not only in Europe, than the war in Croatia.

Most importantly, there are enormous differences between the two wars in the number of dead (at least 1:25), number of refugees and displaced persons (approximately 1:25), and extent of destruction and amount of economic damage (at least 1:20). The war has inflicted considerably greater damage on Ukraine as a state and on Ukrainian society than the war did on Croatia. Since 2014, the population under Kyiv's control has so far been reduced by at least one-third, and the territory by close to one-fifth. It is estimated that the Ukrainian Army, National Guard and volunteers have suffered well over 350,000 deaths. Ukraine has also lost a good deal of its industrial capacity, agriculture, energy generation and critical infrastructure. The dragging on war of attrition is sapping Ukraine's ability to sustain itself, at least in its already rump shape. The war's continuation suits the USA's geostrategic, chiefly anti-Russian objectives, whereas Ukraine is paying a horrible price for them.

The first stage of the war in Ukraine and the war in Croatia revealed substantial similarities as far as their causes and destructive consequences were concerned. In its second stage, the war in Ukraine may be sharply distinguished from the war in Croatia by its magnitude, destructive outcomes, violations of international humanitarian law, international impact, and the involvement of great powers. At the beginning of the second stage of the war in Ukraine, on 24 February 2022 the Russian Army pre-empted the anticipated Ukrainian version of an offensive akin to the Croatian operations "Flash" and "Storm". It not only prevented the possibility of Volodimir Zelenski's triumphant entrance in Donetsk like Franjo Tudjman's entrance in Knin. The Russian Federation also annexed by way of referenda four Ukrainian provinces with strong Russian and Russian-speaking majorities in their populations and the Russian Army occupied a good share of them. In 2014 and 2022, Moscow thus took back a considerable part of former Novorossiya given to Soviet Ukraine in 1920 and 1954. Unlike in Croatia, the conflict in Ukraine has thus far added two more de facto changes to the list of the more than three dozen new or de facto changed borders between European states since 1945.

Responsibility for the war in Ukraine

In a speech given at the UN General Assembly, US President Joe Biden ascribed Russia with full responsibility for the war in Ukraine. Yet, in fact, several states are directly responsible and indirectly co-responsible for its outbreak, dimensions and continuation. First, the Ukrainian Army initiated the war in April 2014 according to orders of the Ukrainian interim Presidency. Under two subsequent Presidents Poroshenko and Zelenski, Ukraine violated two armistice agreements and sabotaged realisation of the Minsk 2 agreement on peaceful resolution of the Donbas conflict. President Zelenski failed to fulfil his pre-election pledge to end the war, a pledge that had seen him win the election in 2019. On 21 March 2021, he ordered the Ukrainian Army to attack Donbas and Crimea in direct violation of both the Minsk 2 agreement and international law. The Ukrainian leadership's instructions to steeply increase the artillery shelling of Donetsk after 16 February 2022 together with the movement of troops provoked an invasion by the Russian army, leading to the armed conflict transforming from an internal to an interstate war. In March–April 2022, President Zelenski reneged on an initialled agreement with the Russian Federation on resolving the conflict, as forged with assistance from the leaders of Israel and Turkey as intermediaries. Ukraine is responsible for the casualties and damage caused by the Ukrainian Army.

On the other hand, the Russian Federation has grossly violated the UN Charter, the Helsinki principles, and a dozen international treaties and agreements by which it guaranteed Ukraine's security and sovereignty within its internationally recognised borders. In February 2014, it committed an act of aggression by occupying and annexing Crimea. On 24 February 2022, it committed a second act of aggression by invading, occupying and annexing four Ukrainian provinces. The Russian Federation is responsible for the casualties and huge damage the Russian armed forces have caused in Ukrainian territory.

The leading NATO members are indirectly co-responsible for the outbreak and continuation of the interstate conflict and war in and over Ukraine. This primarily applies to the USA, which knowingly unleashed a chain reaction in the conflictual relations between NATO and Russia and used NATO to embroil the EU in this conflict, even though that contradicts the objective economic and other interests of many EU members, notably Germany. This chain reaction led to the political conflict deteriorating into a war in which the USA is using Ukraine as a tool to harm and weaken Russia. Germany and France with their swindling signatures under the Minsk 2 agreement and with subsequent policies for 7 years allowed Ukraine's sabotaging of peaceful solution of the Donbas conflict. As leaders in the European Union's collective foreign policy, they encouraged and supported Ukraine's active preparations for a war with Russia. In March–April 2022, the USA and Great Britain prevented the conclusion of an initialled Russian-Ukrainian agreement on resolving the conflict that had been agreed upon with the assistance of the leaders of Israel and Turkey as intermediaries. The members of NATO and the EU politically are encouraging and, by providing arms and funds to Ukraine, enabling the continuation of this war. Without such support, the war in Ukraine would already be over.

The NATO and EU members will certainly not achieve their main declared goal – Ukraine's victory and hence Russia's military defeat. They will thus suffer a political defeat. This applies chiefly to the leader of the West – the USA. After Afghanistan, it will be one more defeat. Nevertheless, the USA has this time been successful in realising several related goals. The USA has solidified its hegemony in the Western camp and in most of Europe, rejuvenated NATO, attracted two new members Finland and Sweden, and bolstered its dominant role in the alliance, subordinated even further and simultaneously economically and politically weakened the European Union, for quite some time poisoned Germany's and the EU's relations with Russia, and inflicted very considerable economic and political damage on Russia.

Conclusion

Ukraine is today much farther away from accomplishing its cardinal strategic goal – to re-establish its sovereignty on the entire internationally recognised territory – than it was in February 2022, let alone in February 2014. Moreover, another goal remains unattained. It was stated in Zelenski's decree as a condition for lifting the prohibition on any negotiations with the Russian Federation – to remove Putin from the position of President. On the other hand, the Russian Federation has achieved some of its goals, albeit not the two declared principal ones – Ukraine's "neutralisation" and "demilitarisation". Accordingly, responsibility for the war's continuation and compliance during it with international humanitarian law must be shared by the two direct belligerents – Russia and Ukraine.

Due to the two sides' mutually exclusive objectives, the final outcome of the war in Ukraine will not be decided around a diplomatic table as a compromise. Like what happened in Croatia in August 1995 and very recently in September 2023 with the fate of Nagorno-Karabakh, it will be decided on the battlefield. Still, it will be very different from both cases mentioned above and certainly will not be viewed as just by both belligerents. Just like how almost all wars end.

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STATE-CENTRISM IN INTERNATIONAL RELATIONS: EXAMINING THE CONSTRUCTION OF NON-STATE COLLECTIVE ACTORS IN HUMAN RIGHTS SCHOLARSHIP**

Abstract. *This article addresses the deficiency in the area of human rights scholarship in International Relations (IR) by examining the theoretical advancements in IR theory that have led to the emergence of non-state collective actors as a pertinent research topic. It provides a review of the trajectory of the constructivist theoretical approach, which has brought major advancements in how international non-state actors are conceptualised in the human rights IR literature. This considers the limitations and implications of side-lining collective non-state actors within IR theory, arguing that expanding the theoretical understanding of how different collective actors are constituted and attributed with agency can enrich IR human rights scholarship. The article also proposes a potential way forward with respect to non-state collective actors in human rights in IR by identifying a research programme based on practice-oriented approaches to help broaden the ability of scholars to foster interdisciplinary conversations. Expanding along these lines would bridge the existing boundaries within scholarly and disciplinary contexts.*

Keywords: *non-state actors, state-centrism, collectives, international relations, human rights, international actors, constructivism*

Introduction

In the last 30 years, international relations (IR) scholars have been increasingly challenging the state-centrism of the discipline (Keyman, 1994; Finnemore and Sikkink, 1998; Keck and Sikkink, 1998; Lacher, 2003; Barnett

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and Finnemore, 2004; Bauman and Stengel, 2014; Dingli, 2015). The reification of state and interstate relations as fundamental topics in the study of IR has been highlighted as problematic, especially by scholars from the critical theoretical tradition (Cox, 1999; Enloe, 2004), which helped broaden the scope of scholarly concern to inter-relations on all “levels” of social organisation (Edkins and Vaughan-Williams, 2009: 3). However, critical scholars are not alone in their calls to expand the selection of relevant forces, actors and issues in international politics (Hirst, 2022: 2–3) because they have found key allies in constructivist human rights scholars equally discontent with the rationalist and (thin) constructivist approaches dominating IR who have decided to also challenge this limitation (Davies and Peña, 2019).

Therefore, the constructivist human rights scholars’ agenda emerging from the 1990s onwards rapidly contributed to expanding the understanding of entities capable of influencing international politics in IR (Berger et al., 2022) by emphasising the transformative potential, relevance and power held by transnational non-state actors in IR, while placing human rights on the research agenda (Dunne and Wheeler, 2019: 339). Yet, as the constructivist literature in IR on human rights proliferated, the issue with the setup of this developing inquiry became ever more visible. Scholars noted that the internalisation of the “object of human rights” and possible products of the concept were “black-boxed” (Madsen, 2011: 261), leading to subsequent inquiries beginning at the point when non-state actors have already settled on the frame of a particular problem (Risse et al., 2013). The way normative change was conceptualised made it impossible for scholars to observe potential shifts occurring in the meaning of human rights (Berger et al., 2022: 15) given the assumption that the content of human rights norms remained stable (Risse, 2016: 13). Moreover, discussions on the relevance and power of transnational non-state actors proved too narrowly focused on a specific type of non-state actor (Berger et al., 2022: 9): the prototypical advocacy non-governmental organisation (NGO).

Expectedly, the second generation of IR human rights scholarship turned to the concepts of the contestation and translation of international human rights norms to explain how non-state actors transform the meaning of human rights so that they resonate with the specific local contexts in which norms are promoted (Wiener, 2014, 2018; Berger and Esguerra, 2018; Draude, 2020) to address the shortcomings of the original framework. While this approach claims that turning to the constitutive dimension of the appropriation, contestation and translation of human rights can make more visible the strategic engagement of those generally assumed to be inactive ‘recipients’ of international norms (Zwingel, 2016, 2017), it nevertheless remains chiefly interested in researching the changing substance of international human rights norms.

Many similarities between the two generations of constructivist scholarship have emerged as they share the common objective of capturing the presence of "nontraditional actors", as previously overlooked in IR (Draude, 2020; Sikkink, 2022: 326). Moreover, both generations seek to shed light on how non-state actors contribute to the realisation, localisation and diffusion of human rights standards. These shared goals have not only prompted human rights scholars from each generation to draw on terminology and conceptual tools from neighbouring social science disciplines to update their frameworks, but also motivated them to present arguments based on the engagement of various non-state collectives with international human rights norm processes.[1] However, even though these contributions have importantly helped advance the research agenda on non-state actors in IR, the discussion on how non-state collective actors are conceptualised continues to be surprisingly ambiguous. This is because scholars of international norms in IR rarely engage in depth with the theoretical and conceptual advancements that have assisted with new non-state collectives becoming recognised as political actors in IR. In addition, there is a lack of scholarly discussions with respect to the capacities or qualities that enable a non-state collective entity to be attributed with the title of an international actor. Such enquiry could help scholars of human rights in IR better understand the extent to which the observed practices indicate these groups are acting in their own right and to what extent collective actions can be generalised to other discussed non-state actors (Braun et al., 2019: 790).[2]

Considering the long-standing critique of the lack of recognised non-state actors in IR theory and the key contribution made by IR human rights scholarship to this issue, this article takes on the task of critically unpacking the implications held by different approaches for the conceptualisation of the mentioned non-state actors for IR, specifically in the context of human rights scholarship in IR. In its goal of aiming to identify socially embedded patterns of meaning and the implications and effects they bring, it thereby remains methodologically grounded on a reflexive thematic analysis as a method that is used to map and decompose the state of knowledge when it comes to human rights and collective non-state actors – via their mutual reflexivity – to spotlight the need for a different agenda for further research

[1] *Most notably, "transnational groups of affected persons", grassroots movements and activists, women and youth movements, and indigenous organisations (Berger and Esguerra, 2018; Holzscheiter, 2018; Baver, 2020; Knappe and Schmidt, 2021; Kotze and Knappe, 2023).*

[2] *In this scholarship, an actor is generally considered to be "an identifiably human or collective subject that in principle can gain agency and thus become an agent"; an "agent" denotes an entity that can act, and "agency" the corresponding ability to act. In turning away from problematising the constitution, the question of how non-state collective actors act is therefore frequently prioritised by scholars, whereas how they become agents is sidelined (Braun et al., 2019: 788).*

(Ward, House and Hamer, 2009; Braun and Clarke, 2022). In doing so, we aim to address the ambiguity surrounding international non-state collective actors in this scholarship.

The article is arranged in four sections. The first section reviews the advancement of key theoretical debates that have influenced the development of constructivist scholarship on human rights in IR. The second section describes the advancement and limitations of the conceptualisation of the international non-state actors most prevalent in the human rights literature in IR: NGOs. The third section takes a closer look at the limitations of the literature on normative contestations, with particular attention to contributions engaging with groups of affected persons given the contemporary relevance of this agenda for research on international organisations. The fourth, concluding section discusses how this research agenda could be beneficially enriched with insights from more practice-oriented approaches, thereby identifying a possible research programme to help broaden the academic community's ability to foster interdisciplinary conversations.

Efforts to advance the position of non-state actors on the IR agenda

Although non-state actors were advocating for rights long before the establishing of a comprehensive system of international human rights protection or the modern global order in the 1940s, with notable examples being the campaigns against the slave trade and the women's suffrage movement, it is only in the past four decades that human rights have become profoundly intertwined with both the practice and study of IR. Early IR theorists attempted to understand the nature of human rights and their significance in global politics by associating human rights with state sovereignty and a universal moral order, focusing primarily on the roles of state actors in their analyses of world politics (Dunne and Hanson, 2009; Dunne and Wheeler, 2019). Further, the dominant perspectives within the analysis of human rights in IR, which emerged from the Great Debates in IR (Lake, 2013), hold limited explanatory power and fail to comprehensively account for the past and emerging dynamics of human rights. The story of human rights in IR may hence be said to begin with the influence of (political) realist assumptions, which have guided much of the IR scholarship since its emergence. Yet, tracing the advancement of new theoretical approaches used to examine human rights in IR within this story also helps to highlight the theoretical limitations caused by realist-influenced state-centrism in the way collective non-state actors are conceptualised. After all, realist assumptions are also shaped by international law, conventional images of international relations, and states' claims to exclusive authority in their domain (Gilpin, 1984: 300–301).

According to realists, human rights are often seen as nothing more than "a polite fiction" (Dunne and Hanson, 2009: 62), while non-state actors have a small role in the realist narrative of international politics (Polizzi and Murdie, 2019: 254). Unsurprisingly, the strengthening of rationalist approaches during the Cold War did not bring significant changes to this view because rationalist accounts of international politics also provide little consideration for actors beyond the state in their analysis of the international system's functioning. Namely, rationalist perspectives also prioritise great powers, national interests, and foreign policy factors, while leaving minimal room for the inclusion of non-state actors (Arts, 2000; Cutler, 2001; Johnston, 2001). It is, however, surprising to observe that even as human rights were gaining international attention as part of the United Nations' (UN) agenda (Dunne and Hanson, 2009: 61), IR scholars continued to disregard the significance of non-state collective actors: "Waltzian structuralists" chose to safeguard the epistemology of IR from "the autonomous influence of democracy, ideology, economic integration, law and institutions on world politics" (Legro and Moravcsik, 2014: 6); institutionalists (Drezner, 2008a, 2008b) remained apprehensive about civil society potentially equating visibility with causality, with this concern causing an overemphasis on the secondary role of civil society actors in international processes (Davies and Peña, 2019: 69). Therefore, the "epochal moment" occurred came in the 1990s when the Cold War ended and authoritarian regimes collapsed, giving rise to new opportunities for a world characterised by "freedom, rights and equality" (Eckel, 2022: 11). These circumstances provided fertile grounds for the flourishing of liberalist scholarship, which aligned well with the prevailing international developments of the time, where states were pursuing policies in rational accordance with human rights principles (Moravcsik, 1997: 516).

In addition, during the 1970s and 1990s, significant growth and formalisation of the UN's international human rights system and affiliated institutions played a crucial role in monitoring compliance. The emergence of human rights NGOs and activists, along with the greater prioritisation of human rights in the diplomatic practices of Western states, further added to the popularisation of liberalism in IR (Dunne and Hanson, 2009). It is not surprising then that these trends led to the widespread acceptance of the regime's conception of human rights in the early 1990s (Donnelly, 1986), which today forms an established part of the legal, political and moral landscape in IR (Alston and Goodman, 2013; Roter, 2016).[3] Yet, even as human rights came to be seen as neutral and impartial standards that all governments should

[3] *An international regime is formed by "norms and decision-making procedures accepted by international actors to regulate an issue area" (Haas, 1980: 358).*

be held accountable to within international regimes, sovereignty remained the fundamental ordering principle, and states remained the central actors (Goodhart, 2020) because regimes necessitated "limited renunciations of sovereign national authority in an issue-area to limit the expenses of international anarchy" (Donnelly, 1986: 601).

The end of the Cold War drew attention to the role of non-material factors and norms in international relations since it led to considerable political changes that could not be adequately explained by rational interests alone. This moment resonated deeply with constructivist scholarship, which sought to provide a sociological perspective on world politics (Reus-Smith, 1996: 2) and stressed the importance of norms (Katzenstein, 1996: 26). Constructivist scholars thereby argued that neglecting normative dynamics was hindering the study of international relations (Klotz, 1995) and thus sought to expand the research topics addressed by IR scholars by exploring previously unstudied phenomena (Klotz, 1995; Risse et al., 1999). They were confident that, in light of the end of the Cold War, constructivism could "shake up" the research agenda in IR (Finnemore and Sikkink, 1998). This new avenue of constructivist inquiry made significant progress by providing an explanation that world politics is socially constructed, whereby power constellations, rules and institutions are the products of social interactions and their meanings are inseparable from the interpretations of the actors involved (Onuf, 1989; Wendt, 1992). Although constructivists recognised the limits of structural determinism and reductionism, they conceptualised agency and structure as being mutually constitutive (Wendt, 1987: 350–351; Dessler, 1989: 451). However, despite these advancements, early constructivists often continued to stress states' role as "the dominant political actors in the international system" (Wendt, 1992: 424).

Nevertheless, dissatisfaction with the "very top-down structural constructivism" (Kratochwil and Ruggie, 1986; Onuf, 1989; Wendt, 1992, 1995, 1999) was also what motivated scholars like Finnemore and Sikkink to "tell a more agentic piece of this" story (Sikkink, 2022: 327). This decision significantly transformed the human rights research in IR scholarship by causing a significant increase in contributions by constructivist scholars who theorised the formation of state interests (Finnemore, 1996) and developed conceptualisations and models to examine human rights change and the creation and diffusion of norms (Brysk, 1994; Finnemore and Sikkink, 1998). The most noteworthy contribution in terms of scholarly influence was the "spiral model", which scholars and practitioners still use today (e.g., Naglič, 2016),[4] since it sheds light on the vital role played by non-state actors (Willetts,

[4] *The spiral model demonstrates how those experiencing oppression can appeal to sympathetic state actors to exert pressure on their governments (Risse et al., 1999).*

1982; Price, 1998; Keck and Sikkink, 1998; Risse et al., 1999; Peter and Brglez, 2007).

Moreover, the ground-breaking "boomerang model" (Keck and Sikkink, 1998) helped scholars explain the unexpected influence of transnational advocacy networks (TANs) in countries of the Global South (Risse et al., 1999), which became central to the interpretation of transnational activism within the literature on human rights and social movements in political science and IR scholarship (Waites, 2019: 388). As the conceptualisation of the influence of transnational non-state actors on world politics was developed further, scholars argued that these actors can fundamentally change domestic and international structures (Berger et al., 2022: 3–4), not merely influence individual governmental policies (Keohane and Nye, 1974), while the power of transnational non-state actors became understood as being derived from a particular type of agency based on their persuasive force (Berger et al., 2022: 3–4).

This breakthrough proved useful for breaking the state-centric framing within the discipline "at just the right time" (Sikkink, 2022: 325) because it broadened the scope of actors acknowledged as legitimate research objects in IR to include non-state actors, particularly highlighting TANs that promote human rights (Reus-Smit and Zarakol, 2023: 20). Still, from a contemporary perspective, the three decades of research that built on or stemmed from these seminal contributions also reveal the limitations of this research agenda in terms of methodology and research focus, challenging many of the fundamental assumptions made in early constructivist scholarship. Scholars have noted that the research has exhibited unwavering confidence in liberalism as a positive force in world politics, leading to the adaptation of an approach that is somewhat idealistic and normative when explaining the progressive potential of human rights (Berger et al., 2022: 9; McCourt, 2022: 113). In addition, scholars have highlighted the existence of the lack of reflection on the problematic reproduction of Western cultural hegemony (Epstein, 2012; Epstein et al., 2014; Mende, Heller and Reichwein, 2022), which forms a central part of the liberal victory narrative (Moyn, 2010) and is extendable even to the link between theorising relations in a homogenising manner (DeMars and Dijkzeul, 2015; Hofferberth and Weber, 2015).[5]

[5] *This is because of the tendency to categorically separate norms from actions and the methodological commitment to a framework that posits a unidirectional or linear causal relationship between independent and dependent variables (DeMars and Dijkzeul, 2015: 291; Hofferberth and Weber, 2015). Scholars have argued that constructivism's "dedication to a neopositivist research methodology" in a demonstration that norms matter led to norm research having a structuralist bias (Hofferberth and Weber, 2015: 81). This isolation of norms as independent variables relegates actors to the status of "throughputs" for pressures located in the structure of the international system (Jackson, 2003: 231–233), with lacking theorisation of the relationship between norms and action not taking the interpretive performances of human actors into account (Goddard and Nexon, 2005: 37).*

Thus, all of these findings importantly contributed to the constructivist setup and the conceptualisation of human rights NGOs becoming a topic of concern among scholars, for example, researching the agency of subaltern actors participating in normative processes (Dunford, 2015, 2017) and trying to better understand normative socialisation (Acharya, 2008, 2009).

The pitfalls of researching human rights NGOs

The limits of seminal constructivist scholarship are clearly illustrated while examining the favoured non-state actors of IR scholars: human rights advocacy NGOs. In the IR scholarship, NGOs are commonly defined as the "secular, professionally run, and transnationally involved segment of civil society" (Götz, 2019: 19). While human rights NGOs are generally conceptualised in a similarly broad manner, for instance, as "any" NGO "with a human rights-related mission statement" (Polizzi and Murdie, 2019: 252), it is the global nature of international human rights that makes NGOs which work in this area also global in their very essence. Thus, to understand the research inclination towards broad conceptualisations of NGOs in the IR scholarship, it should be first noted that NGOs gained broader recognition in international relations through the UN system (Götz, 2019: 19). As research objects directly linked to the IR apparatus, human rights NGOs therefore form part of the thinking tools that help establish disciplinary borders instead of just imports of neighbouring social sciences.[6]

Second, although scholarly engagements with NGOs within IR continue to be a highly popular and valuable endeavour, as shown by the considerable output on this topic in key IR journals, scholars have nonetheless become ever more mindful that "non-governmental" is by no means an empty signifier but instead a catch-all phrase. Namely, in the traditional state-centric perspective of IR, "non-governmental" indicates minor significance (Götz, 2019: 20). Considering the concept of an NGO as mutually constituted by the global norms that they enforce or implement and by the representative rights claims articulated by marginalised groups calls for recognising that it also carries a strong affective element, one that has indeed enticed IR scholars to examine this agenda (DeMars and Dijkzeul, 2019). Further, it is by acknowledging the affective dimension of this research agenda that we can also start to gain a deeper understanding of how strongly the theoretical inclination towards idealist constructivism has influenced human rights research in IR. This is because putting underlying the theoretical

[6] *Still, other disciplines use their own, often conceptually more precise, terminology to refer to the overlapping phenomenon, which includes for example social movement organisations, voluntary agencies, think tanks and pressure groups (Götz, 2019: 20)*

tenets of idealist constructivism under examination reveals the simultaneous presence of pluralist and globalist insights, which are further reinforcing the legitimating discourse surrounding human rights NGOs (DeMars and Dijkzeul, 2015:11; 2019: 86).[7]

As an illustrative example of these dynamics, the most prevailing perspective on NGOs in IR serves well, which follows Keck and Sikkink's (1998) concept of the 'boomerang pattern', due to its clear-cut use of the combination of a pluralist approach, emphasising the bottom-up power of NGOs, and a globalist constructivist understanding of top-down power dynamics, as visualised here through the imagery of a boomerang's rotary path (DeMars and Dijkzeul, 2019: 75–76).[8] With this type of approach, NGOs derive their influence from the representative claims they articulate and the global norms they enforce. Accordingly, this portrayal of NGOs not only resonates with the ideals of cosmopolitanism, but also contributes to the legitimisation and moral authority ascribed to NGOs within IR.[9]

While it is crucial to recognise the inherent complexities of the political landscape within which NGOs operate, the different manoeuvres used by human rights NGOs to evade strict accountability to specific principals, norms, citizens or 'affected' communities, such as working children (see, e.g., Holzscheiter and Hahn, 2013; van Daalen, 2023), whom they claim to represent, have however been relatively omitted from this scholarly discussion. A recent illustration of this deficiency arose when Amnesty International (AI) published a 'legally questionable' press release about the war in Ukraine in August 2022 without engaging with the Ukrainian authorities or considering "the lived knowledge of people of Ukraine" (Tsymbalyuk, 2023). In response, the accuracy of the information in AI's document was loudly questioned online and offline by the wider public along with the Ukrainian authorities and scholars (Beaumont, 2023; Schmitt, 2023).[10] To deal with the

[7] *DeMars's (2005: 36) review of the nature of global NGOs divides the NGO literature into three main approaches: pluralist, globalist and realist. In "pluralist constructivist" views, NGOs empower and advocate for societies against repressive states, representing a bottom-up power dynamic that originates from the grassroots. On the other hand, in "globalist constructivist" perspectives, NGOs enforce global norms on states and corporations, embodying a top-down power trajectory that stems from an international normative authority.*

[8] *The boomerang model of TANs entails domestic NGOs seeking international allies to exert pressure on their own states. As the boomerang gains momentum and gathers international allies, such as states and intergovernmental organisations, it applies normative and material pressure on the original state. This model combines the representative claim of pluralist theory with the normative enforcement of globalist theory (DeMars and Dijkzeul, 2019: 75–76).*

[9] *Cosmopolitanism embodies a belief in universal reason and human emancipation, rejecting particularistic attachments (Goodhart, 2023: 33–34). However, the formation of cosmopolitan human rights opposes local contexts and can be perceived as a hostile response to egalitarian politics because of its cosmopolitan nature (Goodhart, 2023: 40).*

[10] *The document was for example also instrumentalised by Russia's ambassador to the UN who*

rising criticism, AI appointed a panel of five seminal experts in international humanitarian law to provide a legal review of the document to determine what had gone wrong. Yet, it took months for it to publicly release the final report, which criticised the language AI had used; the report was finally leaked by the *New York Times* in April 2023 (Schmitt, 2023).

Even though scholars of human rights and international law engaged in important analysis of AI's understanding of international norms in the document (van Dijk, 2022; Wright, 2022, Schmitt, 2023), their analysis of AI's usage of language primarily focused on the deconstruction of the rigorous documenting and impartiality mentioned by AI in defence of its actions. However, scholars were mostly focused on knowledge production practices, largely overlooking 1) how the way in which representatives of AI emphasised the hierarchy between supposedly 'objective' and partial knowledge that is extremely deeply embedded in academic and legal thinking made invisible the "knowledge coming from the passions of our bodies that mobilises us to bring justice", as stated by Tsymbalyuk (2023); and 2) how AI's engagement with this language contributed to a change in semantic infrastructure, which in the end helped state actors redraw the limits of what is legally permissible while discussing violations of human rights (dos Reis and Grzybowski, 2023). This incident thus illustrates the need for a more critical examination of the work of human rights NGOs not just through a political but also a sociological lens because their actions may sometimes align in unexpected ways with the expectations established by their stated mandates and the global norms they are supposed to espouse.

Insisting on the adaptation of more nuanced perspectives that acknowledge both the positive contributions and potential limits of NGOs in shaping world politics, while also capturing the politics of rights and human rights that take place in "most of the world" (Madhok, 2022: 6), should thus be an imperative for IR scholars. Hence, although the work of Keck and Sikkink (1998: 1–6, 29–37, 209–217) has significantly contributed to advancing the theoretical discussion of human rights NGOs and TANs within IR, their reading of the "logic of appropriateness" problematically relies on a determinist concept of actors that does not allow for a full reflection on human rights norms (Hofferberth and Weber, 2015: 83–84). In their perspective, actors merely internalise roles and rules without conscious choice, conforming to what they consider is appropriate behaviour (Finnemore, 1996: 29). Still, doing this neglects the agency of the collective actors engaging with human rights and fails to account for acts that may contradict the global structures embodied by the international human rights regime.

claimed that, "We don't use the tactics Ukrainian armed forces are using – using the civilian objects as military cover – (...) what [AI] recently proved in a report" (Schmitt, 2023).

It must also be pointed out that deeper analysis shows that a significant discrepancy even exists in this approach regarding agency, which remains ambiguous but has to be further clarified (DeMars and Dijkzeul, 2015, 2019: 76) since it attributes agency to activists or the NGOs they run or sometimes to the TANs that activists and NGOs form and participate in. However, the authors of the boomerang model initially only assigned agency to NGOs because it is they that throw the boomerangs. Namely, the key contribution of their work is the model that provides insights into NGO agencies actively contributing to human rights campaigns.[11] In addition, in this approach NGOs suffer from homogenisation tendencies since authors assumed that actors automatically share common global human rights and principles, which they visibly and publicly signal through the everyday discourse they use while pursuing a shared goal. In contrast, scholars studying patterns of global organising around women's rights and environmentalism (Smith et al., 2021), for example, stress the need to distinguish different types of organising. They find that only multilateralist organisations are strongly connected with international human rights agencies, pragmatists maintain selective ties, and rejectionists completely discard the international arena. This means the issue lies not simply in the fact that NGOs do not engage in this practice, but also in the theoretical assumption that the global human rights norms articulated by NGOs are constitutive of their existence (Hofferberth and Weber, 2015: 82).

Nonetheless, the identified leap in theory also obscures other dynamic aspects of rights politics and political practices that go beyond the idealised pluralist representation of society against the state or the globalist enforcement of human rights norms on the state (DeMars and Dijkzeul, 2019: 77). As a result, this causes the scholarship to overlook the centuries of social struggle that have led to the formalisation of international human rights (Chowdhury, 2011; Goodhart, 2020: 36) and, more significantly, contemporary political struggles on the ground, with their particular political "imaginaries and subjectivities" that contest and challenge oppressive practices and relations, generating new visions of human rights (Madhok, 2022: 16). When considering the consistency in the dominant positioning of contemporary advocacy within the spiral model, it is however almost unsurprising that scholars continue to fail to adequately account for the diverse ways in which local contexts shape the role of TANs in human rights activism, the convergence and disintegration of different actors within networks, and the movement of actors and ideas within them (Hertel, 2016; Goodhart, 2023).

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[11] Keck and Sikkink (1998: 2, 7) define TANs as "actors working internationally on an issue, who are bound together by shared values, a common discourse, and dense exchanges of information and services" and campaigns as compositions of "members of a diffused principled network" that develop "visible ties" and "mutually recognized roles" and "consciously seek to develop a 'common frame of meaning'".

Moving forward: paradigm of affectedness and contestations of international human rights norms

Despite a considerable portion of human rights scholarship in IR continuing to focus on the international human rights regime, the diffusion of global human rights norms and providing new empirical insights concerning the dynamics of global human rights NGOs (Dancy and Sikkink, 2017; Sikkink, 2017; Brysk, 2018), a new branch of IR scholarship has emerged. Known for its critical constructivist approach (Wiener and Puetter, 2009; Wunderlich, 2013; Lantis and Wunderlich, 2022), this branch aims to address the limitations of previous norm scholarship and offer an alternative approach. Equipped with improved tools, these scholars delve into the multidirectional and interactive processes of norm change, emphasising the contingent, ambiguous and indeterminate nature of norms. Their research programme sheds light on the evolving landscape of international human rights norms, challenging traditional perspectives and opening new avenues for understanding normative dynamics in IR.

By posing inquiries regarding the agency of a broader array of actors, their relationships and capacities (Wunderlich, 2013), scholars have progressed from the constrained view of actors presented in early constructivist norm research to examining "normative contestations". Scholars attuned to contestations have become interested in the (de)stabilising effects of ostensibly static norms and their potential for normative change (Lantis and Wunderlich, 2022: 4). As a result, they scrutinise challenges to the diffusion, localisation, contestation and even erosion of norms (Acharya, 2004; Wiener, 2007, 2009; Panke and Petersohn, 2012; Deitelhoff and Zimmermann, 2013, 2019), underscore their fragility, and the diverse forms of resistance linked to their legitimacy and applicability (Deitelhoff and Zimmermann, 2013).

Scholars studying normative contestations exhibit the distinct trait of more thoughtfully conceptualising the relationships between agents and structures while designing their conceptual and empirical frameworks (Acharya, 2011; Wunderlich et al., 2013; Wiener, 2014; Müller and Wunderlich, 2018). They recognise that contestations and resistance can serve as sources of (normative) agency for governed actors (Zimmermann et al., 2020). Still, it is equally important to note that they also emphasise that their conceptualisation of contestation does not inherently represent a critique or rejection of norms, but instead aims to foster mindfulness about engaging with the content of international treaties and regulations (Holzscheiter, 2018: 648). The scholarship on normative contestation, with its focus on the translation and enactment of norms into discursive and social practices, thus offers potential for revealing the agents and actions involved in realising and localising human rights standards. First, this is due to the fact that critical constructivism acknowledges the "'high flexibility' of international norms", and therefore enables scholars to better capture the normative insecurities of actors and the situations in which different international norms are perceived as conflicting, contradictory or difficult to reconcile. Second, critical constructivism also stresses the importance of observing their "contemporary meaning and productive effect" in global discourses, policies and practices. By examining how norms are utilised in discursive interactions and studying how actors frame specific issues based on normative expectations, scholars can hence better determine whether the meaning of the norm is shared or contested among actors with different identities (Holzscheiter, 2018: 648).

Interestingly, simultaneous to the growth of critical constructivist scholarship in IR we were able to observe the rise of another human rights non-state actor, which was actually caused by the growing doubts of scholars regarding the effectiveness of the public interest paradigm that NGOs implement. Namely, it was becoming increasingly clear after the turn of the century that the public interest paradigm limits the representation of public interests in decision-making (Nanz and Dingwerth, 2016), which prompted discussions on the need for more democratic forms of international participation (Falk and Strauss, 2000, 2001). Unsurprisingly, the normative contestation scholars enhanced human rights research in IR, particularly on this intersection with the literature concerned with those social groups affected by international policies. The concept of affectedness in IR, however, must be highlighted here for two reasons. First, due to its importance in allowing individuals affected by international regulations to voice their concerns and lodge complaints with international organisations (Jokubauskaite, 2020). Second, because this approach is based on the recognition and codification of individuals' rights to meaningful political participation in the international arena (Peters, 2009, 2021; Maisley, 2017).[12] Taken together, the two factors help clarify the rising importance of the concept of affectedness in IR, and why the affectedness paradigm is starting to replace the public interest paradigm as the central foundation for including civil society organisations in intergovernmental decision-making processes (Sändig et al., 2020).

This scholarly overlap, which focuses on the positioning of the individuals and groups affected by international regulations, therefore took centre stage in the analysis of norm contestation, where it calls for scholars to pay more attention to the question of agency in international human rights politics, especially for social groups (Holzscheiter, 2018: 650). This

[12] Although UN institutions and agencies have already begun introducing formal rules that connect civil society participation to affectedness, case studies and research on this trend remain mostly isolated (Von Bernstorff, 2007; Abbott and Gartner, 2012; Tramontana, 2012; Fraundorfer, 2015; Vandenbogaerde, 2017; Sändig et al., 2020).

is an outcome of the fact that in the past 30 years a salient criticism of IR theory has been its tendency to overlook and ignore instances of corporeal and epistemic violence, particularly concerning marginalised social groups such as women, postcolonial actors and those disempowered by neoliberal globalisation (Dingli, 2015; Haglund, 2023). Scholars have consequently become more responsive to this critique, leading human rights scholarship to adopt a more nuanced understanding of agency as both tangible and contested. In response, today normative contestation and translation scholarships highlight the significant overlap in examining the participation and human rights practices of non-state actors within international human rights organisations and institutions, and in the broader context of global governance and IR (Holzscheiter, 2018, 2020; Braun et al., 2019; Hofferberth, 2019; Zimmermann et al., 2020; Hofferberth et al., 2022). With these discussions recognising and emphasising these practices as contentious and shaped by relations, the key contribution of this scholarship lies in providing insights regarding how non-state collective actors, such as groups of affected individuals, challenge international human rights norms by pushing the boundaries and recontextualising them. This process, in turn, brings normative inconsistencies and ambivalences to the surface, leveraging norm conflicts that are present within international human rights treaties (Holzscheiter, 2018).

However, even though the human rights contestation scholarship has considerably helped to advance our understanding of the role and effects of human rights norms in IR, it still faces many limitations (Niemann and Schillinger, 2016; Wolff and Zimmermann, 2016; Dunford, 2017; De Almagro, 2018; Blouin-Genest, 2019; Georgi, 2019; Linsenmaier et al., 2021). It falls short in establishing a clear relationship between human rights and the transformative potential of human rights practices for non-state actors by privileging "normative orders that reshape rejection into /…/ status quos" and neglecting "the violent tension that characterizes the relation between the abstract standards and norms of global civil society, and the multiplicities of difference that trouble its narrative" (Chua, 2017: 89; Epstein, 2017). This aspect remains under-theorised given the intense focus on normative contestation practices directly related to the global governance of human rights or codified globalised human rights norms. As a result, the conceptualisation and self-agentification of non-state actors also take a secondary role (Hofferberth and Lambach, 2022), becoming surrounded by ambiguity, despite critical constructivist scholars' general intention to promote an approach that increases the visibility of human rights practice by highlighting the actors that are not states.

Discussion and conclusion: identifying the IR (human rights) research agenda

Today, scholarship on human rights constitutes a broad interdisciplinary field of inquiry that began as a branch of international law focused on monitoring the development of intergovernmental agreements to address cross-border abuses (Brysk, 2020). However, within the field of IR, the inclusion of human rights in scholarly discussions was triggered by the growing importance of human rights in foreign policy, global governance and social movements. This expansion led to a broader scope of research in IR, one encompassing topics like political violence, democratisation and the involvement of new non-state actors such as human rights NGOs (Brysk, 2020; Sikkink, 2022). The rapid recognition of the relevance of social groups and movements for transnational human rights advocacy by IR scholars of human rights (Keck and Sikkink, 1998; David, 2007; Appiah, 2011; Schmitz and Sikkink, 2013; Davies, 2014) has nevertheless brought unintended negative consequences for IR scholarship. Constructivist scholarly accounts of human rights actions by non-state collective actors participating in international politics often rely on conceptual approaches that are inadequate for capturing the complex agendas, dynamics of exclusion and inclusion that define their presence in international relations and for best showing their agency. These conceptual shortcomings were caused by the dominance of legal studies in the development of human rights research in IR, along with the state-centric nature of IR as a relatively new discipline, and led to the methodological and implicit normative implications embedded in the conceptual frameworks of both generations of constructivist scholarship on international human rights norms. Scholars were thereby influenced to mostly examine the normative ambiguities related to international law and human rights regulations and binding documents while neglecting those ambiguities related to non-state collectives actively engaging in international human rights practices, which leads to development of biases and homogenising tendencies (Haglund, 2023: 49).

IR human rights scholarship accordingly seemed to have missed an opportunity to advance its insights when sociology, anthropology and history entered the human rights discussion at the start of the 21st century. The growing globalisation at the time motivated scholars to join in the conversation and bring a critical perspective with them, shedding light on global, collective and interdependent struggles, abuses and power relations relevant to human rights (Dudai, 2019; Brysk, 2020). Yet, the lack of interest in an interdisciplinary conversation led to the creation of a parallel body of work (Wilson and Mitchell, 2003; Morris, 2006; Hunt, 2007; Goodale, 2009; Moyn, 2010; Madsen and Verschraegen, 2013), defined by a different view of the ontological and epistemological grounding of rights (Goodhart, 2020: 40) while maintaining disciplinary boundaries (Banai and Chase, 2020: 46). Especially within IR scholarship, which is intensely focused on examining the spread, diffusion or contestations of human rights norms, there is a strong dependence on more traditional lenses that prefer global or macro perspectives when it comes to analysing human rights (Dudai, 2019).

This means it is not surprising that critical insights (Kennedy, 2002, 2005; Moyn, 2010, 2018; Hopgood, 2013, 2017) challenging the usefulness of human rights or viewing it as part of a hegemonic discourse intertwined with power deployments have increasingly gained popularity. Still, within much of the IR scholarship it seems as if little ground has actually been gained (Acharya, 2010; Chase, 2012); and scholars seem to be stuck singing the same tune of defending the normative foundations, legitimacy and effectiveness of human rights (e.g., Sikkink, 2017; Brysk, 2018). They nonetheless simultaneously lack conceptual tools capable of capturing the dynamic and transformative potential of the practice and politics of human rights, as evident even in examinations of normative contestations that chiefly focus on the impact of practice on shaping the content of international human rights, thus providing a narrative centred on the reshaping of international human rights norms.

The key takeaway from this article, in which the state of knowledge of major conceptual developments in IR human rights research and the limits of non-state actors is decomposed and mapped, is to suggest that there is a pressing need to more closely engage with a sociological perspective on human rights (Hynes et al., 2012, 2016). Scholarly attention to the lived experiences of those claiming human rights and their real-world interactions (Dudai, 2019) is essential. In this inquiry, it is contended that "due attention must be paid to the social actors involved in the creation of rights if we are to fully understand rights regimes" (Short, 2009: 96; Dudai, 2023) alongside prioritising rights and regulations. Recognising a broader range of actors that encounter, resist, strategically employ and engage with human rights theories and practices in their various activities (Merry, 2006) aligns with the practice turn observed in wider IR scholarship. Reliance on a social constructionist understanding of human rights, which concentrates on human rights praxis and sees it as constitutive of human rights, can help IR scholars move towards a grassroots and emancipatory conception of human rights.[13] Human rights, when understood in this way, are not merely rules but also tools that social movements can use for emancipatory social critique and political transformation (Goodhart, 2020).

[13] *This would bring social movements and activists to the forefront as actors shaping and deploying rights in political and social struggles (Stammers, 1999; Dudai, 2019).*

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METAPHOR AS A POLITICAL TECHNOLOGY

Abstract. *Discussions of political metaphors provide fertile grounds for understanding issues in political theory and political practice. The article departs from the established theoretical and methodological approaches to political metaphor (e.g., classical, conceptual, hermeneutical, cognitive) to introduce (post)structuralist and (post)Marxist methodological and theoretical bases. It maintains that the established approaches to the study of functionalities and ontologies of political metaphors are possible, primarily by researching their functioning in political discourses and as events in the power/truth dispositive. Metaphors can be researched as specific political technologies (strategies of power) that influence/create regimes of truth.*

Keywords: *political metaphors, political theory, linguistic theory, political discourse, power, knowledge*

Introduction

In *Poetics*, Aristotle points to the usefulness of a metaphor by emphasising its creative potential and character. Contrary to Aristotle, by employing rigorous grammatical analysis classical linguists reduce metaphor to a mere figure of speech, an ornament of language, with no added functionalities. Later, cognitive linguists and proponents of hermeneutics 'rediscovered' the functionalities of the metaphor that stretch beyond language. Contemporary approaches to metaphor, e.g., Georg Lakoff and Mark Johnson's conceptual metaphor, Paul Ricoeurs' hermeneutics of metaphor, Andrew Ortony's or Raymond W. Gibbs' interest in metaphor within cognitive science, consider it as a much more useful 'tool' that yields knowledge about the world beyond words, while revealing social and political schemata that are not immediately clear. Nonetheless, research on metaphor largely remains confined to the linguistic and cognitive theoretical approaches.

The aim of this article is to move beyond the well-established theoretical and methodological approaches and position metaphor as 'political',

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thereby opening it up in terms of its functionality. By constructing a political metaphor anew, we seek to establish a theoretical and methodological alternative to the existing approaches and widen the possible scope of metaphor for analysing socio-political realities. The dominant linguistic and cognitive methodological framing of metaphor, where metaphor is understood as part of language formation, as a tool of language and communication, will be re-considered in line with (post)Marxist and (post)structuralist methodology. Further, the re-examination of different theories of metaphors – classical and contemporary – will enable us to open the field of the meta-metaphorical and grasp social and political phenomena differently. We shall argue that the conception of 'political metaphor' based upon Foucauldian power relations goes beyond the *word-games* or textual analyses offered by hermeneutics and, when entering the field of politics, metaphor becomes a political technology. In this sense, metaphor in the interplay of diverse discourses sheds light on specific socio-political relationships.

We argue that linguistic, cognitive and hermeneutical traditions lack the power to elaborate the 'real' potential/effect of a metaphor. We try to demonstrate that metaphor is more than just a linguistic structure and is more an *event,* thus a discursive practice. Drawing from the Foucauldian methodological position and its theoretical concepts, we try to 'reveal' the metaphor's material effect, which is broader than word-based or thought-based metaphor theories. Within this framework, we attempt to formulate a concept of metaphor as a political technology, the point where we basically 'ground' our notion of metaphor as a 'circular relationship' of power and truth – as a discursive construction that indicates a certain socio-political reality or 'determines' what is to be tru(th)e. The (post)Marxist account of language and Foucauldian conceptualisation of power will act as the starting point to position metaphor as a political technology.

Methodological framing of metaphor

The initial question in our considerations is whether we can think about metaphor beyond its widely accepted and deeply rooted linguistic tradition. Most of the modern theories of metaphor, whether addressing its significance within social, cultural, cognitive, neural etc. fields, generally just 'broaden' the linguistic approach; namely, the semantics and semiotics of language. Ricoeur's hermeneutics of metaphor and Lakoff and Johnson's conceptual metaphor, for example, provide a notion that partially exceeds 'classical' definitions. Their understanding of metaphor is based on the theory of language that is creative and fluid in nature, yet does not go beyond the linguistic field since it reduces discourse to statements or text (as basic units of language). This implies the existence of a homogeneity of meaning:

a 'hermeneutic circulation' between text and context or a 'cognitive function' revealing the 'hidden meaning'. A methodological 're-framing' of metaphor seems to be essential for 'deconstructing' the linguistic dominance of the understanding of metaphor. A re-examination of metaphor at the intersection of three methodological positions – hermeneutical, archaeological, genealogical, and partly also (cognitive) linguistics – calls for metaphor to be established in the sphere of discourse to be able to reveal its ability to (re)produce socio-political effects and hence point to its ability to transform socio-political events.

Hermeneutical position, primarily in Gadamer's "hermeneutic circle", Ba(k)htin/Voloshinov's "dialogical hermeneutics", and Ricoeur's "hermeneutics of suspicion", provide fertile grounds for breaking with the monological understanding of language. Hermeneutics shows that metaphor has a role/function in creating the socio-political reality by giving meanings to things and events, that it can represent them in a certain way, and expose certain meanings and conceal others. Ricoeur's (Dreyfus and Rabinow 1983) "hermeneutic of suspicions" assumes that individuals do not have direct access to the meaning of their own discourses and practices, but, and here Ricoeur remains Heideggerian, an essential continuity exists between everyday intelligibility and certain profound intelligibility, which everyday views tend to mask. The interpretation, as Gadamer (Ricoeur, 1974: 107; Wilson and Hutchinson, 1991; Laverty, 2003) puts it, is the process of discovering/revealing new forms of being; the hermeneutics is "dialectical circulation" between discovering the world and self-understanding. It is the articulation and revealing of profound, deep meanings (McGaughey, 1988: 423). Ricoeur acknowledges that we can really identify/discern the meaning, or it can be disclosed, only with a consideration of the specific context of the text. Despite the important conclusion drawn by Ricoeur – only in context can meaning be known – language remains, as Gadamer (2004: 389) notes, the "universal medium" for discovering knowledge/understanding: only through language can we see *Sache,* the Thing itself, the truth that one seeks to comprehend. According to Gadamer (Grondin, 2006: 16–19), the interpretation is not subjective, which the author has intended, but the reality of a particular (historical) event. Interpretation does not appear as such and instead disappears into the work itself:

> *[...] understanding is always more than merely re-creating someone else's meaning. Questioning opens up possibilities of meaning, and thus what is meaningful passes into one's own thinking on the subject [...] To reach an understanding in a dialogue is not merely a matter of putting oneself forward and successfully asserting one's own point of view, but being transformed into a communion in which we do not remain what we were.* (Gadamer, 2004: 368–371)

Gadamer's "hermeneutic circle" and Voloshinov's "dialectical hermeneutic" break with the tradition of the existence of full transparency of language. Language and meaning (truth) become a question of the human experience. Bahtin (Dovič, 2002), with the "dialogical construction of language" whereby dialogue is understood as a minimal unit of actual language, made it very clear that language is not to be understood in an atomised sense, but as a communicative–social interaction (Dolinar, 1996; Bahtin and Voloshinov, 2005). The meaning is therefore the effect of this inter-action. Bahtin's (2003: 270–272) concept of *heteroglosia* points to what hermeneutics is lacking and what later became Foucault's major point of critique of the hermeneutical approach. *Heteroglosia* implies the multiplicity of languages as various forms of social speech and other rhetorical tools. Multiplicity does not refer to the heterogeneity and multiplicity of the meaning of words and phrases based on the signifier/signify distinction, but on *strategies,* as various ways of speaking and rhetorical strategies, which are immanent to every statement (Bahtin, 2002: 270–272).

Hermeneutics and cognitive linguistics position metaphor as a "creative thought" (Lakoff and Johnson) or "creative language" (Ricouer). For Ricoeur (1973: 97), the "extraordinary attribute of words is their capability of meaning more than one thing". He sees the strategic nature of language in its three components: sentence as an actual carrier of the meaning and the whole creativity of language, polysemy as the potential creativity of the word, and metaphor as the third strategy of discourse, the poetic (Ricoeur, 1973). While Ricouer finds that polysemy and deep meanings are immanent to language, its creative character or even excess of meaning – the strategy of language – Foucault sees power relations as a strategy immanent to every discourse. Although Foucault and Ricoeur agree that individual can see what an everyday behaviour means, he can even detect its deepest meanings masked by its everyday behaviour, "what neither he, nor authority directing the hermeneutical exegesis can see, is what exegetical situation is doing to both of them and why" (Dreyfus and Rabinow, 1983: 124). For Foucault (Mottier in Pikalo and Carver, 2008: 186), the production of meaning is part of the wider discursive practices, institutions and power relations, and the point where hermeneutics and Foucault's archaeology and genealogy part ways. His formulation of a statement as a non-linguistic entity (as discourse), a statement as an *event,* positions metaphor in the field of power relations:

To describe a group of statements not as the closed, plethoric totality of a meaning, but as an incomplete, fragmented figure; to describe a group of statements not with reference to the interiority of an intention, a thought, or a subject, but in accordance with the dispersion of an exteriority; to describe a group of statements, in order to rediscover

> *not the moment or the trace of their origin, but the specific forms of an accumulation, is certainly not to uncover an interpretation, to discover a foundation, or to free constituent acts; nor is it to decide on a rationality, or to embrace a teleology. It is to establish what I am quite willing to call positivity. To analyse a discursive formation therefore is to deal with a group of verbal performances at the level of the statements and of the form of positivity that characterizes them; or, more briefly, it is to define the type of positivity of a discourse.* (Foucault, 1972: 125)

Foucault's statement – as a discursive formation – is a historical analysis of the effects of a specific discourse on the socio-political reality. Foucault eliminates what hermeneutics are so eager to find, the profound and penetrating (Kuhn and Foucault, 2010a): "in the statement is not to find the unsaid, or what they are hiding. The proper question is the way on which they exist, the conditions of their existence" (Foucault, 1972: 119; Dreyfus and Rabinow, 1983: 11). Foucault clearly shows that the statement should be analysed on the level of production of the effects. A statement seen as an *event* (Dreyfus and Rabinow, 1983: 45; Fubion, 1954/1984: xxii) is Foucault's disposition, whereby power relations penetrate – produce, reproduce and transform – the whole socio-political reality. The polysemy that hermeneutics advocates is about searching for a new meaning. As such, it remains on the level of the sentence or semantic field. Words can produce heterogeneous meanings and constructions, yet remain on the level of a statement, even as polysemy (Foucault, 1972: 120). The unsaid, hidden or subtle, which interest hermeneutics, are also significant for an archaeologist according to what appears on the surface (uttered/said). Still, an archaeologist of discourse also analyses it as an effect of discourse, a "statement is always an event, that neither the language nor the meaning can't quite exhaust" (Foucault, 1972: 28). Archaeology analyses statements as systems of heterogeneous sets, governed by certain rules (rules of formations). Foucault's statement is not an isolated atom, but is constituted in the field of power relations – a statement not depending on linguistic elements (words and sentences) that determine its content, but on the constellations of power. That is where a statement emerges (Dreyfus and Rabinow, 1983: 54–55). Foucault's fundamental objective is to "determine specific forms of articulation" in archaeological writings *qua* power, as power relations in genealogy. With the "politics of the scientific statement" as a singular event, Foucault implies that discourse is a "constitution of different elements" – it is a singular event, yet simultaneously draws on heterogeneous forces; the referential, the subject (the positions he occupies), the field of enunciation where statements enter in the specific relationships, and the repeatable materiality to which the statements are subjected (Foucault, 2002: 112; Dolar, 2010: 60).

> *Instead of being something said once and for all – and lost in the past like the result of a battle, a geological catastrophe, or the death of a king – the statement, as it emerges in its materiality, appears with a status, enters various networks and various fields of use, is subjected to transferences or modifications, is integrated into operations and strategies in which its identity is maintained or effaced. Thus the statement circulates, is used, disappears, allows or prevents the realization of a desire, serves or resists various interests, participates in challenge and struggle, and becomes a theme of appropriation or rivalry. (*Foucault: 1972: 105)

Foucault's *statement-event* shows the immanence of power. The power as a strategy that penetrates all human practices – his language, cognition, institution, conducts, truth and body, the point where metaphor emerges within the "strategic play of power", thus as a specific political technology.

The hermeneutical assumption of 'deep', contextual understanding of discourse implies the existence of a homogeneous discourse and in turn the possibility of determining a homogenous meaning. Cognitive linguists and hermeneutics disregard the broader socio-political context. Metaphor is reduced to the unit of a statement outlining how meaning is constituted in the given communication interaction (Mottier, 2008), that is, how metaphor structures human cognition and perception. The socio-political effects that metaphors produce are not taken into account – reinforcing, reproducing or undermining power (Mottier, 2008). Foucault's methodological account of the archaeology and genealogy of discourses enables an explication of the strategic notion of metaphor. The concept of *event* through which Foucault explains the "constitution" and function of discourse, and the one of *power,* opens up the possibility to think and construct metaphor also outside of language as a political technology.

Metaphor – beyond semiotics towards semantics

Contemporary theories of metaphor are chiefly based on the semiotics of language where metaphor is reduced to a *figure/trope* (of speech). The focus for 'non-classical' theorists of metaphor is to move beyond the synchronic notion of metaphor, namely, the existence of a fundamental difference between *literal and metaphorical language* – the proper and the figurative. With his *interaction theory* (1954: 293), Max Black was probably the first to attempt to resolve this deeply rooted classical assumption. Interaction theory of metaphor tries to demonstrate that meaning is produced in certain relations, in an interactional relationship between "the undivided meaning of the statement and the focused meaning of the word". (Ricoeur, 2003: 98). The metaphorical function is to select, accent, supress or organise the features of the primary subject referring to the statement of the secondary subject. For Black (Ricoeur, 1981: 89; Ortony, 1933: 21–33), metaphor is not a deviant naming, but the "unordinary usage of predicate" (Ricoeur, 1986: VI). However, remaining within the *proper–figurative* dichotomy, Black proposed that an actual distinction between them is not possible. As a result, using the proper or a more suitable word means the "loss of cognitive content" (Black, 1954: 293; Zashin and Chapman, 1974: Massen, 1995; Miller, 1992), implying that the 'interaction metaphor' cannot substitute the literal meaning without the original meaning (cognitive content) being lost. George Lakoff and Mark Johnson in *Metaphors we live by* (1980/2003) subsequently extensively analysed the cognitive function of the metaphor. Cognitive linguists generally assume that *metaphor is the way of thinking* and understanding the reality. Apart from creating the reality, metaphor is the mental processing of things and events, since reality is irreducibly metaphorical. The metaphorical is an immanent "moment" in every thought (Lakoff and Johnson 1980/2003). In this sense, language becomes an extremely dynamic concept where the cognitive potential of the human mind enables diverse 'colours', perceptions and understandings. Lakoff and Johnson ontologically position metaphor within the relation of perception (the question of the nature of human cognition) and text (sentence). Language is the *mirror-image* of the operational and organisational modes of mind: "ontological mapping across domains, that is ontological mapping through source domain, from target domain" (Lakoff and Johnson, 1989/2003: 246; Lakoff, 1993: 278; Walter and Helmig, 2008: 125). Metaphorical meaning appears with the conceptual metaphorical mappings ultimately "originating" from the relation (correspondences) in our bodily experience, that is, from the (nature of) the body, interactions in the physical experiences and cultural practices (Lakoff and Johnson, 1980/2003). Accordingly, the aim of 'conceptual theory' is to demonstrate that metaphor is essentially a conceptual and not a linguistic entity, it 'exists' in thoughts (Lakoff and Johnson, 1980/2003; Lakoff, 1993: 320) and arises from the process of reasoning. Neural theories of language similarly suggest that metaphor emerges in the neurological networks as an "effect" of neural circuits (Feldman, 2003: Xii; Gibbs, 2008).

If metaphor is the way of thinking, then metaphorical expressions are inherently related to the conceptual system that is intrinsic (connected) to perception, cultural practices etc. Cognitive theories of metaphor suggest that metaphors influence our perception of socio-political events. While objective reality is mainly contested on the grounds of the power of human cognition, the aspect that neither cognitive linguists nor hermeneutics consider is the diversity of human practices and specific discourses (images, systems, authorities etc.) that produce, constitute and transform the entire socio-political »body«.

The existence of the literal, proper meaning implies the existence of an objective world where language occurs as uniform, constituted by transparent entities; language as inter-subjectively and trans-subjectively uniform (Pikalo, 2008: 41–54; *cf.* Pušnik, 2022: 315; *cf.* Kokol and Pikalo, 2015: 1091). This classical notion of language assumes that the language–mind relationship is univocal and transparent, whereby any irrationalities in language are the effects of its deviant usage, possibly occurring as metaphor. We could argue that in *Poetics and Rhetoric* Aristotle 'invents' metaphor as a rhetorical figure. By associating metaphor with a noun or a word rather than a discourse, Aristotle set the orientation vis-à-vis poetics and rhetoric for centuries (Ricoeur, 1981: 16; Aristoteles, 1959). However, at the same time the Aristotelian definition of metaphor is quite distinct: it has a unique structure (word) but two different functions, rhetorical and poetical – that of *trope* and that of *epiphora*. In Ricoeur's opinion, *epiphora* – which means transposition – indirectly implies the semantic essence of a discourse. In *Rhetoric,* Aristotle (2004, 139) suggested the following conceptualisation of metaphor, as epiphora:

> *Liveliness is specially conveyed by metaphor, and by the further power of surprising the hearer; because the hearer expected something different, his acquisition of the new idea impresses him all the more... Well-constructed riddles are attractive for the same reason; a new idea is conveyed, and there is metaphorical expression.*

In metaphor, Aristotle 'fused' two seemingly distinct elements, the strategic one (rhetorical, as *techne* of speech): "to make things visible/vivid" as they were in action (Aristotle, 2004), and as meaning, as making sense of it (the proper meaning of the word). In this context, in the strategic play of discourse Aristotle introduces the logical power of analogy and power of comparison – the power of making things visible, the power of speaking of the inanimate (Ricoeur, 1981: 43).

Ricoeur bases his theory of metaphor as a *metaphorical reference* on Aristotelian *poetics,* where metaphor is defined as *mimemis*, Frege's division between meaning and reference, and Benvestine's 'extension' of reference to extra-linguistic reality – indicating the shift from semiotics to semantics. While semiotics applies to the inner relations of language – relations between signs, semantics alludes to the relation between sign and signification, namely, between language and the world (Benvestine, 1988: 36). Hermeneutics has two important distinctions when defining a discourse. Saussurean semantics, which excludes the denotative function of language, analyses the signification, the thing itself – the relationship between the "thing" and reality (Ricoeur, 1981: 125; Benvestine, 1988: 60; Howarth, 2000:

11) and that of the semantics of the word, when meaning becomes apparent, realised or transformed only within the mediation of the whole statement/sentence, which relates to the contextualisation of the word within the statement. Indicating the important shift from the *figure-word based* theory to the *sentence-based* theory (semantics), hermeneutics formulates metaphor as "work in miniature" since both text and metaphor, world and word fall under the one and same category, that of discourse (Ricoeur, 1974: 97; 1981, 217–256). Where the word and sentence are two poles of a single semantic entity, together alone they form a meaning and reference. In the 'position' of the reference (extra-linguistic reality or the object), metaphors hold the power to transform reality. Discourse alludes to the extra-linguistic reality, i.e., to its referent, "...the shift of meaning which needs the contribution of the whole text, effects on words..." (Ricoeur, 1974: 96).

Ricoeur uses the Aristotelian notion of tragedy to further elaborate the hermeneutical understanding of metaphor – the undividable relationship between *muthos* (Aristotelian conception of the story, narration) and *lexis* (the reference) where the meaning of metaphor is only possible within *muthos,* that is, within the discourse as a whole. In the Ricoeurian definition, the 'power' of metaphor is lexis, namely the reference, but a metaphorical sense is solely possible in the immanent relation to the whole text (Aristotelian *muthos*) (Ricoeur, 1973; 1981: 259–280). Understanding of the work as a whole provides the 'key' to the metaphor (Ricoeur, 1973: 107), the interpretation – hermeneutical circle – unveils the new form of being, i.e., the metaphor. Ricoeur's positioning of metaphor in the sphere of references to co-construct the world and Aristotle's notion of *mimesis* (Greek, to unveil the world) establishes the strategic 'nature' of metaphor – fabrication, construction and creation (Ricoeur, 1973: 109). Ricoeur's metaphor exists at the intersection of the story (discourse), its distinctive parts and as diction (reference), which directs and creates it at the same time.

The (post)Marxist and (post)structural implications for metaphor

Poststructuralist and (post)Marxist theory and ontology allow for an innovative conceptualisation of metaphor that moves away from the tradition of the linguistic, conceptual and hermeneutic theory of metaphor. Foucault's archaeology and genealogy of power and discourse show the possibility of re-inventing metaphor within discourse theory. Foucault's notion of statement, as a non-linguistic entity, as an assemblage/set of articulations and actualisations, that is, specific forms which culminate in discourse, position metaphor in the field of 'power relations'. Discussing metaphor as an element of Foucault's discourse, produced within the immanence of the power-knowledge structure, is an innovative approach that allows us to differently evaluate the role and power of metaphor within the political. To do so, Jakobson and De Saussure's structural theory of language must be taken into account. This is also a point of departure from hermeneutics (and cognitive linguist) discourse, and of entry to the (post)Marxist and (post) structuralist 'definition' of language/discourse where metaphor 'becomes' a practice of language and is hence epistemologically effective.

De Saussure's structural linguistic theory develops the "relational theory of language". Language is a 'system of differences' where meaning and identity are produced within the (relational) relationship of signifier and signified. De Saussure breaks with the transparency of language in relation to the object, which lies at the heart of hermeneutics. The structure, the symbolic order, as a 'empty field' of variation of relations (Lacan and Deleuze, 2004), or the Foucauldian (2010a) 'radical event' – the play of differences – is what determines the sense, meaning, reality and truth (*cf*. Foucault, 1994: 217) Language is arbitrary. All that exists is only its function and convention. De Saussure (in Howarth, 2000: 19; de Saussure, 1977: 81) draws on the notion of language, where there is no natural relationship between the signifier and signified: "in language there are just differences...the system of language is a set of differences ... and in a particular set of differences the system of values emerges" (de Saussure, 1974: 81). The *relational* and *differential* concept of language is an essential element of structuralism: every structure represents two aspects, a system of differential relations in which the symbolic elements are mutually determined and the system of singularity that corresponds to these relations and delineates the space of structure (Deleuze, 2004). If we simplify the Deleuzian notion and use Foucault's conception of discourse, the symbolic order or the structure as a relational relationship determines the position of the subject (Foucault, 2010a; 2003). Meaning (sense) arises from the combination of the elements that in themselves hold no meaning. Ducrot (1988; Šumič-Riha, 1988: 51) made a similar assumption: in discourse, there are rules and forces which are not outside the discourse ('the material reality'), but are immanent to every discourse, they are not decisive for his discourse, but constitute the discursive situation itself in which discourse proceeds from the relationship with the speaker.

From the de Saussurean structural principle of language as autonomous order, Ducrot develops the theory of discourse as a *historical event*. The statement is an event; "the realisation of the statement is the historic event, that is the emergence of a statement", and Ducrot (1988: 178) regards that emergence as an "enunciation", neither as an act nor as someone's possession, but the fact of the emergence of the statement. Ducrot's (1988: 241) *polyphonic theory of* discourse refutes the conception where subject is the ultimate author, the producer of the statement, and the source of meaning. The statement has a 'gap' – the meaning of the statement is never identical to what the speaker ought/intended to say (Ducrot, 1988: 260). The statement is never identical to enunciation. "Communication thought" is never the same as the thought of the speaking subject – what was said/uttered is never identical to the 'thing' that the speaking subject intended (Ducrot, 1988: 260).

The meaning of a statement is constituted within the culmination of different elements of discourse, where the simplest sentence is produced through dialogue, and not with the authority of a subject. The 'performative' statement influences reality. In a similar manner, Voloshinov and Bahtin (2005) underlined the historical aspect of discourse production, somehow trivial to Saussure's hegemony of the sign, as Ricoeur notes. Voloshin's 'ideological turn' in language and Bahtin's *dialogical nature* of language enabled language to be 'bound' to reality, to think language as neither an instrument nor a grammatical element, but in its effective function, as an articulation of reality. Voloshinov understands sign in its 'ideological charge', the moment that allows language to be connected to the material reality of human psychological and social practices. Although language is not a simple reflection of reality as objectivists would claim, it is a grasping of reality through language, which as practical consciousness pervades all social 'being'; language is an articulation of active and changing experiences in the world (Williams, 2005: 136). Consequently, meaning is an inevitable social act, depending on social relationships (Williams, 2005: 136). Bahtinian language is immanently ideological and material. Opposing de Saussure's 'hegemony' of structure/form, Bahtin (2005, 17) thinks of language as a practice: language-speaking is not an abstract system of linguistic forms, nor an isolated monological statement, not even a psychophysiological act of its realisation. Language is a *social event* of speaking inter-action that is realised within the statement and statements. Speech as a 'living dialogue' (Bahtin and Vološinov, 2005: 61) is an essential reality of language.

Structure, the symbolic order in Lacanian and Deleuzean's "language", is the moment where the imaginary is eliminated from the language. The structure determines the meaning. It is determined in the series of differences, in the relations between the signifier and signified (not in the relation to the object), the precise relation that determines the identity, the very truth. Meaning/sense arises from the combination of elements that are shifted through the structure and which by themselves have no meaning. Jakobson's structuralist notion of language depicts specific implications of metaphor (and metonymy). Metaphor and metonymy are not perceived as figures of imagination, but fundamental structural 'components' – indicating movement from one series to another and within the same series (Deleuze, 2004). In Laclau's view, Jakobson provides the ground for a strategic notion of discourse. Ricoeur also indicates that with the broadening of the de Saussurean model of language Jakobson allows metaphor to enter into discourse. Jakobson's theory of *two types of aphasic disturbances* defines the constitution and workings of discourse. The mutual implication of 'metaphoric chain' and 'metonymic mesh' form a specific discourse where Laclau (2009) sees the totalisation effects on discourse. The functioning of language through two different operations, *combination and contextualisation,* by which the sign obtains its location and *selection and substitution*, by which the sign can be replaced, indicates the mutual implication of metaphor and metonymy (Jakobson, 1989/1996: 89). This brings rhetorical categories to their specific locations (Laclau, 2009: 6), whereby metaphor and metonymy are not just figures among others, but as Laclau (2009: 6) points out, the two fundamental matrices around which all other figures and tropes should be ordered. Jakobson 'models' a movement of discourse on the axis of similarity and association, the aphasia on both axes results in the concentration on either axis (Jakobson, 1989/1996: 89). Fixation of the meaning for Jakobson always depends on the wider sets of cultural practices (specific individual styles, practices and habits).

Laclau's discourse is immanently constituted as a 'mixture' of metaphor-metonymy circulation, intersected by rhetoric as a dimension of signification that has no limits in its field of operation (Laclau, 2009). Accordingly, Laclau indicates that discourse is every practice of signification connected to social life. As there is no distinction between the signification and activity (Laclau and Muffe, 1985; Laclau, 2009), if words, actions and effects are interdependent networks, then the de Saussurean categories signifier/signified, paradigmatic/syntagmatic aspect quit being linguistic categories as the synchronic method anticipates. In Laclau's (2009) opinion, if we theorise them appropriately, these categories could define relations at work in the field of common ontology; otherwise, rhetoric could not be ontologically constitutive. If we think of any identity or truth as a construction, then we are implying shifts/crossing from metaphor to metonymy: from the starting point of association (metonymic relation) to its consolidation in analogy (metaphoric relation) (Laclau, 2009). This is how the construction of a specific identity or hegemonic discourse is created.

We have tried to show that Ducrot, Voloshinov and Bahtin provide the grounds for thinking about metaphor as part of the wider discursive practices. This connects with Foucault's conceptualisation of metaphor within power strategies. Bahtin and Voloshinov's notion of language as being dialogically "produced" and their "disclosure" of a sign in its immanent materiality is valuable. Bahtin with *heteroglosia* (opposite to monological language) introduces the idea that language is a strategy, implying that diverse strategies are displayed in language. Thus, heterogeneous meanings, which are reflected in language similar to Ricoeur's notion of the inherent creativity of language, demonstrate that language reveals/indicates social speech/ language, which shows the ideological and material 'nature' of a sign. In this sense, sign is not a linguistic element, but a social event of speech interactions that is realised in the statement. Language in this diachronic perspective is a social practice. With Bahtinian's "dialogical language" and Voloshinov's "ideological sign", metaphor 'clashes' with the very materiality.

In the last part of this article, we show that neither Bahtin nor Foucault consider *structure* to be perfectly homogenous and uniform. In the Foucauldian sense, power (relations) penetrate the entire socio-political body. In the Bahtinian and Voloshinov senses, "social sign" is produced within (and a product of) the "arena of class struggles". Discourses are material, they emerge in different relations, and in the language interaction: language is a social event of language interactions, realised with statement(s) (Bahtin, 2005: 61). Ducrot similarly considers a statement as an historic event, where precisely the appearance of this statement is an enunciation (Ducrot, 1988: 178). Consequently, the meaning of a statement is apparent within the confrontation and crossing of different voices (Ducrot's polyphonic theory). It is constituted within the culmination of various discourses. If we acknowledge Voloshinov's "ideological sign", or go along with Bahtin's *heteroglossia*, or if we argue with Foucault and Ducrot's conception of discourse: a statement is an event where language as everything uttered/enunciated (Ducrot) and said (Foucault) induces/effects and enables discourses. Metaphor can thus depart from the linguistic tradition and definitions. Ducrot, Voloshinov and Bahtin provide the basis for a strategic notion of metaphor. In Laclau's explanation of the totalisation of discourse, strategic *metaphoric-metonymic movements*, shifts and intersections, constitute hegemonic discourse or (temporarily) determine particular political identity. For Laclau, discourse or hegemonic identity 'resides' at the intersection/crossroads of metaphor and metonymy as strategic movements or continuous antagonisms that form discourses on one or the other side of 'the end'. Language as a system of differences, where 'antagonism' is failure of difference, can exists only in its interruptions – that is as metaphor (Laclau, 1985).

Metaphor as a political technology

In Foucault's formulation of discourse, *statement as an event* shows two aspects of discourse: contingency and historical development in language. Foucault asserts that the historicity of the statement must be restored and so it is developed in the relations of power rather than in the relations of meaning (Foucault, 2008: 116). A statement as a series of what is actually said, written or uttered, on its surface (Dreyfus and Rabinow, 1983: 45) is Foucault's "order of discourse" (2008: 26) – that is, the nature of the event and nullification of the signifier[1]. Although Foucault never addressed the function of metaphor within discourse, we can draw certain methodological/theoretical conclusions from his work: metaphor should be analysed on the level of event, which contradicts/negates the assumption of the origin; metaphor should be analysed as a series of enunciations in contrast to the metaphor as a unit of the statement; regularities should be traced in contrast to the original/identity or the original meaning; identification of the conditions for the possibility of emergence in contrast with identification of the real meaning. Discourse in Foucault's (2008: 116) sense does not refer to the unsaid or not meant, but to discontinuity, involving all practices that intersect or fuse, ignore or exclude; it does not dwell on the interplay of meanings of a certain pre-discursiveness. Discourse is a practice and within this practice discursive events acquire the principle of their regularity – i.e., the discourse does not imply truth, meaning or sense, but on the level of discourse itself its conditions of existence can be detected. In this vein, a metaphor is neither a figure, a tool nor a word whose essence is to produce diverse and multiple meanings. Being intrinsic to discourse, metaphor is the culmination of different discursive practices and articulations. It must be examined as a singular event that neither language nor meaning can exhaust (*cf.* Foucault, 2002: 130). In Foucault's event, there is immanent contingency in its singularity. This means that reasoning about metaphor should be outside the 'meaning–perception' (trans)formative role and instead take metaphor as an epistemological determinant that produces (communicates) knowledge of the world and to the world.

In line with Foucault's reasoning, metaphor seems to be immanent to every discourse. As such, it becomes epistemologically productive/effective. Similarly as with knowledge, power is always present:

> *Power must [...] be analyzed as something that circulates, or rather as something that functions only when it is part of a chain. It is never localized here or there, it is never in the hands of some, and it is never appropriated in the way that wealth or a commodity can be appropriated. Power functions. Power is exercised through networks, and individuals do not simply circulate in those networks; they are in a position to both submit to and exercise this power. They are never the inert or consenting targets of power; they are always its relays. In other words, power passes through individuals. It is not applied to them.* (Foucault, 2003a: 29)

[1] *Foucault's subject is to be analysed as a complex discursive function. The proper question is not who speaks, but the real question we should pose is to identify the modes of discourse, that is, the different modalities of enunciation: "[...] discourse is not majestically unfolding manifestation of thinking, knowing, speaking subject, but, on the contrary a totality in which dispersion of a subject and his discontinuity with himself may be determined" (Foucault, 1972: 55).*

Foucault's "analytics of power" stresses that every discourse is a constitution/product of power relations (and produces them). Discourses in this sense are "transparent" (Kelly, 2009) and the question is no longer what the unsaid or the real meaning is, but for whom it serves (Foucault, 2008: 119; Kelly, 2009). Discourse as a set of discursive practices outlines the "nature of metaphor and metaphorical" – in every statement there are circulations of power and its effects (Foucault, 2008: 114–115). As we observed with Laclau's (2009: 75) assertion that *metaphoric-metonymic movement* is what is immanent to discourse, i.e., the inherent strategic play that temporarily determines the 'hegemonic discourse' (sublime metaphorical fixation) and at the same time acknowledges its contingency (moderate metonymic association), Foucault's notion of power – present in any relationship and relation (Kelly, 2009; Foucault, 2010b), it is relational and dispersed, intentional and non-subjective (Dreyfus and Rabinow, 1983: 187; Foucault, 2010b) – provides the grounds for taking the strategies of metaphorical and metaphor even further. It is not about the production of additional/surplus meanings that ought to be analysed, but that procedures, techniques and technologies are the new ways of examining metaphor. In turn, the real question is what kind of relations is a metaphor producing in particular socio-political contexts, how it inscribes itself into the socio-political body. Metaphor should be examined within the "meshes of power" or "economies of power" (*cf.* Foucault, 2008: 120). Metaphor should be examined as a specific strategy of power: as a game of strategies that are mobile, transformative and reversible, including relationships between the people and relationships that they have with themselves (Foucault, 2010b: 252; Dreyfus and Rabinow, 1983: 204).

Foucault's *economies of power* or *meshes of power* demonstrate the pervasiveness of power that spreads throughout the whole socio-political body, depicting the failure of any objectivity, or any possibility of truth. Applying this to different theories of metaphor that rely on the assumption that some kind of 'objective law' exists, implying that certainty, true meaning, could be known or discovered by a 'deep' investigation (interpretation), despite refuting literal meaning as objective truth. What we see with Foucault is that every meaning is caught in the meshes of power, every truth is a product of specific 'economies of power', every language practice is where power effects become visible, and every metaphor, despite being 'different', is an object of the same power/knowledge dispositive.

A metaphor is about telling the truth in every single moment. Not an 'excess' of meaning, but as something that we are still understanding as metaphor, even though it is part of the same strategies of truth:

> *What then is truth? A mobile army of metaphors, metonyms, and anthropomorphisms – in short, a sum of human relations, which have been*

> *enhanced, transposed, and embellished poetically and rhetorically, and which after long use seem firm, canonical, and obligatory to a people: truths are illusions about which one has forgotten are illusions ... metaphors which are worn out and without sensuous power; coins which have lost their pictures and now matter only as metal, no longer as coins.* (Nietzsche, 2019: 6–7)

Fearless speech, as Foucault would describe truth telling, is the terrain where "metaphorical interplay" reveals itself in strategies of power. Truth constantly appears in varying forms, conceals itself with different masks, seems elusive, yet at other times is apparent, visible and liberating. However, in the moment we wish to seize it, in a moment of our awareness, to discover a real, truthful meaning, when we make sense of our being, as we have been embodying it, the precise moment when we think that we are expressing it, the truth that we are so eager to grasp disappears in intermission, loses itself in the ashes of discourses, in the said, but not really meant. In relation to *parrhesia,* metaphor uncovers its 'true nature' – as neither a tool, a figure nor the interplay of words and thoughts, but as a political technology that circulates around the truth, around the true meaning, consistently shifts its game (of meanings), accumulates multiple discourses, displaces and so clearly divides the subject in his belief that what he is is truly him, and what he speaks is the truth (Foucault, 2009).

Metaphor exposes the truth, the 'true' meaning or nature of every identity in immanent contingency, raptures and fluidity, revealing metaphorical circulation in every 'word' we say, in every view we have, in every activity we participate in. The meshes in truth, its immanent ruptures, are not what determines its character. The truth is the 'economy' of discourses that repeatedly (re)constitute it, the 'politics' which establishes and destroys it. In these ruptures and meshes, metaphor emerges as the Aristotelian *techne* or a Foucauldian technology of procedures and techniques. Metaphorical play constitutes every discourse, but at the moment of our certainty dissolves it in an instance.

To speak the truth in metaphors appears to be the work of an autonomous individual. However, any use of metaphors is not about 'escaping' power, but restoring it, with new 'rules' and new 'laws' that determine the place of the emergence of truth. Metaphor is to be understood as a 'strategic instance', which continually circuits in the discursive field, and within the struggle of diverse discourses determines the rules of the un-true. In this sense, metaphor is a specific political technology, a strategy of power, that decides about the *regimes* of truth. Metaphor, as a technology, is a struggle over the status of the truth.

Conclusion

In this article, we wanted to go beyond the established methodological and theoretical visions of metaphor and open it up in terms of new functionalities. We sought to widen the possible scope of metaphor for analysing socio-political realities. We showed how metaphor as a strategy gives insight into how power relations determine a particular hegemonic discourse. The contemporary linguistic theories, where we mostly analysed the theories of metaphor put forward by Ricoeur, Lakoff and Johnson, rightly assumes that metaphor can be understood only within the socio-cultural context, but simultaneously these theories assert that the creative-polysemic nature of language and mind is what ontologically produces metaphorical meaning. The 'power' of metaphor manifests itself in generating multiple meanings and in the sense of these approaches we process reality, give meaning to events, discover, and perceive the world in a given way. It is seen as a subjective endeavour whereby while interacting humans produce meanings as interpretations and creations of reality.

Contrary to the mentioned theories, with Foucault we showed that meanings are always already present and hence subjectively-creative ontological (re)creations of 'classical' theories of metaphor miss the realities of power/truth relations. It is instead power relations that constitute the metaphor as immanent to every discourse and something that circulates throughout the socio-political body. Any attempt to fix meanings as such is bound to fail due to the (re)creative nature of discourses and power relations. In this sense, metaphors are political technologies that reflect and create wider socio-political practices. A new potential avenue of research insights into the function of metaphors is thereby opened.

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*Simona KUKOVIČ, Jelena JOKSIMOVIĆ**

CEREMONIAL GIFTS – NICE GESTURE OR POTENTIAL RISK? GIFT REPORTING DISCREPANCIES IN SLOVENIA**

Abstract. *Integrity and transparency are crucial elements of modern democratic countries, and trust in politico-administrative institutions must be pursued and maintained at every turn, including when it comes to reporting ceremonial gifts. Despite their (often) problematic connotations, ceremonial gifts are a major element of building strong relationships, from the highest positions in politics and diplomacy to the closest public servants. This article examines data concerning reported gifts in the Republic of Slovenia. Through in-depth statistical analysis, the authors established anomalies in the reporting of ceremonial gifts, in particular flawed descriptions of gifts and problematic assessment of their monetary values, which in most cases is left to the layperson. The authors conclude that a problem clearly exists with implementation of the normative framework because only the technical aspect and less the qualitative side is taken into account while reporting ceremonial gifts.*

Keywords: *ceremonial gifts; reporting; anomalies; transparency; trust; Slovenia*

Introduction

When discussing ceremonial gifts,[1] we cannot go past the most commonly cited example from Greek mythology, the large wooden horse the Greeks gave to the Trojans. Believing that this gift was the sign of a truce,

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The data and the code used for the analysis presented in this section are fully available for reproducibility at our GitHub Repository, url: https://github.com/jelenajoksa/Gift-Reporting-Discrepancies.

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[1] *In the literature, one can also find synonyms such as diplomatic or protocol gifts.*

the Trojans dragged the horse into the city, without knowing that it was hiding Greek soldiers, who then opened the wall gates at night for their army to enter. Troy was deceived and defeated in this way, and ceremonial gifts are still considered to be given and received with caution. The story of the Trojan Horse is explained by Nagy (1981) as a paradigm according to which the giver of the gift has an advantage, and the receiver is in danger. The latter is especially true in the political world as the recipient country runs the risk of becoming beholden to the donor country by accepting the gift (Kustermans, 2021: 105). From this point of view, it is unsurprising that many countries around the world have established and adopted rules for accepting and giving ceremonial gifts.

Despite the risk, the presentation of gifts is a constant in diplomatic practice as gifts symbolise welcome, honour and the cultivation of beneficial diplomatic relations, and often emphasise the workmanship of local businesses, historical craftsmanship, or local luxury goods and materials (Aubert, 2022). The extent of the gifts often depends on the country where the visit takes place and the customs of the country involved. In the Middle East, for example, countries give lavish gifts on each other during state visits as a sign of their generosity and respect for each other. This is much less common in the West, where the meaning of a gift is more important than its price (Monod de Froideville and Verheul, 2021).

In this article, we examine the reporting of ceremonial gifts in the case of the Republic of Slovenia, including all public and state entities. Through indepth statistical analysis, we investigate the dataset of reported gifts to see if we can detect some discrepancies or anomalies in the reporting by public officials and their family members. We hypothesise that while the reporting of gifts received is an essential element for ensuring integrity and trust in administrative and political institutions and public officials, mere reporting is not enough given that the quality of reporting is also important in terms of accuracy and a fair assessment of gifts. In the first part of the article, we focus on the normative framework applying in the Republic of Slovenia regarding the receiving and reporting of ceremonial gifts. Part two of the article contains a comprehensive analysis of data collected in the gift reporting database managed by the Commission for the Prevention of Corruption (hereafter: the CPC).

Theoretical and normative framework

In a modern democracy, the quality of governance or indicators that measure the quality of regulation, the rule of law, the effectiveness of governance, and the control of corruption are very important (Wiatr, 2018: 7–8). According to administrative theory (Bogason and Toonen, 1998) and corresponding administrative argumentation, the consistency of administrative values is vital for the quality of governance. Administrative values are decisive for ensuring answering the legitimacy of the administration, i.e., for the transformation of its power into authority and its recognition in society. Within the framework of open public administration, two key principles stand out: the principle of openness and the principle of transparency. The principle of the openness of public administration is broader than the principle of transparency as it aims at direct active communication between the administration and the user (Brezovšek et al., 2014).

The openness of public administration is also a condition for citizens' trust in administrative and political institutions (Haček and Brezovšek, 2014: 6–7). Gamson (1968: 42) argues that trust in political and administrative institutions is important because it serves as a "creator of collective power", enabling the government to make decisions and commit resources without resorting to coercion or seeking the explicit consent of citizens for every decision. In modern democracies where citizens are in control, it is trust that gives representatives the leeway to set aside the electorate's short-term concerns while pursuing long-term national interests (Mishler and Rose, 1997: 419; 2001). In the Republic of Slovenia, trust in the central institutions of the democratic political system is quite low; however, Haček (2019: 436–437) notes that trust has dropped further in the last decade due to the permanent state of political crisis.[2]

One area where the trust of citizens should not be further eroded is the reporting and recording of ceremonial gifts received by representatives or officials[3] of political and administrative institutions.[4] The tradition of gift-giving between political leaders and other state officials is a long-standing practice and a strong element of peaceful diplomatic relations. The earliest evidence of a diplomatic exchange of this kind is engraved stone vessels from Egypt given to the Hittite neighbours. Later, gifts between European ambassadors and the Ottoman Empire, albeit mainly textiles, also included clocks and watches. Gift-giving between European monarchies was also unique in that it involved realpolitik: receiving objects became a way of securing or maintaining an advantageous position with a diplomatic counterpart or

[2] A similar trend appears in other Central and Eastern European countries as well (see Agh, 2020: 30–32).

[3] Officials include public officials, officials in positions and other public servants, employees working at the Bank of Slovenia, executive officers and members of management, leadership, and supervisory bodies in public sector entities. Family members include spouses, children, adopted children, parents, adoptive parents, siblings and persons living in the same household or in a non-marital partnership with the person concerned. The prohibitions and restrictions on accepting gifts also apply to companies in which the state or municipality holds a majority stake or exercises a controlling influence, and which were established on a statutory basis.

[4] For more on diplomacy in the Republic of Slovenia, see Udovič (2023).

opponent, based on the value of the gift. Another famous gesture was introduced by the Chinese government in the 1950s when it began sending pandas to its communist allies and later to other foreign governments, becoming known as *panda diplomacy*. In Western democracies where the goal of diplomacy is to promote security, prosperity, democracy and economic development, the exchange of gifts may seem an unusual tactic, although this tradition still has a firm place in international relations today (Aubert, 2022). The exchange of gifts, even if made by individuals, is not considered a personal exchange as these individuals represent the state or an institution and the gifts are thus considered to be state or public property.[5] The exchange of gifts is not limited to the supranational, national or state levels, but is also seen on other levels of government (e.g., regional and local) and, in the broadest sense, concern all officials in public and government institutions. Institutions, ministries, public entities and state companies are therefore subject to special rules and instructions for accepting gifts (e.g., only gifts up to a certain amount may be given). These rules are about integrity and, in many cases, giving and accepting gifts is prohibited to avoid any kind of preferential treatment or even corruption. In other cases, every gift must be reported and evidenced in a database monitored by the respective state institution or commission.

The main element of the Slovenian normative framework that (also) regulates ceremonial gifts is the umbrella Integrity and Prevention of Corruption Act (2010/2020),[6] Article 30 of which talks about the prohibition and restrictions on accepting gifts in the public sector. In paragraph 2 of Article 30, the law is limited to ceremonial gifts and states that "... a public official or his/her family member may accept a ceremonial gift on behalf of the entity for which (s)he works, which becomes the property of his/her employer regardless of its value. Gifts given by foreign or domestic legal or natural persons at work events are considered ceremonial gifts". In the third paragraph of Article 30, the law states that an official may accept a gift traditionally or customarily given on specific occasions (cultural, ceremonial, completion of education, training, holidays etc.) or when performing diplomatic activities, but its value may not exceed the value of EUR 100, regardless of the form of the gift and the number of givers of the same gift.[7]

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5 In some countries, ceremonial gifts are located in state museums or other suitable places and exhibited to the public.

6 The Decree on restrictions and duties of public employees as regards the acceptance of gifts (2003) was in force until 2021.

7 As long as the gift is not a ceremonial gift or a gift presented on certain occasions, the official person is obliged to warn the donor of the prohibition against accepting gifts and to refuse the gift offered. A family member of the official person is also obliged to refuse the gift. If the donor insists on the gift, the official or his/her family member is obliged to deliver the gift to the official's employer. An official or a family member may not accept a gift if the delivery or acceptance of such a gift would constitute a criminal act; it is prohib-

In terms of openness and transparency, paragraphs six and seven of Article 30 (Integrity and Prevention of Corruption Act, 2010/2020) are particularly important, requiring that a public entity keeps a record of gifts received,[8] containing information on the type and estimated value of the gift, the donor and other circumstances of the gift's delivery. The latter instructs all recipients of gifts to enter information[9] on gifts whose value exceeds EUR 50 on the list of gifts. The public sector entity is obliged to submit a list of gifts to public officials, their family members and ceremonial gifts to the CPC by 31 March for the previous year. The way gifts are disposed of, how the value of gifts is determined and how a list of gifts is maintained, together with other issues related to implementation of this Article, are determined by the Minister responsible for systemic control of the limitation of corruption through regulations.

In addition to the Integrity and Prevention of Corruption Act, the Rules on restrictions and duties of officials as regards the acceptance of gifts (2021) are in force. These rules regulate the manner in which gifts maybe be disposed, the determination of the value of gifts, the maintenance and content of the list of gifts given in connection with the performance of one's function, work or public service or received by public officials or their family members in connection with their position, as well as other implementation issues related to the prohibitions, restrictions and duties of public officials in accepting gifts. The following sections of the Rules are especially relevant for our analysis.

The third section determines the conduct in the case a gift is accepted. Article 5 prescribes that in the case of the acceptance of a gift, the recipient[10] must, as soon as possible and at the latest within 8 days, fill in a form to record the gift received and hand it over to the person who maintains the list of gifts in the public entity where they work.[11] On this form, the recipient of the gift must provide the following information: his/her first and last name and the activity he/she carries out; the first and last name and address

ited by another law or regulations issued under it; money, securities, gift certificates and precious metals are given as gifts; the acceptance of the gift would impair or appear to impair the impartial and objective performance of the official's public duties (Integrity and Prevention of Corruption Act, 2010/2020: Article 30).

[8] The CPC publishes the list of reported gifts on ERAR.si application. A link to this dataset can be found here: https://erar.si/darila/.

[9] The gifts that public officials receive are reported via the online form accessible at https://registri.kpk-rs.si/registri/prejeta_darila/prijava/.

[10] If the gift is accepted by a family member of an official, the official is obliged to fill in the form and hand it over to the person responsible for keeping the list in the public entity where they work.

[11] The recipient does not complete the form if they receive a gift of negligible/symbolic value. Gifts of symbolic value traditionally given in connection with work are not considered work-related gifts (plaques, badges, flags, promotional materials and similar items). Prohibitions and restrictions on the acceptance of gifts do not apply to these types of gifts and officials may accept them.

of the donor or the title and registered office of a legal entity if the gift was given on behalf of a legal entity; the date of acceptance of the gift; information about whether the gift was received by a family member; an indication of whether the gift is diplomatic or occasional; the nature and value of the gift and an indication of how the value of the gift was determined; the reasons for, or circumstances in which, the gift was given; the manner in which the gift was given (e.g., in person, by post); an indication of whether the gift has become the property of the recipient or the public entity that employs the recipient; the date of completion of the form and the signature of the recipient.

Further, the regulations provide that the recipient of ceremonial and occasional gifts that become the property of the public entity where the recipient works, as well as gifts that the recipient is not allowed to keep, must be handed over to the person responsible for maintaining the list of gifts at the public entity that employs the recipient immediately upon receipt or as soon as possible, but no later than within 8 days. The person maintaining the list of gifts at the public entity where the recipient works shall also enter on the form the way the gift was recorded and used or kept if the gift has become the property of the public entity where the recipient works.

Article 8 states that while assessing the value of gifts the market price of the gift must be considered. Where the gift is one whose value cannot be determined based on market prices, its value shall be determined according to the lay estimate of the person keeping the register of gifts, noting the prices of similar or comparable things, rights, services or other benefits. If the gift is a work of art or an object of historical value or other value that cannot be assessed based on market criteria, the gift's value is to be determined based on the assessment of a professional valuer.

Each gift shall be recorded in the electronic list under a consecutive number for the period of the calendar year and kept for 5 years from the end of the year in which it was given. In each public entity, one or more persons must be designated as responsible for the proper management of the record of gifts in accordance with the Rules (the person maintaining the list of gifts). If the mentioned person has doubts over the accuracy of the data entered in the record of gifts, they shall determine, as far as possible, whether the data provided are true. If they find that the information on the form is untrue or that it is not an occasional gift of symbolic value, they must inform the recipient and the head of the public entity. They are obliged to do the same if they discover violations in the transmission of data to the record or if the Rules have been violated in any other way.

External control is carried out by the CPC to which public entities must submit a list of gifts received in the previous year by 31 March at the latest, including all the information that must be provided while registering gifts.

In addition to the CPC, internal control is carried out by the heads of the public entities (Rules on restrictions and duties of officials as regards the acceptance of gifts, 2021: Article 15).

Detailed instructions on how to report, record and deal with ceremonial gifts may be found on the official website of the CPC, as well as the website of the Court of Audit of the Republic of Slovenia, where Guidance on the restrictions and obligations when accepting gifts (2021) and the Form for recording a gift received are available.

Analysis of the normative framework shows that the recording of ceremonial gifts received is obligatory for all recipients and regulated quite precisely, also in the light of an open, transparent, credible and trustworthy public and state administration. In the following section of the article, we examine how the provisions of the umbrella law and the Rules are considered in practice.

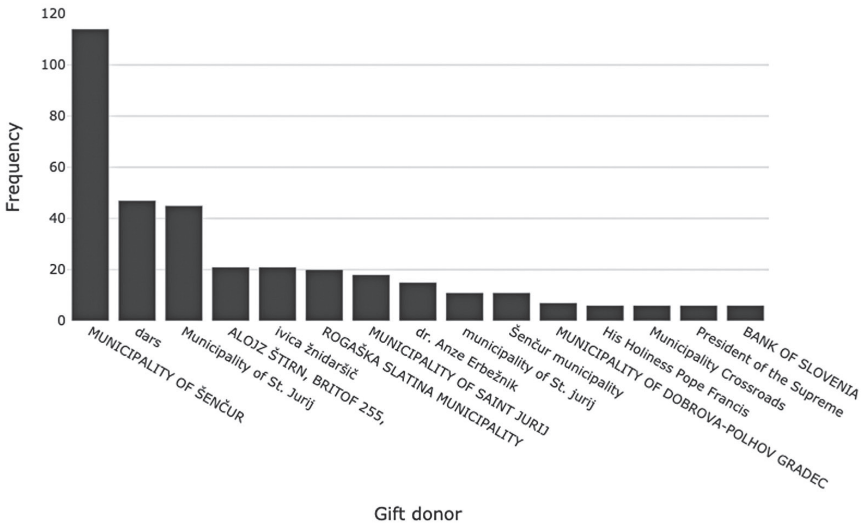
Data and methods

For the statistical analysis, we use the publicly available dataset provided by the CPC at the ERAR.si portal. The table contains 3,954 gifts reported between January 2014 and February 2023. For each gift, the following data points are reported: date of receipt, recipient, donor, gift type (ceremonial or occasional), description of the gift, value, method of value determination, reason for giving the gift and the final owner of the gift.

The initial hurdle in dissecting this dataset becomes apparent on a cursory inspection (as shown in Figure 1) – the lack of uniformity in the reporting of gifts is evident.[12] The CPC mandated this reporting with the aim of enabling the public to closely monitor public officials. However, it is clear that the process can be challenging for those without considerable computer skills.

[12] *Evidently, due to unrestricted inputs such as case sensitivity and organisation type, discrepancies arise within the raw fields of the database. For instance, "MUNICIPALITY OF ŠENČUR" and "Šenčur municipality" are recognised as distinct entities. This observation extends to "Municipality of St. Jurij", highlighting the need for extensive data pre-processing. See Figure 1.*

Figure 1: TOP 15 REPORTED GIFT DONORS BY NUMBER OF GIFTS THEY SENT



Source: Data from ERAR.si portal (2023).

Data pre-processing

The first method we performed was to translate all the data points from Slovenian to English. We did this automatically using the deep translator library in Python. To minimise the amount of noise in the dataset, we cleaned the data for the following attributes:

- *Case sensitivity:* As may be seen in the accompanying dataset, all data points in the collected data are missing case sensitivity. To address this issue, we first converted all text to lowercase to reduce the possibility of category duplication, such as "books" vs. "BOOKS" and similar cases.
- *Stop words:* Stop words (such as the, a, an, in, of) are often used in descriptions of gifts, but provide little context about the gift. The nltk. corpus Python package was used to filter out stop words in gift characteristics, such as the description of the gift, the occasion on which the gift was received etc.
- *Dates:* Textual date fields were converted to timestamps to allow various forms of aggregation and time series analysis.

Unsupervised machine learning

One of the techniques for extracting the most frequent gifts in our dataset entails clustering them based on their description. For this purpose, the

K-means algorithm was applied to the *Term Frequency-Inverse Document Frequency* (TF-IDF) matrix of features (Karabiber, 2023) obtained from the vectorisation step. K-Means divided the gift descriptions into *k* clusters based on their feature similarity.

- *TF-IDF vectorisation:* To represent our text fields numerically, we vectorise our text data using the TF-IDF technique. It measures how important a term is within a document (i.e., the gift description) compared to a collection of documents (i.e., all gift descriptions). The words in a text document are converted into numbers indicating their importance through a text vectorisation process. TF-IDF vectorises (scores) a word by multiplying the word's Term Frequency (TF) with the Inverse Document Frequency (IDF).

$$TF = \frac{number\ of\ times\ the\ term\ appears\ in\ a\ document}{total\ number\ of\ words\ in\ the\ document}$$

$$IDF = log(\frac{total\ number\ of\ documents}{number\ of\ documents\ where\ term\ t\ appears})$$

$$TF - IDF = TF * IDF$$

- *Silhouette Score & Calinski-Harabasz Index:* the evaluation methods we use for our clustering algorithm are the Silhouette Score (SS) and the Calinski-Harabasz Index (CH) (Wang, 2019). We calculate the average SS for the whole dataset and for each cluster using the function from the sklearn.metrics module. The Silhouette Score measures the compactness of each data point within its assigned cluster and the separation between different clusters. A higher Silhouette Score (ranging from -1 to 1) indicates better defined and well-separated clusters. The Silhouette Score for a data point *i* is given as follows:

$$S_i = \frac{b_i - a_i}{max\{b_i, a_i\}},$$

$$b_i = min_{\{k \neq i\}} \frac{1}{C_k} \sum_{j \in C_k} d(i,j),$$

$$a_i = \frac{1}{|C_i| - 1} \sum_{j \in C_i, i \neq j} d(i,j),$$

thus, *bi* is the inter-cluster distance, defined as the average distance to the nearest cluster of data point *i*, other than the one to which it belongs; and *ai* is the intra-cluster distance, defined as the average distance to all other points in the cluster to which it belongs (Tushar, 2021).

The Calinski-Harabasz Index (also known as the Variance Ratio Criterion) is an evaluation index based on the degree of dispersion between clusters and clusters and is defined as follows. A higher value indicates more compact and better separated clusters. The index is calculated in this way:

$$\mathrm{CH(k)} = \frac{\mathrm{B(k)(n-k)}}{\mathrm{W(k)(k-1)}}$$

$$B(k) = \sum_{i=1}^{k} a_i \left|\left|\overline{x_i} - \overline{x}\right|\right|^2 ,$$

$$\mathrm{C(k)} = \sum_{i=1}^{k} \sum_{C(j)=i} \left|\left|x_j - \overline{x_i}\right|\right|^2$$

where *k* is the number of clusters, *n* is the number of samples, W(k) is the intra-cluster divergence and B(k) is the inter-cluster divergence.

Keywords utilisation and words filtering

After running the clustering algorithm, we performed a manual review of the clusters step. This is necessary because there are no labelled records of this type. First, we inspected the SS of each cluster and extracted the most frequent word (gift object) from each cluster. For the clusters with large SS (*strong clusters*), we took the most frequent word as the keyword for further use in the analysis. For clusters with small SS (*weak clusters*), there were only a few possible solutions. First, we used the keywords from the strong clusters and then performed word filtering to extract all the expressions that fit better with the other clusters. We assigned these expressions to the clusters they belong to. For the remaining expressions, there were two steps to ensure the most optimal results:

- The first step was to repeat the task of clustering and using keywords (i.e., consequently several times) until we arrived at a satisfactory result (we managed to group all the gifts in a meaningful way). However, due to the multiple descriptions of the gifts leading to a single large, weak cluster, this method yielded suboptimal results, explaining why we only performed it twice.
- After the second manual inspection, instead of performing a new iteration of clustering, we conducted a subsequent reorganisation of the remaining weak clusters and made a concerted effort to group similar items (e.g., teacups, pots, sets and samovars). Through this process, we also identified different types of keywords that can be used effectively by focusing on gift materials rather than the objects themselves.

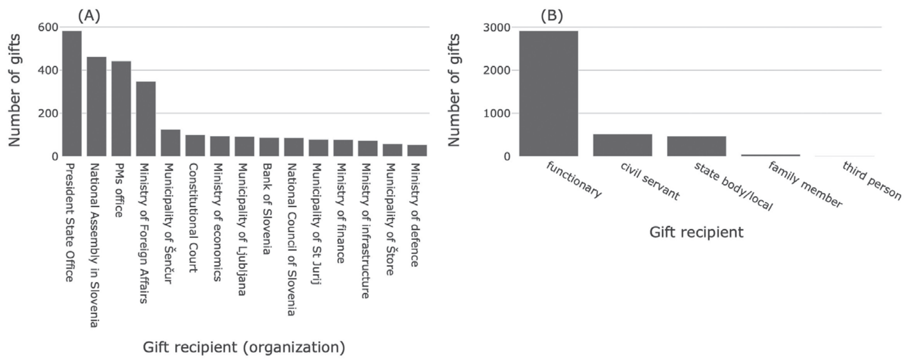
Named entity recognition (NER)

In data categories such as Donors of the gifts, our focus was on uncovering the countries or municipalities that mostly provide gifts to Slovenian public officials. To achieve this, we use Named Entity Recognition (NER) techniques, concentrating on the identification of geopolitical entities, referred to as "GPE" in this feature. To this end, we used the capabilities of the spaCy library. We employed the pre-trained English language model "en_core_web_sm", which includes various text processing and analysis components, including tokenisation, part-of-speech tagging, dependency parsing, and NER (Majumder, 2021).

Record of ceremonial gifts received in practice: results and discussion

Following our initial phase of data cleansing and transformation, we present a series of insightful graphs to spotlight various attributes of ceremonial gifts in our dataset. We begin by presenting the distributions of the most prominent gift recipients (Figure 2) before moving on to the distributions of the leading gift givers (Figure 3). This is to provide clearer insight into the characteristics of the dataset, especially as concerns the most important participants. We then look in more detail at the descriptions and values of the gifts, revealing the most striking differences within the dataset.

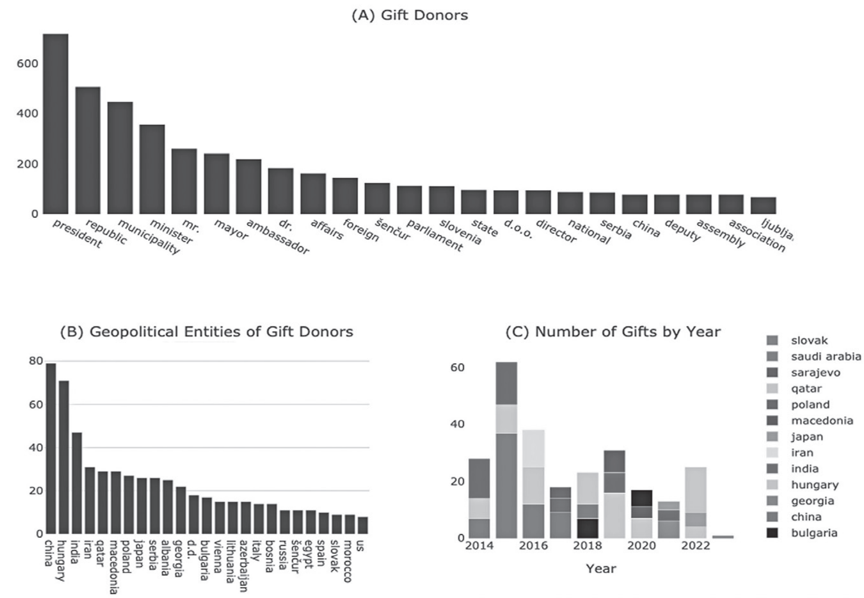
Figure 2: DISTRIBUTION OF ORGANISATIONS (PANEL A) OFFICIALS (PANEL B) THAT RECEIVE GIFTS



Source: Data from ERAR.si portal (2023).

Panel A in Figure 2 shows that the recipients of gifts – as was also to be expected – include the three highest state bodies in ceremonial terms, i.e., the President of the Republic, the National Assembly and the Prime Minister's Cabinet, followed by the Ministry of Foreign Affairs and the Constitutional Court, various municipalities and the Ministry of Economics, the Bank of Slovenia, the National Council, and others. It is particularly interesting that, among the municipalities, the highest number of gifts received was reported by the Municipality of Šenčur and not – as one might anticipate – by the Municipality of Ljubljana as the capital city of the country. In Panel B, we observe that most gifts went to functionaries (and interestingly not also their family members), followed by a much smaller number of civil servants and local authorities.

Figure 3: DISTRIBUTIONS OF GIFT DONORS



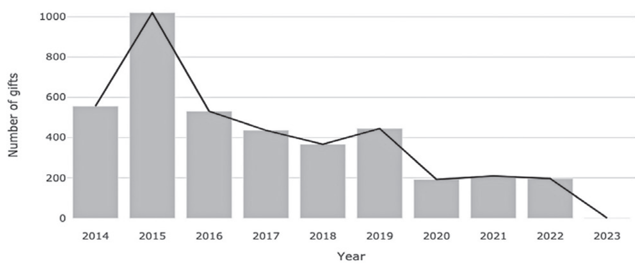
* Panel A: *top 25 words used to describe gift donors. We chose this preview since there are more than 3000 unique records for donors, so this graph presents a more meaningful starting point for further grouping of donors.* Panel B: *Top 25 geopolitical entities the gifts come from.* Panel C: *Number of gifts per top 3 geopolitical locations donated in the particular year.*

Source: Data from ERAR.si portal (2023).

Panel (A) in Figure 3 shows that the majority of gifts were sent by presidents, ministries, mayors and ambassadors, while we end up with few country names. It is indeed interesting to see which geopolitical entities most often gave gifts to officials in Slovenia (Panel B) and how this evolved over time (Panel C). Panel B shows the 25 geopolitical entities from which the gifts originate. It is worth noting that among the most common Asian countries are China, India, Iran, Qatar and Japan, followed by countries from the region such as Hungary, Macedonia, Poland, Serbia, Albania etc. In Panels B and C, we see that China was the largest gift donor in the period 2014–2018, which coincides with the fact that the Republic of China and Slovenia have strengthened their economic cooperation through the Platform 16+1 and the Belt and Road Initiative. This led to a rise in trade of goods, service activities, the number of tourists and investments in both countries (Raščan, 2019). As a result, the number of protocol visits between the two countries' summits increased during this period. Further, in 2015 Slovenia adopted the

Foreign Policy Strategy of the Republic of Slovenia that states with respect to cooperation with countries in Asia that in this part of the world the most important partners of the Republic of Slovenia are India, Japan, and China as one of the biggest economies in the world. The government at the time began to implement the new Strategy (2015), which led to more frequent political contacts between the countries and hence also to the exchange of ceremonial gifts, as may be clearly seen in Panel C where China and India are prominent. There is another interesting observation in Panel C; namely, that countries were donors for 2 years in a row and then either stopped or reduced their gifts (e.g., India in 2014 and 2015, Macedonia in 2019 and 2020, Bulgaria from 2018 to 2020, Japan in 2021 and 2022 etc.). On the other hand, Hungary was a constant donor.

Figure 4: NUMBER OF GIFTS PER YEAR



Source: Data from ERAR.si portal (2023).

Since the analysed timeframe incorporates the COVID-19 pandemic, which had a strong impact on diplomatic activities, we additionally analysed the possible effects of the lockdowns on the presenting of ceremonial gifts. The number of reported gifts (Panel A) during the COVID-19 period was about half the usual number, on average about 100 reported gifts per year between 2020 and 2022. In this period, the Ministry of Foreign Affairs proved to be the most important organisation receiving gifts. As for Slovenian municipalities, Ljubljana, Šenčur and St. Jurij were the most frequent recipients of gifts in the pre-COVID-19 period, but were replaced by the municipalities of Piran and Štore during the pandemic. There was a shift in the recipients (Panel B) themselves during the COVID-19 period. While in the pre-COVID-19 period, functionaries were the main recipients, during the pandemic they almost disappeared in favour of civil servants. In the pre-COVID-19 period, China, Hungary, India, Iran and Serbia were the most common donors of gifts, while in the COVID-19 period, Qatar, Hungary, Japan, Georgia and India were the main donors.

Figure 4 shows the number of gifts received by individual years. We observe that the year 2015 stands out with the highest number of ceremonial gifts received over the entire study period.[13] We attribute the latter mainly to the government's then foreign policy, mainly focused on Asian countries. On the other hand, another political promises of the coalition at the time was transparency and the fight against corruption, which may have led to the more consistent registration of ceremonial gifts. Still, it is somewhat surprising that the number of gifts received did not increase during the period when the Republic of Slovenia was presiding over the Council of the European Union (in 2021) and was hosting many events on the level of the highest national and European representatives. It should indeed be stressed that while the amendments to the normative framework on the reporting of ceremonial gifts (i.e., Amendments to the Integrity and Prevention of Corruption Act; Rules on restrictions and duties of officials as regards the acceptance of gifts) were adopted in 2020 and 2021, no changes in the following years are evident from the data shown in Figure 4.

Gift values

We now consider the reported values assigned to the gifts and look at the main statistics: Median = EUR 40, Minimum = 0, Mode = EUR 50, Q3 = EUR 70, Maximum = EUR 62,000, Mean = EUR 135.8, with all gifts worth more than EUR 131 being outliers. Table 1 presents the frequency distribution of the reported values. It is interesting to note that the most frequently reported value coincides with the threshold of EUR 50 set by the CPC.

Table 1: NUMBER OF GIFTS PER THEIR VALUES

Reported gift value (EUR)	Number of gifts
0–50	2632
50–100	828
100–200	276
200–1000	187
1000–62000	31

** We can notice that it drastically drops in two pints, after 50 and after 1000 EUR.*

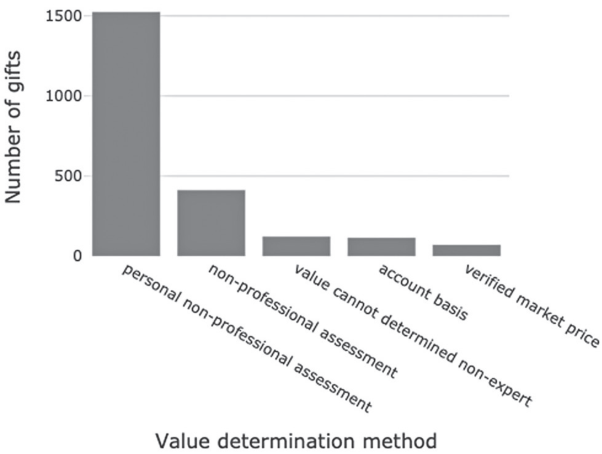
Source: Data from ERAR.si portal (2023).

It is clear from Figure 5 that a significant proportion of gift values does not have a professional valuation. While it is unrealistic to expect entities to hire professionals to value all gifts, there does seem to be an expectation of more conscientious evaluation. Currently, the prevailing view appears to be that, in the absence of further regulation, evaluations of gifts are undertaken

[13] *The six main recipients of ceremonial gifts in 2015 were the President of the Republic of Slovenia, the National Assembly, the Ministry of Foreign Affairs, the Municipality of Šenčur, the Prime Minister's Office, and the Municipality of Ljubljana.*

casually, often with the underlying motivation of them being personally acquired.

Figure 5: BAR-PLOT OF VALUE DETERMINATION METHOD



** We can notice that most of the gifts are evaluated non-professionally (first three groups). Only a minor fraction is appraised based on account or verified market value.*

Source: Data from ERAR.si portal (2023).

Gift descriptions

We found that distinguishing between objects (e.g., "plate", "vase", "bowl") and adjectives (e.g., "silver", "crystal", "glass") is a challenge for any clustering or topic grouping algorithm. For example, consider an object like a glass bowl – deciding whether it belongs more to the cluster "glass" or "bowl" presents a conundrum. An illustrative case, representative of many in our dataset, is the description "decorative, traditionally decorated stone plate with carved wooden frame" – wording for which the machine struggles to determine the most meaningful cluster assignment. To enable the most comprehensive understanding and analysis of gift descriptions, we take a dual approach: clustering of objects and clustering of materials.

Object clustering

The application of the K-means algorithm for clustering objects required testing with different values of k (k = 10, 15, 20, 50, 100). Observations showed that as k increased the Sum of Squares (SS) rose, but the Calinski-Harabasz (CH) score decreased. For all k values tested, a clear trend emerged: a prominent larger cluster (comprising almost half of the items) coexisted with a weaker cluster (which turned out to be negative SS) comprising a wide variety of items. The optimal balance between the SS and CH scores materialised at k = 20. The clusters and their corresponding SS scores are listed in Table 2. This clustering primarily facilitated the identification of the most frequent expressions within the gift descriptions and enabled the gifts to be grouped around these expressions.

Table 2: TWENTY CLUSTERS OF DESCRIPTIONS OF GIFTS

ID	Keyword	Examples	n	SS
0	'book'	'golden book issued on the 60th bank's anniversary', 'Huawei P8 mobile phone', 'Cartier wristwatch'	1790	-0.35
1	'–'	'a gilded model of the palace in a box', 'mosaic of the symbol of the autonomous region of Friuli-Venezia Giulia"	521	-0.01
2	'glass'	'Hand-crafted glass and amber water obelisk with Saudi motifs', 'swarovski glass horse'	127	0.04
3	'bowl'	'marble bowl', 'silver bowl with wooden bottom'	43	0.16
4	'books'	'6 books', 'a collection of books'	44	0.66
5	'–'	'archaeological find from the ruins of Göbekli Tepe', 'shot of central Slovenia from space'	51	0.005
6	'carpets'	'Baku carpet', 'silk carpet', 'carpet – hand woven'	31	0.30
7	'plates'	'marble plate with print', 'engraved silver plate', 'hand painted decorative plate'	127	0.15
8	'set'	'set of porcelain tea cups', 'set of crystal glasses with stars'	112	0.06
9	'tickets'	'tickets for a cultural event', 'tickets for a theatre performance'	48	0.3
10	'picture'	'framed copper picture', 'a picture of a woman in Africa', 'art picture'	162	0.15
11	'painting'	'painting – oil on glass', 'painting, oil on canvas, 50 cm × 37 cm, pine house'	80	0.07
12	'bottle'	'crystal aperitif glasses and a bottle', 'whiskey set', '6 bottles of wine'	116	0.15
13	'book'	'book', '2x book'	81	0.98
14	'pen'	'fountain pen, book "EU.RO" and a set of commemorative coins', 'fountain pen in silver filigree and ink'	52	0.17
15	'gift'	'a gift bag containing wine, a calendar, dried fruit, prosciutto, salami, cheese and honey'	126	0.24
16	'wooden'	'handmade wool carpet (2.97 × 2.02 m) and a gold coin in a wooden box'	206	0.02
17	'coin'	'gold collector's coin', 'tashkent uzbekistan coin collection', 'the gold coin falls'	105	0.07
18	'new'	'new year's gift', 'gift basket'	51	0.66
19	'vase'	'porcelain vase', 'ceramic persian vase', 'traditional chinese vase'	81	0.27

* *Average Silhouette Score (SS) obtained is 0.06, while Calinski-Harabasz Index (CH) is 33.9.*

Source: Data from ERAR.si portal (2023).

While clusters such as 4, 6, 9, 13, 14, 15, 18 and 19 had strong SS scores, there was considerable room for improvement in the other clusters. Conversely, clusters 0, 1 and 5 had strikingly low Silhouette scores. Moreover, the most frequent words did not adequately characterise the items in these clusters. In cluster 0, for example, the word "book" was mentioned the most frequently, even though only about 600 of 1,790 items were books. The composition of the cluster extended to various items such as wristwatches, sculptures and plaques. These cases are due to extensive and complex descriptions that confound the understanding of the clustering algorithm. Despite these challenges, our main goal of describing the gifts remained achievable. By using cluster keywords, the items could be grouped effectively. The main entities identified included ["book", "bowl", "rug", "plate", "set", "ticket", "painting", "bottle", "pen", "gift", "coin", "vase"]. Items containing these keywords were categorised accordingly. Subsequently, 1,679 gifts that did not contain these common expressions were subjected to repeated k = 20 clustering. The results yielded a SS of 0.06 and CH of 19.5. This procedure produced extensive keywords for strong clusters such as ["cuff", "medallion", "plaque", "monograph", "saint's mark"]. Similarly, more abstract clusters emerged, including ["silver", "wood", "New Year's gift"]. A larger, weak cluster comprising 1,188 items was also found. Manual examination of this cluster revealed common words such as ["frame", "statue", "model", "replica", "plaque", "sculpture", "wristwatch", "photo", "coat arms", "award", "Huawei"]. To further refine the grouping, we conducted manual restructuring by grouping similar items. The final list of 782 gifts that defy meaningful grouping was identified. Notably, adjectives like "glass", "porcelain" and "silver" played a major role in this sub-grouping. This finding paved the way for a second iteration to group the gift items by their materials. The final compilation of the most important object groups, paired with their materials, is shown in Table 3.

Materials Clustering

Turning to materials, we draw insights from our objects clustering approach to optimise our methodology. Here, we focus directly on extracting the most frequently occurring adjectives, which are also significant in the context of our topic of investigation. In particular, the most frequently occurring adjectives include "gold", "silver", "pearl", "glass", "wood" and "porcelain". A comprehensive list of these adjectives and their corresponding frequencies is given in Table 3.

Table 3: FINAL LIST OF 28 GROUPS REGARDING ITEMS (OBJECTS AND MATERIALS)

Gifts as objects	Count	Gift materials (adjectives)	Count
books	865	glass	217
paintings	472	wooden	198
gift bags	347	silver	162
bottles	297	porcelain	87
statues	199	ceramic	83
plates	191	golden	79
sets	176	crystal	65
coins	172	handmade	58
luxury gifts	144	stone	46
frames	120	bronze	34
vases	110	leather	28
photos	96	jewellery	12
pens	88	marble	10
boxes	86	pearl	7
plaques	82		
cuffs	80		
monographs	64		
tickets	54		
bowls	47		
medallions	42		
coat of arms	39		
watches	32		
carpets	32		
awards	28		
mobile phones	27		
saint's sign	25		

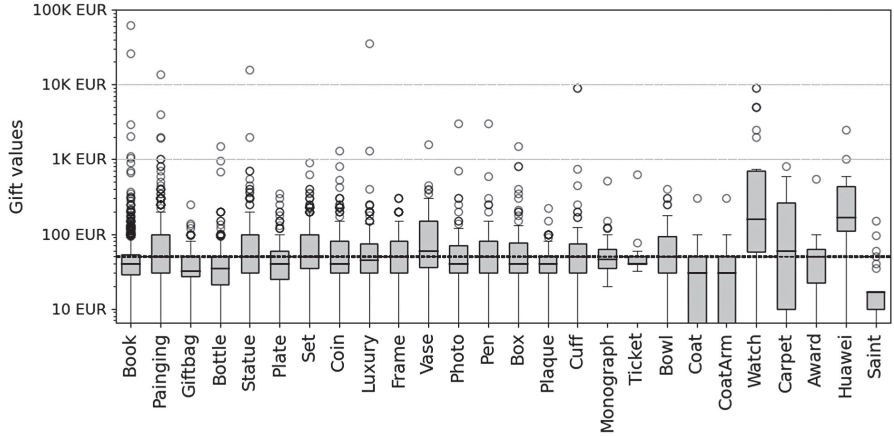
Source: Data from ERAR.si portal (2023).

Gift Value vs. the Description

To obtain insight into the variations of values in the above clusters, we may consider Figure 6 for objects and Figure 7 for the clustering of materials. It is worth noting that for most clusters the median values are either around or below EUR 50 (solid red line), even for clusters such as paintings, carpets, vases, pearls, crystals, marbles and the like.

Since the greatest differences are evident in this segment of reporting, we explain these results in more detail in the section below.

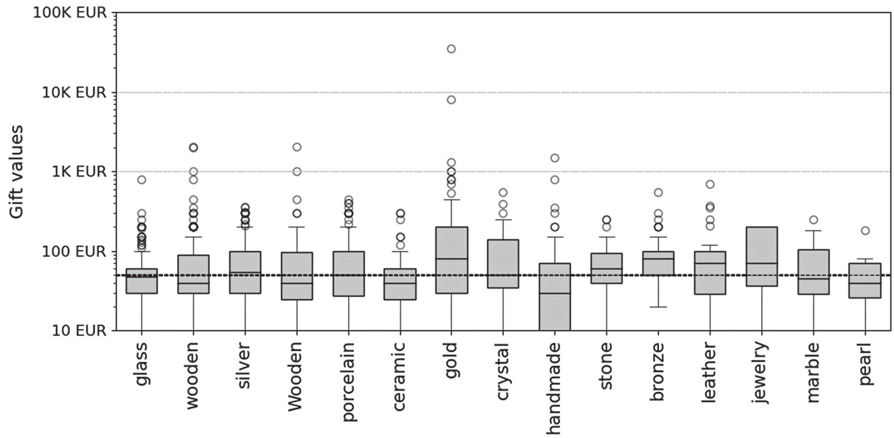
Figure 6: BOX-PLOT OF VALUES OF REPORTED GIFTS (OBJECTS CLUSTERING)



* Horizontal line depicts a value of 50 EUR that the government set as a boundary. On y-axes we have values in a log-scale, for the better preview.

Source: Data from ERAR.si portal (2023).

Figure 7: BOX-PLOT OF VALUES OF REPORTED GIFTS (MATERIALS CLUSTERING)



** Horizontal line depicts a value of 50 EUR that the government set as a boundary. On y-axes we have values in a log-scale, for the better preview.*

Source: Data from ERAR.si portal (2023).

Problematising records and determining the value of an individual gift

Our exhaustive investigation of the reporting in Slovenia revealed some problematic aspects of the system. First, the frequency of reporting of the value of EUR 50, established as the minimum by the CPC, seems somewhat convenient given the negligible threshold. Second, we found several problems with the reporting of gifts, ranging from underestimates with high variability to inconsistent expressions and case usage. These challenges could prevent non-technical people from using the ERAR.si application for hypothesis testing. In addition, our analysis revealed intriguing discrepancies while comparing reported gift values with gift types and materials. For example, the median value of "golden" items was barely above EUR 100; 75% of them were valued below EUR 200, which arouses suspicion. There were also similar discrepancies when it comes to "bronze", "pearls" and "silver". Moreover, the 3rd quartile of "paintings" hovered around EUR 100 (meaning that 75% of the paintings received were valued at less than EUR 100), while there were carpets valued at less than EUR 30.

These findings underline the need to strengthen the gift reporting system and modify it so that fewer anomalies occur in the future. Addressing these discrepancies in reported gift values calls for proactive measures to correct the gift reporting system and assure its effectiveness. As part of these efforts, the CPC could consider implementing additional requirements to enhance transparency and accuracy. Based on our findings, we recommend the following improvements. First, to avoid naming the same entity differently, the electronic form should contain a pre-prepared, drop-down list of public entities from which the person declaring the ceremonial gift can choose. Second, the persons entering the descriptions and values of ceremonial gifts into the database should have access to more precise rules, especially as regards the description of items and assessment of their value. Third, in terms of transparency, it is necessary to provide for a simple yet effective step, such as attaching a photograph of the items, measurements, or information about the material (if applicable) to the description of the gift in the database, so as to provide valuable evidence and verification. This would allow the CPC to match the reported values with the actual nature and value of the gifts received, providing an additional layer of accountability, and reducing the potential for misrepresentation or undervaluation. Fourth, the CPC should not only provide the dataset, but also develop a simple tool to observe the different distributions of characteristics in the database – as shown in our Results section. Fifth, the CPC should tighten control over the reporting of ceremonial gifts and make any established irregularities public. Gift reporting should be an essential part of the code of ethics of all politicians, civil servants, and other employees working in political institutions, the public sector and the state sector.

Conclusion

Ceremonial gifts symbolise welcome, honour and the cultivation of advantageous diplomatic relations. They form a crucial part of building strong relationships, from the highest positions in politics and diplomacy to the closest people in the public service. Nevertheless, ceremonial gifts are seen as problematic in several ways, not simply since the recipient risks being beholden to the giver by accepting the gift, but also because the receipt of ceremonial gifts is often associated with potential favours, preferential treatment or even corruption. To minimise such commercialisation and to ensure the integrity, transparency and openness of politics and public officials, and to maintain trust in political and administrative institutions, many countries around the world have established and adopted rules for the acceptance and giving of ceremonial gifts.

Through detailed statistical analysis, we examined the reporting of ceremonial gifts in the Republic of Slovenia where trust in the most visible political institutions (the political parties, the President of the Republic, the government, the National Parliament) is at a relatively low levels, also due to the many scandals in the political arena over the last two decades. Our analysis reveals anomalies in the reporting of ceremonial gifts as well as weaknesses in the normative framework. In our article, we uncover the most obvious discrepancies in reporting, from the name of the reporting body, to flawed descriptions of gifts, through to the particularly problematic assessment of gift values, which is typically left to the layperson. Further, the question of the control by the CPC (its sufficiency) arises.

In relation to our initial hypothesis, we note that in the case of Slovenia there is clearly a problem with implementation of the normative framework since register entries only show that the technical aspect and less the qualitative side of the reporting of ceremonial gifts is complied with. We believe that the gift reporting system could become more transparent if our recommendations and actions are implemented. This can only help to further strengthen the integrity of politics, public administration and the entire public sector, increase public trust and act as a robust safeguard against fraud, favouritism and corruption in Slovenia.

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THE WAYS DIVERSITY AND GENDER AFFECT MILITARY PROFESSIONALISM AND HOW DIVERSE GROUPS PERCEIVE THIS CONCEPT

Abstract. *Not much research has looked at how diversity and gender affect military professionalism and diverse groups perceive this concept. Using a qualitative approach, the study examined perspectives on military professionalism and unprofessionalism among diverse members of the Albanian Armed Forces (AAF). To ensure a diversity of participants, the study was based on the constructivist paradigm (multiple realities) as well as the Gender Perspective in the Albanian Armed Forces report (2013), which helps identify the varying impacts of such research on diverse groups of men and women. A total of 150 individuals participated in interviews and focus groups between October 2022 and August 2023. The findings show that professionalism and unprofessionalism each have distinct characteristics, where leadership is a key factor. This study sheds light on the members' experiences and how the latter affect the way in which professionals are perceived.*

Keywords: *Albanian Armed Forces, Military Professionalism, Qualitative Research, Diversity*

Introduction

The *Long-Term Plan for the Development of the Albanian Armed Forces 2016–2025* (2015) ("the Plan") is a guiding document created by the Albanian Forces leadership under the auspices of the Parliament of Albania. The Plan has defined professionalism in the Albanian Armed Forces (AAF) for almost a decade. The concept of placing others ahead of oneself, the lawful and proper use of military force, and acceptance of unlimited accountability are what distinguish military professionalism. Its members have accumulated an organised and specialised body of military knowledge

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and talents via education, training and experience, which they utilise competently and impartially while carrying out their objectives. Military professionals in Albania adhere to a shared set of core beliefs and ideals known as the military ethos, which guides them in their tasks and allows them to maintain a special relationship of trust with Albanian society (Long-Term Plan for the Development of the Albanian Armed Forces 2016–2025, 2015). Military professionals in Albania follow a common set of basic values and principles found in the military ethos (On some changes and additions to Law no. 59/2014 for the Military Career in the Armed Forces of the Republic of Albania, 2021). These principles direct the performance of their duties and enable them to preserve a unique bond of trust with the Albanian population. Traditional military concepts like unlimited liability, fighting spirit, discipline and teamwork are woven into Albanian military values such as duty, loyalty, integrity, courage, and the warrior's honour, along with the traditional touchstones in Huntington's (1957) and Janowitz's (1960) definitions of professionalism – specialised knowledge, responsibility, competence, and the nature of civil–military relations (Huntington, 1957; Janowitz, 1960). Various levels of responsibility (organisational and professional etc.) and categories of competency (core, supporting, specialised and common knowledge etc.) are also outlined (Long-Term Plan for the Development of the Albanian Armed Forces 2016–2025, 2015). The Plan sets out the leadership, professional development policies, history, heritage and traditions, as well as the crucial responsibilities these ideas play in upholding the armed forces profession. This profession must remain relevant (i.e., meet the needs of Albanians), open (i.e., knowledge and relevant skills are available), consistent (i.e., attributes of responsibility, expertise and identity are consistent) and provide reciprocity (i.e., expectations and obligations between Albanian society and the profession, and vice versa). The Plan also recognises that the surrounding culture and values shape military professionalism. Such professionalism has been developed over time by conceptual and cultural factors. On the conceptual level, notions of military professionalism have evolved since Huntington (1957) and Janowitz (1960) following changes in both society and the function of the military (Snider and Matthews, 2005). Researchers have sought to comprehend the impact on the societal, organisational and human levels, including a shift from a more traditional perspective on the military (Huntington, 1957; Janowitz, 1960; Sarkesian, 1981) to one formed by the external environment (Evetts, 2003). On the cultural front, in 2013 the Government of Albania issued the *Gender Perspective in the Albanian Armed Forces* report (2013) ("the Report") that described the current state of women's involvement in the Albanian Armed Forces (Gender Perspective in the Albanian Armed Forces, 2013; Baka et al., 2011). The Report calls for institutionalised culture change that is more inclusive of gender and diversity. Although significant research has been conducted on the military as a profession (Snider, 2005) and the military's efforts to boost diversity, few researchers have investigated the diverse perspectives of members themselves with respect to the concept of military professionalism and how diversity fits into it. The purpose of this project was thus to examine views on military professionalism held by various AAF members using a qualitative technique influenced by the Report (Gender Perspective in the Albanian Armed Forces, 2013). The Report (2013) questions assumptions made about shared experiences among a range of men and women to better comprehend the diverse viewpoints and experiences in the Albanian military to do with the concept of military professionalism.

Theories of military professionalism

As stated above, numerous frameworks of military professionalism, notably those of Huntington (1957), Janowitz (1960) and Sarkesian (1981), have long dominated the literature. Other models such as those developed by Moskos (1997), Abbott (1988) and Nuciari (1994) have focused on comparative analysis and evolution in military professionalism. With a focus on the officer corps, Huntington (1957) described professionalism as "a peculiar type of functional group with highly specialized characteristics" (Huntington, 1957: 7), with expertise, responsibility and corporateness composing professionalism. Expertise refers to military personnel's specific talents, as well as the education and training required to develop such skills. Huntington (1957) followed Harold Lasswell (1941) in characterising the specific expertise of military professionals as the "management of violence", implying that the military's primary role is to plan and direct combat operations as well as organise, equip and train the force that is to carry them out. Responsibility relates to the officer corps' societal obligation, which gives rise to civil–military relations: the officer corps is granted a professional monopoly in exchange for delivering a service "essential to the functioning of society" (Huntington, 1957: 9). Finally, corporateness, in Huntington's definition, signifies a shared sense of unity among officers within a hierarchical structure that includes non-professionals like non-combat officers and reservists. Later scholars criticised the Huntingtonian approach for dismissing non-combat officer specialities as unprofessional (Huntington, 1957). Moreover, given the era, Huntington's (1957) framework examined male officers exclusively and their experience as individual professionals (Huntington, 1957). Janowitz (1960) was likewise concerned with the officer corps and its transition to a profession, describing military professionalism as expertise through skill and performance, responsibility, group identity and cohesion, and education and training. He also viewed the military's future as being preoccupied with challenges that military leaders must confront, such as the impact of improvements in technology and the social environment. While Janowitz (1960) is more inclusive of external effects on the military (e.g., societal forces), like Huntington (1957), he focuses on a male officer corps (Huntington, 1957). Following Lasswell (1941), (Sarkesian, 1981) who defined the purpose of the military profession as the "management of violence" situates the military profession within the broader political and societal environment, alongside the institutional perspective (e.g., military–civilian relations) and the individual perspective (i.e., as shaped by institutional socialisation). Sarkesian (1981) defines professionalism as "honesty, integrity, loyalty, honour, and gentlemanly conduct" (Sarkesian, 1981: 11). Military professionalism includes civilian command, dignity and worth, justice, unique knowledge and competency, legitimacy, collective identity, and professional ethos. Professionalism fails when personal ideals, institutional requirements, and community perspectives clash (Sakresian, 1981). Sarkesian's (1981) paradigm, like those of Huntington (1957) and Janowitz (1960), concentrates on the officer corps, with a broader focus given to the intersections between the individual, the institution, and social issues (Sarkesian, 1981). Moskos' (1977) Institutional/Occupational (I/O) model applies to all types of military personnel, not simply officers. Unlike previous frameworks, his model seeks to explain the military's shift from a professional to an institutional and occupational force. Institutional components include service to country (legitimacy), proximity of job and residence (residence), and a major commitment to the organisation (role commitment). A marketplace economy (legitimacy), the separation of employment from the location of a member's home (residence), and a secondary commitment to the organisation (role commitment) are examples of occupational elements. In actuality, the military contains both parts (Moskos, 1977). Cafforio (1988) proposed the Bureaucratisation/Professionalisation (B/P) model, which shows how components of both are present in the officer corps to measure processes of change within the profession, based on the I/O model. Central to this model are elements like "the objective of officers' actions, courses of action, dominant ethical norms, primary sources guiding their thought processes, desired forms of gratification, socio-cultural influences, and reference groups" (Moskos, 1977: 64). According to Nuciari (1994), "all scholars dealing with the military profession agree on one peculiarity: it is simultaneously a bureaucracy and a profession" (Nuciari, 1994: 15). Abbot (1988) defined military professionalism as an "exclusive occupational group applying somewhat abstract knowledge to particular cases" (Abbot, 1988: 8) and as including work, jurisdiction and competition. Knowledge and abilities are controlled by occupational groups, and abstraction separates professionals from non-professionals.

Work refers to the tasks performed within a profession as well as the people who perform them. Further, activities have subjective qualities (e.g., diagnosis and therapy) as well as objective qualities (e.g., technological implications). The power and reputation of the profession's academic understanding are critical for its continued jurisdiction. Accordingly, "diagnosis, treatment, inference, and academic work provide the cultural machinery of jurisdiction" (Abbot, 1988: 59).

Methods and participants

To capture experiences from a diverse range of participants, the research was developed using a constructivist paradigm, which emphasises the inclusion of many social realities experienced by participants (Creswell, 2007; Morse, 2015), and the *Gender Perspective in the Albanian Armed Forces* report (2013). This paradigm explores how racial, cultural, ethnic and gender identities are incorporated into the military institution, which has in place extensive socialisation processes to foster a sense of shared identity. To ensure diverse participation, members of the Albanian Armed Forces were invited to participate via a parallel subgroup (Guest et al., 2006) and the snowball sampling technique (Mason, 1996). Participants were chosen from a variety of demographic groupings encompassing age, gender, military rank, geographic area, and varied identities, including ethnic minorities. Participants in occupations with a low representation of men (medics, nurses, lawyers) or women (women in combat weaponry) were sought. Potential participants were invited by email to in-person interviews or focus groups throughout Albania and a phone interview at their leisure. All information was gathered between October 2022 and August 2023. The duration of the interviews and focus groups, which included the administration of a consent form, semi-structured conversation using the interview and focus group procedures, and debriefing addressing follow-up contact should they have any additional questions, ranged between 30 and 90 minutes. While all the data were combined for the data analysis, some focus groups either had men or only women in them.

As shown in Table 1, the final participant pool comprised 150 individuals affiliated with the AAF, representing all three branches (Army, Air Force, Navy), including both active-duty and reserve components. These participants spanned age groups ranging from 18 to 60, encompassing various ranks from OR2 (junior NCOs) to OF5 (senior officers), and both male and female members. The sample also contained a diverse range of communities, with a mix of majorities and minorities, and was drawn from different geographical regions. While efforts were made to integrate varied views, there are limitations on understanding the intersectionality of these perspectives (in the context of a minority of women). Since the purpose of the research was to investigate military professionalism among various AAF members, several questions were designed to elicit their opinions on professionalism:

1. Is serving in the military considered to be a profession?
2. Which features point to military professionalism?
3. Which features point to military unprofessionalism?

After the interviews and focus groups were completed, the data were coded using the protocol questions, followed by a deeper investigation of themes and patterns in the data (Miles et al., 2014). NVivo (2015) was used to arrange the data and present bigger themes, Microsoft OneNote to summarise and articulate the themes, and Microsoft Excel to create a summary matrix of all the themes found.

Results

This section presents the major themes concerning professionalism and unprofessionalism the participants identified.

Professionalism

When asked about the characteristics of professionalism in general and whether the Albanian military was considered to be a profession, 95% of the participants declared that it is, while the remaining 5% viewed it more as a job than a career. This minority perspective did not significantly alter the overall perception of Albanian military personnel regarding military professionalism. The military's significance within Albanian society, on the other hand, was generally mentioned by those who believed it that it is a profession. When probed about the characteristics of professionalism in the military, participants declared that having their peers' support, being able to trust that they will get the task done, and having the Albanian public's confidence in their efforts and strategy are all key components of military professionalism. Many participants compared professionalism to the military's mission and the reasons people join, saying that professionals realise the risks involved, demonstrate a readiness to serve and, above all else, the military is different from other professions.

The main themes regarding professionalism in the AAF that emerged are: (1) allegiance and corporateness; (2) education, training, and professional development; (3) military discipline and code of conduct; (4) personal qualities and competencies (positive); (5) diversity and inclusion; and (6) social norms and public perception.

Allegiance and corporateness. Several participants stated that being professional entails allegiance to one's country as being as a cornerstone of military professionalism, exemplifying the unwavering commitment and profound sense of duty held by soldiers. Rooted in a deep love for their nation, military professionals dedicate themselves to safeguarding its sovereignty, security and values. This allegiance transcends personal interests, reflecting a selfless willingness to place the needs of the country above all else. Through sacrifice, discipline and unwavering resolve, these individuals uphold the honour of their nation, responding to the call of duty with an unyielding dedication as embodying the essence of military professionalism. Other participants mentioned teamwork and feeling connected to those around you, "To me, professionalism means building a team, being loyal to your superiors above within the limits of the law, and showing loyalty downwards to your subordinates" (Interviewee 1). Another participant stated, "We all learn about each other, and then we have this symbiotic work relationship that we all understand and do" (Interviewee 2).

Education, training, and professional development. Professionalism was defined as a competency in one's occupation and a continuing desire to learn through training, education and professional growth. One participant stated, "I think professionalism is based on education" (Interviewee 3), whereas another noted, "We are a group of people who have to be highly skilled" (Interviewee 4). Given the level of skill needed for a variety of AAF positions, several participants believed that maintaining and pursuing education, training, and professional development opportunities are critical parts of being a military professional.

Military discipline and code of conduct. The Ministry of Defence and the Albanian Armed Forces operate pursuant to the law on Military Discipline in the Armed Forces of the Republic of Albania (2014), which establishes a standard of conduct for AAF personnel. The law and its purpose were acknowledged as important characteristics of professionalism by the participants. According to one participant, "To be a professional, in general, means that you have a culture and understanding of what is right and wrong and how to do things to succeed" (Interviewee 5). Professionalism meant adherence to military and societal standards (Law on the status of the armed forces of the Republic of Albania, 2004). As one participant put it, "It also means acting ethically in terms of not taking advantage of people, either in the chain of command, those who are above, or those below you" (Interviewee 6).

Personal qualities and competencies (positive). Several individuals mentioned a range of skills and personality traits that are crucial to being a professional, including discipline, respect, loyalty, altruism and honesty. A significant number of participants believed that self-control and discipline are essential components of military professionalism: "I'd say a high degree of discipline and self-control makes one a professional" (Interviewee 7). One participant stated, "I would suggest that a professional treats every human being the same regardless of their culture, or where or how they identify" (Interviewee 8).

Social norms and public perception. Several participants argued that professionalism is influenced by broader social norms and one's public image. The military must be professional because not only are they projecting a sense of professionalism out to the civilian population who are looking at us every day ... it's something the country can use to be proud of their military as an institution (Law on the Powers and Authorities of Management of the Armed Forces Command of the Republic of Albania, 2014). Another criterion was accountability to the public, "We're accountable to the public, there's that expectation of accountability" (Interviewee 12). As a final point, some individuals believed that professionalism includes one's personal life, where one's activities either positively or negatively reflect on one's professionalism. A participant (Interviewee 12), stated:

> *I believe it ought to be accepted outside of the workplace as well. You are constantly in the spotlight. When you swear allegiance to your country, you do so for the duration of your life, not just for 8 hours a day.*

Diversity and inclusion. Ethnic-, cultural- and gender-based diversity can significantly enhance military professionalism in numerous ways. Diverse teams bring a range of perspectives to problem-solving, in turn fostering innovation and creative solutions. Cultural sensitivity is vital for international operations, and diverse personnel are better equipped to navigate cultural nuances. Inclusive leadership promotes equitable decision-making and boosts morale and cohesion. Embracing diversity also expands talent recruitment and retention efforts, contributing to a more effective, adaptable and ethical military force overall. One participant (Interviewee 16), stated:

> *Women bring diverse perspectives and life experiences to the table, enhancing the understanding of complex issues and revealing alternative solutions. In diverse teams, including women, collaboration flourishes, fostering creativity and innovation. Women often possess higher emotional intelligence, which aids in conflict management, inclusive leadership, and considering well-being in decision-making.*

Unprofessionalism

Out of the 150 participants, 90% believed that several features of unprofessionalism exist in the military, yet also recognised that these features are not exclusive to the military. The remaining 10% declared that the features of unprofessionalism in the military have evolved over time and are difficult to define clearly. The following themes arose among individuals who identified elements of unprofessionalism: (1) a lack of respect and discipline; (2) alcohol abuse; (3) toxic leadership; (4) personal qualities (negative); (5) stereotypes; (6) double standards; and (7) discrimination.

Lack of respect and discipline. Disrespectful behaviour to one's peers, subordinates or superiors undermines the principles of mutual respect and dignity that are important in a professional military environment. Disregarding military rank and authority can hold profound implications for the chain of command and overall military discipline. Disrespecting the authority of higher-ranking officers or non-commissioned officers undermines the established structure, eroding the foundation of order and obedience that is essential for effective operations. In addition, the consequences extend beyond immediate implications, potentially causing a ripple effect that affects the morale and cooperation of the entire unit. Recognising and upholding the hierarchical structure of the military is paramount for maintaining a functional and cohesive armed force.

Alcohol abuse. Alcohol laws in the military have changed over the years (Draft Law of the Ministry of Defence "On some additions and changes to Law no. 173/2014 "On Discipline in the Armed Forces of the Republic of Albania", 2021), and several participants acknowledged the influence of unprofessionalism. One participant said that when a ritual incorporates drinking, "unprofessional behaviour can follow" (Interviewee 19). Although drinking still formed part of mess life, several participants believed there had been a considerable shift in the way alcohol is used in the military.

Toxic leadership. Leaders who mistreat their subordinates, create a hostile work environment, or prioritise personal gain over the well-being of their team exhibit toxic leadership, which goes against professional standards. One participant (Interviewee 21), stated:

> *Working under dysfunctional leadership is not only demoralising. It can also have an impact on the overall performance of a team. Because toxic leaders prioritise their interests, their actions jeopardise the well-being of their teams.*

Personal qualities (negative). Several participants believed that the way people present themselves and specific personal traits of new members can impact professionalism. One participant noted, "There are certain personality traits you want in this organisation... However, several of the politically correct ideas that we observe appear to conflict with a person's highly positive traits" (Interviewee 22). Another feature mentioned by participants was being self-serving. "Most people are there for themselves", one participant observed, adding "Either they will try to take all the credit to look good and get promoted" (Interviewee 24).

Stereotypes. Gender stereotypes, in particular, can shape people's perceptions of military professionals. The military has traditionally been viewed as a male-dominated institution, leading to stereotypes about what a 'typical' soldier/officer looks like. These stereotypes can affect how individuals evaluate the professionalism of service members of different genders. One participant (Interviewee 25), stated:

> *When gender-based stereotypes are prevalent, there can be lower expectations for women in terms of physical fitness and combat performance. This can result in women being underestimated or not given the same opportunities to excel in combat roles, despite their capabilities.*

Double standards. Gender-based double standards in military are common and stem from entrenched gender stereotypes. Examples include differing physical standards, higher expectations for women in leadership roles, scrutiny of female service members' appearance, biases regarding emotional expression, differing perceptions of language and behaviour, career progression obstacles for women, and harsher criticism of mistakes. These double standards vary by military culture and policies. One participant (Interviewee 26), stated:

> *While evaluating leadership potential and performance, double standards may arise. Men may receive more favourable evaluations for displaying traits associated with stereotypical masculinity, even if their actual leadership abilities are not superior to their female counterparts. This can lead to a lack of recognition for the leadership skills of female service members.*

Discrimination. Gender- and cultural-based discrimination, including sexual harassment and bias, can impact how military professionals are perceived. Experiences of discrimination or harassment can affect a person's career trajectory and may lead to negative perceptions of professionalism. One participant (Interviewee 27), stated:

> *Discrimination can result in women or ethnic minorities being passed over for promotions and career advancement opportunities in favour of their white male counterparts, even when they are equally or more qualified. This can create a perception of unfairness and hinder the development of a professional and merit-based military culture.*

Leadership

Leaders were seen as essential to the professionalism or unprofessionalism of their subordinates. Participants believed that people who wanted to be role models needed to assist both their chain of command and their subordinates. The relationship between leaders and professionalism was best summed up by one participant as follows: “Leading from the top and setting those standards and achieving them yourself...: ‘A professional can’t hold anyone else to a standard if they’re not willing to do it themselves’” (Interviewee 30). Another noted, “There has to be an active interest on the part of leaders to develop and mentor those who are coming after them” (Interviewee 31). Those who highlighted unprofessional features of leadership referred to specific leadership styles and organisational practices. One participant stated, “When unprofessional behaviour happens, leaders must engage themselves on all levels, echoing the approach to unprofessional behaviour” (Interviewee 32). Some interviewees believed that a lack of clear organisational messaging and consistent responses to unprofessional behaviour had harmed military professionalism as well. As regards how to handle unprofessional behaviour, another participant said, “But you don’t get fired, even if you don’t show up for work, even if you do something bad, the punishment is so ridiculous – you get promoted anyway” (Interviewee 34).

Discussion

This qualitative study investigated the views held by various AAF members on military professionalism and unprofessionalism. This section explores the primary characteristics that emerged and how they compare with the notion of military professionalism defined in the *Long-Term Plan for the Development of the Albanian Armed Forces 2016–2025* (2015). In the Plan, the relationship between professionalism and leadership is mirrored, with leadership being critical for maintaining the profession. Leadership is also in charge of developing a culture that is inclusive of gender and diversity and is ultimately accountable for presenting, understanding and practising professionalism for the participants. Given the significance of leadership in regulating military professionalism, issues arise when that leadership is toxic (Padilla et al., 2007; Lipman, 2005), ineffective (Lipman, 2005; Bass, 1985) or perceived to be narcissistic (Lipman, 2005; Mackey et al., 2021). This can be a problem when there are ethical lapses that call for leadership involvement. Toxic leadership can be mitigated by leadership performance that considers subordinate input (Padilla et al., 2007), advisory panels (Bass, 1985) and a stronger emphasis on the traits of good leadership (Lipman, 2005). The AAF leadership model defines leadership as "directing, motivating, and enabling others to accomplish the mission, professionally and ethically, while developing or improving capabilities that contribute to mission success" (Long-term Plan of the Development of the Albanian Armed Forces 2016–2025, 2015; Decision of Council of Ministers for the approval of the Sectoral Strategy of the Ministry of Defence 2007–2013, 2007). Finally, cohesiveness is a key feature of group performance and mission accomplishment; a leader's effectiveness influences how members collaborate (Segal et al., 2015). As mentioned above, the key characteristics of professionalism include maintaining and pursuing training, educational and professional development opportunities. Although group cohesion was seen as being critical to performance, research has shown that task cohesion, not group cohesion, is more crucial for success (Mullen and Copper, 1994; Matthews, 2002; Segal et al., 2015). In other words, group cohesion is less important than the competency of the group members working toward a common goal, which holds consequences for diversity. Leaders who focus on tasks and practise respecting and caring for others produce more successful teams (Matthews, 2002; Segal et al., 2015). The participants agreed that adhering to a code of conduct, rules and societal standards, while also maintaining a professional public image are important aspects of professionalism. These features depend on clear and concise policies, as well as how members are socialised into them (Sion, 2006). This emphasises the significance of inclusive policies and leadership sticking to and ensuring consistent implementation of these policies. People are a vital aspect of the military, as expressed in Albanian's latest defence and human resources management policy (Human resources management strategy 2020–2024, 2020).

As pointed out in the *Long-Term Plan for the Development of the Albanian Armed Forces 2016–2025* (2015), participants considered: (1) allegiance and corporateness; (2) education; training, and professional development; (3) military discipline and code of conduct; (4) personal qualities and competencies (positive); (5) diversity and inclusion; and (6) social norms and public perception as the main themes of military professionalism.

When asked how they would rank such themes based on their importance and level of impact in shaping their perception of military professionalism, 98% of the interviewees considered allegiance and corporateness as the central theme; military professionalism, education, training and professionalism as the second-most important characteristic; military discipline and code of conduct as the third-most; diversity and inclusion as the fourth-most; social norms and public perception as the fifth-most, and positive personal qualities and competencies as the sixth-most important characteristics. The remaining 2% of interviewees proposed a slightly different ranking which, in principle, does not significantly alter the general perception of Albanian military personnel concerning military professionalism.

The interviewees' answers indicate a high level of agreement within the AAF regarding on constitutes military professionalism and its primary themes. The fact the majority of focus groups participants (95%–98%) ranked each theme consistently indicates a strong consensus among the surveyed group. This suggests these themes are seen as highly important and that there is little variation in their perceived importance among the interviewees, where allegiance and corporateness is considered the most important characteristic by 98% of them. This shows that loyalty to the military institution and a sense of unity within the military community are overwhelmingly valued. Education, training and professionalism are ranked as the second-most important theme by 98% of interviewees, in turn highlighting the significance of continuous learning, skill development, and adherence to professional standards. The high ranking of military discipline and the code of conduct as the third-most important characteristic (97%) underscores the importance of adhering to ethical and behavioural standards within the military. While slightly lower in ranking than the previous themes, the fact that 96% of interviewees still considered diversity and inclusion as the fourth-most important theme reveals there is recognition within the military community of the importance of these values, albeit it may not be as universally emphasised as the top three themes. Social norms and public perception, along with positive personal qualities and competencies, are considered the fifth-most important theme by 98% of interviewees. The remaining 2%–4% of interviewees proposed a slightly different ranking which, in principle, does not significantly alter the general perception of Albanian military personnel about military (un)professionalism. While these characteristics are still highly regarded, they are not ranked as prominently as the top four themes. To further promote the desired themes within the military, including allegiance and corporateness, education, training, professional development, military discipline, positive personal qualities, diversity and inclusion, and a positive public perception, military leadership can implement various strategies. These strategies encompass reinforcing the mission and values, fostering camaraderie through team-building, investing in high-quality training and mentorship programmes, consistently enforcing discipline and codes of conduct, cultivating positive personal qualities and competencies, ensuring equal opportunities and diversity training, engaging with the community to shape public perception, and maintaining transparency and media relations. Encouraging continuous learning, feedback mechanisms, and accountability while conducting periodic assessments is the key to fostering a culture of professionalism, unity and positive public perception within the military organisation.

Alongside the themes of professionalism, themes of unprofessionalism were examined. Unprofessionalism was attributed to: (1) a lack of respect and discipline (disrespectful behaviour towards peers and subordinates); (2) alcohol abuse (at events or during customs and traditions); (3) toxic leadership (creation of a hostile working environment); (4) personal qualities (negative: individualistic versus collectivist features); (5) stereotypes; (6) double standards; and (7) discrimination.

When asked to rank the themes of military unprofessionalism and based on their importance and impact on shaping perceptions, three groups of interviewees gave the following rankings:

Group 1 (comprising 58% of all interviewees) ranked them as: (1) a lack of respect and discipline; (2) stereotypes; (3) double standards; (4) discrimination; (5) toxic leadership; (6) alcohol abuse; and (7) negative personal qualities.

Group 2 (22% of interviewees) ranked them as: (1) stereotypes; (2) double standards; (3) discrimination; (4) toxic leadership; (5) a lack of respect and discipline; (6) negative personal qualities; and (7) alcohol abuse.

Group 3 (20% of interviewees) ranked them as: (1) stereotypes; (2) double standards; (3) discrimination; (4) a lack of respect and discipline; (5) alcohol abuse; (6) toxic leadership; and (7) negative personal qualities.

The research findings reveal a significant diversity of opinions among the interviewees regarding the ranking of themes concerning military unprofessionalism. Various interviewee groups prioritise these characteristics differently, indicating a lack of agreement on what is most important in shaping perceptions of military un/professionalism. Despite these variations, some common characteristics emerge. Stereotypes, double standards, and discrimination consistently rank among the top concerns for all interviewee groups, which means that addressing these issues is crucial for enhancing professionalism in the military. In addition, the research highlights varying perceptions of professionalism among the interviewee groups. For instance, Group 1 places stronger emphasis on issues related to respect and discipline, while Group 2 is more focused on concerns related to hostile work environments created by toxic leadership. Notably, Group 3 appears to prioritise gender-related issues and leadership positions, suggesting a specific concern with gender disparities within the military's leadership hierarchy.

These findings hold significant policy and training implications for military organisations. Improving professionalism may require a wide range of issues to be addressed, yet it is also essential to tailor interventions to address the specific concerns raised by the different interviewee groups.

Overall, the research shows the complexity of perceptions of military un/professionalism within the military and stresses the important need to understand and address the unique concerns and priorities of diverse segments within the military. Military leadership can effectively mitigate unprofessional themes in the military by implementing customised strategies. These strategies include leading by example, enforcing standards, providing diversity and inclusion education, ensuring consistency, fostering accountability, addressing toxic leadership via training and intervention, promoting responsible alcohol consumption, nurturing collectivist values, and actively promoting equal opportunities for leadership roles. By emphasising communication and accountability while conducting regular cultural assessments, military leadership can create a culture of professionalism, respect and inclusivity, in turn mitigating unprofessional behaviours within the organisation.

Findings of the research align with the conclusions drawn by Brožič and Pešec (2017) in *Teorija in Praksa*, Brown et al. (2020) in *Military Psychology*, and Vuk and Galiči (2022) in *Teorija in Praksa*. These studies point out the significance of equal treatment, and respect for the dignity and integrity of individuals in the workplace, which can have a profound impact on interest in the military profession and the retention of military personnel. Further, they highlight how workplace commanders or superiors can add significantly to the military culture and collective tolerance through their leadership.

Important considerations and limitations

While evaluating the results presented in this study, it is vital to consider several factors and limitations, particularly those stemming from external influences. For example, the release of news regarding the involvement of Albanian Air Force pilots in drug trafficking (Bushati et al., 2015; Ora News, 2015)[1] or the news about cannabis being cultivated in the Zall Herr military barracks (Isa, 2023)[2] may have influenced the participants' responses. Another factor that should be taken into account is the research methodology, which was influenced by the gender perspective within the Albanian Armed Forces (Gender Perspective in the Albanian Armed Forces, 2013) to ensure a diversity of participants. A third significant factor tied to the inclusion of a variety of individuals is the sampling process, which aimed

[1] *On 29 January 2015, a helicopter carrying nearly 1 tonne of drugs from Morocco to Spain crashed into a high-voltage pole on the outskirts of Malaga, Spain. This incident occurred during a pursuit by the Spanish Civil Guard. The helicopter was being piloted by Major Sokol Feka, an active-duty pilot of the Albanian Armed Forces. Major Feka served as an instructor at an Albanian Air Force base.*

[2] *During a police operation, 125 cannabis plants being cultivated at the Zall Herr military barracks were discovered, resulting in the arrest of 13 service members of different ranks in connection with the case.*

to gather feedback from specific groups (males and females of Roma communities – the least represented minority). However, there are certain constraints in terms of the applicability of the findings to the entire AAF population, as well as the representativeness of the experiences of both men and women. Despite efforts to include a range of AAF members through the sampling method, only binary information regarding gender was collected. As a result, other gender identities could not be incorporated into the sampling technique, which is equally important for understanding a multitude of perspectives. Moreover, the study was unable to address intersectionality and its influence on opinions concerning military careers, professional identities, and experiences. Future studies should therefore explore how different gender identities and their intersections are affected by role models in the professional realm. In fact, the primary objective of a qualitative study is to provide insights into the experiences of a subset of AAF members, which can subsequently shape future research inquiries. It is worth noting that military professionalism has been subject to numerous studies in the past five decades, and its definition has evolved considerably. While the findings cannot be extrapolated to encompass the entire AAF community, they do indicate that opinions and experiences of AAF personnel align with the conventional definition of military professionalism. Notably, leadership is considered one of the most pivotal factors in cultivating a diverse culture within the military. It has the potential to influence both professional and unprofessional behaviours alike.

Conclusion

This research focussed on exploring the diverse viewpoints of AAF members and their perceptions of professionalism and unprofessionalism. Employing a qualitative approach that incorporates the gender perspective outlined in the 2013 report of the Albanian Armed Forces (Gender Perspective in the Albanian Armed Forces, 2013), the study involved interviews and focus groups conducted throughout Albania. The role of leadership in conveying, comprehending and practising professional behaviour emerged as a critical factor.

The research sheds light on several aspects of military professionalism and unprofessionalism, containing important considerations and pointing to future research in the field of military professionalism. Further research can help in gaining a deeper comprehension of how diversity contributes to, and to what extent different perspectives become integrated within, the traditional frameworks of military professionalism.

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Christopher Blattman
Why We Fight: The Roots of War and the Paths to Piece
Penguin Books UK, 2023
400 str., 15 EUR
(ISBN 978-0-241-98925-8)

Christopher Blattman is Canadian-American political scientist and economist specialising in a variety of issues, mostly global conflicts, international development and poverty. Since 2016, he has been working as E. Pearson Professor of Global Conflict Studies at the University of Chicago, the Harris School of Public Policy and the Pearson Institute. He is also known for his blog about international relations and global development, which for over 15 years has been very popular. Blattman also regularly contributes to *The New York Times*, *The Washington Post* or *Foreign Affairs Journal*.

By writing the book *Why We Fight: The Roots of War and the Paths to Peace* as his first commercial book, Blattman's aim was to bring his research and ideas closer to a general audience. In the presented book, the author deals with a framework to understand the reasons that drive violence and result in conflicts. On the other hand, Blattman attempts to offer solutions to achieve a stable environment through several strategies. The book combines knowledge from various disciplines, not only international relations, but also economics, sociology and history. Over 11 chapters, the author focuses on the importance of: the costs of wars, enforcement of values, sufficient access to information, motivation to enter conflicts, peace persisting, ensuring the stability of society, as well as many other phenomena associated with fights and peace.

The book begins with a brief introductory chapter on game theory, serving as a foundation for a better understanding of the events described in subsequent chapters. In this part, the author also presents the concept of balance of power where he describes how actors can function stably in an uneven environment. At the end of the first chapter, reference is also made to the theory of realism – through the idea that an attack on another actor does not always have a bad intention.

The first section of the second chapter, entitled *Unchecked Interests*, illustrates the causes of fighting with the example of Liberia. Liberia was selected as an example of many decolonised states where the autocratic leaders did not reflect the needs of society, which caused rising tensions and led to a protracted civil war. In addition, Blattman notes that Africa is not the only region where a war bias is considered to be the cause of fights; it has happened throughout history all around the world. Unchecked interests, which are directly related to war bias, are presented by the author as one of the fundamental causes of the fights in pre-modern Europe and America; in Africa, the war bias, as a cause of wars, appeared just prior to post-colonial times. Alongside the events in

Liberia, Blattman illustrates war bias by referring to events in medieval Italy and the fights for American independence. This time difference is explained on the basis that war bias is the main cause of the conflicts when there is a lack of democracy, absence of rules as well as an excessive concentration of power.

The third chapter, *Intangible Incentives*, is devoted to non-material objectives, which also play a key role as a trigger for fights. Ideals and values, such as freedom and justice, proved to be crucial during the Arab Spring. The book points to the values of unfairness and willingness as some of the major values that were the cause of many fights. The author describes the gain of better status and fame as other intangible motivations of the fight; this happened mainly during both world wars. Blattman further notes that the prospect of gaining fame and status is not only a trigger for wars, but also a means of keeping warriors motivated. The second part of the chapter refers to ideologies and their role as one cause of fights. The primary issue with ideology is considered to be the fact that its proponents often view the enforcement of their ideology as the only viable solution. At the end of the chapter, the author reflects on whether people are inherently violent, which he tries to point out through the theory of parochialism.

The fourth chapter describes *Uncertainty*; according to Blattman, uncertainty stems chiefly from a lack of information. Uncertainty is also related to the fact that many actors deliberately send out mixed information about themselves in order to unsettle their rivals. In the book, uncertainty is also shown to be linked to the concept of reputation; the problem is that reputation may not reflect the current conditions. As an example of uncertainty associated with a bad reputation, the author presents the USA's invasion of Iraq. In that time, both sides were sending mixed signals to confuse the opponent and suffered reputational damage from their reckless actions.

In the fifth chapter, the book deals with *Commitment Problems*, which are directly connected with leaders' abilities and their responsibility for the decisions. It is stated that the most accurate example of commitment problems is a "preventive" war. It is interesting that the author considers Germany's actions which started the First World War as a preventive act since Germany's primary goal could have been to cause a shift in power. The violation of the *Thirty Years Peace* between Sparta and Athens is also mentioned as an example of commitment problems being the reason for the start of fighting. Despite the valid truce, Sparta pre-emptively attacked Athens with the aim of preventing Athens' domination of the ancient Greek world. Civil wars are seen as an even more extreme example of commitment problems since the state is unable to fulfil its commitment to protect its population. At the end of the fifth part, readers can find reflections on the fact that many conflicts could have been avoided had the leaders better considered their actions; this is also linked to the observance of domestic and international commitments.

The sixth part is entitled *Misperceptions*. In this chapter, Blattman deals with psychological and emotional aspects, which can have massive impact on the start of fights. However, it is stated that the degree to which psychological and emotional factors are involved as triggers of fights is difficult to study since there are no quantifiable data. The author points to some interesting examples showing that there is almost no difference between inexperience, panic, fear and self-preservation. The start of a fight is also caused because each actor might hold a different point of view on a given situation. The influence of psychological factor is also described through group decision-making. The bigger the groups, the more the opinions of the members vary, which creates pressure to adopt the final decision. The last pages of the chapter describe how every person has certain tendencies towards hatred and destruction. However, as indicated in the book, whether and how strong they are manifested depends on the current circumstances.

While the first part of the book is devoted to the causes of fighting, the second part documents the possibilities of peace strategies. The seventh chapter, *Interdependence*, begins with one of Ronald Reagan's famous statements: *"Peace is not the absence of conflict"*. Based on some actions undertaken during Reagan's presidency, the concept of détente is illustrated. Blattman builds on the idea that interdependence is an effective peace strategy when it benefits all actors involved. If the actors are isolated economically or politically, they are much more prone to provoke fights. Social interdependence is presented as an effective strategy for preventing civil wars as the barriers between the population of the state are erased. The author also presents the concept of moral interdependence, which is based on the premise that so long as dignity is granted to all people the level of violence will be lower.

The eight chapter focuses on the concept of *Checks and Balances,* which is related to the decentralisation of power. The author stresses that effective enforcement of the concept of checks and balances calls for transparent institutionalisation – whether on the corporate, sub-state, state or international level. The concept of checks and balances is also clarified via the theory of polycentrism. Polycentrism refers to situations, where polities with a lack of decentralisation of power (e.g., dictatorship or military juntas), are more susceptible to cause conflicts. The chapter ends with the author reflecting on the fact that the current setup of the international system supports greater centralisation, which can disrupt the stability of the international environment.

The ninth chapter is dedicated to *Rules and Enforcement*; the existence of these two elements is necessary to maintain order in every society. Emphasis is placed on the thesis that society can these days only be fully stable if the state has full control over it and has effective mechanisms in place to enforce order. Hobbs's theory of anarchy is used as proof of this statement, when in the absence of rules: *"A man is a wolf to another man"*. In the second part of the chapter, Blattman shows that the enforcement of rules on the international level is much more difficult than on the state level. The reason for this is the non-existence of central authority, as well as the uneven distribution of power across almost 200 states. At the end of the eighth chapter, the author asks whether wars could be prevented if there were some type of "world government". Nevertheless, Blattman currently sees the effective functioning of international and regional organisations as the most effective way of preventing inter-state violence.

The tenth chapter is concerned with *Interventions* and their contribution to obtaining and maintaining peace. Blattman illustrates peacekeeping interventions through five selected strategies – punishing, enforcing, facilitating, incentivising and socialising. International/foreign sanctions are mentioned as an example of punishing. This section offers an interesting debate about the effectiveness of sanctions as well as whether excessive sanctions lead to an increase in tensions. Enforcing is presented through the actions of third parties – UN peacekeeping operations or humanitarian military interventions. Facilitating is illustrated through using the art of mediation; with mediation between Israel and Egypt or the situation in Liberia serving as examples. The idea of socialisation is discussed through the education of society towards non-violence. The tenth part concludes with the incentivising strategy, which is connected with the idea of free elections and their contribution to peace in society.

The eleventh chapter, entitled *Wayward Paths to War and Peace*, offers an interesting perspective on changes in the organisation of society as possible tools for conflict prevention. Blattman first explains the strategy of putting more women in charge as a possible way of ensuring peace. In this case, it is mentioned that, even though women have a greater inclination for pacifism, whether leadership by a woman brings more peace would depend on the person involved. There is also an interesting view about whether reducing poverty would also lead to more peace, where once again the correlation is not confirmed. Here, the author also reflects on where the line is between the positive consequences of war and the share of the costs, whether financial or human.

The final part of the book is entitled *The Peacemeal Engineer*. In ten separate parts, Blattman tries to explain why social and political problems cannot be solved as easily as happens in other sectors. He also presents a theory about how difficult it is to resolve conflicts – although we have many examples of how peace was achieved, most situations are fundamentally different, and it is frequently impossible to apply previous solutions. In this context, the book ends with the author writing: *"For the path of peace today there is no universal template. I can give you some concepts, tools…".*

A positive aspect of the book is that one can find many situations taken from everyday life being used as examples to ensure better understanding of the motivations for the actions by important actors throughout history. Also interesting is the fact that at the beginning of several chapters the author describes a story from the environment of gangs, where he looks for subsequent parallels between gang rivalries and conflicts on a much larger scale. Blattman thereby seeks to illustrate the situations where the causes of 'everyday' violence are not so different from the causes of massive conflicts and their resolution.

The book is recommended mainly for because it offers many interesting instances and reflections that would be overlooked without the impulses that are mentioned. Christopher Blattman used his years of experience as a blog writer, as well as a contributor to major newspapers, to write an interesting and engaging book. While the peer-reviewed book is a valuable addition to the library of all students of social and political sciences, it is additionally recommended to anyone interested in the functioning of society and its changes that lead to either the unleashing of a conflict or the establishment of a path to peace.

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Mike Hulme
Climate Change Isn't Everything: Liberating Climate Politics from Alarmism
Polity Press, Cambridge, 2023,
200 strani, Paperback 17,00 EUR
(ISBN 9781509556168)

Kako prepoznamo dobre knjige, še preden jih preberemo? Zame je priporočilo vedno na prvem mestu. Me je pa nekoliko presenetilo, ko je na dogodku Univerze v Mariboru *Dediščinska znanost in podnebne spremembe* Johanna Leissner (predstavnica Inštituta Fraunhofer v Bruslju in aktivna članica več evropskih pobud na področju podnebnih sprememb in kulturne dediščine) s posebno vznesenostjo priporočila relativno »staro« knjigo Mika Hulma *Why We Disagree About Climate Change?* (2009). Fotografijo naslovnice je na dogodku pospremila z besedami, da bi to knjigo moral prebrati vsak, ki deluje v polju podnebnih sprememb. Knjigo z očitno družboslovnim, celo komunikološkim naslovom priporoča kemičarka, ki dela v humanističnem polju kulturne dediščine?

Hulme je res avtor, ki ga tudi jaz priporočam v branje vsem v polju t.i.

»zelenega prehoda« – naravoslovcem morda še prej kot družboslovcem, čeprav so teme izrazito družboslovne. Ko sem odložila *Why We Disagree About Climate Change?,* sem vzela v roke še druga njegova dela. Tudi njegovo zadnje delo z namenoma provokativnim naslovom *Climate Change Isn't Everything* je vsekakor vredno branja, gre pa Hulme tokrat v svojem razmišljanju še precej dlje kot v preostalih delih, čeprav je osrednje ideje začel izrisovati že v knjigah *Why We Disagree About Climate Change?* in *Weathered: Cultures of Climate.*

Mike Hulme je večino svojega življenja posvetil raziskovanju učinkov podnebnih sprememb in opozarjanju na njihove negativne posledice. Je profesor družbene geografije na Univerzi Cambridge s častitljivo zgodovino raziskovanja. Med drugim je bil med letoma 1995 in 2001 tudi član Medvladnega panela za podnebne spremembe pri Združenih narodih (IPCC – Intergovernmental Panel for Climate Change) in je pomagal pri pisanju 2. in 3. poročila IPCC (2021 je izšlo 6. poročilo) – tistih dveh poročil, ki sta avtorjem IPCC leta 2007 »prislužila« Nobelovo nagrado za mir; med soprejemniki je bila tudi dr. Lučka Kajfež Bogataj.

Čeprav je naslov mogoče brati dvoumno, pa Hulme nikakor ne govori o tem, da podnebne spremembe ne bi obstajale in da ne bi bile rezultat jasno znanih razlogov povečanih izpustov toplogrednih plinov. Tudi ne govori, da ni potrebno ukrepanje. Slednje v monografiji izrecno in večkrat izpostavi, saj se zaveda, da bi bilo njegovo delo lahko hitro izrabljeno kot orožje v javni razpravi o podnebnih spremembah v smislu pozicije t. i. »zanikovalca« podnebnih sprememb (angl. climate denayer). Pri čemer pa tudi ne nasprotuje javni razpravi, temveč nasprotno: celotno delo je prežeto z idejo pomembnosti javne razprave, saj bodo, opozarja, le na tak način politike podnebnih sprememb ubežale depolitizaciji. Depolitizacijo vidi v časovni in vsebinski zožitvi razprav o podnebnih spremembah.

Časovno zožitev razprav vidi v alarmiranju, ko se s pritiskanjem za takojšnje in hitre odločitve sprožajo ukrepi izrednega stanja, nevarnega za demokracijo. Na tem mestu prepoznava, da se mu bo verjetno vsaj deloma upravičeno pripisovalo pozicijo t. i. »upočasnitelja« (angl. »climate delayer«), s tem ko opozarja na zmernost pri alarmiranju – ne zato ker ukrepanje ne bi bilo potrebno, temveč ker s pozivom na izredne razmere ožimo polje razmišljanja o podnebnih spremembah v urgentnih razmerah.

Vsebinska zožitev razprav ima po njegovem mnenju več razsežnosti, na tem mestu izpostavim tri: (a) v poudarjanju enega cilja pred vsemi ostalimi, (b) v enovzročnih obrazložitvah, ki kompleksne probleme ožijo zgolj na vidik podnebnih sprememb, in (c) v nedemokratičnem izključevanju drugače mislečih in dogmatičnemu sledenju lastnemu prepričanju.

V prvi vrsti vidi vsebinsko zožitev razprav o podnebnih spremembah v priseganju na podnebne cilje nad vsemi ostalimi. Blaženje podnebnih sprememb ne bi smelo biti nad cilji, ki so vsebinski argumenti za blaženje podnebnih sprememb: dobrobit in zdravje ljudi, biodiverziteta, družbena pravičnost. Nabor tovrstnih argumentov je v prvi vrsti odvisen od vsakokratnega vrednotnega sistema družb. Namesto priseganja na zgolj en cilj, ki da naj bo nad vsemi ostalimi, Hulme opozarja na pomembnost hkratnega prepoznavanja raznolikih ciljev. Bolj primeren kot je cilj 1,5 °C povprečne globalne temperature nad industrijsko dobo Pariškega sporazuma, je po Hulmu pristop SDG 2030 Ciljev trajnostnega razvoja do leta 2030, ki skrb za globalni ekosistem umeščajo ob skrb za socialne pravice in demokratičen razvoj družb. Hulme s tem razširi kritiko o tiraniji metrik(e), ki jo sicer poznamo iz kritičnih razprav o vsepomembnosti BDP-ja, tudi na področje podnebnih sprememb, pri čemer se boji, da v želji po čim večji učinkovitosti z osredotočanjem na zgolj en cilj (globalna povprečna temperatura ali svetovni ogljični odtis) spregledamo inherentno kompleksnost problemov in teh problemov v najboljšem primeru ne rešujemo, v najslabšem pa povzročamo nove ali pa izvirni problem še poslabšamo.

Prepoznavanje zgolj enega cilja pred vsemi ostalimi lahko namreč po Hulmu prehitro pripelje do perverznih učinkov: od maladaptacije do socialnih krivic ali celo večje energetske odvisnosti od drugih držav, namesto manjše. Eden izmed primerov tovrstnih nezaželenih učinkov je nenačrtovan rezultat zmanjšanja podpore zahodnih držav projektom, ki so povezani s fosilnimi gorivi v državah svetovnega juga. Kar 2,5 milijarde ljudi, približno 30 % globalnega prebivalstva, živi v gospodinjstvih, ki za kuhanje uporabljajo odprti ogenj ali peči na kerozin, oglje, gnoj ali druge oblike biomase. Po podatkih WHO (v Hulme 2023, str. 126) lahko 3,8 milijona preranih smrti pripišemo tovrstnemu načinu kuhanja, kar primarno zadeva ženske in otroke. Ker pa se je zmanjšala finančna podpora zahodnih držav za projekte fosilnih goriv, je to vključevalo tudi podporo menjavam nevarnih kuhalnikov za najcenejšo in glede na trenuten tehnološki razvoj najprimernejšo alternativo – gorilnike na plin. Slednji imajo sicer za približno 30 % manjše izpuste toplogrednih plinov kot alternativa, a še pomembneje: zamenjava ima izredno velike učinke na zdravje in življenja predvsem žensk in otrok; njihova dobrobit je navadno prvi argument, zakaj sploh v boj proti podnebnim spremembam. V knjigi so predstavljeni še drugi primeri, npr. v Evropi najbolj znan primer poslabšanja stanja na globalnem trgu hrane in krčenju gozdov za monokulture v namen biogoriv.

Drugič in povezano, vsebinsko zožitev razprav o podnebnih spremembah Hulme vidi v enovzročni/monokavzalni naravi podnebnih diskurzov. *»Monokavzalne razlage so navadno napačne in včasih nevarne«* (Hulme, 2023, str. 14). Monokavzalnost vidi v vse pogostejšem pripisovanju vzrokov za kompleksne družbene fenomene podnebnim spremembam, npr. razumevanje sirijske vojne kot posledice suše zaradi podnebnih sprememb – interpretacija, ki sicer ustreza Asadovemu režimu, saj spregleda pomembnost zgodovinskih odnosov v državi in politično odgovornost režima. Drug zapomnljiv primer je vprašanje upravljanja delte reke Mekong, ki leži zgolj meter nad morsko gladino in se počasi potaplja. Hulme opozori, da bi ozko razmišljanje o prihodnosti te delte naslovilo zgolj vprašanje dviganja morske gladine (napovedano za 30 do 70 cm v naslednjem stoletju). Ozka osredotočenost zgolj na vplive podnebnih sprememb na dvig morske gladine bi usmerjala aktivnosti v globalno zmanjšanje ogljičnega odtisa. Spregledala pa bi širšo in kompleksnejšo sliko stanja v delti in primernega prepleta ukrepov: grajenje jezov onemogoča nanose sedimentov, rudarjenje v kanalih odnese 54 megaton peska vsako leto, intenzivna agrikultura in preprečevanje poplav sta nadomestila naravne vodne poti in mangrove z nasipi in akvakulturo, varovanje pred poplavami z betoniranjem nasipov pa z rigidnostjo vodnih strug pomeni še več poplavljanja (Kondolf idr. 2022 v Hulme 2023, str. 158). Dvig morske gladine je torej zgolj manjši del mozaika trajnostnega upravljanja delte Mekonga.

Kot tretje, depolitizacijo javne razprave o podnebnih spremembah Hulme prepoznava v drži *»če nisi z nami, si proti nam«*. Hulme uvede koncept »ideologije klimatizma«, ki ga prepoznava v dogmatičnih diskurzih »vseobsegajočih narativ« in »polarizirajočega moralizma«. Prvo predstavlja podnebne spremembe kot enostavno in koherentno obrazložitev delovanja sveta, drugo jasno zgodbarsko slikanje dobrega in zlega, oboje prepleteno z apokaliptično retoriko, ki ponuja religiji podobno dogmatično iskanje smisla lastnega obstoja in politične akcije.

Vendar pa Hulme opozarja, da problem podnebnih sprememb ni enostavna zgodba zlikovcev proti pogumnim herojem, temveč kompleksen (»wicked«) problem, za katerega ni ene enostavne rešitve, temveč morajo v prvi vrsti biti prepoznane pluralnosti vrednot, možnosti specifičnih aplikacij in pluralnosti ciljev – kar Hulme imenuje »nerodne rešitve«. Z »nerodnimi rešitvami« se Hulme vrne k osrednjim idejam »Why We Disagree About Climate Change« in opozori na nujnost umeščanja podnebnih sprememb v širše zgodovinske in politične kontekste, predvsem pa v razmerja do drugih družbenih problemov in ostalih družbenih trendov.

Če sklenem, *Climate Cange Isn't Everything* je delo vredno branja, ki pomaga k refleksiji razlogov, zakaj se sploh borimo proti podnebnim spremembam. Monografijo v prvi vrsti berem kot opozorilo o družbenih dejavnikih, v katere je umeščena razprava o podnebnih spremembah, s tem pa tudi kot poziv o pomembnosti vloge družboslovnega in humanističnega pristopa k zelenemu prehodu. Odlikuje jo razumljiv, mestoma celo pogovorni slog pisanja. Posebno vrednost daje pisanju tudi neposredno naslavljanje potencialnih protiargumentov in s tem preobrazba teksta iz monologa v razpravo z zamišljenimi kritiki (npr. *»Če se je treba zoperstaviti kapitalistični potrošniški ideologiji, mar za družbeno mobilizacijo ne potrebujemo protiideologije, kot je klimatizem?«,* str. 154).

Prednost delu daje tudi priloženo poglavje *»Nadaljnje branje«,* kjer nam Hulme predstavi osrednja pisanja, na katerih gradi ključne ideje in predvsem vrednote lastnega pristopa. Pri tem pa naletimo tudi na eno izmed ključnih pomanjkljivosti monografije – šele v tem priloženem poglavju izvemo zelo na kratko o tem, da svoje misli uvršča v »ekomodernizem«, ki da je »tretja pot« med laissez-fair ekonomijo in antikapitalizmom. V monografiji pogrešam predvsem razpravo o tej poziciji in kako je usmerjala pisanje dela *Climate Change Isn't Everything*.

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Igor LUKŠIČ: HEGELIANISM IN POLITICAL SCIENCE OF ADOLF BIBIČ
Teorija in praksa, Ljubljana 2023, Vol. LX, No. 4, pp. 593–616

Bibič encountered Hegel on several levels. He tackled Hegel directly in his PhD dissertation in which he studied the relationship between civil society and the state according to Hegel and Marx. Here he did not stop at the Philosophy of Law, but also tackled the Phenomenology of Spirit, namely, Hegel's key work for entering the Hegelian way of thinking. In terms of the depth of theoretical elaboration the attachment to Hegel crystallised in the 20th century. The thought that bypasses Hegel's legacy is shallow, the thought that at least tries to learn from Hegel intends to reach deep. Hegel places the state as the highest form in the development of the human being, the highest in the hierarchy of the forms of existence of the freedom of humanity. For him, politics not only resides in the state, but already begins in a natural and civil society form and, in the state as a global process, it shows its mastery. Slovenian political science is fortunate that its primary founder, Adolf Bibič, decided to base his politics on Hegel.
Keywords: Hegel, Hegelianism, civil society, state, freedom

Jure SMOLE, Boštjan UDOVIČ: THE COMMERCIAL DIPLOMACY OF SMALL COUNTRIES: A COMPARISON OF SLOVENIA, SERBIA AND AUSTRIA
Teorija in praksa, Ljubljana 2023, Vol. LX, No. 4, pp. 617–640

The article seeks to analyse and compare the commercial diplomacy of three small countries – Austria, Slovenia and Serbia. The aim of our research is to establish whether and how various political and economic structures in different countries (Austria with a market-oriented economy, Slovenia as a post-transition country, Serbia as a transition one) influence commercial diplomacy. Comparative analysis based on a large number of interviews conducted with commercial diplomacy actors showed that: (1) the country itself always has an influence regardless of the model used by the said countries for formulating their commercial diplomacy, especially when problems or complications arise in a target market (the ex-post approach); (2) each country analysed faces the same challenges related to commercial diplomacy, which do not arise from their particular economic and political system, but from the international environment and the export/import or investment activities of companies; and (3) as concerns the conceptualisation and operationalisation of commercial diplomacy within the study of diplomacy, there is still a lot of missing research that would allow it to be generally accepted because commercial diplomacy and its associated concepts have yet to be uniformly conceptualised, hierarchised and included in

the canon of diplomatic studies in the 20 years since the field started to be actively researched.

Keywords: commercial diplomacy, Austria, Slovenia, Serbia, diplomatic studies

Žiga SELAN, Janja VUGA BERŠNAK: DEPRESSION AMONG FIRST RESPONDERS DURING THE PANDEMIC COMPLEX CRISIS: CASE STUDY AMONG SLOVENIAN HEALTHCARE WORKERS, MILITARY AND POLICE
Teorija in praksa, Ljubljana 2023, Vol. LX, No. 4, pp. 641–659

The pandemic caused by the SARS-CoV-2 virus did not spare Slovenia. On the contrary, it called for a long-term and exhausting response from employees in certain critical professions. During the pandemic, noting the restrictions and need for a greater volume of work, they were exposed to a series of factors that affected their health and general well-being. In the article, we present self-assessments obtained with the help of a quantitative measurement instrument of employees in critical professions (medical personnel, police officers, members of the Slovenian Armed Forces) with regard to their feelings of stress, strain and depression during the selected period of the pandemic, between March 2020 and June 2022. The survey shows that 30% of respondents in a critical profession felt depressed. Further, the results show a correlation between depression and pandemic factors ($r = .567$, $p = < 0.01$) in all professions under study.

Keywords: critical professions, pandemic, mental health, depression, stress

Brina MALNAR: PODPORA POLITIKAM BLAŽITVE PODNEBNIH SPREMEMB: ŠTUDIJA 64 ČLANKOV S PODATKI IZ MODULA EVROPSKE DRUŽBOSLOVNE RAZISKAVE 2016
Teorija in praksa, Ljubljana 2023, let. LX, št. 4, str. 664–690

Članek je metaanaliza znanstvenih člankov na podatkih modula Evropske družboslovne raziskave »Klimatske spremembe«. Cilj je bil strniti ključne individualne in institucionalne dejavnike, ki oblikujejo posameznikova okoljska stališča, ravnanja in podporo politikam, ter ublažiti problem razdrobljenosti izsledkov pri pretoku znanja med akademsko in javnopolitično sfero. Rezultati, predstavljeni v obliki hevrističnega modela, izpostavijo pomen ozaveščenosti, zaupanja in socialnopolitičnih dejavnikov in izrišejo kompleksen odnos med stališči do podnebnih sprememb, čustveno angažiranostjo in javnopolitičnimi preferencami posameznika. Z metodo metaanalitične sinteze razpršenih izsledkov je študija razpoznala ključne ovire, s katerimi se srečujejo evropski nosilci odločanja pri uveljavljanju ukrepov za blažitev podnebnih sprememb.

Ključni pojmi: podnebne spremembe, okoljsko ravnanje, okoljske politike, Evropska družboslovna raziskava

Slavko KURDIJA, Tadej BEVK: CLIMATE CHANGE AND PUBLIC ATTITUDES TO RENEWABLE ENERGY RESOURCES

Teorija in praksa, Ljubljana 2023, Vol. LX, No. 4, pp. 691–716

The article presents survey findings concerning public attitudes to renewable energy sources (RES) (SJM 2019/1) within the context of cross-national climate change comparisons from the ESS 2016 Climate Change module. The results indicate a high level of public agreement with the climate change paradigm, yet reticence with respect to concrete environmental measures. Similar findings emerge in the RES study, which shows a strong preference for the wind and solar scenarios, presented in more detail from the public's perspective, with the advantages and disadvantages. However, when analysing the specific spatial implementation, public opinion slowly has slipped from an environmental to an economic mentality. A comparative analysis of ESS data provides a similar impression, especially when looking at the differences between developed Western European/Nordic countries and Central/Eastern European countries. The authors stress that environmental transformation (including RES implementation) will not be successful without a broader transformation of society which ensures that the benefits and risks are equitably distributed.

Keywords: climate change, renewable energy, ESS, public opinion, wind farm, solar farm, spatial effects

Marko POLIČ, Matija SVETINA: THE IMPORTANCE OF ENVIRONMENTAL PROBLEMS FOR LIFE SATISFACTION

Teorija in praksa, Ljubljana 2023, Vol. LX, No. 4, pp. 717–728

In this article, we present analysis of SJM data from 2011 to 2020, exploring the link between attitudes to environmental concerns and subjective well-being/life satisfaction. The findings reveal that, while individuals exhibit awareness of environmental issues, these concerns tend to be perceived as abstract and remote. Overall life satisfaction places less emphasis on environmental considerations, prioritising day-to-day worries like personal health and finances. We discuss these observations with respect to

the Composite Levels Theory. Further, we discuss the potential impact of weather-related challenges in 2022 and 2023 – such as higher temperatures, reduced rainfall, and flooding – on shaping future environmental attitudes.

Keywords: well-being, ecosystem services, environmental psychology, climate change, positive psychology, composite level theory

Marjan MALEŠIČ: PUBLIC PERCEPTION OF ENVIRONMENTAL SECURITY IN SLOVENIA
Teorija in praksa, Ljubljana 2023, Vol. LX, No. 4, pp. 729–752

This study examines the undeniable connections between environmental and security issues in contemporary society, supported by scientific analyses. We specifically investigate the Slovenian public's awareness of these connections through data analysis of SJM surveys (2020/3 and 2011/1) regarding attitudes to environmental problems. While we observe increasing sensitivity to environmental issues, public concern does not align with the severity of climate disasters, environmental terrorism, crime, civil-unrest-related violence, environmental refugees, and associated armed conflicts. Some of these phenomena have already impacted Slovenia's security. Although the public acknowledges environmental problems, the consequences are insufficiently connected to daily lives, including security considerations.

Keywords: environment, environmental problems, threats, environmental security, public, perception

Sonja BEZJAK, Janez ŠTEBE: INTERDISCIPLINARY THEMATIC DATA COLLECTIONS AS A PLATFORM FOR BRINGING RESEARCHERS TOGETHER: THE CASE OF ENVIRONMENTAL RESEARCH IN SLOVENIA
Teorija in praksa, Ljubljana 2023, Vol. LX, No. 4, pp. 753–774

Environmental data can be an important element in advancing knowledge to address the challenges and questions we face at the beginning of the 21st century. This article reflects on how to conceptualise and what to include in an environmental database to engage different stakeholders and contribute to building a broad community of stakeholders. In our data-intensive era, data archives are a platform for connecting data producers and data users, researchers, research infrastructures, public services, citizen scientists and others. Accessible and transparent data and other data-related services contribute to interdisciplinary collaboration and the implementation of inclusive open science.

Keywords: climate change, environment, data centres, research data, citizens' science, social science concepts

Anton BEBLER: VOJNA V UKRAJINI V PRIMERJALNI PERSPETIVI
Teorija in praksa, Ljubljana 2023, let. LX, št. 4, str. 775–786

Vojna v Ukrajini je postala največja, najbolj krvava in najdaljša vojna v Evropi po letu 1945. Njena prva faza je kazala več podobnosti z oboroženimi spopadi in vojnami na Cipru in prostorih nekdanje Sovjetske zveze ter SFRJ. Med jugoslovanskimi primeri je bila najbolj podobna vojni na Hrvaškem (1991–1995). Ta podobnost je izvirala iz skoraj sočasnega razpada dveh strukturno podobnih večnacionalnih »socialističnih federacij« in njihovih komunističnih režimov. Različnost med drugo fazo vojne v Ukrajini in vojno na Hrvaškem je bila tesno povezana s procesom širjenja NATA in EU ter s politiko ZDA, ki je širjenje NATA in Ukrajino uporabljala kot orodje za škodovanje in slabitev Rusije. Konflikt okoli Ukrajine in njej obljubljenega članstva v NATU se je tako degeneriral v posredno vojno med Rusko federacijo in Zahodom pod vodstvom ZDA ter Ukrajino v vlogi agenta Zahoda in glavne žrtve prave vojne. Tako kot se je zgodilo na Hrvaškem avgusta leta 1995 in v Azerbajdžanu v septembru 2023, bo o izidu vojne v Ukrajini odločeno na vojskovališču in ne za diplomatsko mizo. Toda ta izid bo povsem drugačen od izida na Hrvaškem. Odgovornost za vojno v Ukrajini in njene posledice si delijo dve vojskujoči državi in posredno soodgovorne ZDA in druge članice NATA.
Ključni pojmi: Ukrajina, Rusija, Hrvaška, ZDA, NATO, notranja vojna, meddržavna vojna

Ajda HEDŽET: DRŽAVOCENTRIČNOST V MEDNARODNIH ODNOSIH: ANALIZA KONSTRUKCIJE NEDRŽAVNIH KOLEKTIVNIH AKTERJEV V ŠTUDIJAH ČLOVEKOVIH PRAVIC
Teorija in praksa, Ljubljana 2023, let. LX, št. 4, str. 787–813

Članek proučuje vrzel v študijah človekovih pravic na področju Mednarodnih odnosov (MO) z analizo napredka v teoriji MO, ki je pripomogel k uveljavitvi nevladnih kolektivnih akterjev kot relevantnih objektov proučevanja v MO. S poglobljeno študijo konceptualizacije kolektivnih nedržavnih akterjev v konstruktivističnem teoretičnem pristopu in z analizo omejitev tega pristopa članek obravnava posledice obstoječe konceptualizacije za marginalizacijo nevladnih kolektivnih akterjev v teoriji MO. Članek ugotavlja, da bi razširitev teoretičnega razumevanja, ki se osredinja na konstitucijo

različnih kolektivnih akterjev in njihovo sposobnost delovanja, obogatila študije človekovih pravic v MO. Poleg tega ponudi premislek o oblikovanju raziskovalne agende, utemeljene na socioloških teoretskih pristopih, ki so usmerjeni v analizo praks. Te bi lahko prispevale k obogatitvi študij človekovih pravic v MO s spodbujanjem interdisciplinarnih razprav ter preseganjem obstoječih omejitev na znanstvenih in disciplinarnih področjih.

Ključni pojmi: nedržavni akterji, državocentričnost, mednarodni odnosi, človekove pravice, mednarodni akterji, konstruktvizem

Jernej PIKALO, Petra PODOBNIKAR: METAFORA KOT POLITIČNA TEHNOLOGIJA

Teorija in praksa, Ljubljana 2023, let. LX, št. 4, str. 814–832

Razprava o političnih metaforah so plodna podlaga za razumevanje vprašanj v politični teoriji in politični praksi. Članek se odmika od uveljavljenih teoretskih in metodoloških pristopov k obravnavi politične metafore (npr. klasičnega, konceptualnega, hermenevtičnega, kognitivnega) in vpeljuje (post)strukturalistične in (post)marksistične metodološke in teoretske podlage. Zagovarja, da so uveljavljeni pristopi k preučevanju funkcionalnosti in ontologij političnih metafor možni predvsem z raziskovanjem njihovega delovanja v političnih diskurzih in kot dogodka(ov) v dispozitivu oblasti/resnice. Metafore je mogoče obravnavati kot specifične politične tehnologije (strategije oblasti), ki vplivajo/ustvarjajo režime resnice.

Ključni pojmi: politične metafore, politična teorija, teorije jezika, politični diskurz, oblast, vednost

Simona KUKOVIČ, Jelena JOKSIMOVIĆ: PROTOKOLARNA DARILA – LEPA GESTA ALI POTENCIALNO TVEGANJE? NESKLADNOSTI PRI POROČANJU DARIL V SLOVENIJI

Teorija in praksa, Ljubljana 2023, let. LX, št. 4, str. 833–855

Integriteta in transparentnost sta bistvena elementa sodobnih demokratičnih držav, zaupanje v politično-upravne institucije pa je treba zasledovati in ohranjati na vsakem koraku, tudi pri poročanju o protokolarnih darilih. Protokolarna darila so kljub (pogosto) problematičnim konotacijam eden ključnih elementov pri gradnji trdnih odnosov, od najvišjih položajev v politiki in diplomaciji do najožjih javnih uslužbencev. Članek obravnava nabor prijavljenih daril v Republiki Sloveniji. S poglobljeno statistično analizo so avtorji ugotovili nepravilnosti pri poročanju o protokolarnih darilih, predvsem pomanjkljive opise daril in problematično ocenjevanje vrednosti

daril, ki je v večini primerov prepuščeno laikom. Avtorji ugotavljajo, da se pojavljajo težave pri implementaciji normativnega okvira, saj se pri poročanju protokolarnih daril upoštevajo predvsem tehnični, manj pa tudi vsebinski vidiki.

Ključni pojmi: protokolarna darila, poročanje, anomalije, preglednost, zaupanje, Slovenija

Mimoza BUDECI: KAKO RAZNOLIKOST SKUPIN TER VIDIK SPOLA VPLIVATA NA VOJAŠKO PROFESIONALNOST IN KAKO RAZLIČNE SKUPINE DOJEMAJO KONCEPT PROFESIONALNOSTI?
Teorija in praksa, Ljubljana 2023, let. LX, št. 4, str. 856–874

Obstaja majhno število raziskav o tem, kako raznolikost skupin ter vidik spola vplivata na vojaško profesionalnost in kako različne skupine dojemajo koncept profesionalnosti. Ta študija je preučevala poglede različnih skupin znotraj albanskih oboroženih sil (AOS) na vojaško profesionalnost in neprofesionalnost z uporabo kvalitativnega pristopa. Da bi zagotovila udeležbo raznolikih skupin, je študija temeljila na konstruktivistični paradigmi (več realnosti) z uporabo poročila Vidik spola v albanskih oboroženih silah (2013). Omenjeno poročilo pomaga opredeliti različne učinke raziskav skozi vidik spola. V intervjujih in fokusnih skupinah je od oktobra 2022 do avgusta 2023 sodelovalo 150 posameznikov. Rezultati so pokazali, da obstajajo edinstveni vidiki, povezani s profesionalnostjo in neprofesionalnostjo, pri čemer ima voditeljstvo ključno vlogo. Ta študija osvetljuje izkušnje pripadnikov in kako njihove izkušnje oblikujejo dojemanje profesionalnosti.

Ključni pojmi: albanske oborozene sile (AOS), vojaška profesionalnost, kvalitativna raziskava, raznolikost

SEZNAM RECENZENTK IN RECENZENTOV ČLANKOV LETNIKA LX

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KAZALO LX. LETNIKA TEORIJE IN PRAKSE

NAVODILA AVTORICAM IN AVTORJEM

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

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

ČLANKI

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

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

Tabela 1: UČINEK ODBOROV

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

Vir: Yordanova, 2009: 256.

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

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

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

RECENZIJE KNJIG

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

Ime PRIIMEK
Institucionalna pripadnost

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

Janez NOVAK
Fakulteta za družbene vede, UL

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

NAVAJANJE

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

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

Knjige

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

Zborniki

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

Samostojni sestavek ali poglavje v monografiji

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

Članki

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

Svetovni splet (WWW)

Priimek, Ime (letnica): Naslov. Dostopno prek Internetni naslov, datum dostopa.

Deluze, Gilles (1978): Spinoza. Dostopno prek http://www.imaginet.fr/deluze/TXT/420178.html, 10. 1. 2001.

Viri

Avtorica/avtor je sam odgovoren za spoštovanje materialnih in moralnih avtorskih pravic, povezanih z uporabo podatkov, datotek, reprodukcij in del (v nadaljevanju vir) drugih fizičnih in pravnih oseb v njegovem članku. Avtorstvo vira, ki ga avtorica oziroma avtor uporablja v članku in ki ni plod njegovega raziskovalnega dela, mora biti jasno razvidno v obliki ustreznega navajanja vira v seznamu VIROV in v navajanju vira v besedilu članka.

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

Priimek, Ime (letnica nastanka vira): Naslov/nosilec vira. Mesto hranjenja vira. Dostopno prek Internetni naslov, datum dostopa.

Koprivec, Daša (2005–2008): Avdio kasete. Kustodiat za slovenske izseljence in zamejce SEM. Dostopno prek http://www.imaginet.fr/deluze/TXT/420178.html, 10. 1. 2010.

ali

Luthar, Breda, Samo Kropivnik, Tanja Oblak, Blanka Tivadar, Mirjana Ule, Slavko Kurdija in Samo Uhan (2006): Življenjski stili v medijski družbi 2001. Ljubljana: Fakulteta za družbene vede, Arhiv družboslovnih podatkov.

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

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

Zbirka navijaških šalov. Avtoštoparski muzej, Kanal ob Soči. Zasebni arhiv Mirana Ipavca.

ali

Zbirka pisem Janeza Novaka. 1953–1989. Privatni arhiv.

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

(Poročilo o delu državnega zbora, 2000)
ali

(Zbirka navijaških šalov)

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

RECENZENTSKI POSTOPEK

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

Uredništvo ima pravico, da prispevkov, ki ne ustrezajo merilom knjižne slovenščine (ali angleščine, če je članek oddan v angleščini; upošteva se British English) ne sprejme v recenzentski postopek. Stroški obveznega lektoriranja angleških besedil se avtorjem zaračunavajo po predhodnem dogovoru.

Avtorica/avtor ima od trenutka, ko je seznanjen z recenzentskimi mnenji, tri tedne časa, da v besedilo vnese popravke in popravljeno besedilo vrne v uredništvo TIP. V primeru, ko recenzenti zahtevajo temeljitejše popravke, se popravljeno besedilo ponovno vrne recenzentu v presojo. Avtorica/avtor naj popravljenemu besedilu priloži poseben obrazec “avtorjevo poročilo”, ki ga dobi skupaj z recenzijama besedila, v katerem naj obrazloži, katere dele besedila je popravil in kako. Če avtorica/avtor oziroma avtor meni, da so pripombe recenzenta neutemeljene, pomanjkljive ali kakorkoli nerazumljive, naj neupoštevanje recenzentskih pripomb pojasni in utemelji v posebnem poročilu glavnemu uredniku.

Avtorica/avtor in soavtorji ob objavi dobijo po en brezplačen izvod številke revije, v kateri je bil objavljen njihov prispevek. Vsak dodaten izvod stane 10 evrov (plus poštnina). Na zahtevo lahko avtorici/avtorju pošljemo brezplačen izvod njegove objave v formatu pdf.

Avtorica/avtor prenese materiale avtorske pravice za objavljeni prispevek na izdajatelja revije.

ETIKA OBJAVLJANJA

Revija Teorija in praksa upošteva Pravila o ravnanju Odbora za etiko objavljanja Committee on Publication Ethics (COPE Code of Conduct guidelines in zahteve za recenzirane revije, ki jih je oblikovala založba Elsevier Publishing House (skladno z mednarodnimi pravili založniške etike za znanstvene publikacije).

Revija Teorija in praksa je te politike in postopke sprejela z namenom podpreti urednike, recenzente in avtorje pri izpolnjevanju njihovih etičnih dolžnosti skladno s temi smernicami. Od avtorjev, recenzentov in urednikov se pričakuje, da upoštevajo smernice dobre prakse glede etičnega ravnanja, kot jih določajo te politike in postopki.

INSTRUCTIONS FOR AUTHORS

Submitted texts should not be previously published or the subject of a peer-review procedure for another journal or book/monograph. The publishing of an article or a book review in *Teorija in praksa* is free of charge.

Texts should be sent to the e-mail address: teorija.praksa@fdv.uni-lj.si. A text should be in A4 format with 1.5 spacing, Times New Roman of 12-point font size, and the centre aligned with 2.5 cm margins. All pages of the text should be numbered consecutively. The first and last name of the author/s should be placed on a separate cover sheet showing the title of the article, along with their academic title and current employment, full postal address, telephone number and e-mail address. The last name of the author/s should be printed in uppercase. The initial page of the text should only include the title of the text, and the abstract. The text should be accompanied by the author/s' statement that the text has not previously been published or is not in press with any other journal or monograph. In the statement, the author/s should also make a proposal for the article's classification in compliance with the typology of documents/works (an original article, a review article, or a book review). The Editorial Board shall decide on the final classification of a submitted text.

ARTICLES

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

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

Table 1: COMMITTEE EFFECT

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

Source: Yordanova, 2009: 256.

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

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

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

BOOK REVIEWS

Book reviews not older than 2 years are accepted for publication in *Teorija in praksa* and should contain up to 1,500 words. In a book review, the author should strictly avoid making any references to any sources and literature. The book review should not include title or subtitles. Information about the author and the reviewed book should be given at the review's start in the form shown below:

First Name LAST NAME
Institutional affiliation

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

John SMITH
Oxford University

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

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

REFERENCES

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

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

Books

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

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

Edited Books

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

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

Chapters or Essays in Monographs

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

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

Articles

Last Name, First Name (year of publication): Title of the Article: Subtitle. Name of Journal Volume (Number): pages.

Bachrach, Peter and Morton S. Baratz (1963): Decisions and Nondecisions: An Analytical Framework. American Political Science Review 57 (3): 632–642.

Internet (WWW)

Last Name, First Name (year of publication): Title. Accessible at Internet address, date of access.

Deluze, Gilles (1978): Spinoza. Accessible at http://www.imaginet.fr/deluze/TXT/420178.html, 10. 1. 2001.

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The author should give as much data as reasonably necessary about the source such as its author, city or institution, address, name or description, evidence number, webpage address, place and year of its creation, and similar. Such details should allow the traceability or intersubjective verifiability of the source. With electronic sources, the author should also include the date the material was accessed.

Last name, First name (year of creation of the source): Address/holder of the source. Place of keeping the source. Accessible at Internet address, date of access.

Featherstone, Mike (2005–2008): Audio cassettes. National Museum of New Zealand. Available at http://www.imaginet.nz/deluxe/TXT/420178.html, 10. 1. 2010.

or

Activity Report of the National Assembly of Republic of Slovenia, 1996–2000. Ljubljana: National Assembly of the Republic of Slovenia, 2000.

If a source is the author's private archives or those of another person, this should be clearly stated. An indication of the identity of private archives' owner is recommended, but not necessary if this may affect the protection of their material rights or personal integrity.

Last name, First Name of any author (potential year of creation of the source): Source name or description. The place where the source is kept. Private archives.
Collection of supporters' scarves. Hitcheiker Museum, Richmond upon Thames. Private archives of James Longfield.
or
Collection of letters by Janez Novak. 1953–1989. Private archives.

When a source's author and year of creation are known, the same way of citing it in the article text applies as for the citation of articles, chapters in a book or books. When the source's author and year of creation are unknown, the source's title, name or description should be used sensibly in the article text. If the title, name or description of the source consist of more than five words, the initial wording of the source's address, name or description should be used when citing the source in the main text so that it will be clearly identifiable in the Bibliography.

(Activity Report of the National Assembly, 2000)
or
(Collection of supporters' scarves)
Concerning other ways of citing the literature or sources used in articles, please contact the Editorial Board of *Teorija in praksa*.

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All types of articles undergo a mutually anonymous peer-review procedure organised by the Editorial Board of the journal. Articles and book essays are to be reviewed by no fewer than two reviewers. As a rule, the review procedure takes 2 months from submission of a text to notification of the reviewers' opinions. The publication of a text can be rejected by the Editorial Board without any external review if the text does not follow the instructions given above, or falls outside of the scientific fields covered by *Teorija in praksa*.

The author shall improve the text and re-submit the improved text to the Editorial Board within 3 weeks of being notified of the reviews. When extensive improvements are required by the reviewers, the author should resubmit the improved text for the reviewers' reassessment. A special sheet, "Author's Report", sent to the author along with the reviews of the text, must be sent as an attachment to the improved text by the author, explaining which parts of the text have been improved, and how. If the author finds a reviewer's comment to be unfounded, deficient or unclear in any way, they should justify their potential disregard of the reviewer's comment in a special report to the Editor in Chief. The Editorial Board reserves the right not to commence the review procedure of papers which failed to meet the standards of formal written language.

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