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Časopis za istraživanje politike

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Izlazi tri puta godišnje

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SADRŽAJ

[ČLANCI I STUDIJE]

Luka Petrović

Evropsko građanstvo i ustavni patriotizam:
ka solidarnijoj Evropi

7

Irina Milutinović

Politička instrumentalizacija medijskog diskursa o pandemiji
kovida 19 u Srbiji: izveštavanje i neki normativni aspekti

27

Valentina Petrović

Threats to democracy: measures taken by right-wing populist
regimes during the Covid19 crisis in Eastern Europe

51

Zoran Stojiljković

Rad, kapital i socijalna kohezija u (post)pandemijskom okviru

69

Ankica Čakardić

Capital and Marx's Epistemological Revolution
From Neue Marx-lectüre to Political Marxism

87

Gustavo Oliveira Teles de Menezes
North Kosovo and the Serbia-Kosovo normalization dialogue

111

[OSVRTI, PRIKAZI, RECENZIJE]

Mario Pallua

Paul Collier, *The Future of Capitalism: Facing the New Anxieties*

139

Novak Nikola

Vedran Duančić, *Geography and Nationalist Visions of
Interwar Yugoslavia*

145

~

UPUTE SURADNICIMA (HRVATSKA REDAKCIJA)

151

UPUTSTVO SARADNICIMA (SRPSKA REDAKCIJA)

153



ČLANCI I STUDIJE



EVROPSKO GRAĐANSTVO I USTAVNI PATRIOTIZAM: KA SOLIDARNIJOJ EVROPI¹

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SAŽETAK

Pandemija korona virusa ponovo je stavila na agendu pitanje solidarnosti i ekonomske redistribucije unutar Evropske unije. Zdravstveni sistemi država Juga su najpogođeniji pandemijom, a došlo je i do ekonomske i socijalne krize. Zahtev za preraspodelom bogatstva, mutualizacijom dugova i zajedničkim finansiranjem ekonomskog oporavka u početku nije naišao na odobravanje „štedljivih” država. Za razliku od rasprava o krizi evropskog duga vođenih nakon Svetske ekonomske krize iz 2008. ovoga puta krizu su proizveli eksterni faktori, što je otupelo snagu argumenata zasnovanih na navodnoj neodgovornosti pojedinih država. Autor polazi od pretpostavke da je nadnacionalno udruživanje neophodno radi uklanjanja negativnih efekata ekonomske globalizacije. U tekstu ispituje evropsko građanstvo, te kako ovaj koncept može pospešiti stvaranje solidarnijeg poretka. Problem posebno predstavlja da ono što je „urgentno potrebno da se uradi je ekstremno nepopularno i stoga praktično nemoguće demokratski uraditi” (Offe 2013), a tiče se mutualizacije dugova i stvaranja jedinstvenog fiskalnog sistema unutar Evropske unije. Autor posebno ispituje oblik građanstva zasnovan na konceptu ustavnog patriotizma (Habermas 2006; Muller, 2010). Zajedničko sećanje na posleratnu pomoć nemačkoj ekonomiji (Young 2020) ovoga puta se može iskoristiti kao motivacija za slične politike solidarnosti.

KLJUČNE REČI: kriza, solidarnost, Evropska unija, ustavni patriotizam, građanstvo

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UVOD

Pandemija koronavirusa ostavlja dubok trag. Svakodnevni život se menja, društva će biti drugačija, a sigurno će se posledice osetiti u političkoj sferi i ne samo na nacionalnom nivou. Evropska unija (EU) je ponovo stavljena na test i istraživači su mogli da vide kako se jedna nadnacionalna tvorevina ponaša u kriznim situacijama. Ne samo da su zdravstveni sistemi država članica različito odgovorili na izazove virusa, već se kriza „prelila” i u druge oblasti – ekonomska kriza je neizbežna, društvene posledice će biti osetne i dalje nije jasno kako će se sve to odraziti na budućnost EU. Situacija je vrlo slična kao za vreme krize Evrozone i danas se može reći da je „[k]riza ekonomska, politička i normativna. Situacija gotovo podseća na predrevolucionarno stanje” (Dimitrijević 2016, 142–143). Sada se EU nalazi u prelomnom trenutku kada je potrebno odlučiti kako će izgledati ova politička zajednica i da li će uopšte opstati.

Suštinski politički karakter naših svakodnevnih života, društava i, u krajnjem, evropskih integracija možda je moguće prikriti tokom „normalnih” vremena, kada se stvari odvijaju „po planu”. No, kada kriza nastupi, postaje jasno koliko su gotovo sve društvene i lične sfere isprepletane sa politikom. Zdravstveni sistem, socijalna zaštita, pomoć drugih država u nevolji, način na koji će se finansirati ekonomski oporavak su samo na nivou tehničke implementacije stvar eksperata. Sada je potrebno doneti odluku o daljem pravcu kretanja i to nije stvar eksperata, pa je prebacivanje odgovornosti na njih samo pokušaj sakrivanja suštinske političnosti takvih odluka.

Deluje da je teško da postoji jedinstveni politički projekat koji okuplja Evropljane, a da se političke elite snebivaju da iznesu jasne predloge i političku viziju kako će EU izgledati u bliskoj budućnosti. „Čini se da EU uporno propušta da odgovori na hobsovsko pitanje *quis iudicabit* – ko odlučuje?” (Muller 2010, 147). Otvoren je horizont različitih mogućnosti i izbori koji se donose u sadašnjem trenutku mnogo su važniji od izbora tokom „normalnih” vremena.

U tekstu zastupam tezu da je period tokom pandemije korone predstavljao povoljan trenutak da se razreši najznačajniji institucionalni nedostatak Evropske unije, odnosno to što ekonomska integracija i monetarna unija nisu ispraćene stvaranjem političke i fiskalne unije. Ovo je posebno važno u situaciji kada će ponovo porasti dugovi država članica i kada će doći do rasta nejednakosti između država centra i periferije EU i unutar njih. Države članice će i dalje biti odgovorne za svoje postojeće dugove, uz dodatni dug koji će nastati iz trenutne krize, dok je veliko pitanje koliko će stvaranje zajedničkog fonda zaista pomoći ugroženim ekonomijama država Juga. Rešenje u obliku zajedničkog fonda kojim će se finansirati oporavak je samo privremeno i ne rešava osnovni poli-

tički problem – nepostojanje jasnog političkog pravca delovanja. Jedan i ne toliko novi koncept ustavnog patriotizma može biti iskorišćen za konstruisanje takvog političkog pravca.

Na početku ću prikazati kako su odluke donesene u važnim istorijskim trenucima odredile tok evropskih integracija i kako je došlo do strukturnih problema sa kojima se EU suočava ne samo danas, već i tokom krize Evrozone. Nakon toga ću se osvrnuti na političku dinamiku tokom pregovora o rešavanju sadašnje krize i kako su ponovo do izražaja došli evropsko nejedinstvo i nesolidarnost. Na kraju ću kroz koncept ustavnog patriotizma prikazati jednu od mogućih vizija Evropske unije, koja bi se uhvatila u koštac sa ključnim pitanjima koja su na dnevnom redu.

PRELOMNI TRENUTAK

Krupne promene, unutar jednog društva ili političkog sistema, nisu česta pojava i retko se dešavaju u „normalnim” vremenima. Obično je reč o vanrednim situacijama ili krizama, kada stvari ne funkcionišu na uobičajen način i kada postoji prilika da se gotovo u potpunosti redefiniše postojeće stanje i preusmeri tok razvoja društva ili političkog sistema. Takva situacija, velikih društvenih lomova (critical juncture), je „situacija velike nesigurnosti, stresa i vremenskog pritiska kada se događa slom uspostavljenih institucionalnih struktura i/ili kultura i relevantna 'pravila igre' nije lako razaznati ili trenutno izgleda da se ne primenjuju” (Hart 2010, 102). U trenutku kada nestaje stari poredak potrebno je odrediti kako će izgledati novorođeni. To je prilika da se donese odluka o tome kako će ubuduće izgledati jedna politička zajednica. Postoji uverenje da su pandemija korona virusa, zdravstvena i ekonomska kriza kao njene posledice jedan od takvih prelomnih trenutaka, kada je postojala (ili i dalje postoji?) mogućnost da Evropska unija skrene svoj politički put u smeru produbljivanja integracija. To bi podrazumevalo definisanje jedinstvenih fiskalnih pravila unutar EU i posledično prelazak na puno federalno uređenje. Utoliko bi trebalo i da se konstituiše jedinstveno evropsko građanstvo. Pandemija je prilika da se izađe iz „Moneovog tehnokratskog kaveza” (Kovačević 2019, 19) i na nivou EU donese politička odluka o tome šta EU želi da postigne kao politička zajednica.

Trenutak krize se ovde vidi kao šansa da se postignu krupne promene – kriza je prilika za definisanje novih pravila. Kriza će biti duboka i situacija je otvorena za donošenje odluka. U toku krize postoji niz različitih mogućnosti i prosto je otvoreno kakva će odluka biti donesena i u kom pravcu će se razviti društvene i političke institucije. Kako navodi Rajnhart Kozelek (Reinhart Koselleck), „[u]suštini krize sadržano je to da je situacija zrela za odluku, ali odluka još nije donesena. Isto tako, za krizu je svojstvena otvorenost u pogledu toga koja odluka će biti donesena” (Kozelek

1997, 175). Dakle, rezultat nije unapred zadat, nije predodređen istorijom ili strukturnim faktorima, već zavisi od *izbora* i *odluka* najznačajnijih aktera u datom trenutku. Kriza zahvata razlog postojanja Evropske unije i sada je trenutak kada se EU preispituje kakav poredak želi da postane.

U istoriji evropskih integracija postojalo je nekoliko takvih momenata, kada su ključni akteri usmerili razvoj integracija u određenom pravcu. Još pre samog početka integracija i nastanka Evropske zajednice za ugajl i čelik raspravljalo se o tome kako bi trebalo da izgleda ujedinjena Evropa. Fridrih fon Hajek (Friedrich von Hayek) u svom tekstu sa kraja tridesetih godina dvadesetog veka zagovara stvaranje „međudržavnog federalizma”, koji bi pre svega omogućio ukidanje državnih granica, slobodno kretanje robe, ljudi i kapitala, sa zajedničkim sistemom vladavine prava i jedinstvenim komunikacijama (Hayek 1996, 255). Naj taj način se, kroz stvaranje jedinstvenog tržišta i uklanjanjem carinskih barijera, osigurava političko jedinstvo i obezbeđuje mir. Na suprotnoj strani političkog spektra bio je projekat Altijera Spinelija (Altiero Spinelli), italijanskog socijaliste i kasnije člana pokreta Evropskih federalista, koji se u svom manifestu iz Ventotenea zalagao za stvaranje federalne, slobodne i ujedinjene Evrope. Prema njemu, „evropska revolucija mora biti socijalistička i kao svoj cilj mora imati emancipaciju radničke klase” (Spinelli 1941, 8). Borba radničke klase je, stoga, borba na evropskom, a ne na nacionalnom nivou i krajnji cilj je trajno održanje mira, koji je jedino moguć unutar socijalističke Evrope.

Treći projekat je Žana Monea (Jeanne Monnet), neofunkcionalistički, gde političke elite nacionalnih država zadržavaju vodeću ulogu u procesu integracija i gde se odluke predominantno donose kroz pregovore samih država (međuvladin model), koji je danas dominantan. Ovde je ideja da pažljive i postepene integracije u jednim oblastima imaju efekat prelivanja (spillover effect) na druge i tako, pod kontrolom država članica, postepeno napreduju integracije (Rosamond 2000, 59–65). Dobar primer ovakve, neofunkcionalističke logike integracije, jeste kreiranje Evrozone i stvaranje zajedničke valute, što bi, navodno, trebalo da prouzrokuje integracije u drugim oblastima. Ukratko, „[i]deja o malim (ekonomskim) koracima i velikim (političkim) učincima zamišljena je da bi se ostvario dugotrajan mir i blagostanje (...) prividno prizemne tehnokratske mere, u početku jedva vidljive ljudima u osnivačkim zemljama, trebalo je da se na kraju „preliju” u visoku politiku” (Muller 2010, 110). Moneov model, koji je posleratna hrišćanska demokratija sprovela u delo², od početka se percipira kao tehnokratski i depolitizovan.

U važnom istorijskom trenutku, nakon završetka Drugog svetskog rata, donesena je odluka i izabran je neofunkcionalistički model integracija,

2 Više od tome kako su ideje hrišćanske demokratije oblikovale posleratni politički život Evrope u: Jan-Verner Miler. 2013. Osporavanje demokratije. Fabrika knjiga: Beograd (posebno – četvrto poglavlje).

što je presudno uticalo na razvoj političkih i ekonomskih institucija EU. „Godine 1951. grupa evropskih lidera odlučila je da zanemari demokraciju i usredsredi se na ugalj i čelik” (Dimitrijević 2016, 142). Ovakav model ostavlja političkim elitama država članica glavnu reč u procesu integracija, što često vodi dugotrajnim pregovorima i stavljanju interesa nacionalnih država u prvi plan u procesu nadnacionalnih integracija. Ovaj model se često kritikuje da je depolitizovao EU i da mu nedostaje prava politička vizija i cilj koji bi trebalo postići sa evropskim integracijama. „Izvođači radova na gradilištu na kom je nicala današnja EU bili su ubeđeni da stvaraju nešto novo, što nikada nije postojalo, ali bez jasne vizije o tome šta bi to novo moglo biti” (Kovačević 2019, 90).

Deluje da je korona kriza pokazala da i dalje nije jasno šta EU želi da postigne sa sobom i u kom pravcu želi da se razvija. Ono što je pre nekoliko godina primećeno, odnosno da je u pitanju „kriza samog modela integracije” (Samardžić 2012, 4), te da je „došlo do granice takozvanog *methode Monnet*” (Muller 2010, 112), važi i danas. To je bilo jasno tokom krize Evrozone, ali i danas kada se ista kriza manifestuje u drugom obliku. Zbog toga su važni oni projekti koji nude politizaciju i jasan smer delovanja EU – ovde nije samo reč u naučnoj analizi institucionalnih felera u okviru političkog sistema, već o normativnim projektima koji govore kako bi trebalo da izgleda jedna politička zajednica.

SOLIDARNOST, EVROPSKO GRAĐANSTVO I IZABRANI PUT

Kako se Unija razvijala javljale su se ideje o konstruisanju evropskog građanstva i stvaranju solidarnijeg sistema. Nedavna istorija, takođe, pokazuje dva primera kada je EU mogla da se transformiše. Intervencija u Iraku 2003. godine bila je povod za raspravu o tome da li je to pogodan trenutak da se krene sa dubljom integracijom. Jürgen Habermas (Jurgen Habermas) i Žak Derida (Jacques Derrida) su demonstracije širom evropskih gradova zbog vojne intervencije u Iraku videli kao prekretnicu u razvoju Evropske unije. Smatrali su da je to presudan istorijski trenutak koji je označio rađanje evropske javne sfere neophodne za konstituisanje evropskog građanstva, trenutak kada bi mogao da se preoblikuje evropski identitet, prevaziđu takmičarski nagoni između država zasnovani na samointeresu i stvori zajednička spoljna politika nezavisna od SAD³ (Habermas & Derrida 2003, 291–293). Ostaje otvoreno pitanje koliko se uradilo na polju kreiranja evropske javne sfere i konstituisanju evropskog građanstva. Predlozi o, na primer, panevropskim partijskim listama i dalje ostaju na nivou pokušaja da se konstituiše jasna politička unija.

3 Ovo se pre svega odnosilo na države centra EU.

Pored zajedničke spoljne politike, važne su i one unutrašnje. Kriza Evrozone, posle izbijanja Svetske ekonomske krize iz 2008. godine, donela je na dnevni red pitanje solidarnosti. Još od Mاستrihtskog ugovora debatuje se o odnosu zajedničkog tržišta, valute, javnog duga država članica i fiskalne politike. Stvaranjem zajedničke valute i formiranjem Evropske centralne banke (ECB) vladama nacionalnih država onemogućeno je da pomoću monetarne politike ublažavaju negativne posledice ekonomske krize i da, u skladu sa ekonomskim ciklusima, vode adekvatnu monetarnu politiku. Stvaranjem jedinstvene valute države članice Evrozone izgubile su mogućnost da emisijom novca odgovaraju na trenutnu ekonomsku situaciju. Istovremeno, države se međusobno takmiče u privlačenju investicija smanjivanjem poreza. Kreiranje Evrozone najviše koristi donelo je Nemačkoj i drugim državama centra, pre svega zbog jeftinog izvoza svojih proizvoda. Posledično, bilansi država Juga zbog toga su u deficitu i zbog nepostojanja jedinstvenog fiskalnog sistema u vremenima ekonomske krize nameću im se mere štednje (Offe 2015; Piketty 2016; Varoufakis 2020). Zato su dublje integracije i stvaranje jedinstvenog poreskog sistema zagovarali autori koji pripadaju političkoj lewici, s obzirom na to da postojanje jedinstvene Evrozone bez postojanja jedinstvene poreske politike vide kao osnovni strukturni nedostatak EU (Habermas 2012; Offe 2015; van Parijs 2012). Kritiku takvom institucionalnom dizajnu upućivali su i autori sa suprotne strane političkog spektra, jer mobilnost radne snage nije na zadovoljavajućem nivou za stvaranje monetarne unije, a probleme donosi i jezička raznolikost (npr. Havel prema Samardžić 2012, 17; Friedman prema van Parijs 2012, 3). Ekonomska integracija nije ispraćena fiskalnom i političkom unijom i postoje različiti modeli upravljanja, komunitarni i međuvladin, u sferama koje jesu različite ali međuzavisne.

Ovi sistemski nedostaci ekonomske i monetarne unije proishode odsustvom korelacije između nje, sa jedne, i potrebne fiskalne i političke unije, sa druge strane. Drugim rečima, monetarna unija pretpostavlja postojanje fiskalne unije (tzv. fiskalnog federalizma), a obe zajedno u osnovi su uslovljene političkom voljom da se izgradi politička unija. Iz ovog niza uslovnosti proizlazi jednostavan zaključak: ili će se unutar EU stvoriti politička unija koja će omogućiti solidnu ekonomsku i monetarnu uniju, ili će nivo integracije biti zaustavljen (faktički biti vraćen) na stepenu zajedničkog tržišta koji ne podrazumeva ni monetarnu ni političku uniju (Samardžić 2012, 22).

Imajući navedeno u vidu, EU se (i dalje) nalazi pred izborom: ili će produbiti integracije i u drugim oblastima, stvarajući punu federaciju sa jedinstvenim fiskalnim pravilima i izvršnim i zakonodavnim telima odgovornim evropskim građanima, ili će poći putem dezintegracije, kada pitanje nije kada će se raspasti već koja će naredna kriza dovesti do toga.

Koristeći šmitovsku argumentaciju, Jan-Verner Miler (Jan-Werner Muller) navodi sledeće: „Ako se radikalno ne izmeni i ne preobrazi u tradicionalnu federalnu nacionalnu državu, Unija neće imati jednu odredljivu instancu suvereniteta i ona *zaista* izmešta 'političko' u sferu ekonomije i etike” (Muller 2010, 147). Da bi se EU konstituisala kao federalna država sa jedinstvenim fiskalnim pravilima, neophodno je da postoji osećaj solidarnosti među građanima. Pod pojmom solidarnost koristim definiciju Klauza Ofea (Claus Offe), koji je upravo u jeku rasprava o solidarnosti unutar EU za vreme krize Evrozone 2013. napisao da „solidarnost znači ne da radimo 'ono što je dobro za tebe', već što je dobro '*za sve nas*'. Umesto toga, nerazumevanje koje meša akte solidarnosti (u smislu koji je upravo određen) i altruističke humanitarne donacije dovodi do pitanja: Zašto bi 'mi' plaćali za 'njih'?” (Offe 2013, 599)

Pandemija korona virusa je, s jedne strane, donela strah da će ovo biti presudan trenutak koji čak može uticati na raspad EU, dok se istovremeno javila nada da će ovo biti trenutak koji će Evropljane dublje povezati u korist jedinstvenog poretka. Oni koji su bili posebno inspirisani uporedili su dešavanja u Evropskoj uniji sa stvaranjem federalne SAD, pa se pojavila teza o Hamiltonovskom trenutku za Evropu (npr. Vallee 2020). Između ostalog, važan argument za stvaranje federalne SAD iz konfederacije bili su dugovi pojedinačnih država i jedan od razloga za formiranje centralne vlasti bio je upravo preuzimanje dugova pojedinačnih država i njihovo zajedničko finansiranje. Utoliko bi, prema ovom argumentu, Evropska unija trebalo da preuzme finansiranje dugova država članica koji će se nužno povećati usled borbe sa posledicama korone i finansiranje njihovih ekonomija u borbi protiv posledica pandemije korona virusa. „Evropa će se ujediniti ili će nestati” naveli su iz pokreta DiEM25, zagovarajući emitovanje korona obveznica od strane Evropske centralne banke verujući da samo „demokratski izabrana federalna vlada u Evropi može da napravi ovakve odluke” (DiEM25, 2020). Pitanje ekonomske redistribucije unutar Evropske unije se ponovo našlo na agendi, a evropsko građanstvo i solidarnost su se ponovo našli na testu. Postoji li *zaista* evropska solidarnost i da li su Evropljani spremni da preraspodeljuju bogatstvo u korist siromašnijih ili su odredbe o solidarnosti između država članica u Lisabonskom ugovoru samo puke proklamacije i mrtvo slovo na papiru koje u praksi ne znače puno?

U prelomnim trenucima donesene odluke i izabrani put mogu presudno da utiču na razvoj jedne političke zajednice. Odluka je donesena nakon teških pregovora i u okviru međuvladinog modela. Severne države ponovo nisu bile solidarne sa Jugom. Kao što vidimo, za Ofea je važno da razmišljamo u „mi” kategorijama da bismo imali solidarnost i otuda drugi deo teksta o ustavnom patriotizmu kao pokušaju da se izgradi zajednički

identitet na nadnacionalnom nivou. Deluje da se nakon svih dešavanja u okviru EU i dalje razmišlja u kategorijama šta je dobro za mene, odnosno za moju nacionalnu državu, te da nema previše prostora za solidarnost. Korona kriza je to još jednom jasno pokazala, ako već nije bilo jasno tokom krize Evrozone.

Zdravstveni sistemi država Juga, konkretno Italije i Španije, najpogođeniji su pandemijom. Te zemlje, uz Grčku, imaju najviše problema sa stabilnošću javnih finansija, dok su države koje su imale manje problema sa koronom upravo one koje predstavljaju „fiskalno odgovorni” deo EU. Kada govorimo o solidarnosti i evropskom građanstvu, važno je istaći da su se takozvane štedljive države (frugal states), u koje spadaju Holandija, Austrija, Švedska i Danska, od početka usprotivile zajedničkom finansiranju dugova. Argument se zasnivao na tome da poreski obveznici iz tih država nisu dužni da plaćaju za dugove drugih država i da bi finansiranje dugova vodilo moralnom hazardu (Khan 2020; Young 2020). Ukoliko bi dugovi država Juga bili pokriveni stvorio bi se podsticaj među državama da se ubuduće neprimereno zadužuju, jer će očekivati da ih neko pokrije kada to bude bilo potrebno. Argument o moralnom hazardu nije uopšte nov i zapravo je to bio najznačajniji argument tokom rasprava o krizi Evrozone (Offe 2015). „Štedljive” države nisu imale preterano kompleksnu argumentaciju po ovom pitanju. U non-paper-u koji su poslali samo su kao jednu tačku naveli da se protive mutualizaciji dugova (Frugal states 2020).

Dakle, korišćena je prilično slična argumentacija kao u slučajevima Grčke, ali i drugih PIIGS država (Portugal, Irska, Italija, Grčka i Španija) u periodu nakon 2008. Ipak, neposredni povod krize je nešto drugačiji, što je značajno ublažilo snagu argumenta o moralnom hazardu. Za razliku od rasprava o krizi evropskog duga vođenih nakon Svetske ekonomske krize iz 2008, ovoga puta krizu su nedvosmisleno proizveli eksterni faktori, što je otupelo snagu argumenata zasnovanih na navodnoj neodgovornosti pojedinih država. Iako je upitno da je u prvom slučaju ogromna visina javnih dugova posledica neodgovornog ponašanja, ovoga puta je bilo jasno da se ne može koristiti takav argument. Korona kriza je nedvosmisleno došla „spolja” i teško je govoriti o odgovornosti pojedinačnih država za nevolje. Ako je argument o odgovornosti za sopstvene finansije mogao da prođe tokom rasprava o krizi Evrozone, sada to nije bio slučaj.

Za vreme pandemije se pojavilo nekoliko predloga o tome kako prevazići krizu, a korona obveznice su sigurno najpoznatiji instrument kojim bi se zajednički finansirali dugovi. Predloženo je izdavanje obveznica čiji bi rok dospeća bio pedeset ili sto godina (Giavazzi & Tabellini 2020), a nešto radikalniji predlozi su išli do „večnih obveznica” (perpetual bonds) koje čak ne bi morale nužno da se otplaćuju (Soros 2020). Uz sve razlike u detaljima, osnovna ideja je ista – da se dugovi država članica transformišu u

dug Evropske unije, odnosno da na taj način bogatije države pomognu siromašnijim i finansijski nestabilnijim. Politička posledica bila bi očuvanje evropskog jedinstva. Ukoliko bi se pokazalo da u ovako velikoj nevolji nema zajedničke pomoći, samo postojanje i svrha Unije bila bi dovedena u pitanje. „Svrha nije akt milosrđa za slabije, već zaštita zajedničkog evropskog projekta od izazova koji pogađaju sve ničijom krivicom. Svrha je da se obezbedi da Evropa kao celina iz ove neočekivane krize izađe jača i spremnija za rešavanje mnogih drugih izazova koji su privremeno ostavljeni po strani, ali koji ostaju nerešeni” (Avbelj et al. 2020, 4). Sa druge strane, pitanje je koliko bi emitovanje korona obveznica rešilo strukturne probleme. Nesaglasnost između različitih nivoa integracije u različitim oblastima će opstati. Čak i da su evroobveznice prikladne za ublažavanje krhkosti evrozone, samo bi stvaranje fiskalne i političke unije dugoročno rešilo problem.

Osim toga, postavilo se i pitanje ko bi emitovao obveznice. Štedljive države su se zalagale za Evropski stabilizacioni mehanizam (ESM), dok je Evropska centralna banka bila kandidat suprotne strane. Za države Juga bilo je važno izbeći ESM. „Predlog za upotrebu ESM-a izaziva strah od ponovnog talasa štednje koji bi doneo još jednu izgubljenu deceniju za ekonomski, socijalni i ekološki razvoj u Evropi” (Avbelj et al. 2020, 3). Rane iz sukoba Grčke (ali i Španije i Irske) sa ostatkom EU oko mera štednje i dalje nisu zalečene i deluje da bi ponovno aktiviranje ESM-a ovoga puta zaista dovelo do nezapamćenog socijalnog bunta. Radi ilustracije, prema podacima Eurostata, u drugom kvartalu ove godine BDP EU pao je za 11,9%. Procene su da će pad BDP-a biti oko 8% na kraju godine, a radi poređenja 2009. godine, za vreme ekonomske krize, pad je bio „svega” 4,3%” (Eurostat 2020). Verovatno je to razlog zašto su „štedljive” države propustile.

Ipak, EU se nije odlučila za sopstvenu transformaciju, niti je postojala jasna želja svih evropskih država i evropskih građana za takvim rešenjem. Rešenje je samo parcijalno i privremeno pronađeno u zajedničkom fondu koji će nastati zaduživanjem EU u ime država. S jedne strane, kreiranje zajedničkog fonda od 750.000.000.000 evra tumači se kao „trenutak Evrope” koji će omogućiti prosperitetni oporavak (European Commission 2020), dok su kritičari na poziciji da će usvajanje fonda samo produbiti postojeće klasne podele unutar EU i voditi daljoj fragmentaciji (Varoufakis 2020a). Upravo je usvojeno rešenje oko formiranja zajedničkog fonda proizvod međuvladinih pregovora samo privremeno rešenje koje nije dotaklo strukturne probleme. Osim toga, zaslugom „štedljivih” država, 390.000.000.000 evra biće dostupno u vidu grantova ili bespovratnih kredita, umesto predloženih 500, dok će 360.000.000.000 biti isplaćeno kroz kredite. Propuštena je prilika da se promovise drugačija vizija Evrope

i predlože politička rešenja koja bi produbila integracije. Dugovi će ostati, Evrozona će funkcionisati po pravilima kao i do sada, dok će političko nejedinstvo i dalje biti prisutno. Tržište i valuta su internacionalni, dok demokratske politike ostaju suštinski nacionalne i u okviru „metodološkog nacionalizma” (Offe 2013, 604). Nacionalne države su i dalje osnovne jedinice koje sačinjavaju poredak, te ne postoji zajednički interes Evropske unije van partikularnog interesa nacionalnih država.

Dubina ekonomske krize koja će uslediti neminovno će strukturne nedostatke ponovo staviti na dnevni red. Ako je sada donošenje odluke izbačeno kroz prozor, ono će ubrzo pokucati na vrata. Problem redistribucije unutar EU i šire pitanje da li je za redistribuciju neophodna jedinstvena lojalnost u vidu nacionalne pripadnosti nije rešeno. Tada će Evropska unija morati da odgovori na ključno pitanje razloga sopstvenog postojanja.

USTAVNI PATRIOTIZAM, POLITIČKA MEMORIJA I MILITANTNOST

Kada se raspravlja o budućnosti EU neophodno je osvrnuti se na ulogu nacionalnog identiteta i na njegov odnos sa nadnacionalnim integracijama. Nacionalizam, u kombinaciji sa prosvetiteljskim liberalizmom, odigrao je važnu ulogu u prevazilaženju hijerarhijski ustrojenog feudalizma. Nacije su omogućile „izgradnju demokratske vladavine obezbeđivši solidarnost i suštinsku jednakost, koje su neophodne za nacionalnu državu, što je i dalje jedini politički oblik u kojem se u modernom dobu pojavljuje izborna demokratija velikih razmera” ali je istovremeno „nacionalnost naprosto izgubila svoj pređašnji etički značaj” (Muller 2010, 141). S obzirom na to da je sada moguće praktikovati demokratiju na nadnacionalnom nivou, EU bi trebalo da radi na izgradnji dubljeg nadnacionalnog povezivanja.

Kada se pregovaralo o finansiranju dugova i redistribuciji tokom pandemije, pregovaralo se u okviru međuvladinog modela i nije bilo institucionalnog podsticaja da se prevaziđu nacionalne razlike. Deo pregovarača nastupao je iz ugla sopstvenog nacionalnog interesa, zanemarujući opšti interes EU. Institucionalni okvir pregovora perpetuirao usko nacionalni interes pregovarača – pregovaralo se u okviru Saveta. Janis Varufakis (Yanis Varoufakis) je naveo zanimljiv primer koji dobro oslikava kako trenutna institucionalna rešenja u okviru EU reprodukuju nacionalističke pozicije bogatijih država:

Kada se nemački kapitalizam iz bilo kojih razloga nađe u krizi, budžetski deficit savezne vlade se automatski uvećava, dok se pomoć iz budžeta najvećim delom upućuje delovima zemlje najviše pogođenima rastom nejednakosti i padom državnih prihoda. Lepota stvarne fiskalne unije je u tome što niko od nemačkih političara ne mora da

donosi odluke o tome koliko koja pokrajina treba da dobije. Zamislite haos koji bi nastao ako bi Bundestag ili forum predstavnika nemačkih pokrajina svaki put morao da raspravlja o iznosima koji će se iz bogatih delova zemlje, iz Bavarske, Severne Rajne-Vestfalije i Baden-Virtemberga, uputiti u siromašnije, u Tiringiju, Saksoniju-Anhalt i Meklenburg-Zapadnu Pomeraniju. I zamislite da pred sam transfer novca neki predstavnik Bavarske blokira pomoć za Tiringiju na tri meseca da bi revizori prvo pretresli njen budžet i račune. Nemačko jedinstvo bi se istopilo, a država bi bila paralisana (Varufakis 2020).

U Evropskoj uniji se dešava upravo to – pregovaraju predstavnici nacionalnih država u okviru Saveta – kao kada bi se u Nemačkoj pregovaralo u okviru foruma nemačkih pokrajina. Ostaje otvoreno pitanje da li je moguće da u toliko različitoj Evropskoj uniji, sa mnoštvom nacionalnosti, postoji solidarnost koja bi omogućila „stvarnu fiskalnu uniju”, kako je to slučaj u federalnoj državi kao što je Nemačka. Tu se vraćamo na početni problem različitog stepena integracije u monetarnoj, političkoj i fiskalnoj oblasti. Posledično to vodi dezintegraciji, partikularizmu i trci za maksimizacijom sopstvenog usko shvaćenog nacionalnog interesa. Dok se nacionalne države trude da očuvaju svoju dominantnu poziciju u procesu integracija, istovremeno onemogućavaju stvaranje solidarnijeg sistema i prevazilaženja usko shvaćenog nacionalnog građanstva, jer same (buduće) građane Evrope drže podalje od zajedničke političke prakse koja bi mogla da stvori osećaj zajedništva među Evropljanima.

Naime, u procesu integracije svi učesnici slede svoje ciljeve i interese. Niko nikome ne veruje. Nema solidarnosti. Predstavnici vlada različitih zemalja ne veruju jedni drugima. Nemci ne osećaju solidarnost sa Francuzima, ni Francuzi sa Grcima. Posledica ovog sveopšteg nepoverenja i usredsređenosti na sopstveni interes jeste nemogućnost donošenja većinskih odluka. (...) Zbog odsustva čvršće osnove zajedništva svi učesnici i dalje posmatraju integraciju kao sredstvo za ostvarenje svojih sebičnih interesa i ciljeva. Zbog toga se politički ciljevi definišu unapred, u samim ugovorima čije donošenje države drže čvrsto pod kontrolom. Određivanje ciljeva, dakle, nije nešto što su nacionalne elite spremne da prepuste evropskom političkom, većinskoj volji Evropljana (Kovačević 2019, 98).

Koristi od ovakvog aranžmana ne uživaju jednako svi. Sa jedne strane, bogatije države imaju korist od zajedničke valute i tu se otišlo poprilično sa integracijama, dok je pitanje redistribucije ostavljano za pregovore između vlada. Uživanje od koristi je „automatsko”, dok su za raspodelu dobiti neophodni pregovori, kada se oni u lošijem položaju optužuju za neodgovornost. Ovako se gubi vreme na pregovore i zaoštravaju se odnosi između država članica u vremenima krize, dok su trgovinski bilanci i budžeti samo

pojedinih država u plusu tokom „normalnih” vremena. Ukoliko se nastavi sa međuvladinim modelom donošenja odluka, „evropski narodi će uvek morati iznova da pregovaraju i odlučuju koliko zajedničkog će deliti, a šta ne žele da dele” (Muller 2010, 145). Deluje da u ovom trenutku interesi za očuvanjem poretka koji donosi korist malom broju država prevladava u odnosu na zajednički evropski identitet. U pitanju nisu otvoreni nacionalizam i evroskepticism, već „meki nacionalizam” (Piketi) država centra EU i vladajućih, „umerenih” partija u tim državama koje dozvoljavaju integraciju samo u onim oblastima od kojih imaju korist.

Imajući u vidu navedeno, postavlja se pitanje, da li ovakva Evropska unija zaslužuje našu vernost i kako bi trebalo „misliti Evropu vrednu očuvanja” (Dimitrijević 2016, 141), odnosno da li je Evropska unija vredan projekat u kontekstu prevazilaženja partikularizma nacionalnih država. Oči zagovornika prevazilaženja nacionalne države od početka su uprte u evropske integracije, posebno onih koji smatraju da je nadnacionalno udruživanje neophodno kako bi se ukrotili negativni efekti globalizacije (Habermas 2006, 74; Miler 2010), te da je koncept ustavnog patriotizma pravi kandidat za izgradnju nadnacionalne lojalnosti. Kada kažem ustavni patriotizam mislim „na ustavnu kulturu što počiva na univerzalističkim liberalno-demokratskim normama i vrednostima, koje se prelamaju i tumače u skladu sa konkretnim istorijskim iskustvima” (Muller 2010, 138). Premisa je da je nadnacionalno udruživanje neophodno radi uklanjanja negativnih efekata ekonomske globalizacije (Habermas 2012; Offe 2013) i da suverenost sama po sebi nije garant progresivnih ekonomskih politika, te da u ovoliko globalizovanom svetu može samo dodatno suziti prostor za delovanje. Za borbu protiv nejednakosti uzrokovanih nadnacionalnim faktorima neophodan je nadnacionalni odgovor. Rečima Milera, „ustavno zatvaranje dostupno je samo najmoćnijim i najslabijim državama na svetu” (Muller, 2010a: 242), s obzirom na to da veoma slabi imaju malo kapaciteta da se uključe u međunarodne tokove, dok veoma moćni mogu sebi da priušte da ne trpe negativne posledice od neuključivanja u međunarodne tokove. Uostalom, primeri balkanskih država pokazuju da navodni suverenitet koji imaju države van EU malo znači.

S druge strane, važan argument dolazi od strane liberalnih nacionalista koji smatraju da je neophodno da postoji zajednička nacionalnost kako bi postojali solidarnost i redistribucija (npr. Miler 1988). Do sada je masovna redistribucija vršena jedino u okviru nacionalne države blagostanja koje su uglavnom bile prilično nacionalno homogene. Otuda „no-demos” teza, tj. da ne postoje Evropljani u smislu kojem postoji nacionalna pripadnost kao što je to slučaj u okviru nacionalnih država i da pripadnici pojedinih evropskih naroda ne žele da svoje bogatstvo preraspodeljuju prema drugim narodima, kao što to rade prema svojim sunarodnicima. Liberalni naciona-

listi ističu važnost nacionalne ili socijetalne kulture kao osnovu za demokratsku solidarnost i doveli su u pitanje da ustavni patriotizam može da obezbedi privrženost konkretnoj političkoj zajednici. Utoliko problem za izgradnju nadnacionalnog, evropskog građanstva predstavlja činjenica da ono što je „urgentno potrebno da se uradi je ekstremno nepopularno i stoga praktično nemoguće demokratski uraditi” (Offe 2015, 4) i tiče se kreiranja jedinstvenog fiskalnog sistema i federalizacije Evropske unije. Tu se javlja problem demokratskog deficita takve odluke. Većina građana bogatijih država se protivi ovakvom produbljivanju integracija. Stavovi građana štedljivih država idu u prilog tezi liberalnih nacionalista. Korona kriza je pokazala kakva je ambivalentnost Evropljana prema nadnacionalnoj lojalnosti, ali i da je skepticizam prema zajedničkom finansiranju dugova najveći u državama centra EU od kojih se očekuje da najvećim delom preuzmu dugove. Podaci pokazuju da 44% ispitanika u Nemačkoj podržava fiskalnu solidarnost, a svega 22% podržava emitovanje korona obveznica (Koos & Leuffen 2020, 4), dok se čak 61% Holanđana protivilo fondu za oporavak (Kanne 2020). Istovremeno, istraživanje naručeno od strane Evropskog parlamenta iz maja 2020. godine pokazuje da je 34% ispitanih stanovnika Evropske unije zadovoljno nivoom solidarnosti između država u borbi protiv pandemije (Kantar 2020), što, sa druge strane, navodi na potragu za mehanizmima koji bi garantovali veću solidarnost unutar ovog poretka. Ovo istraživanje je sprovedeno pre usvajanja paketa pomoći, ali pokazuje da je Evropljanima ipak stalo do solidarnosti. Građani pojedinih država su prilično skeptični spram nadnacionalne redistribucije, dok su istovremeno većinski bili nezadovoljni iskazanim nivoom solidarnosti tokom pandemije. Kako rešiti ovaj problem?

Nesporno je da „[u]nija u stvari nije zasnovana ni na čemu što bi se moglo shvatiti kao *jedna* konstitutivna vlast ili *jedan* demos” već da se „zasniva na više *demosi*” (Muller 2010, 145). Pitanje je da li je pored toga moguće izgraditi jedinstvenu lojalnost prema EU. Zagovornici ustavnog patriotizma ističu da su nacionalni identiteti društveni konstrukti, nastali sa izgradnjom građanskih društava, stvoreni pomoću masovnih medija i masovnog obrazovanja. Iz toga izvode da je moguće konstruisati postnacionalnu verziju lojalnosti, slično kao što je urađeno tokom procesa izgradnje nacija započetog nakon građanskih revolucija (Habermas 2012, 45), samo što bi u ovom slučaju presudnu ulogu trebalo da odigraju javna sfera i zajednička komunikacija uz reinterpretaciju univerzalnih normi koje se prilagođavaju specifičnom iskustvu.

Novije verzije ustavnog patriotizma dodaju dva elementa na osnovu kojih se gradi zajednička pripadnost. Posebno je u nemačkom kontekstu ustavni patriotizam sadržao „borbene dodatke”, jaku dozu memorije i militantnosti (Muller 2010, 130). Memorija se, u nemačkom kontekstu,

primarno odnosila na negativno iskustvo Holokausta i nacističku prošlost. Militantnost je, s druge strane, usmerena protiv neprijatelja demokratije, najviše kroz sudska sredstva kao što su zabrana partija i restrikcija slobode govora. Drugim rečima, militantna demokratija je eksplicitno ne-neutralna o svojom principima i vrednostima – i stavlja na jaku proveru one koji su neprijateljski nastrojeni prema njenim principima (Muller 2008, 194).

Političko sećanje se ne mora koristiti isključivo u negativnom kontekstu – kao nečovečne prakse koje se nipošto ne smeju ponoviti. Za izgradnju ustavnog patriotizma u okviru EU može se koristiti „kombinacija negativnih i pozitivnih elemenata” (Dimitrijević 2016, 161). Pozitivni elementi upućuju na slavne istorijske trenutke koje Evropljani zajednički dele. Zajedničko sećanje bi trebalo da bude gradivni element zajedničkog identiteta, nešto što sve građane okuplja. Utoliko su 2003. Habermas i Derida postavili pitanje: „Da li postoje istorijska iskustva, tradicija i uspesi koji nude evropskim građanima svest političke vere koju dele zajedno i koja može biti oblikovana zajedno?” (Habermas & Derrida 2003, 293).

Zajedničko sećanje na posleratnu pomoć nemačkoj ekonomiji ovoga puta se može iskoristiti kao motivacija za slične politike solidarnosti. Ovde ne mislim toliko na primer Maršalovog plana i rekonstrukciju kontinenta nakon Drugog svetskog rata, već na Londonski sporazum o nemačkim spoljnim dugovima iz 1953. godine. Ugovorom je omogućeno da se obnovi održivost nemačke, ali i evropske ekonomije, otpisivanjem oko 50% duga na osnovu zločina iz Drugog svetskog rata, i koji su, između ostalih, potpisali i Grčka, Španija i Italija (Young 2020). To bi bio jedan svetao primer iz evropske istorije koji bi mogao da posluži za izgradnju zajedničkog sećanja na evropsku solidarnost. Kao što su nekada druge države Evrope solidarno postupile, slično je potrebno uraditi i danas. Naravno, ciljevi nisu bili isključivo ekonomski. Pored jasnih političkih ciljeva u tom trenutku i blokovske podele sveta, cilj je bio i stvoriti određenu vrstu evropskog jedinstva. Bez zajedničke solidarnosti više država evropskog kontinenta teško da je bilo moguće krenuti sa integracijama i to bi mogao da bude moralni argument za pomoć državama u sadašnjem trenutku.

Drugo, ustavni patriotizam postavlja i jasne granice prema antidemokratskim snagama. Iako se militantna demokratija koristila, pre svega, u trenucima napada nedemokratskih pokreta na demokratske institucije tokom tridesetih godina prošlog veka (Loewenstein 1937), obnavljanje principa militantnosti, a samim tim i ustavnog patriotizma, može se videti u sadašnjoj situaciji. Prema predlozima, za povlačenje novca iz zajedničkog fonda, neophodna je lojalnost prema demokratiji i vladavini prava, što je direktno upućeno protiv autoritarnih režima u Poljskoj i Mađarskoj. Zajedno sa obnavljanjem militantnosti i jasnijem određenju prema vrednosti demokratije, ustavni patriotizam bi mogao da postane koncept koji bi

učinio evropski identitet mogućim. Istovremeno treba imati u vidu opaske radikalnijih kritičara Evropske unije, kao što je Pablo Iglesias (Pablo Iglesias), koji ističe da je ovde mnogo manje važno pitanje moralnih argumenata, već da je stvar u odnosima moći i da trenutna pravila zapravo proizlaze iz odnosa moći Evrope (Iglesias 2015, 132). Moralne argumente je ponekad teško odbraniti od kritika koje u prvi plan stavljaju odnose moći. Ipak, da bi EU zaslužila bilo čiju lojalnost potrebno je izgraditi drugačiju vrstu privrženosti od trenutne. „Biti privržen Evropi znači napustiti kao nelegitimne prakse koje odišu političkom arogancijom i cinizmom moći, a pogotovo one među njima koje počivaju na razumevanju da oni koji su ekonomski slabi treba da se podrede onima koji su ekonomski jaki. Ekonomska moć se ne sme prevoditi u politički autoritet” (Dimitrijević 2016, 160).

ZAKLJUČAK

Pandemija korona virusa će ostaviti duboke društvene i političke posledice i veliko je pitanje kako će se Evropska unija izboriti sa ekonomskom krizom koja je neminovna u narednom periodu. Iako kriza sa sobom donosi patnju i neizvesnost ujedno može predstavljati priliku da se donesu krupne političke odluke koje bi mogle da utiču na nedostatke koji su upućivani EU tokom prethodnog perioda. Postojala je prilika da se u najtežim trenucima pokaže solidarnost i da je moguće prevazići nacionalne podele u Evropi. Kriza je bila prilika da se donesu neophodne političke odluke i prevaziđe neofunkcionalistički model upravljanja. Model koji je depolitizovao Uniju i koji je odgovoran za nepostojanje jasne političke vizije je opstao i dalje će biti korišćen za donošenje odluka. Ipak, države članice su odlučile da je važnije štititi svoje nacionalne interese. Deluje da je prilika za promenama propuštena i da su donesene samo one neophodne mere, tek toliko da se „zakrpe” rupe na brodu koji već dugo ne zna kojim pravcem želi da plovi i koja mu je krajnja destinacija.

Stare podele, koje su postojale tokom ranijih kriza, opet su izašle na videlo. Nepostojanje mehanizama redistribucije i integracije, sem u oblastima od kojih korist uživaju već bogate države, ostaje glavni problem. Umesto osvetljavanja tog problema, ponovo je pokušano da se krivica svali na države Juga. Ovoga puta bi posledice sukoba bile tolike da se državama centra EU više isplatilo da odigraju na sigurno i formiraju zajednički fond koji će privremeno smanjiti socijalne tenzije. Sve dok ponovo ne izbije kriza kada će se ponovo pregovarati ko koliko kome treba da preraspodeli i ponovo će isti akteri biti protiv fiskalne i političke unije, iako nesumnjivo izvlače korist od postojanja monetarne unije. Solidarnost je iskazana tek toliko da se poredak održi.

Jedan od načina da se izgradi zajednička lojalnost prema EU je građanstvo koje bi prevazilazilo granice nacionalnih država i koncept ustavnog patriotizma koji bi kao efekat imao stvaranje federacije sa stvarnom fiskalnom unijom. Iako može delovati utopistički, to je jedno od moguća dva rešenja za postojeće stanje unutar EU. Drugo bi predstavljalo dezintegraciju. Ustavni patriotizam pokušava da konstruiše nadnacionalnu lojalnost, lojalnost zasnovanu na univerzalističkim i prosvetiteljskim normama interpretiranim u datom kulturnom kontekstu. Utoliko su važni zajedničko političko sećanje i militantnost prema neprijateljima demokratije, kao dva dodata elementa konceptu ustavnog patriotizma. Zajedničko sećanje ne mora imati isključivo negativnu komponentu, odnosno sećanje na događaje koje ne bi trebalo ponoviti, već pozitivne stvari iz zajedničke evropske istorije mogu obnoviti solidarne prakse. Iz toga bi trebalo da proizađe zajednički evropski identitet. Militantnost je drugi element ustavnog patriotizma čija primena nagoveštava uslovljavanje korišćenja novca iz fonda na osnovu vernosti demokratskim vrednostima.

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SUMMARY

EUROPEAN CITIZENSHIP AND CONSTITUTIONAL PATRIOTISM: TOWARDS A MORE SOLIDARY EUROPE

The corona virus pandemic has once again put the issue of solidarity and economic redistribution within the European Union on the agenda. Unlike the discussions on the European debt crisis conducted after the World Economic Crisis from 2008, this time the crisis was produced by external factors, which blunted the strength of the arguments based on the alleged irresponsibility of certain countries. The author starts from the assumption that supranational association is necessary in order to remove the negative effects of economic globalization and rejects the sovereigntist answers. The paper examines the notion of European citizenship, and how this concept can accelerate the creation of a more solidary order. The problem is especially the fact that “what is urgently needed to be done is also extremely unpopular and therefore democratically virtually impossible to do” (Offe, 2013). Solving the problem would include broad economic redistribution, mutualization of debts, and even the creation of a single fiscal system within the European Union. The author specifically examines the form of citizenship based on the concept of constitutional patriotism (Habermas, 2006, Muller, 2010). One of its elements, the shared memory of post-war aid to the German economy (Young, 2020), this time can be used as a motivation for similar solidarity policies.

KEYWORDS: crisis, solidarity, European Union, constitutional patriotism, citizenship.

POLITIČKA INSTRUMENTALIZACIJA MEDIJSKOG DISKURSA O PANDEMIJI KOVIDA 19 U SRBIJI: IZVEŠTAVANJE I NEKI NORMATIVNI ASPEKTI

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SAŽETAK

Predmet istraživanja je medijski diskurs o pandemiji kovida 19 u Republici Srbiji, s posebnim naglaskom na normativne aspekte medijske politike u periodu vanrednog stanja (15.3–6.5.2020). Glavni cilj istraživanja je da ispita da li mediji u Srbiji izveštavaju slobodno i nezavisno o pandemiji kovida 19 ili deluju na instrumentalan način, kao posrednici političke agende. Stoga je prvi deo istraživanja fokusiran na normativni poredak. Metodom uporedne analize pravnih dokumenata pokazana je neusaglašenost instrumentalnih mera medijske politike u naznačenom periodu, sa obavezujućim normama saopštenim u međunarodnim konvencijama i deklaracijama o slobodi govora. U drugom delu istraživanja identifikovani su neki indikatori političke instrumentalizacije medijskog izveštavanja o pandemiji kovida 19, pomoću metoda kritičke analize diskursa. Potvrđena je istraživačka hipoteza da je osnova za političku instrumentalizaciju medijskog izveštavanja o pandemiji kovida 19 u Srbiji uspostavljena na normativan način, primenom neproporcionalnih mera u oblasti informisanja o pandemiji, i da je konsekventno razrađena kroz diskursnu praksu u medijskim redakcijama, sa ciljem mobilizacije podrške javnosti za sprovedene mere izvršne vlasti.

KLJUČNE REČI: *politička instrumentalizacija, medijski diskurs, sloboda informisanja, pandemija kovida 19, Republika Srbija*

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1. UVOD

Pojava zdravstvenoj javnosti nepoznatog patogena tipa virusa korone u Kini, decembra 2019. godine, unela je jedinstven i dramatičan poremećaj u savremeni poredak javnog i privatnog života širom sveta. Sa širenjem bolesti uzrokovane novim smrtonosnim korona virusom – kovid 19 (COVID-19), promovisan je imperativ zaštite javnog zdravlja i pojedinačne zdravstvene bezbednosti građana kao najviši javni interes. U tom cilju je legitimizovana primena – za društva liberalne demokratije – neuobičajenih i nepopularnih intervencionističkih mera, kako u sistemu javnog zdravlja i bezbednosti tako i u oblastima ekonomske i medijske politike.

U korpusu vrednosti liberalne demokratije, sloboda govora (kojom obuhvatamo slobodu izražavanja i informisanja) postulirana je kao jedna od temeljnih vrednosti na kojima je normiran jedinstveni evropski pristup medijskoj politici: „Svako ima pravo na slobodu mišljenja i izražavanja, što obuhvata pravo da ne bude uznemiravan zbog svog mišljenja, kao i pravo da traži, prima i širi obaveštenja i ideje bilo kojim sredstvima i bez obzira na granice” (UN 1948, čl. 19). (...) „Ovo pravo uključuje i slobodu na stanovište i na primanje i saopštavanje obaveštenja i ideja bez mešanja javne vlasti i bez obzira na granice...” (CoE 1950, čl. 10). Prema ovoj paradigmi, u demokratski konsolidovanim društvima, slobodni i nezavisni mediji deluju kao posrednici između građana i njihovih političkih predstavnika, odnosno kao kontrolor političkog procesa za koji su nadležni njihovi izabrani predstavnici. Nužni preduslovi slobode medija tiču se instituta pravne države, koji garantuju adekvatno regulatorno okruženje, merodavno da sprečava bilo kakve uticaje na sadržaj medijskog izveštavanja i da suzbija tendencije vlasti da ograničavaju rad medija (Rozumilowicz 2002, 14; McConnell & Becker 2002, 3–5), dok dispozicija nezavisnosti medija podrazumeva uređivačku samostalost u odnosu na političku ili ekonomsku kontrolu.

Kontrolna funkcija medija koja je u poretku liberalne demokratije projektovana kao svojevrsni korektiv državne vlasti („četvrta vlast” ili „čuvari demokratije”), poslednjih godina ugrožena je konsekvantnim globalnim opadanjem slobode i demokratije (Repucci 2020, 2–10, 12).¹ Referentne institucije za istraživanje slobode i pluralizma medija izveštavaju o višegodišnjim negativnim trendovima, koje je pandemija kovida 19 ubrzala. Naime, prema istraživanjima Fridom hausa, najmanje 91 država je u domenu medijske politike primenila restrikcije kao odgovor na pandemiju: vlade su projektovale korpus restriktivnih mera protiv širenja

1 Izveštaj Fridom hausa pod naslovom “Nations in Transit 2020. Dropping the Democratic Facade” navodi da je u toku poslednjih deset godina, na globalnom nivou, broj slobodnih zemalja opao za tri odsto, dok je za jedan odsto porastao udeo neslobodnih a za dva postotak zemalja koje su označene kao delimično slobodne.

lažnih vesti o virusu, među kojima su novi zakoni, zatim neuobičajena praksa ograničavanja slobodnog ispitivanja na konferencijama za medije, čak i obustavljanje štampanja novina i blokada određenih veb-stranica (Repucci & Slipowitz 2020, 7). Analizirajući stanje demokratije u zemljama Centralne i Istočne Evrope (gde se pozicionira Srbija), Izveštaj Fridom hausa iz 2020. godine ukazuje na opadanje broja demokratskih režima sa 15 (u 2010. godini) na 10 (2020) i rast hibridnih režima u istom periodu sa tri na 10 (Csaky 2020, 2). Kao oblasti koje trpe urušavanje najčešće su identifikovani instituti slobode izražavanja, uverenja i vladavine prava (Repucci & Slipowitz 2020, 7–8).

Kada je Republika Srbija u pitanju, sve međunarodne organizacije koje se bave slobodom medija izveštavaju o kontinuiranom opadanju vrednosti ovog indeksa poslednjih godina. Prvi put nakon 2003, Srbija je, iz kategorije delimično konsolidovanih demokratija (koje upražnjavaju visoke standarde izborne demokratije, ali pokazuju i izvesne slabosti u praktikanju političkih prava i građanskih sloboda), u 2020. godini pala u kategoriju tranzicionih ili hibridnih režima (prepoznatljivih po krhkim institucijama, kombinovanju demokratskih i autoritarnih instrumenata upravljanja i još slabijoj zaštiti prava i sloboda) (Csaky 2020, 3, 12). Nebojša Vladislavljević (2019) aktuelni tip hibridnog režima u Republici Srbiji određuje kao kompetitivni ili takmičarski autoritarizam, karakterističan po tome što kao tip izbornog režima dopušta političku konkurenciju, ali istovremeno, čvrsto kontrolišući poluge vlasti, ostavlja suviše mali prostor za delovanje opozicije i regularno političko nadmetanje. Pored referisanih dokumenata Fridom hausa, i Reporteri bez granica su u svom izveštaju za 2020. godinu objavili pad indeksa slobode medija u Srbiji, i to za 3 pozicije u odnosu na prethodnu godinu (sa 90. na 93. mesto) (RSF 2020), odnosno za 17 pozicija u odnosu na 2018. godinu (RSF 2018), tj. za čak 30 pozicija u odnosu na 2013, kada je monitoring otpočeo a Srbija bila pozicionirana na 63. mestu od ukupno 180 zemalja rangiranih prema ovom indikatoru. Dinamika kojom se kreće ovaj indeks ukazuje na proces permanentnog urušavanja demokratskog kapaciteta društva. Stoga istraživačku pažnju usmeravamo na moguće implikacije restriktivnih instrumenata u oblasti informisanja o kovidu na funkciju medija da objektivno, istinito i pravovremeno informišu javnost o stvarima od opšteg značaja.

Kako bismo rasvetlili ulogu medija u periodu javnozdravstvene krize uzrokovane pandemijom kovid 19 u Srbiji, neophodno je da, u narednim redovima, podsetimo na politički kontekst (prema: Milutinović 2021, 3–4). Prema zvaničnom saopštenju, novi korona virus je importovan u Srbiju 6. marta 2020, dakle dva dana nakon što je raspisano održavanje redovnih parlamentarnih izbora za 26. april. U tom trenutku, prisustvo ovog nepoznatog smrtonosnog virusa bilo je evidentirano u 80 država širom sveta,

uključujući sve susedne zemlje (izuzev Crne Gore) i virus se progresivno širio Evropom. Vanredno stanje je uvedeno 15. marta, kada je u Srbiji bilo registrovano ukupno 48 obolelih od kovida, a epidemija je proglašena 5 dana kasnije, što nije uobičajen redosled. Mera policijskog časa počela je da se sprovodi od 17. marta, a vanredno stanje je bilo na snazi do 6. maja.

Metodologija uvođenja vanrednog stanja – kao krajnje mere za zaštitu opstanka države ili građana (kako je određuje Zakon o odbrani, čl. 4), u jednom delu političke javnosti je kritikovana sa stanovišta demokratskog deficita. Razlozi za takvu reakciju prvenstveno su argumentovani činjenicom da prethodno nisu bili iscrpljeni manje rigidni mehanizmi koje predviđa institut za vanredne situacije, a zatim i procedurom koja je isključila Ustavom propisano izjašnjavanje Narodne skupštine, sa obrazloženjem da skupštinsko okupljanje sprečava podzakonski akt koji prisustvo javnim događajima ograničava na 100 ljudi u zatvorenom prostoru (Naredba 2020). Sa formalnopravnog stanovišta, instrument vanrednog stanja je bio neophodan radi odlaganja parlamentarnih izbora, koji su zakazani samo 11 dana ranije. Takođe, vanredno stanje je omogućilo da se sprovedu restrikcije kretanja po uzoru na represivni kineski model, u očiglednom cilju sprečavanja omasovljenja epidemije u početnoj fazi, kada zdravstveni sistem nije raspolagao odgovarajućom medicinskom opremom. Ističući ispodprosečne stope letaliteta, Krizni štab za suzbijanje zarazne bolesti kovid 19 promovisao je svoje mere kao najuspešnije u Evropi. Međutim, poverenje javnosti poljuljale su informacije o zataškavanju broja preminulih od ove bolesti (Jovanović 2020), da bi potom i glavni epidemiolog Kriznog štaba, gostujući u programu *Newsmax Adria*, osporio zvanične izveštaje koji između marta i juna referišu trostruko manje žrtava kovida u odnosu na stvarno stanje (Nova.rs 2020).

2. TEORIJSKI OKVIR I METOD ISTRAŽIVANJA

Pandemija kovida 19 je deo političke i medijske agende u svim državama. U demokratski stabilnim društvima snažne institucije imaju ključnu ulogu u procesima postavljanja vladine agende; one zatim utiču na specifičiranje praktičnih odluka i, konačno, na primenjene izbore među raspoloživim instrumentima moći (Kingdon 2014). Tu su i mediji, kao značajni činioци, koji – prema liberalno-demokratskoj paradigmi – slobodno i nezavisno posreduju u odnosima između građana i izabrane vlasti, snabdevajući građane informacijama koje im pomažu da razumeju javne probleme, skrećući pažnju zvaničnika na neke od ovih problema, i podstičući debate o pitanjima od opšteg značaja u kojima se diskutuju javne odluke i preispituju ili osporavaju različiti stavovi, mišljenja, interesi.

U uslovima savremenih poremećaja karakterističnih za demokratske političke sisteme, opšte stanje medija se pogoršava na način da njihove

izvorne funkcije sve češće podležu partikularnim interesima iz sfera politike, biznisa, ideologija i drugih (Murdock 2014, 145; Kaitatzi-Whitlock 2008, 34–35; Trenz 2008, 59–61). U okruženjima, pak, demokratski nekonsolidovanih režima, čiji se tipovi u literaturi terminološki određuju kao populizam, hibridni (tranzicioni) režim, kompetitivni autoritarizam, obrnuti totalitarizam (...), mediji su još ranjiviji na političke uticaje (Repucci 2020, 12–13). Naslonjena na ovu paradigmu proizlazi premisa predmetnog istraživanja, a to je da se medijsko kadriranje pandemije kovida 19 u Srbiji odvija pod snažnim uticajem političkog diskursa. Osnovna hipoteza koju želimo da proverimo jeste: osnova za političku instrumentalizaciju medijskog izveštavanja o pandemiji kovida 19 u Srbiji uspostavljena je na normativan način, tj. izborom i procesuiranjem određenih restriktivnih propisa od strane izvršne vlasti; ova instrumentalizacija je potom konsekvantno razrađena kroz diskursnu praksu, tj. izborom i primenom određenih komunikacijskih strategija u medijskim redakcijama.

Teorijske osnove ovog istraživanja potiču iz mediološke i šire politikološke literature: teorija dnevnog reda, teorija uokviravanja i izabranih pristupa kritičkih studija diskursa. Prema teoriji dnevnog reda, mediji postavljaju agendu društvenih pitanja i posreduju javnosti obrasce za njihovo tumačenje, kako selekcijom i hijerarhijom tema koju uspostavljaju na dnevnom nivou (Kunczik & Zipfel 2005, 205) tako i isticanjem i ponavljanjem pojedinih tematskih atributa, odnosno njihovim uokviravanjem i pojačavanjem (McCombs 1997, 6; Coleman et al. 2009, 150). Koncept medijskog uokviravanja podrazumeva selekciju i isturenost: „Uokviriti znači izabrati neke aspekte opažene stvarnosti i načiniti ih istaknutijim u komunikacijskom tekstu, na način koji promovise određenu problematiku, interpretaciju uzroka, moralnu procenu i/ili preporuku” (Entman 1993, 52). Ističući određene aspekte stvarnosti i drugima umanjujući značaj upotrebom sredstava kadriranja – tematskih i leksičkih izbora, stilskih i retoričkih figura, formulisanjem naslova, odgovarajućih vizualizacija, itd. – mediji mogu da utiču na poziciju iz koje pristupa recipijent poruke. Uokviravanja predstavljaju procese kroz koje društva reprodukuju značenja. Zato je važna izbalansiranost u uokviravanju nekog pitanja, koja podrazumeva upotrebu neke vrste alternativnog narativa ili kontraokvira. Raspravljajući o problemima dominacije diskursnih okvira, Entman dolazi do važnog zaključka da je „paritet okvira izuzetak, a ne pravilo” (Entman 2003, 418).

Pored teorijskog određenja „dnevnog reda”, koje preuzimamo iz korpusa komunikološke literature, istraživanje se naslanja i na politikološki pristup Džona Kingdona (Jonh Kingdon). Ovaj autor polazi od koncepta dnevnog reda kao „liste tema ili problema na koje vladini službenici i ljudi izvan vlade usko povezani sa tim službenicima u svakom trenutku obraćaju ozbiljnu pažnju” (Kingdon 2014, 3) i jasno diferencira vladinu agendu

kao listu pitanja od interesa (koja privlače pažnju) i agendu odlučivanja, odnosno listu izabranih predmeta koji su aktivni, tj. procesuirani. U knjizi "Agendas, Alternatives and Public Policies" autor analizira različite aktere i procese koji utiču na postavljanje dnevnog reda vladinih programa, s jedne strane, i na agende odlučivanja o praktičnim delovanjima (specified alternatives) (Kingdon 2014, 15–16). Kingdon navodi niz činilaca koji mogu učestvovati kao izvori tačaka dnevnog reda i mogu uticati na izbor instrumenata delovanja: od izabranih predstavnika državnih institucija (predsednik, Kongres [ili Narodna skupština, prim. autora], službenici u izvršnoj vlasti), te političkih stranaka i interesnih grupa, preko naučnika, profesionalaca [„struke”, prim. autora], do medija i šire javnosti (Kingdon 2014, 4, 15–16). Glavni podsticaj koji utiče na postavljanje neke tačke na dnevni red obično je pojava intenzivnog problema koji pritiska sistem – u našem slučaju to je javnozdravstvena kriza usled prodora virusa korone u Srbiju. Druga grupa činilaca koji pokreću vladine agende i doprinose izboru odluka za delovanje može poticati od resora akumuliranog znanja među specijalistima (profesionalna zajednica) u datoj oblasti javne politike (npr. zdravstvenoj politici), koji bi imali stručni zadatak da generišu predloge za izvršnu vlast. U našem slučaju, to bi bila profesionalna zajednica lekara i epidemiologa u okviru tela koje je Vlada imenovala 13. marta 2020 – Krizni štab za suzbijanje zarazne bolesti kovid 19. Indikativno je da ovo telo, na čelu sa premijerkom, uključuje ministre u Vladi Srbije, ali ne i medicinske eksperte opozicionog političkog opredeljenja. Konačno, treća grupa faktora koji mogu imati snažne efekte na upravljanje vladinim agendama pripada sferi dnevne i unutrašnje politike: nacionalno raspoloženje, nestalnost javnog mnjenja, izborni rezultat, ekonomska stabilnost, tenzije u vezi sa kosovskom secesijom, EU pregovorima i drugi.

Kada je reč o medijima, oni mogu igrati dvostruku ulogu u odnosu na vladinu agendu: proaktivnu, skrećući pažnju zvaničnika na određene probleme, s jedne strane, ili pasivnu, delujući u cilju mobilizacije javnosti za određene teme kojima su zvaničnici naklonjeni, u procesima koji te medije često instrumentalizuju. Glavni cilj ovog istraživanja je da ispita da li masovni mediji u Srbiji o pandemiji kovida 19 izveštavaju slobodno i nezavisno, odnosno da li diskurs o pandemiji uokviravaju samostalno ili deluju na instrumentalan način, kao posrednici političke agende?

U istraživanju su kombinovane deskriptivne i analitičke metode. Najpre je upotrebljena metoda uporedne analize pravnih dokumenata, kojom je ispitana usaglašenost određenih mera medijske politike koje su propisane u periodu vanrednog stanja (15.3–6.5.2020), sa obavezujućim normama saopštenim u međunarodnim konvencijama o slobodi govora. Normativne mere posmatrane su u Kingdonovom algoritmu, kao procesi u postavljanju određene agende (Kingdon 2014, 16–18). Prvi deo istraži-

vanja fokusiran je, dakle, na normativni okvir, radi ispitivanja instrumentalnog kapaciteta restrikcije ovog ljudskog prava. Posebna pažnja posvećena je načelima neophodnosti i proporcionalnosti posmatranih mera u demokratskom društvu. U nastavku istraživanja, kako bismo pribavili relevantne empirijske podatke na temelju kojih je moguće razraditi argumente i zaključke o karakteristikama medijskog diskursa, primenjena je „objektivna, sistematična i kvantitativna deskripcija manifestnog sadržaja komuniciranja” (Berelson 1952, 18). Ova analiza je sprovedena na reprezentativnom uzorku od 230 medijskih tekstova sa kodnim listom kao instrumentom i medijskim tekstom kao jedinicom analize. Jedinice kodiranja obuhvataju formalne karakteristike teksta, zatim kategorije šematske strukture teksta prema Van Dajku (naslov, lid, glavni događaj, pozadina, posledice, verbalne reakcije, evaluacija i očekivanja) (Van Dijk 1988, 52–59) i zastupljene interpretativne okvire diskursa o pandemiji. Uzorak je prikupljen pretragom ključnih reči (korona ili kovid) u arhivskoj online bazi *naslovi.net*, za 10 medija s najvećom publikom (*Blic*, *Kurir*, *B92*, *Telegraf*, *N1*, *Večernje novosti*, *Informer*, *Danas*, *RTS* i *Politika*) u periodu vanrednog stanja. Uporedo je, radi potpunijeg i dubljeg razumevanja medijskog diskursa o pandemiji, korišćena deskriptivna jezička analiza i interpretativna intertekstualna analiza uzorkovanih medijskih tekstova, po uzoru na dijalektičko-relacijski pristup kritičkih studija diskursa Normana Farklafa (Fairclough 2018, 13–25). Razumevanjem odnosa među diskursima u okviru medijskog teksta razotkrivamo redove diskursa, odnosno ukazujemo na potencijalnu društvenu i političku hegemoniju (Fairclough 1995, 55–56).

3. NORMATIVNI OKVIR IZVEŠTAVANJA O PANDEMIJI

Sredinom februara 2020. godine predsednik Svetske zdravstvene organizacije (SZO) Tedros Adhanom (Tedros Adhanom Ghebreyesus), na Minhenskoj bezbednosnoj konferenciji, konstatovao je da je nemoguće predvideti u kom pravcu će krenuti epidemija virusa koja je izbila u Kini. U tom trenutku virus još uvek nije bio široko rasprostranjen izvan Azije. Stoga što je globalna istraživačka zajednica dobila na vremenu da preduzme neophodne korake u oblastima dijagnostike i farmakologije, kao i da vlade uspostave održivo snabdevanje potrebnim medicinskim materijalom, Adhanom je izrazio ohrabrenost. Međutim, među ključnim brigama koje zahtevaju urgentan tretman istakao je štetnost neproverenih informacija i lažnih vesti u uslovima zdravstvene krize (WHO 2020). Glasine i dezinformacije se najčešće šire „putem internetskih portala, foruma i društvenih mreža, bilo od strane pojedinaca koji su neupućeni u problem o kojem diskutuju, bilo od onih zlonamernih, sa efektom da zbunjuju i uznemiravaju građane koji nisu kompetentni da neku vest prepoznaju kao lažnu”

(Milutinović 2020, 256–257). Stoga je sa ovog mesta upućen poziv vladama, medijskim kompanijama i organizacijama da sarađuju sa SZO, kako bi se efikasno suprotstavili širenju infodemije. Druga poruka bila je: „Sada je više nego ikad vreme da nauka i dokazi vode politiku” (WHO 2020). Vlade su podstaknute da sprovode koordinisan i koherentan pristup upravljanju krizom, u skladu sa odgovarajućim stručnim konsultacijama i prioritetima javnog zdravlja. Takođe, upozoreno je na rizik uočen u nekim državama, čije vlade preduzimaju određene mere bez odgovarajućih konsultacija i razmatranja njihovih posledica. Kada je o Srbiji reč, premda su se pojavili ekstremni predlozi o gašenju društvenih mreža u cilju suzbijanja „epidemije širenja panike i sprečavanja njenih potencijalno smrtonosnih efekata” (Nedeljnik 2020), ovakve ideje nisu realizovane, niti su podržane u javnosti. Međutim, u periodu vanrednog stanja zabeleženo je nekoliko neadekvatnih odluka u oblasti medijske politike.

Nedugo nakon što je proglašeno vanredno stanje, Vlada Republike Srbije donela je uredbu Zaključak o informisanju u vreme pandemije (28. marta 2020), kojim je Krizni štab za suzbijanje zarazne bolesti kovid 19, na čelu sa predsednicom Vlade, imenovan nadležnim za obaveštavanje javnosti o stanju i posledicama zaraze. Ovim propisom je centralizovano informisanje javnosti o svim preduzetim zdravstvenim merama i drugim informacijama u vezi sa kovidom, budući da je on postao obavezujući za teritoriju čitave države, dakle i za sve lokalne samouprave. Zdravstvene ustanove i osoblje koji obavljaju delatnost zdravstvene zaštite obavezani su da medicinske informacije o merama koje sprovode dostavljaju isključivo nadležnom lokalnom zavodu, odnosno institutu za javno zdravlje, koji te informacije dalje usmerava ka Kriznom štabu (Vlada RS 2020). Nadalje, Krizni štab, odnosno lice koje ovo telo ovlasti, vrši diseminaciju pohranjenih informacija u javnost, dakle, preuzima ulogu svojevrsnog komunikacionog centra koji je nadležan za legalno procesuiranje informacija o kovidu 19. Ovim propisom je predviđena i mera sankcije za sva obaveštavanja javnosti od strane tzv. neovlašćenih lica, a koja predviđa mogućnost „primene propisa koji se odnose na odgovornost i pravne posledice za širenje dezinformacija u periodu vanrednog stanja” (Vlada RS 2020), podrazumevajući, dakle, i zatvorsku sankciju. Eksplicitno je isključeno da se informacije o virusu koje su distribuirane izvan zadate matrice mogu smatrati tačnim i proverenim. Opisana metodologija izveštavanja javnosti obrazložena je u prvom stavu Zaključka, koji informisanje stanovništva predviđa kao posebnu meru za njegovu zaštitu od zaraznih bolesti, te interes građana da dobiju isključivo proverene i tačne informacije u vezi sa ovim virusom definiše kao „apsolutni imperativ”.

Šta je, onda, problematično u ovom zahtevu? Kada se diskutuju i projektuju mere u vezi sa ljudskim pravima i njihovim ograničenjima,

svaka elaboracija u demokratskom društvu počinje članom 19. Univerzalne deklaracije o ljudskim pravima (United Nations 1948): „Svako ima pravo na slobodu mišljenja i izražavanja, što obuhvata i pravo da ne bude uznemiravan zbog svog mišljenja, kao i pravo da traži, prima i širi obaveštenja i ideje bilo kojim sredstvima i bez obzira na granice”. Na osnovu ove regule Ujedinjenih nacija, evropska Konvencija za zaštitu ljudskih prava i osnovnih sloboda (Council of Europe 1950) u članu 10. stav 2, kao i Međunarodni pakt o građanskim i političkim pravima UN (ICCPR 1966) u članu 19, izričito određuju nekoliko uslova pod kojima izvršna vlast države raspoláže pravom da ograniči ili suspenduje zajemčeno pravo na slobodu izražavanja: prvi uslov je da su ta ograničenja ne samo jasno opravdana, nego i neophodna u demokratskom društvu; drugi uslov je da restriktivne mere mogu biti primenjene samo sa specifičnim ciljevima zaštite: nacionalne bezbednosti, javne bezbednosti, teritorijalnog integriteta; zdravlja ili morala...; sprečavanja nereda ili kriminala, itd.; zatim, ograničenja moraju biti precizno propisana u pozitivnim pravnim aktima; konačno, svrha svih zabrana mora biti proporcionalna u odnosu na objektivnu pretnju.

Dakle, u međunarodnim konvencijama o ljudskim pravima jasno su istaknuta dva ključna kriterijuma, i to su neophodnost i proporcionalnost ograničenja prava na slobodu govora. Ovi uslovi su saopšteni i u dokumentu preporuka koji je 19. marta 2020. godine potpisala grupa međunarodnih organizacija (među kojima su UN i OEBS), a kojim su vlade država zahvaćenih kovidom pozvane da sprovode obavezu saopštavanja tačnih i istinitih informacija o prirodi i stepenu pretnji od virusa, a da cenzurisanje informacija bude preduzimano samo ukoliko se njime ne narušavaju napred navedeni standardi opravdanosti, neophodnosti i proporcionalnosti (UNHR 2020). U cilju adekvatnog informisanja javnosti, ovaj dokument upućuje vlade da pružaju zaštitu novinarima i njihovim izvorima, da novinarima obezbeđuju pristup informacijama i da se uzdržavaju od ograničavanja pristupa internetu. Ograničavanje protoka informacija i primena tehnologija nadzora u cilju suzbijanja širenja lažnih vesti i panike predviđeni su samo u skladu sa međunarodnim standardima o ljudskim pravima, koji štite pravo ličnosti na privatnost, nediskriminaciju i druge slobode zajemčene međunarodnim pravom.

Ako ove standarde primenimo na Zaključak od 28. marta, lako je uočiti vrednosno i normativno razilaženje. Najpre, Zaključak o informisanju u vreme pandemije razvlašćuje ustanove i pojedince koji pružaju zdravstvenu zaštitu, da „slobodno, u neposrednoj komunikaciji sa medijima i u interesu javnosti, iznose sopstvena kvalifikovana mišljenja i iskustva o borbi sa kovidom, kao i da pravovremeno, relevantnim i ažuriranim informacijama i preporukama snabdeavaju lokalno stanovništvo u njegovom interesu” (Milutinović 2020, 253). Zatim, zahtevom da se sve informacije najpre

skladište u jednom centru koji ih potom selektivno distribuira, one se monopolizuju, odnosno sprečava se njihov slobodan protok i ograničava se pristup javnosti informacijama od interesa. Drugim rečima, bez neophodnosti se uskraćuje pravo javnosti da slobodno koristi pravovremena saznanja, shodno kojim se osposobljuje da praktikuje ponašanja koja su u njenom najboljem interesu. Drugi problem proizlazi iz neadekvatnosti proporcionalnosti propisane zabrane: time što suzbija slobodan pristup informacijama od javnog značaja, Uredba narušava uslove za kvalitetno novinarstvo i, potencijalno, generiše okruženje nepovoljno za otvorenu demokratsku raspravu. Stoga njena jedina racionalna svrha može biti pretpostavljena u okviru sprovođenja kontrole informacija, sa snažnim kapacitetom za političko instrumentalizovanje saznanja o prirodi i toku pandemije i sa rizikom da proizvede progresiju informacija iz nekredibilnih izvora (lažnih vesti i dezinformacija). Što bi predstavljalo potpuno suprotan efekat od deklarisanog „apsolutnog imperativa”.

Uredba je povučena nakon kritičkih reakcija novinarskih udruženja, samo 4 dana po njenom donošenju. Međutim, povlačenje problematične uredbe nije prošlo bez kontroverzi. Ono se, naime, dogodilo posle reakcija na hapšenje novinarkе proopozicionog portala *Nova.rs*, pod sumnjom da je, šireći lažne vesti, izvršila krivično delo izazivanje panike i nereda. U tekstu pod naslovom „KC Vojvodine pred pucanjem: Bez zaštite za medicinske sestre” (Lalić 2020), novinarka je citirala izjave svojih izvora, zaposlenih u Kliničkom centru Vojvodine u Novom Sadu, koji su svedočili o nedostatku adekvatne zaštitne opreme za medicinske radnike u ovoj zdravstvenoj ustanovi koja je zbrinjavala obolele od kovida. Na predsedan privođenja i zadržavanja novinarkе momentalno su protestovala kako novinarska udruženja i međunarodne organizacije zvaničnim saopštenjima, tako i visoki predstavnici Evropske unije svojim *Tviter* objavama. Hapšenje je bilo legitimisano uredbom Zaključak o informisanju u vreme pandemije. Međutim, u ovom, ali i u nekolicini drugih slučajeva privođenja i zadržavanja novinara i drugih pojedinaca pod optužbom da su plasiranjem neistinitih informacija na društvenim mrežama izazivali uznemiravanje javnosti i širili paniku, prvi problematičan kriterijum je osnovanost. Preciznije, kakvim se dokazima raspolaže da je počinjeno delo za koje se terete ova lica? Prema ekspertizi stručnjaka Beogradskog centra za ljudska prava, ključni problem u procesuiranim slučajevima bila je neuverljivost dokaza koji neposredno ukazuju da je panika (ili uznemirenje) proizvedena. U konkretnom slučaju, dokaz bi bilo praktikovanje ponašanja kojim primaoci spornih poruka demonstriraju uznemirenost ili paniku, kao empirijsku posledicu poruka koje su recipirali. Štaviše, istinitost navoda o nedostatku zaštitne medicinske opreme (zbog kojih je protiv novinarkе pokrenut postupak) nedugo nakon incidenta potvrdio je

glavni epidemiolog Kriznog štaba dr Kon – priznajući da u početku epidemije u Srbiji zdravstvene ustanove nisu raspolagale dovoljnom količinom adekvatne opreme. Drugi problematičan kriterijum, u postupcima protiv novinarke i drugih, predstavlja proporcionalnost: da li je zatvorski pritvor adekvatno odmerena sankcija s obzirom na potencijalni zdravstveni rizik za osumnjičenog i druge zatvorenike u periodu smrtonosne epidemije? (Milutinović 2020, 257).

Da mera centralizovanja informacija i uvođenja kategorija nadležnih i nenadležnih za obaveštavanje o zarazi nije bila nepredumišljajna posledica usled nepažnje ili nerazumevanja standarda i protokola, već inicijativa sračunata s politički instrumentalnom svrhom kontrole i ograničavanja informisanja javnosti, dokazuje druga problematična mera, koja je ubrzo usledila. Reč je o odluci Vlade da isključi prisustvo novinara sa konferencija za medije Kriznog štaba, koje su u formi svakodnevnih brifinga održavane i prenošene u programu uživo iz Palate Srbija. Ova odluka je obznanjena 10. aprila, dakle, samo nedelju dana nakon ukidanja problematičnog Zaključka. Odluka je zvanično okvalifikovana kao mera predostrožnosti usled nemogućnosti da se novinarima garantuje prisustvo u prostoru Palate Srbija bez rizika od međusobnog prenošenja zaraze. Pri tome nisu planirane nikakve supstitutivne metode za neometano funkcionisanje neposrednog dijaloga između novinara i predstavnika Kriznog štaba, kako je praktikovano u drugim državama², poput onlajn komuniciranja u televizijskom programu putem video-linka ili telefonskim uključanjem iz redakcija. Pitanja su se u ovom slučaju slivala u jedinstvenu bazu, putem elektronske pošte. Ovaj model omogućava da se kontroliše medijski diskurs o pandemiji, manipulacijom filtriranjem pristiglih pitanja i njihovim selektivnim posredovanjem članovima Kriznog štaba. Mera je ugrozila transparentnost upravljanja krizom na njenom vrhuncu jer su novinari bili sprečeni da stručnjacima direktno postavljaju pitanja i potpitanja, a građani uskraćeni za uvid u informacije koje pripadaju drugom redu diskursa, dakle one koje medijski mejnstrim zaobilazi, ili makar za priliku da provere glasine. Negativne posledice ove odluke manifestuju se kroz sužavanje demokratskog pluralizma u javnoj sferi i neproporcionalno redukovanje prava iz Univerzalne deklaracije UN i Evropske konvencije. Mera je bila na snazi do 21. aprila, kada su statistike počele da ukazuju da je stabilizovana epidemijaska kriva, odnosno da je uspostavljena kontrola nad epidemijom. U projektovanim merama medijske politike očigledan je kontinuitet nastojanja da se pravnim propisima osigura neka forma centralizovanja informacija i kontrole nad njihovim protokom.

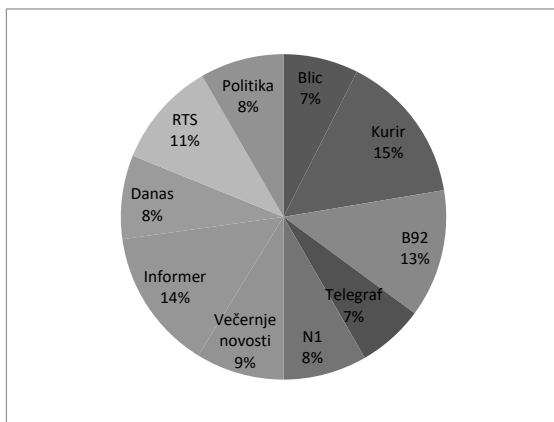
2 Na primer, u Italiji, Velikoj Britaniji, SAD, te na konferencijama Svetske zdravstvene organizacije.

4. MEDIJSKO UOKVIRAVANJE DISKURSA O PANDEMIJI

Na prethodnim stranama diskutovani su pokušaji instrumentalizacije normativnog okvira, a u nastavku se fokusiramo na karakteristike medijskog diskursa o pandemiji kovida 19. Za ovu analizu važno je podsetiti da povod izveštavanja predstavljaju pseudodogađaji – konferencije za štampu u kojima učestvuju članovi Kriznog štaba, kako bi se rasvetlila uloga aktera koji upravljaju javnozdravstvenom krizom (medicinskih eksperata i nosilaca javnih funkcija) u oblikovanju medijskog diskursa o toj krizi.

U posmatranom vremenskom okviru, najveći udeo tekstova koji tematizuju bolest kovid 19 objavljen je u onlajn izdanjima provladinih tabloida *Kurir* i *Informer*; sledi portal *B92*, pa *Javni medijski servis Srbije (RTS)* (grafikon 1). Ostali mediji objavili su ujednačen procenat priloga s ovom temom (7–9 %).

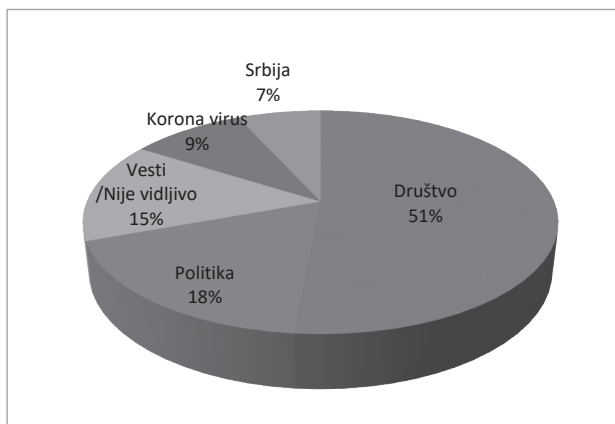
Grafikon 1. Distribucija medijskih tekstova o kovidu 19



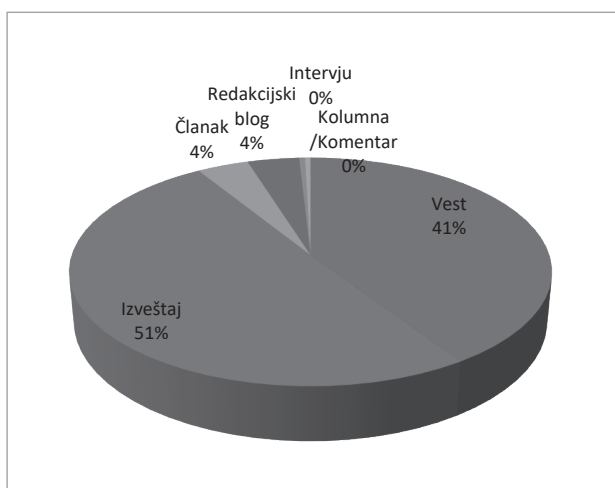
Izvor: Milutinović 2021, 6–7.

U kumulativnom uzorku, distribucija medijskih tekstova o kovidu pokazuje otprilike polovičnu zastupljenost ove teme u medijskoj rubrici Društvo (51 %), dok je sledeća po zastupljenosti rubrika Politika. Grafikon 2 pokazuje da vrednost vesti skoro jedne petine svih pandemijskih pojava i događaja novinari prepoznaju i uokviravaju u vezi sa nekim aspektom politike. Pritom je indikativno da je identifikacija autora, imenom i prezimenom ili makar inicijalima, transparentna samo u 13% svih priloga o kovidu. Po sebi, ovaj procenat nije uverljiv indikator verodostojnosti i kredibilitnosti izveštavanja. Jedna trećina svih tekstova preuzeta je od nekog drugog – domaćeg ili inostranog – medija ili agencije.

Grafikon 2. *Distribucija medijskih tekstova po rubrikama*



Grafikon 3. *Distribucija medijskih tekstova po žanrovima*

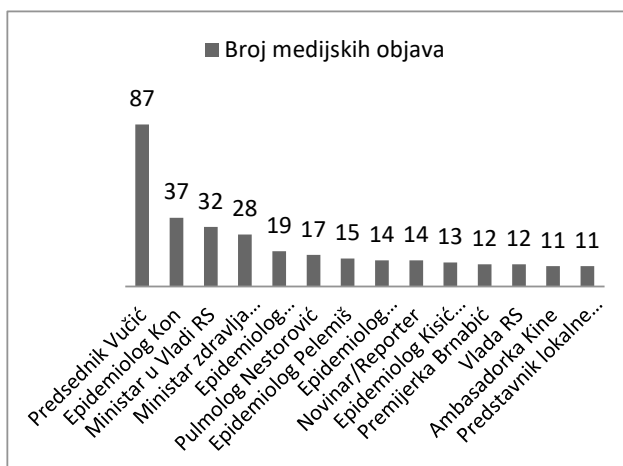
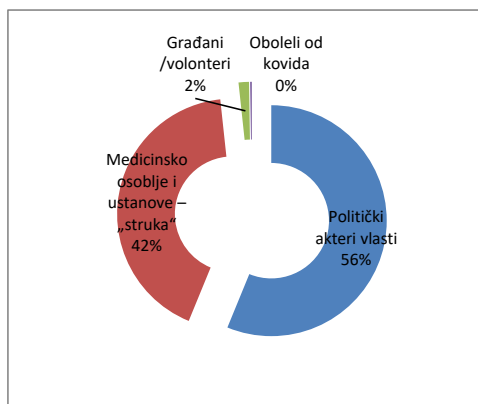


Predominacija faktografskih žanrova (izveštaj i vesti), izostanak istraživačkih, analitičkih i kritičkih članaka (grafikon 3), kao i činjenica da je značajan deo medijskog diskursa o kovidu definisan u okviru političke rubrike, navodi na pretpostavku o zavisnosti medija od političke agende o koroni. Kako se ova zavisnost manifestuje?

Da bismo odgovorili na ovo pitanje, najpre ćemo razmotriti koji akteri dominiraju u postavljanju medijske agende. Pitanja mogu dospeti na agendu, na primer, kroz difuziju ideja profesionalne zajednice ili cirkuli-

šuću među političkim elitama. Ili, da modifikujemo ovo pitanje na način kako se njime Džon Kingdon bavi u svojoj knjizi: „Koliko često ideje dolaze od ljudi poput analitičara, istraživača, naučnika i konsultanata, ili se takvi ljudi smatraju nebitnima?” (Kingdon 2014, 16). Stoga proveravamo distribuciju subjekata izveštavanja u medijskim tekstovima o kovidu: to su komunikacijski akteri čije su aktivnosti predmet medijske obrade i čije se poruke prenose javnosti (u formi citata ili sažetaka iz njihovih obraćanja). Naredna dva grafikona ilustruju visoku zastupljenost političkih aktera vlasti u ulozi subjekata izveštavanja o kovidu 19.

Grafikon 4a i 4b. Udeo komunikatora u ulozi subjekta izveštavanja (nosilac radnje ili stava)



Izvor: Milutinović 2021, 7–8.

Komunikatori čije perspektive mediji najčešće posreduju su: predsednik Srbije Aleksandar Vučić (27%), predstavnici Vlade Srbije (premijerka i ministri različitih resora) (18%), epidemiolog dr Predrag Kon (12%) i ministar zdravlja (9%), pa sledi nekoliko eksperata u oblasti virusologije i epidemiologije (po 4%) (grafikon 4b). Zanimljivo je da je u ulozi subjekta izveštavanja zastupljena ambasadorica Kine u Srbiji u istom procentu kao svi predstavnici lokalnih samouprava i kriznih štabova širom Srbije (3%). Dakle, udelom od 42% u ulozi subjekata medijskog izveštavanja o kovidu 19 glasovi medicinskog osoblja i ustanova (tzv. struka) zastupljeni su na drugom mestu, dok su građani, volonteri i oboleli od kovidu potpuno marginalizovani u izveštavanju o ovoj bolesti (grafikon 4a). Ova analiza je pokazala da se glasovi profesionalne zajednice ne transponuju u javnu sferu sa pozicije najvišeg, odn. medijski najvidljivijeg autoriteta (Milutinović 2021, 7). Uprkos aksiomu da je profesionalna zajednica jedini izvor medicinski legitimnog znanja o bolesti, medijski diskurs razotkriva njen podređen položaj u odnosu na političke aktere. Ovaj zaključak podstiče sumnju na instrumentalizaciju njihovog angažmana u odlučivanju, odn. izboru aktivnosti na agendi javnozdravstvene zaštite.

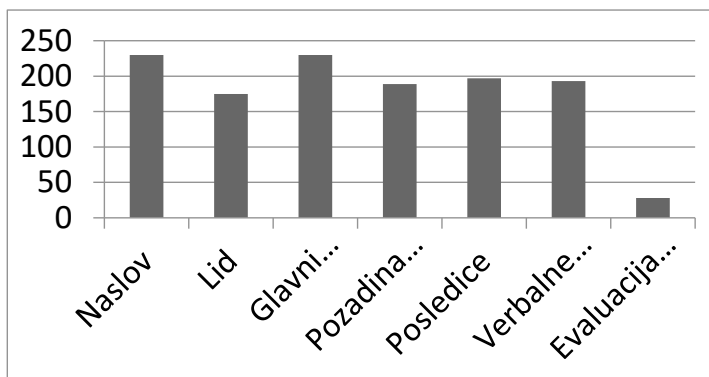
S prethodnim nalazom je u vezi još jedna važna karakteristika medijskog diskursa o pandemiji (odnosno njegovog najvećeg dela) – a to je njegova interpretativna homogenost. Opredeljujući se za jednoličan izbor sagovornika i izvora, mediji s najvećom publikom uobličavaju gotovo homogenu percepciju događaja u vezi sa pitanjima pandemije. Provladini mediji na svojim veb platformama kao izvor najčešće potpisuju državnu novinsku agenciju *Tanjug*. U opsežnijoj intertekstualnoj analizi medijskog diskursa o kovidu 19 (Milutinović 2021) pokazujem kako se diskursna praksa realizuje u interpretativno homogenoj interakciji medijskih institucija (sa izuzetkom *TVNi* i dnevnika *Danas*), odnosno kako svega nekoliko autentičnih izvornih tekstova, obrađenih u *Tanjugu* i potom prenaslovljenih ili neznatno modifikovanih i multiplikovanih na različitim medijskim platformama, generiše skoro čitav diskurs. Pokušaj diversifikacije izvora vidljiv je na proopozicionim portalima *Danasa* i *TVNi*, koji se manje od proseka naslanjaju na agencijske izvore, češće konsultuju *Novinsku agenciju Beta* (koja je u privatnom vlasništvu) i decentralizuju izveštavanje obraćajući se medicinskom osoblju i ustanovama iz unutrašnjosti, građanima, kao i stručnjacima nevidljivim u drugim medijima, koji svedoče o stanju u svojim sredinama i prenose sopstvena iskustva o epidemiji.

Nadalje, analiza ukazuje na gotovo potpuni izostanak klasičnog elementa tematsko-organizacijske strukture medijskog teksta kakav je evaluacija (grafikon 5). Odsustvo evaluacije u medijskoj obradi tema o pandemiji potvrđuje tezu o interpretativno homogenoj reprodukciji značenja: nastojeći da

se što vernije podražavaju verbalne reakcije sagovornika, u većini medijskih tekstova izostavljena je analitička i kritička obrada predmetnih komunikacijskih događaja. Zvanični iskazi pojedinaca odgovornih za upravljanje krizom posredovani su u formi faktografskih žanrova. Ovako se po pravilu prenose izjave članova Kriznog štaba sa konferencija za medije, a provladini tabloidi se ističu kao direktni posrednici formiranih interpretativnih obrazaca koje preuzimaju od predsednika države. Komentar novinara, ukoliko je uopšte prisutan u tekstu, impliciran je u podtekstu, tj. u onome što medijski pismen čitalac prepoznaje kao podrazumevano u kontekstu. Na primer, komentar na događaj neuobičajenog i revoltiranog prekidanja konferencije za novinare od strane jednog člana Kriznog štaba, nakon što je građanima uputio kritiku za zdravstvenu nedisciplinu, u većini medija je izostao; samo su retki mediji diskretno implicirali neprimerenost reagovanja određivši ovaj postupak kao „demonstrativno” (Blic) ili „dramatično” ponašanje „dr Hausa” (Telegraf).³

Drugi element šematske makrostrukture medijskog teksta – lid zastupljen je u 76% tekstova (grafikon 5). Međutim, i on često menja svoju klasičnu informativnu funkciju tako što postaje mamac za privlačenje i zadržavanje pažnje čitalaca. Na primer, nepotpunu funkciju lida preuzima naslov, koji u 'caps lock' formi izdvoji senzacionalnu poruku: „SRPSKI LEKARI APELUJU: 'Nema razloga za brigu, običan grip je opasniji od korone! Nemamo nikakav razlog za strah'” (Kurir_26/02_a).

Grafikon 5. Tematsko-organizacijska struktura medijskog teksta



Rezultati ili posledice događaja u medijskom uokviravanju pandemije najčešće su eksplicitno sadržane u formi upozorenja ili apela za: prevenciju bolesti, poštovanje epidemioloških mera i solidarnost građana. Ali na

³ Upotrebljeno je metaforičko poređenje sa fikcionalnim likom iz istoimene igrane serije, koji je karakterističan po visokoj stručnosti i ekscentričnom ponašanju.

dubljoj ravni impliciranih značenja moguće je pratiti kako dominantne medijske poruke korespondiraju sa političkom motivacijom, odnosno uočava se kauzalnost između političke i medijske agende pandemije.

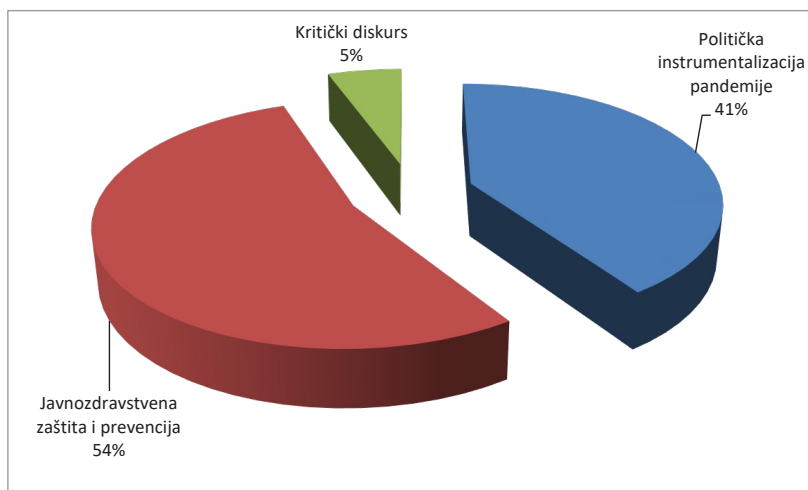
Naime, dominantne medijske poruke jasno podržavaju tri faze upravljanja krizom, odnosno izabrane modele praktičnog delovanja izvršne vlasti u toku tzv. prvog talasa epidemije (Milutinović 2021, 9–14). U objavama iz nedelja koje neposredno prethode importovanju virusa u Srbiju dominirale su poruke u rasponu od kozerskog ismevanja do umirujućeg optimizma: „Najsmešniji virus u istoriji čovečanstva” (Blic_06/03_b; Kurir_26/02_a); „Ja neću nositi masku (...). Ruke ću prati ko što sam i dosad prao” (Kurir_26/02_c); „(...) Srbija neće zatvarati granice” (Politika_26/02_e). Posle prve sednice Kriznog štaba (14. marta), dakle, svega jednu nedelju nakon zvaničnog registrovanja prvog slučaja obolevanja od kovida u Srbiji, nastupa dijametralni zaokret od osporavanja zdravstvenog rizika i potceñivanja prevencije ka komunikacijskoj strategiji širenja uznemirenosti. U tom trenutku broj novoobolelih na dnevnom nivou još uvek je bio jednocifren, ali je pripremano proglašenje vanrednog stanja i policijska zabrana kretanja. Dramatičan ton pojačavan je čestom upotrebom metafore „italijanski scenario” (RTS_31/03_f), a plasiranje optužujućih i zatrašujućih poruka: „... čekaju nas još gori dani...”; „Ne dolazite u Srbiju za vreme verskih praznika, to bi bio za nas kraj” (Kurir_23/03_f), upotrebljeno je u cilju da dodatno disciplinuje građane u fazi organizovanja zdravstvenog sistema za zbrinjavanje obolelih i intenzivne nabavke nedostajuće zaštitne opreme i drugih medicinskih sredstava. Konačno, treća faza upravljanja zdravstvenom krizom vremenski se preklapila sa predizbornim pripremanjima (6.5–21.6), kada dominantne poruke u medijskom diskursu o kovidu pokazuju usmerenost ka umirivanju javnosti. Tada je ukinuto vanredno stanje i relaksirane su sve restriktivne mere za suzbijanje zarazne bolesti, koje je Vlada – ističući ispodprosečne stope novoobolelih i umrlih – promovisala kao najuspešnije u Evropi. Krizni štab se nadalje nije oglašavao u medijima. Već sledećeg dana nakon izbora, u provladinim tabloidima su se pojavile objave o čak trocifrenom broju obolelih od kovida na dnevnom nivou, začim je usledila kampanja prebacivanja odgovornosti na građane kako je epidemija ponovo narastala: „Mi smo dali šansu da svako odlučuje svojom odgovornošću kako će biti. (...) Zamolio bih sve da ne idemo toliko daleko da tražimo odgovornost nekog drugoga, nego da krenemo od sebe” (RTS_27/06_g). Mediji na opisan način nisu proaktivno delovali u postavljanju javne agende, već su poslužili u jednosmernom procesu kao instrument za difuziju poruka na relaciji izvršna vlast – građani i, konsekventno, za mobilizaciju građana da podrže izabrane mere.

Instrumentalizacija medija je politički manifestovana najčešće kroz manipulativno pomeranje fokusa sa centralne teme pružanja pomoći

zdravstveno ugroženim građanima ka političkim implikacijama tog čina (Milutinović 2021, 12–14). Glavna karakteristika politički instrumentalizovanog diskursa o pandemiji jeste uokviravanje virusa kao pitanje opstanka države. Deo komunikacijskih sredstava, kojima se postiže efekat politički instrumentalizovane obrade tema u vezi sa kovidom 19, predstavljaju, na primer: iterativne metafore „moj brat” (vezana uz predsednika Republike Kine) i „čelični prijatelji” (opisuje srpsko-kineske odnose), kojima se izdvaja značaj jednog partnera u međunarodnim odnosima Srbije (Kurir_21/03_j); metafore borbe ili rata „protiv nevidljivog protivnika” sa evokativnom i integrativnom funkcijom u cilju održavanja društvene i političke hegemonije (Kurir_21/03_h); zatim leksički izbori „uništitelji Srbije” (Informer_23/03_b) ili „hejteri iz SzS” (Informer_23/03_c) kojima su, u obrascu negativne promocije, stigmatizovani kritičari Vlade; te manir neformalnog obraćanja „kao boga vas molim” (VNovosti_14/03_), kojim se formalni položaj vlasti transponuje u kolokvijalni diskurs, daje se populistička snaga službenim glasovima i potencira odnos solidarnosti i zajedničkog identiteta vlasti sa građanima. „Kopirajući ovaj obrazac, tabloidi se obraćaju 'običnom svetu' svoje publike, te se odnos solidarnosti uspostavlja i na relaciji mediji–publika” (Milutinović 2021, 13).

Analiza medijskog diskursa pokazala je da je u manjem njegovom delu politička instrumentalizacija pandemije bila predmet kritičke obrade. Kao što pokazuje grafikon 6, kritički obrazac izveštavanja je izrazito marginalizovan sa udelom od samo 5% u celokupnom uzorku medijskih tekstova o kovidu. Ovaj kritički diskurs vidljiv je samo na proopozicionim portalima *TVNi* i *Danasa*. U njegovom fokusu je pitanje uticaja vlasti na samostalnost odlučivanja medicinskih eksperata u Kriznom štabu. Naime, pretpostavke o ovom uticaju inicirane su još na početku epidemije, izjavom od strane članice Kriznog štaba, da je prva infekcija koronavirusom u Srbiji izolovana 1. marta, dakle pet dana ranije u odnosu na datum kada je to Vlada građanima zvanično prijavila. Ovom tvrdnjom u programu uživo na RTS-u, pa sutradan i njenim demantijem, uneta je zabuna u vezi sa datumom importovanja virusa u Srbiju i podstaknuta sumnja da ekspertski tim lekara zadužen za suzbijanje epidemije podleže političkim pritiscima. Takođe, predmet kritičke medijske obrade bila je i pojava razilaženja između statistika koje je saopštavao državni Informacioni sistem Covid-19 i onih kojima je upravljao beogradski Gradski zavod za javno zdravlje, koja je takođe pojačala sumnje u kredibilitet zvaničnih narativa o kovidu, koje je uokviravao Krizni štab a distribuirali mediji. Dominantni obrasci u kojima je uokviren medijski diskurs o ovoj pandemiji, prikazani na grafikonu 6, svedoče o izrazitoj neizbalansiranosti.

Grafikon 6. Dominantni diskursni okviri u uzorku



5. ZAKLJUČAK

Empirijska analiza sprovedena na temelju referisanih teorijskih stano-
 višta, upućuje na argumentovan zaključak: medijski diskurs o pandemiji
 kovid 19 u Srbiji je visokodeterminisan političkom agendom. Medijski
 mejnstrim (mediji s najvećom publikom) skoro u potpunosti preuzima
 političku agendu i uokviruje diskurs u skladu s njom. U većem delu
 medijskog diskursa, koji je oblikovan na način da održava i reprodu-
 kuje političku hegemoniju, pandemija je instrumentalizovana za perma-
 nentnu promociju u okviru predizborne kampanje koja je zvanično bila
 obustavljena u periodu vanrednog stanja, odnosno kao pozadina za
 marginalizovanje kritičke agende o problemima u vezi sa vladavinom
 prava, demokratijom, slobodom medija. Pandemija je dvojako instru-
 mentalizovana: kako primenom neproporcionalnih mera u oblasti infor-
 misanja o pandemiji, tako i uokviravanjem medijskog diskursa sa ciljem
 mobilizacije podrške za mere javne politike i promocije njenih prota-
 gonista kao uspešnih aktera u borbi protiv teškog javnozdravstvenog
 izazova.

Centralizovanje i ograničavanje protoka informacija normativnim sred-
 stvima predstavlja preduslov za uokviravanje medijskog diskursa u kontro-
 lisanim uslovima, u skladu sa političkim interesima vlasti. Premda smo u
 radu pokazali da svi pokušaji direktne kontrole protoka informacija na
 normativan način nisu bili uspešni, normativne intervencije su olakšale
 političkim agensima da, kroz institucionalne uređivačke rutine, utiču na

najveći deo izveštavanja o pandemiji. Budući da sofisticirane i neformalne mehanizme usmeravanja politike u medijskim redakcijama ne možemo dokazati naučnom metodom, izdvajamo nekoliko ključnih indikatora za prethodnu tvrdnju: mediji s najvišim rejtingom su izbegavali kritičke žanrove prilikom uokviravanja diskursa o pandemiji; njihovo bitno obeležje je posredovanje interpretativnih obrazaca od vodećih političkih aktera; oni češće preuzimaju političku agendu nego što posreduju javne prioritete; tabloidi podržavaju one izvore i interpretacije koji se adekvatnije uklapaju u Vladinu politiku upravljanja pandemijom. Od ove matrice, upadljivom manjinom, odstupaju proopozicioni građanski mediji.

Bitno obeležje predmetnog medijskog diskursa je neravnoteža gledišta usled neizbalansirane koncentracije komunikacione moći. Akteri javne politike koji sprovode izabrane mere ujedno upravljaju informacijama o tim merama i njihovim interpretacijama, tako da medijski mejnstrim deluje kao produžena ruka izvršne vlasti. Medijski diskurs se karakteriše suženošću unutrašnjeg pluralizma, čime odražava stanje političkog pluralizma. Izostaje dvosmerni proces u kojem mediji delegiraju pitanja na agendu izvršne vlasti i problematizuju neke njene odluke i poteze. Kritički glasovi ostaju marginalizovani u diskursu, izgubivši svoj kapacitet da na demokratski način doprinose rešavanju javnih problema, kroz transfer predloga „odozdo nagore” i preispitujući, u debatnom maniru, vladine agende i odluke. Neizbalansiranost reda diskursa, odnosno visoka zavisnost medijskog izveštavanja od vladine agende, korespondira sa opadanjem slobode i nezavisnosti medija karakterističnim za tranzicione (hibridne) režime. Ova negativna tendencija je markirana u uvodnom poglavlju rada kao jedan od indikatora pada Srbije iz kategorije delimično konsolidovanih demokratija, prema relevantnim izveštajima. Premda su, prema istim izveštajima, neki oblici medijskih restrikcija u periodu pandemije kovida 19 prisutni i u državama stabilnije demokratske orijentacije, preuzimanje kontrole nad medijskim diskursom u tranzicionim društvima preti još intenzivnijim implikacijama urušavanja političkog i društvenog sistema, inače krhkog demokratskog kapaciteta.

Povratno svetlo na izvedenu analizu i zaključak bacaju događaji nakon analiziranog perioda, koje dodajemo kao kratak epilog. Nekoliko dana uoči ukidanja vanrednog stanja, do tada prilično umireni politički antagonizmi koji su se održavali uglavnom još na *Tviteru*, počinju da se vraćaju u društveni život Srbije, „ovog puta oblikovani kroz konfrontirane akcije građana koji nezadovoljstvo ispoljavaju bukom sa terasa svojih domova i kontra-akcije koje organizovanim bakljadama sa gradskih krovova demonstriraju pristalice vlasti” (Milutinović 2020, 259). Ukidanjem vanrednog stanja

naglo su opozvane sve epidemiološke restrikcije i na snazi su ostale samo preporuke za ponašanje u javnom prostoru. Vlada je uveravala građane da je virus poražen. Na izborima, održanim 21. juna, mobilisana je izlaznost glasača koja obezbeđuje legitimitet izbornog rezultata (koji je potencijalno bio ugrožen pozivom na bojkot od strane opozicionog bloka) i neprikosnovenu leadersku poziciju vladajuće stranke. Samo jedan dan nakon izbora provladini tabloidi vratili su se rutini svakodnevnog izveštavanja o broju obolelih na dnevnom nivou – koji je sada narastao na tri cifre. Krizni štab se ponovo oglosio s rasplamsavanjem nove epidemiološke krize (tzv. drugi pik). Na najavu ponovnog uvođenja ograničenja kretanja usled pogoršanja epidemiološke situacije antagonizmi su se najednom vratili u politički život Srbije, eskalirajući nasilnim sukobima demonstranata i policije ispred Narodne skupštine u trajanju od nekoliko dana. Demonstranti su optuživali Vladu da je manipulisala informacijama kako bi se podstakla izlaznost birača na izborima, dok je, s druge strane, Vlada prebacivala odgovornost za drastično pogoršanje epidemiološke situacije na građansku nedisciplinu. Nemiri su okončani izostankom ponovnog uvođenja policijskog časa.

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SUMMARY

POLITICAL INSTRUMENTALIZATION OF MEDIA DISCOURSE
ON THE COVID-19 PANDEMIC IN SERBIA: REPORTING AND SOME
NORMATIVE ASPECTS

the subject of this study is media discourse on the Covid-19 pandemic in the Republic of Serbia, with special emphasize on the normative aspects of media policy during the state of emergency (March 15 – May 6, 2020). The main goal is to examine whether the media in Serbia report freely and independently or just function instrumentally as mediators of the political agenda. Hence, the first part of the research is focused on the normative order. By the method of comparative analysis of legal documents, the paper shows the inconsistency of the instrumental measures of media policy in the specified period, with binding norms announced in international conventions and declarations on freedom of speech. In the second part of the research, some indicators of the media discourse on Covid-19 political instrumentalization were identified, using the Critical discourse analysis. The hypothesis has been proven, that basis for political instrumentalization of the media reporting was established in a normative way, by applying disproportionate measures in the field of informing about the pandemic, and consequently developed by discursive practice in the media newsrooms, with aim to mobilize public support to the Government measures.

KEYWORDS: political instrumentalization, media discourse, freedom of information, Covid-19 pandemic, the Republic of Serbia.

THREATS TO DEMOCRACY: MEASURES TAKEN BY RIGHT-WING POPULIST REGIMES DURING THE COVID19 CRISIS IN EASTERN EUROPE¹

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ABSTRACT²

Right-wing populist governments in Central and South-eastern Europe are currently abusing the emergency caused by the pandemic in order to extend their power and influence over institutions through legislative changes. The governments in Poland, Serbia, Slovenia and Hungary have raised fears by their measures to either establish authoritarian regimes and/or to reassert their grip on power during the Covid19 crisis. This text is intended to give an insight into the measures of the ruling right-wing populist parties (PiS in Poland, SNS in Serbia, SDS in Slovenia and Fidesz in Hungary) during the pandemic. On the one hand, the article intends to show that the individual governments have misused the crisis to bring independent and/or state media under their control, to conclude corrupt deals between the ruling party and government-related companies and to put pressure on other independent institutions (such as the

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judicial system) and the opposition. On the other hand, reactions by civil society organizations and the European Union shall be examined. The article shows that both, civil society and EU pressure is indispensable, particularly in times of crisis, since shifts in power in favour of right-wing populist rulers happen swiftly and have negative long-term consequences for democracy.

KEYWORDS: Covid 19, Democratization, Democratic Backsliding, European Union, Civil Society

INTRODUCTION

The Global Financial Crisis (GFC) in 2008, as well as the Refugee Crisis in 2015 increased the electoral strength of right-wing political parties. Various scholars have noted a trend towards illiberal politics across the globe, whereat the Eastern and South-eastern European regions are no exception to this development (Kapidžić 2020, Bermeo 2016, Levitsky and Way 2010). While the rise of illiberal regimes takes on a variety of forms, depending on the context, one commonality is the formal respect of democratic procedures (i.e. elections), but not to what comes before or after (Kriesi and Pappas 2015). In such settings, an uneven level playing field between the dominant ruling party and the political opposition is observed, but also less political freedom, captured state institutions and controlled media. Democratic abuses are today thus less obvious and need a detailed analysis of the mechanisms that underpin an illiberal regime.

Obviously, the current Covid19 pandemic presents a new challenge to regimes across the globe. Especially younger democracies, which are characterised by relatively less rigorous checks and balances' mechanisms found themselves in a dare situation, in which the Covid19 Crisis could (and was) misused by illiberal ruling parties to fortify their rule. Right-wing populist governments in Central and South-eastern Europe are currently abusing the emergency caused by the pandemic in order to extend their power and influence over institutions through legislative changes. But not only are ruling parties misusing the crisis for their personal interests, the Covid19 pandemic has also revealed institutional weaknesses in younger democracies. The similarity between the measures undertaken by right-wing governments in the wider Eastern European region is striking. This paper looks at the measures undertaken during the year 2020 in Hungary, Poland, Serbia and Slovenia.

While Hungary, Poland, Serbia and Slovenia have had different historical trajectories and differ according to their democracy indices, they converge on certain dimensions: in all four states, investigative journalists, independent media and minority groups are attacked, whilst the independence of state institutions (notably the judiciary) is either already

under the control of the ruling party or is currently experiencing pressure from the government. As an answer to these policies, in all four countries protests were organized but were often limited to online protests, protests from the balconies using kitchen utensils, or cycling protests. Last summer the European Union agreed to use EU funds to uphold the rule of law by using a conditionality clause for its member states. As things stand now, the conditionality clause needs to be reviewed by the European Court of Justice as requested by Hungary and Poland. This means that another two years will pass, before the clause is applicable.

This article introduces the reader first to the current political situation in Hungary, Poland, Serbia and Slovenia before discussing the measures undertaken from March 2020 until October 2020. As the pandemic is still ongoing in the beginning of 2021, the paper gives the reader a descriptive overview of the policies conducted that concern the economy, state institutions and media. In addition, attacks on political opponents will also be presented. The final part discusses the reactions of civil society and the EU in times of the Covid₁₉ crisis. As a matter of fact, right-wing leaders in Eastern Europe are very well connected, support each other and nurture close relationships. It is therefore of utmost importance to reveal how ruling parties try to strengthen their grip on power and why a strong answer by the European Union is absolutely necessary.

EXPLANATIONS FOR THE RISE IN ILLIBERAL POLITICS IN EASTERN EUROPE

While there is a plethora of classifications of regimes that are not fully democratic, but also not fully authoritarian, this article applies the concept of illiberal politics in order to grasp the procedural dimension of illiberal or hybrid regimes (Bieber 2020; Levitsky and Way 2010). Illiberal politics is therefore a set of policies “that extend an electoral advantage for governing parties with the aim to remain in power indefinitely. This includes perpetuating advantageous socio-economic structures and governing practices, as well as specific and targeted restrictive actions against political opponents and independent institutions” (Kapidžić 2020, 2). It results thus in hybrid and illiberal regimes, in which only formal democratic procedures are respected.

The rise in illiberal politics in Eastern and South-eastern Europe since the GFC in 2008 resulted in numerous analyses on the subject. Given the development during the last decade in the two most dramatic cases – Hungary and Poland – a rich literature exists that deals with the phenomenon of illiberalism in these two countries (for example see Bernhard 2021; Bernhard 2020; Gora and Wilde 2020; Cianetti et al. 2018). The cases of Hungary and Poland are representative of a broader global pattern: rather

than the direct breakdown of democracy into autocracy (for example via direct military interference), we are witnessing the establishment of hybrid regimes, where illiberal ruling practices are less blatant, more hidden and therefore, need more analytical scrutiny in order to detect them (Bermeo 2016). The South-eastern European countries are no exception to this trend, whereat many of the post-Yugoslav successor states never moved away from their hybrid limbo since the end of the Yugoslav wars (Bieber 2019). While Slovenia's regime stability has been an anomaly within the former Yugoslav federation, recent electoral strength of the right-wing political party SDS as well as Janša's nomination as Prime Minister in 2020 has raised concerns for the country's democratic future.

Scholars have emphasised various factors for the rise of illiberal regimes in Eastern and South-eastern Europe since 2008: the rise of populist parties and their ruling strategies (Vachudova 2020; Bieber et al. 2018; Innes 2014); the role of changing structural conditions, such as socioeconomic factors, domestic institutions and the characteristics of civil society (Bernhard 2021; Bieber 2020; Greskovits 2020; Kapidžić 2020); as well as the EU's responsibility for it (Sedelmeier 2014). This paper acknowledges the importance of external factors (primarily the role of the EU) as well as domestic factors (primarily the role of civil society organisations) when explaining the rise of illiberal politics.

As most of the CEE countries joined the EU in 2004, the disappearance of the stick and carrot relationship with the Union led to non-compliance with the EU's fundamental norms, as countries are not subject anymore to enforcement mechanisms (Bernhard 2021, 19; Sedelmeier 2014). Authoritarian practices were not punished by the Union and with this, right-wing leaders were given the freedom to strengthen their grip on power (Kelemen 2017). Thus, due to the absence of conditionality, the relationship changed between the EU member states. Furthermore, despite reaching a recent compromise regarding the rule of law clause, the European institutions demonstrated a weak and inconsistent response to the rising authoritarian practices in Poland and Hungary. Being not punished by the EU, leaders in the East continue to abuse their power. Reasons for not punishing illiberal behaviour are found in partisan politics as well as a weak normative consensus among the EU member states (Sedelmeier 2014).

In the Western Balkans, the conditionality mechanism is still in force, yet the expected positive influence on democratisation as in the CEE accession process failed to materialise (Schimmelfennig 2008; Schimmelfennig et. al 2006; Vachudova 2005). Consequently, scholars have recently started to emphasise the presence of unfavourable structural conditions in the Western Balkan countries and assessed the EU's responsibility in a critical way (Elbasani 2013). One of the main criticisms refers to the accusa-

tion of the EU being more interested in “stabilitocracy” than democracy (Bieber 2019; Kmezić 2019). The term denotes the current EU’s strategy towards the Western Balkans which focuses more on security conditions on the ground and interstate disputes, in order not to experience violent escalation in Europe’s backyard. As Veljković argues, the displacement of stability into the sphere of security pushed the question of democracy into the background, which led to captured states in the respective countries (Veljković, 2019: 80).

Thus, the EU has been accused of possibly unintended negative effects in the region, as Börzel and Pamuk state. „Europeanisation can have unintended negative effects on the domestic structure of the states. EU policies and institutions not only empower liberal reform coalitions to the extent that they exist in the first place, but can also bolster the power of incumbent authoritarian and corrupt elites“ (Börzel and Pamuk 2012, 81). By supporting directly and indirectly authoritarian parties, EU institutions boost their publicity and increase their legitimacy. What is more, political leaders often misuse European conditionality and European demands in order to strengthen their own power base. Yet, not sanctioning such practices fortifies their strength *vis-à-vis* liberal opposition parties, especially in a context where the ruling political party exerts pressure on the rule of law, the media and civil society organisations.

Next to the EU’s responsibility, numerous accounts point to the relevance of non-autonomous civil society organisations in perpetuating illiberal regimes (Bernhard 2020; Greskovits 2020). Accordingly, it is not enough to understand why citizens voted in the first place for right-wing political parties, but also how right-wing parties are able to uphold power positions and to establish a lasting hegemony in the society (Greskovits 2020). In this view, ruling parties have strong connections to civil society organisations which are not independent and function as a prolonged arm of the right-wing party (examples are the Civic Circles Movement in Hungary, Church affiliated organisations in Poland or GONGO in Serbia). Thus, internal characteristics of civil society organisations (i.e. whether it accepts liberal democracy and represents democratic values) and its links to the ruling power structure are quite important for the rise of illiberal politics (Bernhard 2020).

The article investigates the practices during the Covid₁₉ crisis, whereat evidence is predominantly based on analysis of the newspaper articles in the last 12 months, investigative reports (Balkan Insight, BIRN) and official interviews with politicians and scholars. Currently, few scholarly studies exist on illiberal measures in the four countries and time period assessed here (Fink-Hafner 2020). Thus, while external and domestic factors paved the way for the illiberal ruling practices that we are currently observing,

special attention is given to the ruling parties' strategies in times of crisis, hence a doptinga procedural lens. The argument is therefore that despite different historical legacies of the four cases, very similar features and mechanisms are observed in the right-wing political parties. All came to power via elections and started to eliminate horizontal checks and balances, independent media, and thus, hollowing out democratic foundations (Sadurski 2019; Scheppele 2014).³ The paper focuses on four areas in which the strategies of the right-wing political parties are described and compared: in (a) the economy, (b) rule of law, (c) media and (d) opposition. This aims to contribute to a better understanding of the concept of illiberal politics as a feature of illiberal regimes.

BEFORE THE PANDEMIC: DEMOCRATIC BACKSLIDING IN EASTERN EUROPE

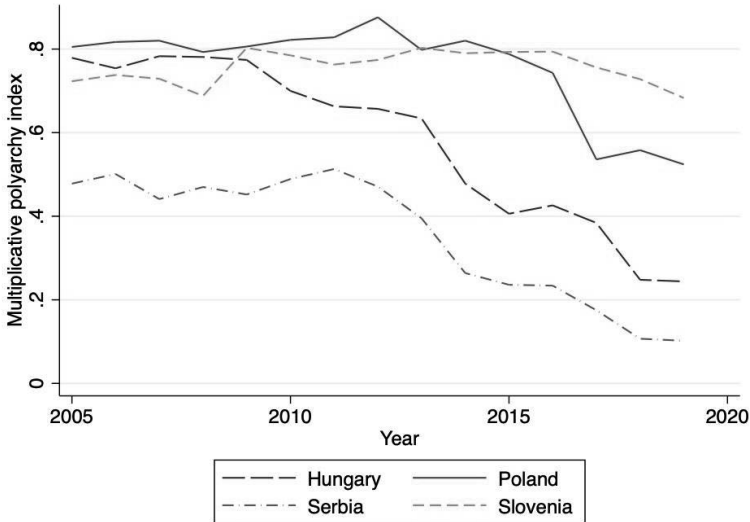
The rise of right-wing populist parties occurred before the Covid19 pandemic and was, inter alia, enabled through the GFC in 2008/09. In Hungary, Viktor Orbán and the right-wing political party Fidesz is the dominant party since 2010. In Serbia, the SNS (Serbian Progressive Party) came to power in 2012, while in Poland PiS (Law and Justice Party) under Jaroslaw Kaczynski is ruling since 2015. In Slovenia, the right-wing SDS (Slovenian Democratic Party) had in the last elections in 2018 the best result as a single party. Its president, Janez Janša, is currently the Prime Minister in Slovenia.

The level of democracy, and generally, the independence of state institutions, differ in the four cases. However, there is convergence in some dimensions with regards to the quality of the regimes in recent years as well as the general trend, when looking at established democracy indices. Figure 1 depicts the V-Dem multiplicative polyarchy index. Since 2013 Hungary, Poland and Serbia experience deterioration in their democracy level, while in Slovenia this deterioration happened more recently. Additionally, the newest report by Freedom House (Freedomhouse.org 2020) has classified Hungary as a hybrid regime (along Serbia), while Poland was classified as a semi-consolidated democracy (previously being classified as a consolidated democracy). This decision was largely determined by the increased influence of the ruling party in Hungary and Poland on the judicial system. Hungary is therefore the first EU member state which is classified as being a non-democratic regime. In addition, the October 2020 report by the Commission on Serbia has stated that the country has

3 Strictly speaking, Slovenia slightly differs from the other three cases as after the elections in 2018 Marjan Šarec Centre Party controlled a minority government. However, due to a political stalemate, Šarec had to step down by the end of 2019 and Janez Janša became PM.

made no progress in the area rule of law, whilst elections held this summer were controlled by the ruling structures (European Commission 2020).

Figure 1. *V-Dem Multiplicative Polyarchy Index for Hungary, Poland, Serbia and Slovenia (2005–2019)*



Source: Varieties of Democracy Dataset Version 10. (available on www.v-dem.net)

Note: The multiplicative polyarchy index asks the question: to what extent is the electoral process of democracy achieved? The index is operationalized as a chain, defined by its weakest link (multiplication). The components are the following: freedom of association, clean elections, freedom of expression, elected executive and suffrage. In all four cases, the dimension freedom of expression deteriorated in the last years.

As a result of these developments, the relationship with the European Union (EU) is strained, especially between the EU and Hungary, Poland and Serbia. In 2018, the European Parliament, with the support of the European People's Party, has initiated a rule of law procedure under Article 7 against Hungary. As unanimity from all states is required, the proceedings are stagnating (Mijnssen and Steinvorth 2020). Parallel, there are several proceedings against the PiS in Poland due to their controversial reform of its judiciary since 2017. Poland and Hungary protect each other from further measures.

At the same time, a growing network and close relationships between the PiS, Fidesz, SDS in Slovenia and SNS in Serbia is taking place. In September 2020, Orbán, Janša and Vučić have held an online conference

with the theme “the future of Europe”, in which the leaders presented their political vision for the European Union. During the conference, Orbán stated that keeping the EU together requires that the West “does not enforce its view on the Eastern countries” (Politico.com 2020, 1). The network between the right-wing parties is becoming ever more obvious as well as stronger. This is followed by growing economic ties as well as financial support to the respective right-wing party (Orbán’s support for Janša’s SDS as well as media outlets in Slovenia).

MEASURES DURING THE STATE OF EMERGENCY

During the state of emergency, the parliament in Hungary has passed an emergency law on March 30th, which allowed Orbán to rule per decree. While also other European States have introduced the state of emergency, in Hungary the ruling Fidesz has used this situation to strengthen their grip on power. More than 200 decrees have been passed since March that not only serve to combat the pandemic but serve economic and political purposes (Dw.com 2020b). According to Kreko, four approaches can be distinguished within these decrees: 1. the ruling party concluded new business contracts with oligarchs close to the government; 2. many decrees were directed towards the municipal finances, often strongholds of the opposition parties, thereby depriving them of important sources of income; 3. financial pressure was exerted on opposition politicians by high fines for allegedly disseminating „misinformation”; 4. human rights have been systematically curtailed, for example through the passage of the Omnibus Act in July 2020, which discriminates against the LGBT population as it stipulates that the gender must be on the ID card at birth and cannot be changed (Youtube.com 2020).

Since the state of emergency was terminated relatively quickly, at the end of May, experts suspect that this instrument was deliberately used to demonstrate that there is no authoritarian style of government in Hungary (Youtube.com 2020). With the end of the state of emergency in May, however, a law was passed that allows the government to govern by decree and without control mechanisms during epidemics in the future (Dw.com 2020b). At the end of July, it was also announced that Index, one of the last long-standing and independent online magazines, would close because the editor-in-chief has been replaced by the new owners, whilst the advertising department was taken over by an oligarch close to Orbán. As a sign of protest, most employees have resigned.

Viktor Orbán’s Fidesz party has excellent links with right-wing conservative parties in Central and South-eastern Europe, including the PiS, which is ruling Poland since 2015. Imitating Fidesz, the PiS tried to bring the Supreme Court under its control by forcing an early retirement of its

judges. This move, however, was declared by the European Court of Justice to be incompatible with EU law. The Supreme Court is important in Poland as it confirms the validity of the election results in the country. Therefore, the PiS had to wait for the end of the term of the Supreme Court's president, which was the case during the Corona crisis. In May 2020, a new president of the court close to the government was sworn in (Dw.com 2020a). In addition to its great influence on various state institutions, the PiS control the state television TVP, the only TV station that is broadcasted throughout the country.

In March, Poland's government introduced a nationwide lockdown, which was welcomed by a large majority of the population. As in the other Eastern European countries, it quickly became clear that the country's health system would not be able to cope with a large number of sick people, not least because of the severe migration of professionals and medical staff to Western Europe. After the almost three-month curfew, the Poles slowly returned to normality, also because presidential elections were to be held in June. In the midst of the pandemic, the two candidates, Duda from the PiS and his challenger Trzaskowski from the PO (Civic Platform) run a very close race. The focus was not necessarily on the management of the Corona crisis, but rather on the position of the candidates on government subsidies, cultural and ideological issues and human rights. There was as well a scandal before the elections. The Duda's government had ordered 100,000 protective masks from a „friend of the PiS”, which turned out to be useless (Notesfrompoland.com 2020).

The PiS candidate Duda has narrowly beaten his challenger. Contrary to the usual analyses of the Polish media, which portrays 51 percent of Poles as “conservative or nationalist”, it seems that the subsidies to families (i.e. the Family 500+ program) which have been paid out since 2015 were the decisive factor for PiS' election success. The government supports families with 500 zlotys a month (around EUR 110), which makes a noticeable contribution to the monthly budget in Poland. This lifted many families out of poverty, especially those who live in smaller communities and villages. The nationalist-conservative bloc only makes up about a third of the electorate. In fact, it was Duda's aggressive anti-LGBT rhetoric that led to a tight election result, and not because the majority of Poles have a right-wing conservative or semi-authoritarian view of the world. The anti-LGBT campaign has thus rather harmed Duda, than helped him gaining votes. Against the background of an average annual economic growth of five percent, many voters decided in favour of the PiS, also out of fear that the opposition candidate would cancel the family allowances in case of victory (Orenstein 2020).

Elections were also held in Serbia this summer despite the Corona pandemic. The task force for the Covid19 crisis initially ridiculed the virus in March 2020 and asked residents to go shopping in Milan as there would be now clearance sale (Rs.niinfo.com 2020a). After the first corona cases appeared, it quickly became clear that the underfunded and ailing health system in Serbia would be overwhelmed by a pandemic. The government then implemented some of the most draconian measures in Europe: day-long curfews from 6 p.m., an absolute curfew for the over 65-years-old population and a general curfew for everyone over the weekend, sometimes up to four consecutive days.

At the end of May, the SNS declared that the “war on the pandemic” has been won, in order to schedule the parliamentary elections for June 21 (Rs.niinfo.com 2020b). From absolute lockdown, the government quickly switched to opening discos and restaurants, allowing football games with up to 25,000 spectators, all without any epidemiological measures, but with the aim of giving voters a false sense of security so that they could vote on June 21. Consequently, the political opposition boycotted the elections, not only due to the pandemic, but also due to lack of free and fair conditions for competition. As in 2016, there were cases of election fraud and manipulation, as well as a low turnout. As expected, President Vučić’s SNS celebrated a huge victory; Only 6 opposition MPs made into the parliament.

However, the rapid relaxation of the corona protective measures and the holding of the elections turned out to be fatal after a few days. During the summer, the number of new infected persons was between 200 and 300 per day, while local hospitals were in a near- catastrophic situation. There was not only a shortage of medical personnel, but also of basic materials such as masks and disinfectants. Many doctors and large parts of the medical staff became infected with the virus. Journalists who reported on the precarious conditions were arrested and later released under pressure from civil society (Rs.niinfo.com 2020). In addition, research by the Balkan Investigative Reporting Network (BIRN) showed that the statistics in Serbia were manipulated and data on new infections and deaths were falsified so that the elections could be held in June (Birn.eu.com 2020).

In Slovenia, on the other hand, the right-wing conservative parties are not dominant, even if Janez Janša’s SDS won 25 percent of the votes in 2018 and thus achieved the best election result single-handedly. After previous Prime Minister Marjan Šarec resigned with his center-left minority government, Janša was sworn in as Prime Minister in January 2020. This gave him control over the measures during the Corona crisis. As in the countries previously discussed, the government tried to replace the board of the state television RTS during this period. During this process, however, the

Constitutional Court stopped Janša on the grounds that a change of staff before the expiry of the board's term of office would be unconstitutional. At the same time, independent media and journalists who reported on the measures imposed by the government in a critical way were attacked.

A corruption scandal was also revealed. When buying masks and ventilators, the government had given preference to a company that is close to the ruling party (Fink-Hafner 2020). The material procured had proven to be insufficient. Moreover, many firms who won public tenders were not experts in the field, nor did they provide any expertise in the health care sector. In this way, one of Slovenia's richest businessman secured a 24.5 million EUR deal to provide protective equipment. Although Slovenia has a lengthy and controlled bidding process, these rules have been suspended due to the pandemic (Delić and Zwitter 2020). In addition, another scandal was revealed in the second wave, when the government purchased useless Covid₁₉ tests, which were delivered through connections with the youth organisations of Janša's party (Balkaninsight.com 2021). As in previous governments where Janša held decision-making positions, he replaced the heads of the military and police and the head of the National Public Health Institute. Hence, Slovenia is also experiencing increased attacks by the right-wing SDS on state institutions, media and journalists.

Even if the takeover of state television in Slovenia has been stopped, Janša learns from other right-wing populist leaders, uses Twitter every day and tries to set up his own media houses and television stations with financial help from Orbán's circles. On July 9th, a law was passed that provides a budget reduction of 13 million EUR for the state television RTS, which would lead to a reduction of around 600 jobs (Birn.eu.com 2021). It is clear that Janša was looking in the direction of Budapest, Warsaw and Belgrade: Fidesz, the PiS and the SNS have long ago taken control of the state television. The controversial law is currently being debated in the Slovenian parliament, while the Culture Ministry received numerous objections from more than 100 organisations and individuals about the proposed legislation.

REACTIONS FROM CITIZENS AND THE EUROPEAN UNION

The corona crisis was misused by right-wing populist leaders to negotiate corrupt deals between government-affiliated companies and the ruling party, as well to control various media outlets and to increase their influence on institutions. Civil society responded with protests and demonstrations, which were heavily supported by left-wing movements and NGOs. The ways how citizens demonstrated ranged from car demonstrations in Warsaw and Budapest, cycling protests in Ljubljana to balcony protests

with kitchen utensils in Belgrade. After the lockdown, mass protests were organised in Serbia in order to prevent new lockdowns. In Poland, the parliamentary debate on further tightening of the abortion law has led to demonstrations by the end of October. Such protests need to be analysed as a reaction to the restrictive and corrupt measures undertaken by the right-wing governments, and not primarily against epidemiological measures that should protect the health of its citizens. While the Friday protests in Ljubljana are still ongoing at the beginning of 2021 (albeit on a smaller scale), protests in the other capital cities have gradually faded away.

Simultaneously, a response to the current developments by external actors is weak and disappointing. The European Parliament has debated for several years how to react to breaches against the rule of law within the EU (Gora and Wilde 2020). As applying Article 7 on the member states led to a faltering process in the past, several EU representatives called for making the accession to the EU funds conditional on a rule of law clause. As expected, during the budget negotiation of the Coronavirus recovery fund, Poland and Hungary demonstrated their political coalition, vetoing any adoption of the budget (Holesch and Kyriazi 2021). This resulted in a political stalemate for months. By the end of 2020, a compromise between Poland, Hungary and the EU was reached. The compromise between the rule of law and access to EU funds drawn-up by Germany has been heavily criticised by several MEPs (Theguardian.com 2020). As Hungary and Poland are currently insisting on legal review of the clause by the European Court of Justice, its implementation can be postponed up to two years.

Those who oppose the compromise, notably the Northern EU countries, state that the new text is narrowing down the definition of rule of law, rowing back on important elements. Furthermore, the compromise aims to punish breaches against the rule of law which are linked to the EU budget. Critics thus state that the clause is somehow degraded to an anti-corruption measure. Additionally, Poland and Hungary succeeded in demanding a need for a qualified majority: 15 of the member states, representing at least 65 % of the EU's population are needed to support possible sanctions. The European Commission holds the monopoly on the right of the initiative, but as the Commission was rather reluctant in condemning illiberal practices in Hungary and Poland, only time will show whether something will change through the rule of law clause.

CONCLUDING DISCUSSION

The article demonstrated similarities between the strategies of ruling right-wing parties in the Eastern Europe. All current leaders came to power via formal democratic procedures, i.e. elections, while all of them are as well experienced politicians and had a “start-up” period during the 1990s. The democratic abuses are, therefore, less blatant and more hidden, and the mechanisms used by the ruling parties need more analytical scrutiny in order to make sense of illiberal politics, and therefore, a rise in illiberal regimes in Eastern Europe. While the article demonstrated a convergence of illiberal politics during the Covid₁₉ crisis, the outcome in the four cases is likely to differ. Notably, the country that exhibits the strongest, most independent institutions, as well as most autonomous and strong civil society organizations, will experience the least democratic backsliding. This is currently the case in Slovenia. As things stand now, Janša’s SDS is facing a strong opposition, as the current political crisis in the country shows. In February 2021, the Slovenian parliament aimed to topple the right-wing government in fear of democratic backsliding. Yet, Janša survived the no-confidence vote. Next elections are set to be held in early 2022, until then the SDS still has time to continue with its illiberal politics.

The ruling right-wing parties apply similar strategies in order to strengthen their grip on power and to weaken any domestic opposition. Measures range from corrupt contracts, control of courts and independent media to defaming and threatening the political opposition. Their mechanisms nurture clientelism and nepotism, ultimately leading to democratic backsliding. While the EU compromise on the rule of law clause has been interpreted by some as disappointing, not counting anymore on Brussel’s help, certain domestic factors still can exert pressure on the right-wing parties. In the case of Slovenia, independent institutions still can check Janša’s government. While Janša aimed to strengthen Slovenia’s military complex with an investment of 780 million Euros for the purchase of weapons (like Hungary), the Constitutional Court has temporarily suspended the implementation of the law. As major institutions in the other cases are already under control of the ruling party, and therefore independent civil society organizations, coupled with a strong answer from the EU, are indispensable. The current situation in Europe and the ongoing pandemic during the winter months present substantial challenges for the future of democracy in Eastern Europe as well as the future of the Union itself.

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RAD, KAPITAL I SOCIJALNA KOHEZIJA U (POST)PANDEMIJSKOM OKVIRU¹

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SAŽETAK

Komparativna istraživanja pokazuju da sindikatima i zaposlenima „dobro ide” samo u situacijama paralelnog demokratskog razvoja i ekonomskog rasta koji vode socijalnoj koheziji i smanjenju nejednakosti. Unutar aktuelne pandemijske krize, uz već postojeći demokratski deficit, ponovo ulazimo u period pada ekonomskih pokazatelja i daljeg rasta siromaštva i nejednakosti. Dramatično ekonomsko zaostajanje Srbije se može delimično nadoknaditi samo visokim stopama rasta. Promena je moguća radikalnom promenom ekonomske politike u čijoj je osnovi objedinjavanje nužnih regulativnih sa razvojnim funkcijama i ulogom države, odnosno jasan razlaz sa raširenim neoliberalnim ekonomskim mitovima. Pandemijaska kriza, kao istovremena kriza i ponude i tražnje, kroz brojne izazove, poput rada na daljinu i razvoja internih sistema kontrole i redukovanja troškova, urgentnim čini kreiranje Novog društvenog ugovora kojim će se definisati radni standardi i bazični prihodi za sve radno angažovane.

KLJUČNE REČI: socijalna kohezija, nejednakost, prekarnost, sindikati, razvoja država

Ovaj tekst nastaje u vreme pandemije Korona virusa, atipične zdravstvene i ekonomske krize čije je trajanje i brojne efekte, uključiv i one političke i svetonazorne, krajnje nezahvalno prognozirati. Istovremeno, pandemijaska kriza se ne može, zbog svog planetarnog karaktera i dubine, ni

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ignorisati – u maniru čekanja izvesnijeg i komotnijeg perioda postkriznih analiza kao pokazivanja naknadne pameti. U tom (pre)uskom okviru prvo ću nastojati da konstatujem neke prepoznatljive izazove i promene koje pandemijska kriza nosi. U drugom koraku, krajnje sumarno, pokušaću da evidentiram moguća adaptivna pomeranja ili, pak, ozbiljnije promene u postojećim interpretativnim ekonomskim i socijalnim obrascima, kao i u sadržaju vođenih ekonomskih i socijalnih politika. Društvenu cenu krize, odnosno šanse za rast kohezije i solidarnosti ili, obrnuto, dalji rast nejednakosti, analiziraću u polju uspostavljenih klasnih odnosa i koalicija u Srbiji kao poluperiferijskom društvu i ekonomiji. Najzad, poslednji, četvrti problemski krug sadrži listu predloga i praktičnih koraka koji mogu voditi uspostavljanju socijalno i ekološki održivog društva.

EKONOMIJA POD PANDEMIJOM I POSLE NJE: (PRED)VIDLJIVE POSLEDICE

Nesporno je da će pandemija izazvana virusom Covid-19 imati brojne posledice. Tri posledice su praktično već na delu. Prvo, već je došlo do ograničenja kretanja i okupljanja i, posebno, do pojačanog nadzora u sistemu zdravstvene i bezbedonosne kontrole saobraćaja i putovanja. Drugo, zbog uvećanih troškova upravljanja krizom, povećaće se opseg svetskog duga u odnosu na bruto domaći proizvod (BDP), upravo kao što je 2008. godine došlo do smanjenja kamatne stope i dokapitalizacije i sanacije finansijskog sektora unutar hipotekarne krize. Finansijski balon će se i dalje prenavavati sa uvek otvorenim pitanjem dokle će od toga koristi imati najbogatiji? Treće, velika ulaganja u digitalni svet, posebno u razvoj radnog procesa i obrazovanja na daljinu, postaće deo strategije kriznog menadžmenta i u „normalnim” okolnostima, kako bi se povećala efikasnost rada i racionalizacija. Virtuelni svet biće samo još u većoj meri sastavni deo naše životne svakodnevice.

U pozadini akutne zdravstvene krize sve su vidljivije dodatne dve krizne tendencije. Pandemija u pitanje dovodi sposobnost država da blagovremeno i efikasno upravljaju krizom. Ako se epidemija i dalje bude širila to će izvesno dovesti do oštre politike štednje stanovništva i izazivanja ozbiljne političke nestabilnosti i još dublje ekonomske krize. Prve analize pokazuju da svet ulazi u izvesnu, ozbiljnu recesiju.

Recesija i kriza tada postaju prostor unutar kojeg rastu rizici daljeg rasta nesigurnosti i nejednakosti, što razumemo kao drugu negativnu konsekvencu pandemije. Predviđanja Međunarodne organizacije rada (MOR) su da bi poslove moglo da izgubi na desetine miliona ljudi. Analize MKSS pokazuju da 55% globalnog stanovništva – četiri milijarde ljudi – nije obuhvaćeno bilo kojom naknadom za socijalnu zaštitu, dok manje od jedne trećine sveta uživa u sveobuhvatnom stepenu zaštite. Pad udela prihoda

od rada u odnosu na rastuću produktivnost znači da se ekonomski rast sve manje deli sa radnicima. Svet je tri puta bogatiji u odnosu na period od pre trideset godina, ali daleko je veći broj ljudi koji idu gladni na spavanje nego što misle globalni lideri koji tvrde da su ukinuli siromaštvo (Nezavisnost 2020).

Sve govori da već prisutna recesija i, posebno, dolazeća ozbiljna kriza iz logike vanrednog stanja mogu preći u zlokobnu tišinu radnog logora u kome će poluzaposleni i dodatno osiromašeni i zaplašeni biti usmereni na golo preživljavanje.² Na Balkan će se dodatno, bar na neko vreme, vratiti i oni koji su izgubili nesigurne radne aranžmane u zemljama EU. Prateće aktuelno suspendovanje demokratije i logika vanrednog stanja može završiti u njenom dugoročnom simuliranju. Ovi trendovi uzrokuju očaj i ljutnju, otežavaju agregatnu potražnju i održiv globalni rast.

U kriznom okviru, pored traganja za efikasnom vakcinom i rešenjem akutnog zdravstvenog rizika vlade širom sveta nastoje da upumpavanjem novca relaksiraju posrnule ekonomije i zaustave rast nezaposlenosti. U stanju akutne krize antikrizni menadžment mora biti usmeren ka sigurnosti i zaštiti, moratorijumu na otpuštanja i sužavanja prava i zarada svih radno angažovanih, kao i na odlaganju dospelih poreza i obaveza svima koji ih ne mogu izmiriti.³

Na duži rok gledano, ključno pitanje je, međutim, da li će kriza iznedriti nove ekonomske i razvojne modele i kakva će biti njihova socijalna cena, odnosno hoće li oni voditi redukovanju nejednakosti ili će se samo nastaviti trend već gotovo poluvekovnog njihovog rasta?

MODELI I SCENARIJI IZLASKA IZ KRIZE

Brojne vlade su, pod pritiskom velikih kompanija ili zbog verovanja u neoliberalnu ideologiju, kreirale institucionalni dizajn i odnose moći koji ugrožavaju ljudska i radnička prava, plate i socijalnu zaštitu svojih građana. Dodatno, po nalazima Rebeke Gordon (Gordon 2020), u vreme korona

2 Simulacija efekata mera za očuvanje radnih mesta na finansijski položaj stanovništva u Srbiji pokazuje da one smanjuju stopu siromaštva za oko 1,2 procentnih poena na relativno proporcionalni način u svim starosnim grupama, ali ipak ne uspevaju da povrate nivo siromaštva od pre krize. Kada simulaciji dodamo ključnu meru za podršku prihodima – jednokratnu isplatu od 100 evra (EUR) svim punoletnim građanima – distribicioni efekat i efekat na smanjenje siromaštva kombinovanih mera smanjuju stopu siromaštva na 22,9%, ispod nivoa iste pre krize. Mikrosimulacije pokazuju da su ove dve mere uspele da zaustave širenje siromaštva (Bradaš, Reljanović i Sekulović 2020, 7–9).

3 Kvalitet zapošljavanja i dalje predstavlja izazov u Srbiji. Neformalna zaposlenost čini 18,2% ukupne zaposlenosti. Skoro 23% svih radnika ima ugovore o radu na određeno vreme, što je skoro dvostruko više u odnosu na 2011. godinu (12,4%), dok se broj prekarnih radnika učestvostručio od 2011. godine (2,4% u 2011. i 8% u 2019. godini) pa je sad trostruko veći od proseka u državama EU (2,5%) (ILO 2020, 31).

virusa, poslodavci počinju da sagledavaju nepandemijske koristi od toga što njihovi zaposleni rade od kuće. Zašto, recimo, radnici ne bi sami obezbeđivali sredstva potrebna za rad? To je mnogo lakše opravdati ako oni rade od kuće. I zašto bi poslodavci plaćali rentu za sav taj poslovni prostor kad su kancelarije prazne? Kompanije će profitirati i zahvaljujući manjim troškovima infrastrukture, a u nekim slučajevima čak i zbog zaposlenih koji se sele na jeftinije lokacije.

Posebno su na udaru tri grupe radnika: slabo plaćeni radnici javnih službi i servisa i usluga od čijeg rada svi zavisimo, a koji moraju da odlaze od kuće da bi obavljali svoj posao, čime se izlažu znatnoj opasnosti; bolje plaćeni zaposleni koji rade od kuće, ali od kojih će poslodavci očekivati da budu dostupni tokom celog dana; i neplaćeni ili veoma slabo plaćeni radnici u domaćinstvu, najčešće žene, koji se staraju da svi budu siti, odeveni i emocionalno namireni (Gordon 2020). Do gotovo identičnih zaključaka došlo se i u studiji Fonda Centra za demokratiju (Bradaš, Reljanović i Sekulović 2020, 6–8) posvećenoj uticaju pandemije na položaj radnika u Srbiji.⁴ Posledično, ne iznenađuje pri tome rast gubitka poverenja u institucije, uključujući i demokratiju. Preveliki broj ljudi nije video dividende od demokratije, a vezana nesigurnost i očaj podgrevaju osećaj ljutnje i frustracije.

SOCIJALNO ODGOVORNI KAPITALIZAM – OKSIMORON ILI REALNOST

Već prisutna kriza (post)demokratije i paralelni izazov autoritarnog i ksenofobičnog populizma (Spasojević i Stojiljković 2020) sada su praćeni i ekonomskom recesijom. Istovremeno decenijsko brzo privredno napredovanje Kine otvorilo je proces deglobalizacije i rivaliteta i sukoba oko svetske prevlasti. Sedam decenija nakon Drugog svetskog rata hegemon, gotovo imperijalna, pozicija SAD dovedena je u pitanje. U međuvremenu, finansijski prenaduvani balon nastavlja da raste – po meritornim računicama finansijskih institucija države i građani i dalje nastavljaju da se „zaduju od budućnosti”. Zbir finansijskih derivata u opticaju i dugova, kako

4 Lica u prekarnim (nesigurnim) oblicima rada našla su se u posebno teškom položaju jer radno angažovana lica koja nisu u radnom odnosu sa poslodavcem prema Zakonu o radu nemaju gotovo nijedno radno pravo koje imaju zaposleni. Samozaposleni u neformalnom sektoru, a u koje spadaju ulični trgovci novom i polovnom robom, različite zanatlije, pijačni prodavci, kućno pomoćno osoblje, muzičari, svi radnici neformalno angažovani u ugostiteljstvu i drugim granama ostali su bez prihoda. Teška finansijska situacija sakupljača sekundarnih sirovina dodatno se pogoršala za vreme vanredne situacije budući da je većina njih prestala da radi ili je radila sa smanjenih obimom posla (Bradaš, Reljanović i Sekulović 2020, 6–8).

onih poslovnih tako i porodičnih i studentskih, deset puta je veći od planetarnog GDP-a (Mitrović 2018).

Na analitičkoj ravni radi se, u poslednje tri decenije, o takmičenju, uz uzajamne pozajmice pojedinih alatki, dva modela kapitalizma: liberalno-meritokratskog modela i političkog kapitalizma koji tržišne reforme i privatizaciju drži pod kontrolom aktivne razvojne države i političkom dominacijom komunističke partije. Ukoliko ne reši probleme rastuće nejednakosti, odnosno što se ekonomska i politička moć na Zapadu budu više stapale i postajale jedno, to će liberalni kapitalizam biti bliži plutokratiji, uz preuzimanje određenih elemenata iz političkog kapitalizma (Milanović 2019). Krajnje odredište oba sistema je isto: zbijanje redova privilegovane manjine i beskonačna reprodukcija postojećih elita u budućnost.

Suočen sa klimatskim i demografskim promenama, socijalnim i rasnim sukobima i pandemijom, Svetski ekonomski forum je u Manifestu iz Davosa iz 2020. počeo da zagovara Veliko resetovanje kapitalizma, odnosno da uobličuje model društveno odgovornijeg kapitalizma zainteresovanih strana u kome korporacije svoje ciljeve usklađuju sa dugoročnim ciljevima društva. Kapitalizam zainteresovanih strana, primera radi, traži od kompanija da publikuju podatke o ekološkoj ceni i efektima svoga delovanja, ali i da pokriju sve troškove zdravlja zaposlenih, kao i njihovu obuku za sticanje novih veština. Kompanije su dužne i da javnim učine podatke o razlikama u zaradama zaposlenih, kako u pogledu razlika između različitih rodnih, starosnih i rasnih grupa radno angažovanih, tako i u pogledu neopravdano velikih raspona između njihovih zarada i plata menadžmenta. Manifest iz Davosa prihvata i drži legitimnim i narativ o osnovnoj zaradi kao zaradi dovoljnoj da zadovolji osnovne životne standarde koji se razlikuju zavisno od nivoa razvijenosti. Ne radi se tu, naravno, kao što to ističe desnica, o napuštanju kapitalizma i puzajućem socijalizmu već o preventivnom dizaj-niranju spašavanja kapitalizma (Schwab 2020).

IMA LI ODRŽIVE ALTERNATIVE? KA OBNOVI JEDNAKOSTI I PRAVIČNOSTI

Paralelno sa krizom rastu i razvijaju se i ideje o povratku u normalnost, osiguranju pristojnog života za sve, odnosno o povratku umerenoj (ne) jednakosti. Ključno pitanje je: da li je moguća alternativa – skup politika koje su efikasne a pritom i inkluzivne, odnosno ne proizvode još dublje društvene podele?

Ovde ćemo sumarno izložiti tri takva pristupa. Dva od njih – (1) koncepti i inicijative oficijelnih aktera, poput Decent Job Initiative ili Programa za budućnost rada Međunarodne organizacije rada ili danskog Flex-security programa, (2) kao i predlozi povratka na progresivno oporezivanje ostaju u okviru „organizovanog kapitalizma”, odnosno tržišno-socijalne

ekonomije. Tek treća grupa pristupa – koncepti razvijeni na bazi Rolsove ideje radikalnog reformizma i socijalizacije vlasništva poseduju postkapitalistički potencijal.

Deceniju unazad čak i Svetska banka i Međunarodni monetarni fond promovišu inkluziju i dostojanstveni rad u svojim dokumentima. Dobar primer je „Pristojan rad” (Decent Job Initiative) Međunarodne organizacije rada koja je izazvala mnogo pohvala, analiza i unošenja u javne dokumente brojnih država, ali je donela samo kozmetičke promene. Kao i u slučaju danskog Flex-security programa, poenta je u pokušaju mirenja fleksibilizacije radnih odnosa sa sigurnošću – obilnim transferima i programima obuke države onima koji gube posao ili ga imaju neredovno. Ključno ograničenje sadrži se u činjenici da program nije dobar kada su vremenske prilike loše – kada prekarni radnici postaju mnogobrojni, a budžeti čak i bogatih država se pokazuju ograničeni.

Kada je o redistributivnim strategijama reč, ideja o povratku na fiskalnu politiku progresivnijeg oporezivanja čini važan deo plana. Prethodno veliko smanjivanje poreskih stopa za najviše dohodovne razrede, izvedeno u vreme „konzervativne revolucije” Regana i Tačerove, doprinelo je naglom rastu nejednakosti, a da pritom nije ostvarena adekvatna korist za društvo u celini. Atkinson predlaže povratak na politiku univerzalne socijalne zaštite koja bi bila svima dostupna, nasuprot uslovljenom pružanju pomoći koja izoluje najsiromašnije; govori i o formiranju „svetske poreske uprave” i mogućem povećanju međunarodne pomoći na jedan odsto bruto društvenog proizvoda (navedeno prema Piketty 2015). Važan teorijski doprinos primeni oporezivanja u rešavanju problema koncentracije bogatstva dao je Tomas Piketi zalaganjem za povećanje poreza i progresivno oporezivanje, ali ne samo tekućih dohodaka nego i akumuliranog bogatstva. On predlaže da se uvede porez od 1% za domaćinstva koja imaju imovinu u vrednosti od 1.000.000 do 5.000.000 dolara, a 2% na imovinu veću od 5.000.000; na imovinu preko milijardu dolara ona bi mogla da bude i 10% (Piketi 2015, 253). Ukratko, tržište i tržišna ekonomija moraju se ponovo ugraditi u jedan širi društveni kontekst, a to uključuje i moderno društvo, ekonomiju znanja, ograničavanja nejednakosti i u nove forme kontrole biznisa.

Rols u svojim poznim spisima, posebno Pravdi i pravičnosti (Rawls 2001), tvrdi da u pravednom društvu politička ekonomija mora biti organizovana sa eksplicitnim ciljem *zajedničkog* ili *široko raspedeljenog* bogatstva. Brojni autori su se fokusirali na razvijanje oblika proizvodnog kapitala sa širokim vlasništvom, bilo od strane radnika, lokalnih organizacija i samouprava ili drugih hibridnih oblika vlasništva poput kooperativa, zadruga i drugih oblika socijalnog preduzetništva. Pristalice progresivne agende pritom ne nameravaju samo da stvore socijalnu državu sa „distributivnim organima”, već netržišni sektor sa svojom spontanom dinamikom

i mehanizmima: kreditnom unijom, neprofitnom bankom, platformama zadruga, anarhističkih pekara, otvorenim izvornim softverskim projektima, dobrovoljnim jaslicama... Pri tome se neretko predlažu promene vlasničke strukture proizvodnog kapitala kroz, recimo, efektivno podružtvljavanje vlasništva nad akcijama korporacija koje svakom građaninu daje trajni udeo u vlasništvu nad korporacijama. Sa stanovišta efikasnosti nevažno je kako su vlasnička prava alocirana, pod uslovom da troškovi transakcija ostaju ravni nuli.

Jedan takav mehanizam nedavno je opisao Piketi u knjizi *Kapital i ideologija* (Milanović 2020). Piketi ne predlaže ukidanje svih oblika privatnog vlasništva, već traga za načinima da se ekonomska moć vlasnika ograniči. Za tu svrhu iznosi radikalnan predlog da se za sva preduzeća koja dostignu određenu veličinu uvede obaveza suvlasništva radnika koji bi posedovali 50 odsto udela, dok nijedan pojedinačni kapitalista ne bi mogao posedovati više od jedne desetine unutar onih 50 odsto udela koji ostaje kapitalistima. Tu je i predlog da se svakome u dobi od 25 godina dodeli suma od 120.000 evra, kao univerzalna dotacija i početna mera smanjenja društvene neravnopravnosti na samom početku aktivnog radnog života. Takav sistem uključuje visoke godišnje poreze na privatno bogatstvo i progresivno oporezivanje nasledstva. Ostvarenjem ovog cilja smanjila bi se nejednakost i strukturno ograničila mogućnost bogatih da kontrolišu politički proces i prenose bogatstvo sa generacije na generaciju (Milanović 2020).

Time se postupno, a da Piketi ne formuliše ideju o akterima promena i njenim alatcima, prelazi put od hiperkapitalizma do participativnog socijalizma. On samo konstatuje da bez novog, uverljivog, univerzalističkog narativa, koji promovise jednakost, sve je verovatnije da će izazovi rastuće nejednakosti, migracija i klimatskih promena ubrzati povlačenje u identitetske nacionalističke politike koje su zasnovane na strahovima od „velike zamene” jedne populacije drugom (Piketty 2019, 19–26).

Poseban, na relnom odnosu snaga rada i kapitala na tržištu rada zasnovan način zamišljanja promene modernog kapitalizma Branko Milanović izlaže na kraju dela *Capitalism, Alone* (Milanović 2019). Taj način je utemeljen na „objektivnom” odnosu dva faktora proizvodnje (rada i kapitala) ili, tačnije, njihovoj relativnoj oskudnosti. Današnja apoteoza kapitalizma velikim delom je proizvod slabljenja pozicija rada usled udvostručavanja globalne radne snage koja radi pod kapitalističkim uslovima posle tranzicije u kapitalizam u zemljama bivšeg sovjetskog bloka, Kine, Vijetnama i Indije. Takođe, savremeni digitalni kapitalizam omogućio je komercijalizaciju („komodifikaciju”) mnogih aktivnosti koje dosad nisu bile komercijalizovane. Dominioni kapitalizma prošireni su i prostorno i „interno”, dubinski ulaskom u privatnu sferu pojedinca. Milanović konstatuje da ako brojnost svetske populacije dostigne vrhunac i na njemu ostane

(na šta ukazuju sve projekcije) i ako zalihe kapitala nastave da rastu mogli bismo se suočiti sa sasvim drugačijom situacijom – suprotnom onoj u kojoj se svet nalazi od 1990. Iako ne mora tako izgledati na prvi pogled, to je veoma važno: moć delovanja koja je sada gotovo isključivo na strani kapitalista bila bi prenetna na „radnike” (Milanović 2019, 209–214).

IMAJU LI SINDIKATI PROGRAM I STRATEGIJU ZA IZLAZAK IZ KRIZE?

Strateški cilj sindikata i njegova misija je vratiti dostojanstvo radu. Nasuprot uslovima u kojima živi većina (polu)zaposlenih, dostojanstven rad je samo onaj rad koji ne unižava čoveka i koji objedinjuje sledećih šest elemenata: (1) produktivan rad, a ne tek politički kreirano (privremeno) radno mesto, (2) uređen i fer odnos poslodavaca prema zaposlenima, (3) bezbedno i zdravo radno mesto i (4) zaštitu socijalnih prava zaposlenih i članova njihovih porodica. Time se ujedno kreiraju i (5) uslovi za lični prosperitet zaposlenog i njegovu socijalnu integraciju, koja uključuje i (6) slobodu zaposlenih da se organizuju i aktivno učestvuju u odlukama koje ih se neposredno tiču. Višestruki krizni izazovi naterali su sindikate na aktivniju poziciju i urgentnim učinile izradu šire pregovaračke pozicije koja, pored interesa zaposlenih, uključuje i interese i zahteve svih radno angažovanih, samozaposlenih, aktuelno nezaposlenih i nekadašnjih zaposlenih (penzionera). Primer takvog angažovanja su i zahtevi za socijalno pravedniju i ekološki održivu Evropu, koje je Evropska konfederacija sindikata (EKS) uputila takmacima na izborima za Evropski parlament 2019. godine. Zahvaljujući, pored ostalog, i kampanji i angažovanju EKS, rast ksenofobičnog desnog populizma je usporen.

Prethodno proklamovani Evropski socijalni stubovi govore o potrebi postojanja socijalnog dijaloga kao institucionalnog okvira i mehanizama za postizanje konsenzusa. Evropski socijalni stubovi su politička povelja – dokument potpisan na socijalnom samitu u Geteborgu u Švedskoj, novembra 2017., od strane Evropskog saveta, Komisije i Parlamenta. Dokument sadrži bazičnih 20 socijalnih stubova – radnih i socijalnih prava, grupisanih u tri celine: jednake mogućnosti i pristup tržištu rada, fer radni uslovi i socijalna zaštita i inkluzija (European Commission 2017, 10–18).

Unutar pandemijske krize Međunarodna konfederacija sindikata govori o novom društvenom ugovoru.⁵ Nejednakost, rasna nepravda i rodna diskriminacija proizveli su eru ljutnje praćenu građanskim nemirima i nepoverenjem u demokratiju. Globalni sindikalni pokret poziva vlade da

5 MKSS konstatuje da je i pre COVID-19 pandemije 60% globalne radne snage u neformalnom sektoru, bez prava, minimalne plate i socijalne zaštite, a neizvestan rad zabrinjava gotovo 40% onih u formalnom sektoru (Nezavisnost 2020).

se pripreme planovi za oporavak i otpornost koji će sadržati, naravno uz prisutnu planetarnu solidarnost, tri ključne grupe ciljeva.

Prvu grupu ciljeva sigurno čine zapošljavanje i socijalna zaštita u koje su uključeni: minimalne plate za dostojanstven život i osnovni prihod za one u neformalnoj ekonomiji, bolesne i nezaposlene; univerzalna prava na slobodu udruživanja i kolektivno pregovaranje; jednako ekonomsko učešće žena, svih rasnih grupa, radnika migranata, mladih radnika i zaštita svih od diskriminacije; adekvatno finansirano univerzalno javno zdravlje, obrazovanje i nega.

Druga grupa ciljeva je vezana za regulisanje ekonomske moći. Ona uključuje: socijalni dijalog i mere pravedne tranzicije, dogovore sa radnicima i njihovim sindikatima; industrijske politike za klimatsku tranziciju; javno zdravlje, obrazovanje i negu; javni transport; jačanje i obnovu eko sistema i održive poljoprivrede, kao i digitalno povezivanje za sve.

Treću grupu čine mere podsticaja za radna mesta i pravednu tranziciju. Potrebno je korigovati i obnoviti sisteme oporezivanja tako da se omogući ulaganje u radna mesta u javnim uslugama i industriji, u skladu sa industrijskim politikama za inkluzivan i održiv razvoj. Zajedno sa ovim, potrebni su novi mehanizmi, uključujući porez na finansijske transakcije, digitalni porez i porez na bogatstvo (Nezavisnost 2020).

Po mome sudu, unutar aktuelne krize sindikalni mejnstrim se pomakao od odbrane nasleđa države sigurnosti ka tvrdnji da javni i netržišni sektor mora obezbediti pružanje univerzalnih besplatnih osnovnih usluga i osnovnog dohotka. Sindikati nisu bili skloni univerzalnom bazičnom dohotku, odnosno ukidanju svake veze između rada i primanja. No, svest da neće biti kvalitetnih i održivih poslova za sve dovela je do prihvatanja neke vrste kombinovanja osnovnog dohotka sa univerzalnim javnim uslugama. U prilog ovom stavu ide, recimo, nalaz Arandarenka i Aleksića da je 16% starijih od 65 godina u Srbiji bez ikakvog prihoda (Arandarenko i Aleksić 2020, 17).

Nužnim se čini povratak na progresivnije poreske stope. Jačaju i argumenti za ozakonjenje kraće radne nedelje, bez gubitka plate, poput prakse u Finskoj. Ujedno se tako socijalno promovise automatizacija i robotizacija, kao što i uvođenje univerzalnih osnovnih prihoda i usluga pruža adekvatnu kompenzaciju za proces gubitka poslova. To omogućava da ljudi prežive vremena kad dobro plaćeni posao postaje deficitaran – i poništava slabu pregovaračku moć rada (Stojiljković 2020).

DRUŠTVENE KOALICIJE I ISHODI KRIZE: SLUČAJ SRBIJA

Polaznu pretpostavku ovog rada čini teza da ishodi krize zavise od uspostavljenih interesnih saveza i konstelacija, pre svega od rezultirajuće (pre) raspodele političkog kapitala, kao i moći političke mobilizacije i interpre-

tacije. Primera radi, razlike u imovini i prihodima stvaraju se ili redukuju u velikoj meri vođeni poreskim i socijalnim politikama, kao i kreiranim (antiradničkim) radnim zakonodavstvom koji su efekat raspoloživog političkog kapitala i moći. Srbija je početkom treće decenije 21. veka, kada su u pitanju njen državno-politički okvir i identitet, nedovršena i još uvek slaba, preciznije, selektivno slaba, interesima bogatih i moćnih dominantno okrenuta poluperiferijska, država i društvo. Osnovni ekonomski problem Srbije su, i pored više puta započinjane „giljotine propisa”, siva ekonomija, korumpirana administracija, slabi konkurentski obrasci i javni i privatni monopoli, razvijene koruptivne sheme i partokratska vladavina nad javnim sektorom.⁶ U takvom sistemu nema adekvatne kontrole nad racionalnošću javnih nabavki i efektima poslovanja (Stojiljković 2013; Pavlović 2018).

Postoji čitav niz faktora koji omogućavaju ovakvu putanju u slučaju Srbije. Na prvom mestu je tu fenomen „zarobljene države”, u kojoj su javne institucije pod vlašću i uticajem krugova koji se uglavnom rukovode kratkoročnim interesima.⁷ Drugo, paralelna otvorenost granica znači da će sva ulaganja u „ljudski kapital” – bilo da su u pitanju inženjeri, informatičari, vozači kamiona ili patronažne sestre – lako biti uzaludna. Demografska situacija, odnosno istovremeni pad broja i starenje stanovništva, uz prateću ekonomsku migraciju, posledično vrši pritisak na penzijski sistem, radni sistem i opšte razvojne perspektive. Razvojna strategija svih dosadašnjih vlada od 2000. godine bila je privlačenje stranih direktnih investicija (SDI). U svetu koji je sektor po sektor, službu po službu, izbacivao državu i društvo iz privrednog upravljanja i razvoja, oslonac na strani kapitala i privatizacije bio je jedini smislen pravac delovanja koji bi mogao da omogući ostanak na vlasti novoj političkoj eliti. Istovremeno, gotovo da nema domaćih ulaganja, pa ni domaće štednje.

Polazeći od Hiršmanovog modela interesnih koalicija, Arandarenko (Arandarenko 2020) govori o formiranoj političkoj ekonomiji dvostrukog izlaska (spoljne i unutrašnje emigracije, odnosno opstajanja u sivoj ekonomiji) i kupljene lojalnosti – kroz potrošnju servisnih srednjih slojeva. Zarobljena država mogla bi se opisati kao metaorganizacija i institucionaliza-

6 Iznos propuštenih poreskih prihoda usled sive ekonomije u Srbiji procenjuje se na oko 11% BDP-a, po čemu je Srbija na drugom mestu u Evropi prema utaji poreza. Visok iznos utajenog poreza u Srbiji je posledica rasprostranjene sive ekonomije i iznadprosečnog nivoa poreskog opterećenja zemalja CIE (Arsić i Randelović 2017, 319–321).

7 Zarobljavanje države, shvaćeno u najužem smislu, predstavlja situaciju u kojoj kompanije, institucije ili moćni pojedinci koriste korupciju – kupovina zakona, amandmana, dekreta ili kazni, kao i davanje ilegalnih priloga političkim partijama i kandidatima, kako bi uticali i oblikovali državnu politiku, zakonsko okruženje i ekonomiju u skladu sa svojim parcijalnim/privatnim interesima. Ekspertski tim Svetske banke pod zarobljenom državom podrazumeva uspostavljanje pune kontrole nad zakonima od strane biznisa preko uticajnih političkih posrednika u parlamentu, vladi i drugim državnim telima (Maira 2014).

cija korupcijskih odnosa koji vode ka virtuelnoj privatizaciji upravljanja (Innes 2014).

Privredni sistem Srbije je takav da stanovništvo, pre svega na osnovu apresijacije dinara, odnosno nerealnog kursa, omogućenog i visokim doznakama iz inostranstva koje čine oko 8% GDP, troši, a stranci ulažu. To je model po kome se živi od danas do sutra. Priliv doznaka drži siromaštvo pod kontrolom i dopunjava socijalne transfere, pa je država, makar delimično, rasterećena svoje uloge u preraspodeli dohotka od bogatijih ka siromašnijim grupama stanovništva. Monetarni sistem i politika deviznog kursa nisu podešeni da podrže međunarodnu konkurentnost ekonomije i izvozno orijentisani rast, već da obezbede viši ukupni dohodak i potencijal potrošnje 'grupa lojalnosti' (Arandarenko 2020). Od 2015. politika se menja u smeru da se subvencionišu investicije i štedi na platama i penzijama. To za efekat ima da ljudi manje troše, a više se izvozi, ali to takođe ne obećava visoki rast.

Srbija već duže vreme primenjuje subvencionisanje kao način privlačenja stranih ulagača. Podsticaji su najčešće usmereni prema kreiranju proizvoda niske složenosti i male dodatne vrednosti uz veliko angažovanje ručnog rada niskokvalifikovanih radnika. Aktuelni primenjeni razvojni obrazac u Srbiji može rezultirati prevazilaženjem zamke siromaštva i nerazvijenosti, ali strane direktne investicije, posle kraćeg perioda dinamičnog rasta, u drugoj fazi mogu uvesti u tzv. klopku srednje razvijenosti – zaposlenost je relativno visoka, ali su plate i životni standard na trajno niskom nivou (Katić 2020).

Preuveličavanje značaja stranih direktnih investicija, zastupljenost niskog (linearnog) oporezivanja, urušavanje uloge i snage sindikata, kao i fleksibilizacija tržišta rada u pogledu vremena, zaposlenja, plata i organizacije rada su bitni faktori rizika od zarobljavanja države od strane stranog kapitala. Šanse da se na tako kreiranom klijentelskom prostoru probude demokratski prkos i solidarnost i kreira reformrska ekonomska i politička agenda svakim danom sve su manje (Stojiljković 2017, 21). Ko je, pri tome, uživao u plodovima kakovog-takvog rasta, bilo neposredno bilo posredstvom državnog budžeta?

Dobitnici su jasni: strani kapital i domaći kartel vlasti, koji opslužuje poslušna servisna klasa koju čini stotinak hiljada nosilaca javnih funkcija (37.000) i njihovih pomoćnika, pretežno regrutovanih kroz mreže političkog klijentelizma.⁸ Dodatni, spoljni osigurač vlasti čine i stotine

8 U intervalu od 2001. do 2018. godine u Srbiji je realizovano više od 450 projekata stranih direktnih investicija, ukupne vrednosti preko 31.000.000.000 evra. Tokom poslednjih 20 godina trećina ukupnih ulaganja u Srbiji potiče iz stranih direktnih investicija (Filipović i Nikolić 2017; Molnar 2020, 94). Privatizacija je omogućila da se reši problem vlasničke kontrole nad preduzećima, dok je visok stepen koncentracije vlasništva uzrokovao probleme

hiljada partijski uposlenih, pretežno u javnom sektoru. Posledično, država je zarobljena od pripadnika političke i poslovne elite koji kroz razvijene mehanizme klijentelizma, korupcije i partijskog zapošljavanja kontrolišu društvo ostavljajući ga bez realne socijalne i političke alternative.

Na drugoj, gubitničkoj strani, prema podacima Tima za socijalno uključivanje i smanjenje siromaštva (Bradaš, Reljanović, Sekulović 2020) iz 2018. godine, u Srbiji trenutno živi pola miliona apsolutno siromašnih građana, 24,3% građana je u riziku od siromaštva, dok čak 61,6% građana (4.300.000) ima ličnu procenu o sopstvenom siromaštvu (tzv. subjektivno siromaštvo). Uz to, Srbija je zemlja sa izuzetno visokim stepenom socijalnih nejednakosti. Gini koeficijent 35,6, u poređenju sa prosekom EU od 30,4, svrstava nas na začelje liste evropskih zemalja, sa tek neznatno boljim rezultatom od Crne Gore, Litvanije, Bugarske i Turske. Za već visoku nejednakost imovine i dohotka i visok rizik od siromaštva i socijalne isključenosti nije odgovoran samo (1) disbalans između kvantiteta i kvaliteta zaposlenosti, već i (2) sistem slabe socijalne zaštite, (3) neadekvatna politika oporezivanja rada, ali i (4) izmene radnog zakonodavstva nakon 2014. godine (Arandarenko i Aleksić 2020, 14–16).

Istini za volju, u ovoj praksi nema ničega novog. Nove su razmere koje je zadobio politički klijentelizam koji Hicken određuje kao „uzajamno korisnu razmenu resursa između aktera nejednakog statusa” (Hicken 2011, 290). Klijentelizam i partijsko zapošljavanje u Srbiji nije ograničeno samo na javni sektor već se kroz praksu ostavljenih radnih mesta za potrebe lokalnih moćnika preliva u javno-privatna partnerstva i privatni sektor.⁹

rastućih nejednakosti. Zbog toga se, u formalnom smislu, čini kao da je postojao „narodni kapitalizam” zbog ogromnog broja akcionara, dok se suštinski radi o „tajkunizaciji” korporativnog sektora u Srbiji, odnosno umesto „narodnog kapitalizma” stvorena je „tajkunska privreda” (Labus 2007). Otuda često dolazi do saradnje političkih elita i velikih korporacija pa se ne govori samo o korporativnoj i/ili stranačkoj zarobljenosti države, već i mogućnosti simbioze ova dva tipa zarobljenosti. Tajkuni su rezultanta političkog i ekonomskog sistema, a ne njihov uzrok, pošto vlast upravlja korupcijom. Tajkuni idu logikom lakše zarade, kada je i ukoliko je to moguće, odnosno svuda imaju isti karakter, logiku, psihologiju, mentalitet i etiku (Katić 2013; Đukić 2018).

9 Političkim pokroviteljstvom uspostavljena (ne)formalna mreža funkcionise kao piramidalna struktura sa patronom na vrhu i klijentima („brokerima”) koji predstavljaju patrona na nižem hijerarhijskom nivou sa sopstvenom klijent-mrežom u prizemlju sistema (Kitschelt & Wilkinson 2009). Razlika između patrona i posrednika je da broker nema kontrolu nad resursima, on dobija samo neke resurse od patrona koje može da distribuirati klijentima. Klijentelizam podrazumeva asimetrično prirodu povezanosti između aktera različitog statusa i moći, čuva i reprodukuje nejednakosti, i, stoga, češće se može naći u ekonomski nerazvijenim društvima, uključujući sve društvene slojeve. Klijentelistički odnosi su tako prodrli u pore svih institucija koje su nadležne za funkcionisanje sistema: parlamenta, sudstva, vlade, lokalne uprave, političkih partija i medija. Po potrebi, čak i organizacije civilnog društva mogu da se uključe u klijentelističke transakcije (Cvejić 2016).

Država manje-više otvoreno, poput štrajka u Fijat Krajsleru iz 2017, u svim konfliktnim slučajevima staje na stranu vlasnika, osobito stranih kojima se izlazi u susret jer oni „ne vole da se petljaju” sa otkazima zaposlenima i zahtevima sindikata (Bagnardi i Petrović 2020). Aktuelno stanje industrijskih odnosa u Srbiji, kao i većini drugih zemalja u tranziciji, ima šest svojih temeljnih karakteristika: (1) nekoordinirani sindikalni pluralizam; (2) sve manju stopu sindikalizovanosti; (3) sve više preduzeća bez sindikata; (4) sve restriktivnije radno zakonodavstvo, uključiv i norme kojima se reguliše delovanje sindikata; (5) istovremeno odsustvo dovoljno relevantnih poslodavačkih organizacija i (6) nedovoljno razvijen socijalni dijalog. Ima, dakle, dovoljno osnova da se zaključi da su pre potrebni prethodni sanacioni radovi nego rekonstrukcija građevine autonomne moći sindikata i zaposlenih koje nikada nije ni bilo.

Istovremena politička marginalizacija sindikata rezultat je činjenice da je, zbog dominacije kulturno-vrednosnih podela i nacionalnih identiteta, kao i prisutnog postkomunističkog protržišnog entuzijazma, ekonomska stranačka ponuda ostala i praznjikava i nespecificovana (Spasojević i Stojiljković 2020). Dodatno, zbog izraženog praktičnog pritiska globalizovanog korporativnog kapitala, prostor politike ostao je i bez ozbiljne i odgovorne, prosindikalne političke ponude. Posledično, rašireno je mišljenje da su za zaposlene i sindikate sve partije iste, odnosno jednako neprihvatljive. Populizam i rašireni klijentelizam su, dakle, stvari samo dovele do kraja (Stojiljković 2020b).

DRŽAVA I DRUŠTVO U POSTPANDEMIJSKO DOBA

Vratimo se na kraju polaznoj tezi da se unutar kriza rađaju nova rešenja i da atipične krize, poput ove pandemijske, otvaraju prostor i za zaokrete i pronalaženje i izbor atipičnih rešenja. Značajno je, recimo, pitanje da li će pandemija trajnije probuditi osećaj solidarnosti i empatije, što bi vodilo ka izboru socijalno senzibilnijih rešenja i redukciji nejednakosti?

Naravno, šta će biti odabrano rešenje zavisice pre svega od sposobnosti uspostavljenog dominantnog bloka moći da ga interpretira i nametne kroz prihvatljivu političku formulu. Nažalost, to na duži rok neće biti rešenja koja zagovaraju radikalne antikapitalističke strategije, poput ideja o participativnom socijalizmu ili radikalnim imovinskim reformama, jer ona nemaju razvijenu strategiju i artikulisane i umrežene (moćne) socijalne adresate i promotere. Verovatni scenario je poluoficijelni program Velikog resetovanja kapitalizma Svetskog ekonomskog foruma koji ima i tri glavne komponente. Prva težište ima na, najmanje izvesnim, pravednijim ishodom. Vlade bi trebalo da poboljšaju koordinaciju u poreskoj, regulatornoj i fiskalnoj politici, nadgrade trgovinske aranžmane i stvore uslove za ranije spomenutu „ekonomiju zainteresovanih strana”. To može uključiti-

vati promene poreza na bogatstvo, povlačenje subvencija za fosilna goriva i nova pravila koja regulišu intelektualnu svojinu, trgovinu i konkurenciju.

Druga komponenta agende Velikog resetovanja osigurala bi da investicije unapređuju zajedničke ciljeve, kao što su jednakost i održivost. Programi potrošnje velikih razmera, koje mnoge vlade sprovode, predstavljaju glavnu priliku za napredak. Evropska komisija je, recimo, objavila planove za Fond za oporavak u iznosu od 750.000.000.000 evra. Umesto da se sredstva koriste za popunjavanje pukotina u starom sistemu, trebalo bi da posluže za stvaranje novog koji je otporniji, pravičniji i dugoročno održiv. To znači, na primer, izgradnja „zelenih” urbanih infrastrukture i stvaranje podsticaja za industrije da poboljšaju svoje rezultate u pogledu ekoloških, socijalnih i upravljačkih pokazatelja.

Treći i poslednji prioritet agende Velikog reseta je da se iskoriste inovacije četvrte industrijske revolucije za podršku javnom dobru, posebno rešavanjem zdravstvenih i socijalnih izazova. Pandemija tako predstavlja nesiguran i uski prostor mogućnosti da se sistem resetuje kako bi stvorio zdraviju, pravičniju i prosperitetniju budućnost (Schwab 2020).

IZGLEDI ZA SRBIJU

Kada je o Srbiji reč, sledeći analize Katića (Katić 2020), moglo bi se izdvojiti šest osnovnih poruka. Kvalitet obrazovnog sistema će odrediti sudbinu države – postoji visoka pozitivna korelacija između kvaliteta obrazovnog sistema i ekonomskih rezultata. Za državu bez demokratske tradicije je ključno da se podigne zid između političkog (smenjivog) dela vlasti i meritokratske državne uprave. Bez te jasne i čvrste podele entropijski procesi će neprekidno razjedati državu. Treće, strane investicije mogu biti dopuna industrijskoj politici, ali nijedan uspešan model razvoja nije počivao na stranim investicijama kao strateškom opredeljenju. Četvrto, unutar aktuelne pandemijske krize Srbija mora razumeti da preživljavanje zavisi od samodovoljnosti na osnovnim egzistencijalnim segmentima. Koncept zaštite strateških grana danas sprovode sve velike razvijene ekonomije. Državno vlasništvo nije smetnja profesionalizaciji javnih preduzeća, niti bi evidentne slabosti u upravljanju trebalo da budu izgovor za prodaju. Peto, poreska politika svake civilizovane države treba da počiva na progresivnim stopama oporezivanja. To bi pomoglo da se porezi na najmanja primanja smanje, da se spreči veliko socijalno raslojavanje i da se stimuliše društvena solidarnost. Najzad, da bi se ovaj model mogao sprovesti, neophodno je preći na sistem bruto plata u kome zaposleni imaju jasnu svest o plati koju zarađuju i davanjima za poreze i doprinose. Ključna socijalna i politička posledica je „revolucija u glavama” – svest da nam nikakva vlast ništa ne poklanja već dobro ili loše usmerava i troši naš novac (Katić 2020).

Istovremeno, pitanja kvaliteta radnih mesta, kvaliteta obrazovnog sistema, oskudice određenih kvalifikacija, potrebe većeg i intenzivnijeg učešća u radnoj snazi stanovništva radnog uzrasta koje je sada izvan radne snage ili je angažovano na lošim, slabo plaćenim i nisko produktivnim poslovima – obeležiće narednu deceniju i biće glavni izazovi politike zapošljavanja i ukupne ekonomske politike. U tom kontekstu, potrebno je preispitati regulativu i primenu zakonskih instituta koji podržavaju rast prekarne zaposlenosti – ugovora o delu, o privremenim i povremenim poslovima, agencijskom zapošljavanju, o stručnom osposobljavanju i stručnoj praksi, preko studentskih ili omladinskih zadruga. Jači inspekcijski nadzor, izmene zakonskih rešenja i maksimiziranje broja fleksibilnih ugovora predstavljaju potencijalna rešenja koja bi mogla da preokrenu sadašnji nepovoljan trend rasta prekarnosti.

Kada je o socijalnim politikama reč, udeo rashoda za socijalnu zaštitu u BDP-u u Srbiji (ispod 25%) niži je od proseka EU koji se poslednjih godina kreće na nivou od približno 29%. Srbija tako spada u grupu zemalja koje izdvajaju malo a i to što izdvoje ne upotrebe na dovoljno efikasan način (Matković 2017, 38–41). U stanju limitiranih resursa a ogromnih socijalnih potreba, za koje je Srbija ideal-tipski primer, eksperti preporučuju fokusiranje države na socijalno investiranje i socijalno preventivno delovanje. Investirati treba u ono što može povući razvoj – u obrazovanje i sticanje veština.

U širem smislu, prevenciju čine i socijalni dijalog i dogovor sindikata i društveno odgovornih poslodavaca o podizanju nadnica, sticanju veština i izdašnjim socijalnim benefitima. Unapređenje socijalnih prava i standarda uključuje i održive, pristojne penzije. Država ima dužnost da obezbeđuje javna dobra i socijalnu zaštitu. Sve to govori u prilog uključivanju države u obezbeđivanje socijalne i zdravstvene zaštite i obrazovanja i jačanje njene razvojne funkcije.

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SUMMARY

LABOUR, CAPITAL AND SOCIAL COHESION IN POST-PANDEMIC
FRAMEWORK

Comparative research shows that trade unions are “doing well” only in situations of parallel democratic and economic growth which lead toward social cohesion and reduction of inequality. Simultaneous effectuation of all three development factors never occurred in Serbia. Within the current pandemic crisis, along with democratic deficit, we are re-entering the period when drop in economic indicators causes further increase of poverty and inequality. Serbia’s dramatic stunting can only be partially compensated by high growth rates. Change is possible only with radical change of economic policy, implying integration of necessary regulatory and development functions and role of the state, in other words clear abandonment of widespread neoliberal economic myths. Pandemic crisis, as the crisis affecting both supply and demand, with its numerous challenges, such as remote working, and development of internal control systems and cost reduction that may lead to further flexibilisation of work, urgently requires the creation of a new Social Contract that would define labour standards and basic income for all persons engaged in any form of work.

KEYWORDS: social cohesion, inequality, precariat, trade unions, development state.

CAPITAL AND MARX'S EPISTEMOLOGICAL REVOLUTION

FROM NEUE MARX-LEKTÜRE TO POLITICAL MARXISM

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SUMMARY

The paper discusses the thesis about Marx's "epistemological revolution" by elaborating two issues that incorporate two entirely different contemporary Marxist traditions. To give this undertaking a more precise formulation, in its first part, the study examines the relationship between theory and history within the critique of political economy, proposed by Michael Heinrich under the tradition known as Neue Marx-Lektüre. It then turns to introducing the second part of the discussion related to the "commercialization model" of capitalist development, outlined by Robert Brenner and Ellen Meiksins Wood within the context of the so-called Political Marxism. A special emphasis is thereby put on the latter, since it deals with the contemporary nature of a few distinct epistemological and methodological novelties of the *Capital*, as well as some posited in the *Grundrisse*.

KEYWORDS: *Capital*, Marx, history, theory, form, commercialisation model, epistemological revolution, critique of political economy

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1 INTRODUCTION

*Every new aspect of a science involves a revolution
in the technical terms (Fachausdrücken) of that science.*

– Engels 1886, 35–6

The *Capital* is one of those extraordinary books that one will hear mentioned in practically every serious discussion regarding capitalism. Clearly, interpretations of the *Capital* that appeared throughout history vary and are affected by different ideological inclinations. This is evident just by briefly comparing the interpretations that emerged after the historical fall of the socialist left and were developed in either the context of close ties between party politics and Marxism or at the margins of the academia. The amount of texts on Karl Marx and Marxism written during the economic crisis of 2008 increased, as it was, after all, the time when debates on capitalism, austerity measures, and state bailouts were mainstreamed as an integral part of everyday life. Marx “has been on the rise”, as stated by *The Guardian* a couple of years after the outbreak of the crisis (Jeffries 2012). Under the same public and political climate, Piketty’s *Capital in the Twenty-First Century* was listed among the best-selling books of all time. Unsurprisingly, from 2008 onwards, Marx’s *Capital* has been intensely deliberated upon in numerous studies (Fine and Saad-Filho 2010; Jameson 2011; Altvater 2012; Harvey 2010, 2013; Haug 2013; Callinicos 2014), not to mention the many publications issued on the occasion of the renowned German philosopher’s 200th birthday.

Slightly diverting from his 1848 *Communist Manifesto*, which was more than a brilliant essay brimming with insight into the class struggle and capitalist mechanisms of production that was acquired through rather momentary inspiration than an exhaustive study, in the late 1850s Marx began keeping extensive notes on the theories he developed with respect to political economy, which soon resulted in a series of important, albeit unfinished and unpublished manuscripts, such as the *Introduction* to the *Grundrisse* of 1857, the *Grundrisse (Foundations of the Critique of Political Economy)* of 1857/58 themselves, as well as the *Theories of Surplus Value* of 1861–1863 (Heinrich 2004, 22). Although Marx intended to develop this intellectual project, only a handful of written materials were published during his lifetime. Among the works to be counted into this category is the 1859 preliminary work titled *A Contribution to the Critique of Political Economy*, a short document on commodities and money which Marx never revised (Ibid., 23). There is also his *Capital, Volume I*, published in 1867 and edited in 1872, the fourth edition of which came to be used to create the version most commonly used today. Also, somewhere towards the end of his life, Marx disclosed to Engels that he wanted to thoroughly revise

the *Capital* and abandon the English variety of capitalism in favour of the American one as the textbook example of that economic system (Stützle 2017). Thus, *Capital* is a sort of work in progress, and should be approached as such. Friedrich Engels published the second and third volume, respectively, only after Marx's death: the former in 1885 and the latter in 1894 (Hecker 1999). In preparing these editions, Engels used Marx's at least 30 years old notes and the work has since been edited so many times that Marx never got to see today's final versions.

Although written 153 years ago, the *Capital* is to a great degree a contemporary book. It represents a major epistemological breakthrough both in developing criticism of the orthodox political economy and in understanding the origins of the capitalist mode of production. This is particularly distinguishable in the subtitle of the *Capital*, Marx's comprehensive scientific project named "The Critique of Political Economy". Notwithstanding the fact that Marx was rejected as a dead thinker on numerous occasions and in numerous contexts, his analysis of conceptual categories of political economy and methodological patterns can hardly be ignored when searching for origins of capitalism and its viable alternatives. Since the *Capital's* aimed not only at presenting political economy and developing a fundamental "critique" of comprehensive economic science, it is highly reasonable that Marx explicitly insisted on what Thomas Kuhn calls "scientific revolution" (Murray 1988). Accordingly, the thesis about Marx's "epistemological revolution" will be analysed by elaborating two topics that incorporate two entirely different contemporary Marxist traditions. First thing that will be explicated is the relationship between theory and history within the critique of political economy as proposed by Michael Heinrich under the tradition known as the Neue Marx-Lektüre (New Marx Reading). The second topic represents one segment of discussions related to the "commercialization model" of capitalist development as outlined by Robert Brenner and Ellen Meiksins Wood within the context of the so-called Political Marxism. Specific focus will be directed at the latter, as it not only illuminates the contemporary nature of several distinct epistemological and methodological novelties of the *Capital* (and some of the *Grundrisse*), but it also takes into account the latest theoretical contributions to the critique of transhistorical interpretations of capitalism's development that are primarily based on the concept of "primitive accumulation".

2 CAPITAL – DYNAMICS BETWEEN THEORY AND HISTORY WITHIN THE FRAMEWORK OF POLITICAL ECONOMY

The chapter that follows attempts to summarize the relationship between history and theory as understood by various Marxist traditions in order to demonstrate the influence of epistemological novelties and peculiarities

of the *Capital*. By insisting, in a methodological sense, on locating the two parallel lines in the Marxist critique of political economy, the historical and the theoretical one, we do by no means suggest that they are divorced from and uninformed by each other. In fact, they operate within a unitary universe rather than in separate ones. Although Marx flirts with the methodological issues we consider here only briefly, namely in the foreword to the first edition of the *Capital* and in the afterword to its second edition, we have to concur with the statement of Patrick Murray that „Marx was one of the most methodologically self-reflective thinkers in the history of science” (Murray 1988, 109) and that he „informed his scientific work with an extraordinary methodological sophistication” (ibid., 139).

The discussion on scientific method could touch upon at least four big thematic registers: (1) the meaning and values of science; (2) the relations of science to morality, critique, and practice; (3) the relationship between science and the actual world; and (4) the proper scientific method (ibid., 221). Considering that Marx deepened the epistemological power of all four aspects in a way hitherto unseen, including philosophical method of historical materialism and subjecting to scrutiny the methods and conceptual apparatus of bourgeois economic sciences, as well as rejecting the metaphysical-theological system of philosophical idealism and reinterpreting its terminology, we are going to label the influence of Marx’s epistemology as „revolutionary”, since it showcases a strident, darting and unequivocal departure from mainstream regime of knowledge production in the context of political economy. Using Engels’ own words from the Preface to the volume two of the *Capital*, Marx’s work appears as a „thunderbolt out of a clear sky (Engels 1893) or, as Althusser puts it, the *Capital* represents a „brutal index of Marx’s novelty” (Althusser and Balibar 1970).

Even though our topic focuses primarily on contemporary Marxist tendencies that in a certain way amplify the revolutionary effects of the epistemology outlined in the *Capital*, we also listen in to Althusserian concerns: “[W]hat is the peculiar object of the economic theory founded by Marx in *Capital*, what is the object of *Capital*? What is the specific difference between Marx’s object and that of his predecessors?” (ibid.). When talking about *Capital*, we undoubtedly have that double “epistemological cut” in mind, whether we consider its departure from previous methods of economic sciences or the philosophical-scientific method in general. It is important to note that, although the discussion in terms of an “epistemological cut” always takes us back to Althusser’s *Reading Capital*, we are here not going to insist on deepening the argument about the difference between the “early” and “mature” among Marx’s works:

[W]e posed *Capital* the question of the specific difference both of its object and of its discourse – asking ourselves at each step in our reading,

what distinguishes the object of *Capital* not only from the object of classical (and even modern) political economy, but also from the object of Marx's Early Works, in particular from the object of the 1844 Manuscripts; and hence what distinguishes the discourse of *Capital* not only from the discourse of classical economics, but also from the philosophical (ideological) discourse of the Young Marx (ibid.).

Our goal is to take a step ahead of Althusser and his chronologically underlined understanding of the "epistemological cut" and to refresh the discussion on revolutionary effects of *Capital's* epistemology by taking into account interpretative traditions of the New Marx Reading (NMR) and Political Marxism (PM). Fully aware of how limited this format of discussion is for a substantial and serious presentation of various Marxist traditions that focus on the epistemology of *Capital*,¹ this paper will not present them all, but rather start with an introductory analysis of history and theory in *Capital* as conceptualized by the contemporary tradition of the NMR, particularly by Michael Heinrich as one of the most distinguished members of its "younger" generation.²

Speaking in very concise terms, the NMR critique of economy concentrates on reinterpretation of Marx's critique that was envisioned from a methodological perspective of social theory and took into account such questions as the original object of *Capital* (economic form-determination), the particularity of scientific presentation (dialectics of value-forms), as well as the connection between the three volumes of *Capital* (*Capital* in general vs particular *Capitals*). These questions „are posed anew”, as stated by Ingo Elbe, a member of the younger NMR generation, „as distinct from quantitative approaches, and with a specific emphasis upon the significance of the *Grundrisse* (Elbe 2014). Following the central problematic thread of the analysis of value-forms inevitably leads to an analysis of a whole cluster of related questions and ideas pertaining to the Marxist

1 It should be noted at the very beginning, however, that the studies examining the language and logic of presentation in *Capital*, as well as Marx's critical analysis of certain economic categories vary both in chronological and in genre sense. In this chapter we are primarily going to focus on the tradition of the New Marx Reading, yet it would not be superfluous to mention at least some influential analytical studies that, in the past century, dealt with interpreting the forms of presentation and language in *Capital*; for a systematic review of global discussions since 1965 cf. Hoff 2009; Harvey 2010. For specific studies and analyses of *Capital* cf. Rubin 1928 [1972]; Althusser and Balibar 1970; Fine and Saad-Filho 2010 [1975]; Cohen 1978; Haug 1979; Fine and Harris 1979; Pilling 1980; Resnick and Wolff 1982; Smith 1990.

2 The interpretative tradition of the NMR has its roots in the pioneering studies of former Adorno's students Hans Georg Backhaus and Helmut Reichelt from the early 1970s. It should be stressed that it is possible to identify even earlier interpreters who, in their works, emphasized Marx's theory of value and the problem of fetishism, in the first instance the Soviet-Marxist Isaak Illich Rubin (Čurković 2015, footnote 5). For a concise review of development of the NMR cf. Elbe 2014.

critique of political economy, including whether Marx's method outlined in the *Capital* is, in fact, logical or historical.

Even though Marx's *Capital* indisputably examines the capitalist mode of production, Heinrich suggests that the reading of the book reveals that Marx simultaneously combined two methods: the abstract-theoretical and the historical (Heinrich 2004, 29). On the one hand, the work features theoretical discussions on capital, prices, and money, while on the other hand there are instances of historical method where Marx presents his theories about the causes for the decline of feudalism in England and describes processes of transition from feudalism to capitalism. As Heinrich states, the central question of the work is: "Is *Capital* first and foremost concerned with the main features of the *history of capitalist development*, or with a particular *phase* of capitalism, or is the point rather about *abstract-theoretical depiction of the mode of operation* of capitalism?" (ibid.). This question inevitably opens further concerns: does this type of critique represent a medium through which we may problematize only certain aspects of existing theories and scrutinize only certain assumptions of economic science or does this critique indeed make comprehensive critical-theoretical claims? Friedrich Engels summarizes this problem in the following way:

The purpose of a work like the one under review [*Capital*, A/N] cannot simply be desultory criticism of separate sections of political economy or the discussion of one or another economic issue in isolation. On the contrary, it is from the beginning designed to give a systematic résumé of the whole complex of political economy and a coherent elaboration of the laws governing bourgeois production and bourgeois exchange. This elaboration is at the same time a comprehensive critique of economic literature, for economists are nothing but interpreters of and apologists for these laws (Engels 1859).

When comparing the interpretative patterns of *Capital* among Marxist classics, mainly those from the Second International, although both the abstract-theoretical and the historical method are employed, it is clear that the latter has precedence. In this regard Engels states the following:

Even after the determination of the method, the critique of economics could still be arranged in two ways – historically or logically [...] The logical method of approach was therefore the only suitable one. This, however, is indeed nothing but the historical method [...] The point where this history begins must also be the starting point of the train of thought, and its further progress will be simply the reflection, in abstract and theoretically consistent form, of the historical course (ibid.).

Quite similarly, Karl Kautsky suggests that the *Capital* should be read through the historical lens. In the very introduction to *The Economic Doctrines of Karl Marx*, he defines his analysis of the *Capital I* as a “historical work” and emphasizes that “value is a historical category” (Kautsky 1887/1903). Kautsky notes that “Marx was charged with recognizing capital to be a historical category and to prove its emergence in history, rather than mentally constructing it” (Elbe 2014). Rudolf Hilferding also states that “in accordance with the dialectic method, conceptual evolution runs parallel throughout with historical development” (ibid.). Both Marxism-Leninism and Western Marxism, claims Elbe, follow Hilferding in this assessment (ibid.). Also, taking the *Capital* as her point of departure, Rosa Luxemburg analyses imperialism as a specific accumulation method, claiming that it represents the final developmental stage of capitalism (Luxemburg 2015). In other words, she also performs an overwhelmingly historical reading of *Capital* while seeking a way to scientifically study and explain the conditions of capitalist monopolisation, extended reproduction and imperialism, all while taking into account the dynamic relation between capitalist and non-capitalist spatiality (Čakardić 2015).

A particular objection on part of the NMR to such examples of Marxist “historical schools”, which neglect the abstract-theoretical level of *Capital* – in particular the objection to Engels, whose assessments of Marx’s economic critique had long been considered the only legitimate and adequate – complains about disregarding revolutionary effects of Marx’s epistemology as are evident from examples of his radical theoretical departure from labour theory of value inherent to the classical political economy:

Up until the 1960s, Engels’ theorems continued to be passed on undisputed. [...] There is a significant disproportion between, on the one hand, the emphasis upon the “historical,” and on the other, the absence of a historically specific and socio-theoretically reflected concept of economic objectivity. This is made evident by the irrelevance of the concept of social form in the discussions of traditional Marxism, in which it is at most considered to be a category for ideal or marginal circumstances, but not a constitutive characteristic of Marx’s scientific revolution (Elbe 2014).

According to Elbe, to insist on a historical interpretation, which excludes a theoretical-abstract dimension, is to approach the reading of the text in a reductionist manner, particularly if Marx’s analysis is implied to be outdated or, at best, valid only for the nineteenth century (ibid.). It is precisely along these argumentative lines and unlike the above mentioned Marxist classics that Heinrich argues that Marx intentionally insisted on the theoretical-abstract approach in his research. To further strengthen this assertion, Heinrich quotes Marx’s definition of his own work, which

may be found at the end of the *Capital III*, where the author states that his analysis was out to present “the internal organization of the capitalist mode of production, its ideal average, as it were” (Heinrich 2004, 31). Therefore, it is not unlikely that all “historical” parts of *Capital* follow only after theoretical analysis of the presented associated categories, such as in the case of the “so-called primitive accumulation of capital.”

By following the thesis of Helmut Reichelt, which claims that the method of critique of political economy may be described as a “development” or “form analysis” (Reichelt 2001), NMR tends to encompass the particular sociality of different historical modes of production. Whereas “bourgeois” approaches at best conduct a science of social reproduction *within* specific economic and political systems, Elbe claims that the critique of political economy ought to be understood as a science *of* these forms (Elbe 2014). The critique of political economy, especially in later Marx’s works, “does not tolerate comparisons with the imminent demand from the programmatic statement of the *German Ideology*” (Reichelt 2001, 73) – namely to describe the capitalist mode of production in its totality. The critique, therefore, as Elbe argues, is not imminent in the sense that it would affirm the determinations of exchange, bourgeois ideals, proletarian demands for rights, or industrial production (which is subsumed to capital) against capitalism as a whole. The author points out that the NMR form analysis:

develops these forms (such as value, money, capital, but also law and the state) from the contradictory conditions of the social constitution of labour, “clarifies them, grasps their essence and necessity” (Marx 1843, N/A). Form *development* is not to be understood as the retracing of the historical development of the object, but rather the conceptual deciphering of the immanent (sic) structural relationships of the capitalist mode of production. It unscrambles the apparently independent, apparently objectively grounded forms of social wealth and the political compulsion of the capitalist mode of production as *historically specific* and therefore – albeit in no way arbitrarily or in a piecemeal manner – as *changeable* forms of praxis (sic) (Elbe 2014).

NMR claims that traditional and Western Marxism totally disregarded the revolutionary epistemological potential of Marx’s approach and his theory of monetary constitution of value (ibid.). Following in these footsteps, this interpretative tradition critiques the empirical-historical interpretation of *Capital* that starts with Engels, as well as the “pre-modern” interpretation of the theory of value in *Capital* (Hoff 2004). Elbe accentuates that Marx’s critique of political economy differs from some alternative political economy primarily in that it does not constitute a theory about surplus value, but rather a theory of labour based on the form. This may in a certain way also be seen by Reichelt, who also points to Marx’s

difficulties in grasping the capitalist system in all its varied details, and, according to him, the from it resulting solution of the problem through the focus on the “general notion of capital” (Mattick 1974). For Reichelt, this does not amount to “a superficial reduction, but was considered by Marx as a completely adequate treatment of the whole matter” (ibid.).

As we already mentioned, Heinrich suggests that *Capital* should in a methodological sense be conceptualized as an abstract-theoretical work that features some historical episodes. However, it should be many times stressed that the efforts of the NMR to underline the importance of the abstract-theoretical method of *Capital* by no means suggests that historical materialism is not a valid method or that it is superfluous. Although *Capital* primarily provides a comprehensive theoretical analysis of capitalism instead of focusing on a more closely defined particular subject and examines its essential traits and categories instead of only its history, historical passages in *Capital* are not irrelevant. On the contrary, according to the NMR, they complement the theoretical account even if they do not constitute it (Heinrich 2004, 33). This is so because, to reach serious scientific conclusions about social-economic relations in history, it is necessary to understand social structure at a definite stage and make the matter of historical research more specific. Nevertheless, this does not mean to suggest that the presentation of categories in *Capital* is ahistorical, as classical or neoclassical economic science would like to suggest. In fact, the terminology in classical economic theory, such as competition, commodity production, and entrepreneurial spirit, all express aspects of human nature, a substantive definition of a person, and are thus constructed as ahistorical constants, rather than results of specific capitalist relations that emerged historically and hence may be overcome. As will be explained in detail in the second part of this paper, it is precisely the analysis of these and similar would-be ahistorical categories, that makes Marx's critique of the entire economic science and society still relevant today (Stützle 2017).

Capital is still considered one of the historically most consequential breakthroughs in the critique of orthodox political economy. It is seen as the first systematic research into the peculiarities of capitalism in relation to previous modes of social production and reproduction. The epistemologically revolutionary nature of this type of analysis is exemplified in Marx's theory, which explains how every historical mode of production consists of entirely specific social relations, whose representation necessitates corresponding categories. In Marx's own words:

The example of labour strikingly demonstrates how even the most abstract categories, despite their validity in all epochs – precisely because they are abstractions – are equally a product of historical

conditions, even in the specific form of abstractions, and they retain their full validity only for and within the framework of these conditions (Marx 1859).

Strictly speaking, the categories used to describe or explain reality have historical rather than transhistorical character. It is indisputable that Marx appropriated the concept of labour theory of value from Adam Smith and David Ricardo, but to claim that he appropriated classical-economic definition of that theory would be farfetched. Marx's revolutionary rejection of the capitalist system is preceded by his theoretical disputes with the representatives of classical economics (Mattick 1974). He concluded that abstract categories such as "labour" or "labour as such", that oftentimes constitute points of departure in modern economics, are rendered "true in practice only in modern bourgeois society" (Marx 1859). He asserts:

The categories which express its relations, and an understanding of its structure, therefore, provide an insight into the structure and the relations of production of all formerly existing social formations, the ruins and component elements of which were used in the creation of bourgeois society. [...] The anatomy of man is a key to the anatomy of the ape. On the other hand, rudiments of more advanced forms in the lower species of animals can only be understood when the more advanced forms are already known (ibid.).

These statements provide guidelines that help us determine the level of abstraction we are dealing with. If we begin our analysis with a "completed structure" or an "ideal average" of the capitalist mode of production, as Marx suggests, it may mean that theoretical analysis, rather than strictly historical one, will provide categories which will underlie any further research into the history of capitalism. Heinrich controversially argues that "the notion that one must know history in order to understand the contemporaneity has a certain justification when applied to historical events, but not to social history (Heinrich 2004, 31).³ Michael Sommer and Dieter Wolf emphasize that what was written about historical origins of capital does not cease to be true once we analyse the case of production and reproduction of capital on historical foundations, i.e. when it comes to the contemporary history of capital that relies on its basic structure and

3 This controversial and provocative assertion – and many others centred around the question of whether Marx's method in *Capital* tends to be more "logical" or "historical" and, by extension, questions like whether there is only simple commodity production or the commodity form depends on the capitalist mode of production as captured by the term "abstract labour", also whether commodity has value or this value constitutes a strictly relational term – facilitated a polemic between Wolfgang Fritz Haug and Michael Heinrich in the magazine *das Argument* in the period between 2003–2004. Croatian translation of this interpretative dispute we can find in the first issue of the magazine *3k: kapital, klasa, kritika* (2014).

constitutes a subject of logical-systematic presentation in *Capital* (Sommer and Wolf 2013, 282).

As mentioned earlier, Marx's aspirations were focused on the entire "critique of political economy", rather than just developing a new system. In theory, *Capital* is a critique of an entire structure behind a category, rather than mere development of alternative "political economy". At certain point Marx states that in every historical and social science, including those dealing with presentation of economic categories, the subject "is presupposed both in reality and in the mind" (Marx 1978, 619). In this sense, categories we use to denote certain forms of existence oftentimes point to more than just individual and realistic sides of society or a subject matter at hand, and, hence "even from the scientific standpoint, [subject matter] by no means begins at the moment when it is discussed as such" (ibid).

Marx's epistemological revolution is literally a critique, or more precisely, a dismantling of self-evident categories and perspectives that political economy uses to defend its own supposed plausibility. In addition to the critique of the existing bourgeois science and the dissection of its theoretical field, Marx turns to examining capitalist social relations. Roughly speaking, although he concentrates on the attempt to prove that the rise in socially productive labour was carried out at the expense of an individual worker, he does not practise moral criticism. In fact, Marx refuses to reduce his analysis to a debate on "norms of justice" and instead outlines deeply and "immanently destructive" potential of capitalism. In relation to this, Matthijs Krul insists that *Capital* should be observed as a serious and painstaking analysis of functional modes of capitalist production rather than just random invective against that system (Krul 2017). This partly explains the abstract-theoretical nature of the first three chapters of the work. In them, Marx determines his key terminology and elaborates upon its application in text. However, "the 'abstractions' of the critique of political economy do not have anything to do with abstract models or generalizations that simply summarize the characteristics of the already existing forms" (Bonefeld 2013, 238). Presumably, *Capital* explains not only the logic of capitalism, but also what makes that logic functional. Hence, it fulfils both descriptive and explanatory purpose. This position will be further elaborated in the follow-up through the critique of commercialization model of capitalist development.

3 CAPITAL AND THE CRITIQUE OF “COMMERCIALIZATION MODEL”

In 1980s, Robert Brenner's article "Agrarian Class Structure and Economic Development in Pre-Industrial Europe", which was based on Marx's analyses in *Capital* and, to some extent, those in the *Grundrisse*, initiated a debate on European transition from feudalism to capitalism (Brenner 1985). Its controversial nature won it the name "The Brenner Debate"⁴ and the Marxist tradition responsible for further development of Brenner's theoretical approach came to be known as Political Marxism (PM).⁵ The key theoretical considerations outlined in the afore-mentioned article are structured around critiquing the description of capitalism as a social form distinguished by the rise and spread of urbanization, demographic growth and commercialization. Arising from Smith's classical-economic view on equilibrium "laws", which postulated that the quantity demanded equals the quantity supplied, Brenner's analysis was rooted in the opposition to the narrative that considered capitalism an inevitable consequence of trade, or more precisely, the market. Brenner rejected the self-evident assumptions that capitalism had to have been present in all societies throughout human history to a certain extent. Following Marx's passages on history and phenomena from *Capital*, Brenner rejects the Smithian concept of society by dismantling the so-called "commercialization model" of capitalist development. So what does this model represent, especially if its critique is viewed as a revolutionary result of Marx's epistemology?

The classical narrative of economic theory teaches that capitalism has "somehow always been there". Ellen Meiksins Wood states that "old models" of classical economics are highly paradoxical and problematic:

How we understand the history of capitalism has a great effect on how we understand the thing itself. The old models of capitalist development were a paradoxical blend of transhistorical determinism and "free" market voluntarism, in which the capitalist market was both an immutable natural law and the perfection of human choice and freedom (Meiksins Wood 2002, 34).

4 Cf. Aston and Philpin 1985. For an updated review of the debate cf. Dimmock 2015; the study lays out Brenner's key theses and comprehensively discusses some of the critiques against them.

5 Term "Political Marxism" (PM) was first coined by Guy Bois as a criticism directed to Brenner, but today the phrase "Political Marxism" is widely accepted, cf. Guy Bois 1985, p. 115. School of PM repoliticizes Marxist project and all its analyses are centred in *Capital* (often-times they are called "Capital-centric Marxism"). It is a movement away from post-Marxism and structuralism, and it stresses analytical importance of the role of class conflicts in society. For a detailed review of PM and bibliography of this school cf. Political Marxism's Research Group website: <<http://politicalmarxism.wordpress.com>>.

According to the commercialization model, basic tenets of capitalism originate from prehistory, and capitalism as such aims at reaching the moment of its full, complete, and mature realization. This historical approach has produced an abundance of explanations stressing the “continuity” of capitalist and non-capitalist societies, and simultaneously of historical distinction of capitalism. The argument introduces the narrative that exchange has existed since time immemorial, and that capitalism does not represent a revolutionary innovation in relation to, for instance, feudal trade. Instead, it is understood as an extension of natural, inevitable, eternal, and universal characteristics of productive forces, almost seen as inherent characteristic of human nature and its inclinations. In other words, capitalism is primarily explained as a system of exchange or trade, the “commercialization” of society, which had already been present in feudalism and earlier societies and their trade patterns. By the same token, the emergence of industrial capitalist class is explained in the context of technological progress, as if it had emerged directly from the early modern bourgeoisie, which would then have developed out of mediæval bourgeoisie and this developmental line would go back in history all the way to early-Babylonian traders (*ibid.*, 5).

According to Meiskins Wood, in its attempt to summarize the existing research on capitalism and its history, the commercialization model wanted to provide a universal and all-encompassing explanation of transhistorical development of human economy.⁶ This narrative assumed that capitalism is a result of specific human activities and that its intrinsic assumptions have been developed by humans over the course of history as obstacles on the path to its development and final realization were gradually being overcome. According to this model, rational individuals, focused on their own interests, have always been involved in some kind of exchange and calculation. The development of technology caused a growth in productivity and fuelled specialization and division of labour. This essentially gave structure to the model, as it was based on synching the development of market and technology, respectively. According to it, capitalist society is defined as a highly developed “commercial society” that has surpassed the primitive and outdated social forms and liberated itself from political constraints of pre-capitalist societies. However, the explanations based on this model never truly offered an answer to the question of origins of capitalism itself.

The first epistemological leap away from the classical commercialization model and the earliest emphasis on exploratory analysis of the origins of capitalism, as was already mentioned in several passages, was carried out by Marx himself in the very *Capital*. Therefore, if we undertake further

6 Cf. *ibid.*, pg. 11–33. Term “commercialization model” was coined by Brenner, cf. Brenner 1985, pp. 25–30.

attempts to elaborate the premise of Marx's epistemological revolution, as proposed in the first part of the paper, what would certainly have to be considered is Marx's critique of ahistorical commercialization model of capitalist development. His historical analysis of capitalism proves that the principles of development of capitalist dynamics are actually unbalanced and that a single cataclysmic cause of capitalism, which in its pure form would have carried the seed of new social order and broken the chains of feudalism or earlier systems of social relations, does, in fact, not exist.

Contrary to commercialization interpretations, which attempted to generalize the emergence of specific systemic logic of capitalism as an extension of the old feudal exchange and trade, Brenner used Marx's theory of the so-called primitive capital accumulation as a departure point and further developed it. A key novelty in Brenner's interpretation and the PM's tradition in relation to *Capital* was the re-labelling of "relations of production" as "social-property relations". What Brenner Debate identified as relevant for the class analysis of transition processes along vertical line (capitalist – wage labourer) was the inclusion of class relations into a particular class along the horizontal line. In this context, the status of peasant population ranged from expropriated to land-owning peasants. This factor determined the access to the means of production, reproduction, and distribution of surplus value.

In his research, Brenner emphasizes the position of direct producers, who were forced to submit to "imperatives" of the market, even before the process of industrialization gained momentum. In this regard, he reaches two conclusions. Firstly, the bourgeoisie of industrial class was not necessarily the result of capitalist processes of separating labourers from the means of production. Secondly, capitalism originated even before the "bourgeois revolution" and was present among the richer peasant class. Simply put, as proposed by PM on the example of England in the 16th century, capitalism did not necessarily imply bourgeoisie. In his analysis, Brenner focused on the new rules of reproduction in 15th and 16th century England in order to emphasize the importance of increased production value and the methods that improved land value (Čakardić 2016). From there he concluded that these improvement techniques caused changes in social-property relations, i.e. class relations between lords and peasants. Meiksins Wood paraphrases Brenner's discovery, arguing that improvement and industrialisation were "the result, not the cause of market society" (Meiksins Wood 2002, 144).

With his critique of dominant economic theories, Brenner examined the transition to capitalism, concluding that capitalism evolved with the emergence of similar social structures in other geo-historical contexts. These factors, above all, imply the effects of a specific class structure and

long-term development of productive forces and economic growth. Brenner's socio-historical starting point is England as the historically first capitalist country (cf. Brenner 2003; Wood 2002; Marx 1867, chapter 24). He believes that English class configuration and social property relations, together with demographic changes and the growth of trade, facilitated the development of capitalism in that country. Brenner additionally points out that this shift was one-directional, with social-property relations serving as the universal trigger.

In Medieval England an exceptionally large part of land was owned by lords, whereas the tenants cultivated and maintained it. A factor that particularly strongly affected this relationship was the unstable rental price, i.e. unfixed rents. The price of rent was not prescribed by law, hence rendering it very flexible, deregulated and "situational", i.e., determined by market conditions. With capitalist-rentiers as a power player in the economic game, very specific reproductive conditions emerged, determined by highly competitive social relations. These did not in any way correspond to the idea of the market as an "opportunity", but rather to the idea of the market as a synonym for imperative, coercion, and subsistence. If we consider this phenomenon in the context of class structure of the early-modern English society, it is obvious that the peasant class had to be subordinated to the imperatives of the market and certainly not because they saw "opportunities" for progress there. Rent deregulation did not suit the interests of peasants who were better off if they remained "in direct possession of their means of subsistence, were shielded from competition and the compulsions of the market, even if they engaged in market exchange (Meiksins Wood 2002, 53)".

The position of English landowners was likewise conditioned by the growth in productivity. Although lords occupied the position of principal owners and enjoyed substantial economic power, they were not obliged to use force, i.e. extra-economic coercion to extract surplus value. In agreement with Brenner and Meiksins Wood, this argument presupposes the distinction between the English and the French ruling classes. The latter primarily used political and legal means, or force, to implement strategies of surplus value appropriation, whereas English agrarian capitalism evolved due to the increase in tenant's productivity, which was something lords very much depended on. The English case is a phenomenon that is manifest most precisely in this distinction. In these circumstances, according to Brenner, relations between classes were organized under particular conditions of reproduction.

Seeing that, for Brenner, class structure of feudalism or feudal social-property relations are not strictly determined by social relations between serfs, one should also consider a somewhat bigger picture that

would include the allocation of feudal lands and class power. Brenner argues that the continuity of relatively stable feudal power played an important role in the development of English capitalism. In the early 15th century, Brenner claims, serfdom largely disappeared:

It was the English lords' inability either to re-enserv the peasants or to move in the direction of absolutism (as had their French counterparts), which forced them in the long run to seek novel ways out of their revenue crisis. With the decline of their own self-discipline and self-organisation under the pressure of the later medieval crisis of seigneurial revenue, the English ruling class was impelled, for a time, to turn instruments of feudal political accumulation in upon itself. But the resulting zero-sum game *within the ruling class* in the context of declining overall ruling-class incomes, could not constitute a stable solution. Lacking the ability to reimpose some system of extra-economic levy on the peasantry, the lords were obliged to use their remaining feudal powers to further what in the end turned out to be capitalist development. Their continuing control of the land – their maintenance of broad demesnes, as well as their ability to prevent the achievement of full property rights by their customary tenants and ultimately to consign these tenants to the status of leaseholders – proved to be their trump card. This control of landed property was, above all, an expression of their feudal powers, the legacy of the position the lords had established and maintained throughout the medieval period on the basis of their precocious self-centralisation (Brenner 1985a, 293.)

Because they focus on serfdom, Brenner's claims are of great importance to comprehensive understanding of the origins of capitalism. He additionally proposes reasons for analysing the origins of feudal crises. Only when rights and authority of lords ceased to be the means of control of peasantry was it possible to talk about the actual abolition and the decline of serfdom. Of course, serfdom could have always been restored by various existing political and economic means, even if the decline of serfdom automatically implied the decline of feudalism. For Brenner, transition from feudalism to capitalism implied "the collapse or breakdown of lordly surplus extraction by means of extra economic compulsion as one side of a two-sided development of class relations, the other being the undermining of peasant possession or separation of direct producers from their means of subsistence (ibid., 214–215)".

The role of yeomen, or free peasants, is almost equally important for this discussion. Operational principle in Brenner's analysis, as addressed earlier, is the role of market compulsion, and not what orthodox economics regards as market "opportunities". If in the class analysis of this discussion the focus lies on small landowner-farmer or small producer of certain

goods, it has to be taken into account that the social-economic position of these subjects was less than ideal as they did not have ample opportunities for advancing or competing on the market. On the contrary, they were in a highly conditioned situation in which the relationship of competition or, more precisely, the imperative for active competition on the market constituted one of the primary evolutionary forces of society towards agrarian capitalism. In this respect, yeomen mostly assumed the role of typical capitalist leaseholders and were under constant pressure from competitive market, which soon imposed itself as the only means of economic survival. This way, lords and leaseholders were in a strong mutually dependant relationship, that is, they depended on market dynamics and their personal success in agrarian-capitalist rules of the market. In this type of relationship, lords depended on profit from leaseholders, whereas leaseholders depended on the lease.

Meiksins Wood argues that leaseholders in medieval England were more than mere producers who would suddenly have “transitioned” into capitalists. The situation is somewhat more complex, as she herself admits: “His [leaseholder’s] specific relation to the means of production, the conditions in which he had access to land itself, in a sense made him a capitalist from the start” (Meiksins Wood 2002, 54). This means that the tenant did not miraculously acquire a position when he was finally able to appropriate surplus value for himself or gained access to economic development, or rented labourers to work for him. It is more likely that “his relations to the means of his own self-reproduction from the outset subjected him, together with any wage labourers he may have employed, to market imperatives” (ibid.).

The reason why we consider Brenner and Meiksins Wood to be the key reference points in the context of alternative approaches to the dominant theoretical-historical commercialization narratives is simply because they emphasize social “imperatives” as the catalysts of transition from feudalism to capitalism. This historical transition happened purely due to economic pressures of competitive dynamics of the market and because of direct pressure from landowners, who had enormous economic benefits from the increase in the lease rate. Here, the appearance of “mass proletariat is the *end*, not the beginning of the process” (ibid., 60). Similarly, Brenner states that the logic of the market as a force and imperative is the cause, not the consequence of proletarianization (cf. ibid.).

It appears that Brenner took a step ahead of Marx’s *Capital*. If we want to further explicate the subject matter explored in Marx’s analysis of transition from feudalism to capitalism, complications immediately arise due to the fact that Marx not only developed more than one line of argument in his work, but also because these lines of argumentation do not always

mutually correspond (cf. Comninel 1987). In *The German Ideology* and *The Communist Manifesto* Marx hypothesizes that capitalism existed already during feudalism, but a discussion of the origins of capitalism is omitted and they somewhat tacitly assumed. Then, in the *Grundrisse* and the *Capital*, he proposes an alternative perspective and breaks away from the “old paradigm”. This shift takes place, as already emphasized, in the section of *Capital I* on the “so-called primitive accumulation”.

The classical commercialization model of Adam Smith is based on the theory that treats the process of capital accumulation, which enabled the accumulation of wealth on part of the capable and “entrepreneurial” individuals, as the underlying cause of the emergence of capitalism. This process is in its entirety merely a story about the “history” of gaining material wealth and creating investment opportunities. In the commercialization model, the origins of capitalism are interpreted as a result of accumulation of “capital”. Furthermore, within that model, understanding the phenomenon of “commercial society” assumes the description typical of the “quantitative” model of interpretation, i.e. it takes on the form of a narrative about how trade was developed and how wealth was being accumulated. This theory barely touches upon the “qualitative” change that may provide some insight into transition from feudalism to capitalism, i.e. a transition from one social relation into another.

Marx delivered an intense blow to orthodox economics and simultaneously prospectively rejected the commercialization model with his critique of the “so-called primitive accumulation of capital.” His revolutionary explication that wealth in itself does not imply merely “capital”, and that capital implies specific social relations, served as the basic material for the development of Marxist explanatory models for transition from feudalism to capitalism. Meiksins Wood emphasizes that this key premise in Marx became the point of departure for the critique of classical-economic narrative on capital accumulation as the origin of capitalism (Meiksins Wood 2002, 36). The accumulation of capital was an indispensable precondition for capitalism, but it was far from sufficient or the only one. What facilitated the transition to the capitalist mode of production or transformation of wealth into “capital” was the change in societal property relations. They affected the dynamics of the phenomena and laws in the distribution of capital and economic growth, not vice versa. What does this mean for Marx specifically?

Marx argued that England was the original place where transformation of relations of production took place and that expropriation of land provided the basis for that whole process. Due to the newly established agrarian relations, feudal lords began making significant profit from rent that they received directly from well-off capitalist-leaseholders, whereas

small producers, who were unable to pay rent, were dispossessed and ultimately turned into cheap labour. Meiksins Wood points out that Marx called this process of accumulation the “original” primitive accumulation, because he sharply shifted the focus from classical-economic mythology of voluntarism and entrepreneurship to the historical role of societal property relations in generating new economic imperatives and systemic investment in improving the productivity of labour (ibid., 37). This is where we ought to look for origins of capitalism and interpret particularities of its logic. Moreover, to clarify the issue, epistemological novelties proposed and elaborated by Marx in analyses of these issues are an entirely new concept in the socio-humanistic theory.

Once we accept Marx's argument arising from the historical analysis of capitalism, we have simultaneously made two very important epistemological steps. Firstly, we are paving the way for analysing the origins of capitalism and historical conditions that enabled it, thus understanding that it is not a transhistoric phenomenon, but rather one that has its own sources and origins. Secondly, the stakes are even higher when one realizes that identifying the origins of capitalism may mean anticipating its end. With respect to that, Meiksins Wood states the following: “Capitalism was not the product of some inevitable natural process, nor was it the end of history” (ibid.). In a sense, Brenner and the whole PM tradition, in their critique of the commercialization model, continue to epistemologically develop theory established in the *Capital I*, which is primarily the critique of orthodox-economic analysis of the history of society and its trade/commercial activities, their transhistorical methodological form and ontology, and the specific discourse on human nature that arises from it.

4 CONCLUSION

Combing through the interpretative traditions of the NMR and the PM, still fully aware that we are dealing with very different systems of thought that must be read as separate entities, our discussion was primarily intended as an incentive for deepening the epistemology of *Capital* and its effects. No less than 153 years since the publication of *Capital*, the contemporary critique of the commercialization model starts to demonstrate how the work's radical-epistemological breakthrough is still applied in both the abstract-theoretical and historical analyses of capitalism. Thus, *Capital* is far from obsolete. Similarly, the New Marx Reading tradition, starting with Rubin, continues to develop an epistemological repository of *Capital*, focusing on further investigation of the concept of form of value and bringing out particularly clearly the significance of distinctions between value and exchange value, as well as between abstract and embodied labour. All of these contribute much to the debate about the

methodology of *Capital* (Rubin 1927). For these reasons we tend to believe that NMR's extraordinary epistemological enterprise enables a broader critique of orthodox political economy and paves the way towards insisting on the relationship between theoretical and historical approach to *Capital* in a fashion similar to the undertakings of the PM's tradition. In a sense, these contemporary Marxist traditions, apart from pointing to the analytical vitality of Marx's scientific project, remind the humanities in general, and philosophy in particular, of the impossibility of forming a plausible theoretical basis of any idea if it has not been appropriately socio-historically pinpointed beforehand. In the same sense, the analyses of political economy are not to be reduced to trivialized series of particularizing empirical data, since some minimal dosage of theoretical universalism and abstraction is mandatory for understanding capitalism as a whole.

However, apart from theoretical-historical discussion, which is primarily motivated by methodological implications and readings of *Capital* through the lens of NMR and PM, we would like to conclusively emphasize the inherent connection between epistemology and politics. This would basically mean that it is not enough to take a scientific study and locate certain methodological novelties or radical epistemological approaches in it, but also to persistently highlight the revolutionary effects of particular epistemology. If we want to deliver an example of a philosophy whose bonding of epistemology and politics possesses revolutionary potential, then we would certainly be obliged to point out Marx's *Capital*. When Althusser, in the first part of *Reading 'Capital'* states that "some day it is essential to read *Capital* to the letter" (Althusser 1970), it cannot simply be taken as a demand that stops at correct and scientific understanding of theory. It bears a much more radical epistemological implication. To understand how political economy works from a Marxist perspective means polishing the critical, methodological and conceptual apparatus to its maximum, because, in order to be able to change the world, we have to know how it functions. Anyway, forms of consciousness have not only a historical and political character, but a logical character as well (cf. Murray 1988, 14). Geoff Pilling formulates it similarly:

For Marx a study of the concepts of political economy as they had arisen in the pre-1830 period was decisively important for he held that without conceptual thinking, no conscious thinking was possible. [...] These forms had to be investigated, because it was only through them that the content of bourgeois relations developed and revealed itself (Pilling 1980).

This paper may be summarized by paraphrasing the words of Ellen Meiksins Wood: "We live in times when capitalism has 'finally' become a universal system that no longer has corrective mechanisms beyond its own

logic; therefore, in the spatial sense, it feeds exclusively on itself” (Meiksins Wood 1997). It is universal, not only in the sense that it is global or that every economic actor operates according to the capitalist logic, be it the centre or the periphery, but also in the sense that the logic of accumulation, commodification and competition has become the fundamental way of organizing human life and nature. This premise may serve as a departure point to modestly argue that Marx's *Capital* and his epistemology represent more than just efficient current instructions for explanatory analysis of systemic logic of capitalism. „Heavy” terms like “revolutionary” or “radical” are employed in describing the epistemology of *Capital* not only to point out the extraordinary nature of political conclusions it allows, but also to underline it as is the “most radical” critique of economics and society in modern philosophical thought, as well as of the manner in which we analyse the scientific field of economic theory today and debunk its foundations. Therefore, *Capital* is more than a critique of particular corrosive and destructive elements of economics. It represents Marx's more ambitious, and hence, more revolutionary theory, which suggests that the element of destruction are the economics itself.

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NORTH KOSOVO AND THE SERBIA-KOSOVO NORMALIZATION DIALOGUE¹

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ABSTRACT:

The article describes and discusses political and security trends in Serb-majority North Kosovo during the Serbia-Kosovo normalization process launched in 2011. Perspectives from the local Serb population in the face of the interests and policies of the governments of Serbia, Kosovo and the Western great powers that promote normalization are highlighted, showing that critical views of normalization and associated trends are widespread in North Kosovo. In this connection, it is argued that dissatisfaction and insecurity with normalization and associated trends also became present in the region's political life, pointing to latent challenges to the legitimacy and sustainability of normalization.

KEYWORDS: Serbia, Kosovo, North Kosovo, European Union, Stabilitocracy

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1. INTRODUCTION

North Kosovo (hereafter the North), a 1,200 km²- region adjacent to Central Serbia composed of the municipalities of Leposavić, the Northern part of Kosovska Mitrovica (henceforth North Mitrovica), Zubin Potok and Zvečan, has been known as a flashpoint in the Balkans since the end of the 1990s Kosovo conflict. This is due to its overwhelmingly Serb population, estimated at around 70,000 people (OSCE 2019),² articulating with Belgrade to preserve institutions that were highly integrated with Serbia's political system, obstructing the administrative framework established under international auspices in Kosovo in 1999 and Kosovo's statehood after the latter's 2008 declaration of independence.

This situation meant a *de facto* partition in Kosovo opposed by Kosovo Albanian leaders and the Western great powers, who backed Priština's claim to sovereignty over the North. Solving this dispute became part of the European Union (EU)-mediated, United States of America (US)-supported Serbia-Kosovo normalization dialogue launched in 2011, whose progress became a condition for Serbia's desired EU accession. By making concessions that partly dismantled its remaining institutions in the North, Serbia advanced EU accession negotiations while keeping a significant degree of influence in the North and not recognizing Kosovo's independence. In its turn, Kosovo began expanding its authority in the North, a scenario seen by the Western powers as a stabilizing factor in the Balkans.

For its protagonists, thus, it can be said normalization has been a relative success, as Serbia, Kosovo and the Western powers attained some of their goals concerning the Serbia-Kosovo dispute and European integration. Similar assessments, however, hardly fit perspectives from most of the Northern Serb community, which was not meaningfully included in the negotiations. Although normalization's declared intents included guaranteeing security and the protection of rights for Kosovo Serbs, as well as better life conditions in the region (UN 2010; Serbia 2013c, 2019b), critical views of the dialogue and the general security and political environment in 'normalization-era' North are widespread among Northern Serbs, who overwhelmingly opposed living under Kosovo state authority.

In view of these conflicting perspectives, this paper describes and discusses political and security trends in normalization-era North. Attention is drawn to the perspectives and forms of political mobilization from the Northern Serb community in the face of the interests and policies of normalization's protagonists, i.e., the EU (and its leading states) and the governments of the US, Kosovo and particularly Serbia as the North's main

2 Besides the Serb majority, other communities (circa 10,000 people), mainly Albanians and Bosniaks, also live in the North (OSCE 2019).

supporter. In this connection, it is argued that local dissatisfaction and insecurity regarding normalization and associated trends became present in the region's political life, pointing to latent challenges to the legitimacy and sustainability of normalization.

By doing this, this paper aims to contribute to the literature on Kosovo Serb perspectives on peace-/state-building promoted by international and regional actors in Kosovo.³ It also hopes to contribute to debates on “stabilitocracy” in the Balkans, i.e., the contemporary pattern of relations according to which Western great powers seek geopolitical deference and the promise of stability from Balkan governments in exchange for tolerance and/or support for regimes with authoritarian features (Pavlović 2017; Bieber 2018).

The paper is structured as follows. The first section discusses the emergence and features of the Serbian Northern Kosovo system, as well as developments in the region, as a product both of the post-war context and the historical Serb-Albanian conflict in and over Kosovo. Then, normalization, its implications, perspectives and reactions from the North are analyzed in two following sections, one corresponding to the first, so-called technical phase of negotiations; and the second, corresponding to the political one and its aftermath. Finally, concluding remarks are provided in the last section. The article draws on the academic literature, policy papers, reports, official documents, press coverage, public opinion surveys and other material related to the paper's theme.

2. THE NORTH: FROM THE EARLY POST-WAR PERIOD TO THE NORMALIZATION DIALOGUE

The North Kosovo question and its developments during the normalization process are a direct product of the Kosovo status dispute that appeared in the aftermath of the 1990s conflict. At the same time, they also have deeper historical roots whose imprint is an important input for understanding the emergence of the Serbian Northern Kosovo system and developments in the region since 1999.

Namely, the late nineteenth century witnessed the rise of the competing claims of the Serbian and Albanian national programs over the territory of present-day Kosovo. Since then, as Serbs and Albanians took turns as dominant groups in the region, political orders associated with these programs were often accompanied by forms of domination, discrimination and inequality (or perception thereof) experienced by both nations in relation to each other. Throughout history, polarization between Serbs and Albanians at times led to violent confrontations that further contributed

3 See, for example, Clark (2014), Lončar (2019), Vladislavjević (2012) and Zupančič (2019).

to exacerbate tensions in their relations (Ristanović 2019, 8–14; Vladislavljević 2012, 34–35). In this connection, developments in Kosovo in the 1980s, when the region was an autonomous province within Serbia in socialist Yugoslavia, are of particular importance, as they inaugurated a new period of Serbian and Albanian national mobilization.

The 1981 massive protests by Kosovo Albanians seeking social equality and greater autonomy for Kosovo (or even an Albanian national unification) signaled, as Jović (2009, 183) put it, “the beginning of the state crisis of Yugoslavia”. This was later followed by Kosovo Serb mobilization for closer links with Serbia and the overcoming of inter-ethnic inequalities. In 1989–1990, Serbia’s leader Slobodan Milošević restricted Kosovo’s autonomy and asserted control over the region. As Kosovo Albanians resisted this process, Belgrade responded with harsh repression and the curtailment of Albanians’ participation in Kosovo’s public sector. In reaction, the local Albanians created their own parallel institutions (Vladislavljević 2012, 27–28). Latent tensions in Kosovo escalated into a broader armed confrontation in the second half of the 1990s. The conflict between the forces of the Federal Republic of Yugoslavia (FRY)/Serbia and the Kosovo Albanian insurrection led by the Kosovo Liberation Army (KLA) eventually led to NATO’s military intervention against the FRY/Serbia from March to June 1999.

As the conflict came to its end in June 1999, the United Nations Security Council (UNSC) adopted a peace framework based on its Resolution 1244 – which, despite its nominal commitment to FRY’s/Serbia’s territorial integrity and sovereignty, effectively meant the suspension of Belgrade’s control over Kosovo. In its place, Resolution 1244 led to the establishment of the United Nations Interim Administration Mission in Kosovo (UNMIK), a civilian authority that later started partly transferring its competencies to local provisional self-governing bodies. The resolution also demanded the withdrawal from Kosovo of FRY’s/Serbia’s armed structures (which could, however, be deployed under minor, agreed-upon exceptions). Finally, the document authorized the deployment of the Kosovo Force (KFOR), an international NATO-led mission with a mandate for security in Kosovo (Headley 2008, 416; Ker-Lindsay 2009, 15–20; UN 1999).

The end of the conflict, however, did not immediately lead to a stable, peaceful environment. In the early post-war period, many Kosovo Serbs, fleeing persecution by Albanians throughout Kosovo, settled in the North, whilst part of the Albanian population persecuted by Serbs either fled or had its return to the North blocked. This process contributed to reinforce traditional Serbian demographic predominance in this part of Kosovo and turn it, for Serbs, into a secure area centered in North Mitrovica. The effective division between North Mitrovica and Albanian-majority Southern

Kosovska Mitrovica, accompanied by periodic Serb-Albanian clashes, became one of the symbols of the North's separateness (ICG 2004, 44–52; 2005; Zupančič 2019, 579–580).

This demographic trend was accompanied by the maintenance of Serbian state institutions in Kosovo. Labeled internationally as “parallel structures” (OSCE 2003), they defied the institutional framework derived from Resolution 1244 – which Belgrade itself had accepted, and encouraged Kosovo Serbs to do so, in the early 2000s (Vladislavjević 2019, 176–178).⁴ Bolstered by a porous border with Central Serbia, Serbian state structures became especially strong in the North, where Serbs overwhelmingly favored links with Serbia against an Albanian-dominated independent Kosovo – on whose behalf the institutional framework derived from the international protectorate was often perceived to work (ICG 2005; 2012, 3; Zupančič 2019, 580).

This Serbian Northern Kosovo system was composed of several dimensions. Judicial, educational, healthcare, welfare and public administration organs functioned under Serbia's institutional system (ICG 2005; OSCE 2003). Serb-run security structures also functioned, obstructing the authority of the international protectorate's and Kosovo's security structures. Such was the case of the North Mitrovica-based Bridge Watchers (*Čuvari mosta*) group,⁵ the Civil Protection (*Civilna zaštita*, CZ)⁶ and Serbia's Ministry of Interior (*Ministarstvo unutrašnjih poslova*, MUP) staff.⁷

4 Belgrade promoted Kosovo Serbs' participation in the 2001 parliamentary elections under Kosovo's Provisional Institutions of Self-Government (PISG). It should be noted, however, that the turnout in the North, where some local leaders opposed participation, was significantly lower than in other Serb-inhabited areas in Kosovo. Following the March 2004 anti-Serb riots, Serb deputies left the PISG (ICG 2001, 13–19; 2009, 4–5). Additionally, the municipalities of Leposavić, Zubin Potok and Zvečan held local elections under international auspices in 2002, and had partially integrated with UNMIK in the early 2000s (ICG 2005, 5–6).

5 The name comes from the group's activities on crossings of the Ibar river, especially the main bridge linking North and South Mitrovica. Although partly financed by Serbia, the Bridge Watchers were mostly of local background. Active mainly in the early post-war years, they monitored and mobilized against international forces and Kosovo Albanians (especially preventing the latter's entry in the North) and performed police-like functions. Although often seen as reliable security providers by local Serbs, the Bridge Watchers monitored and reportedly harassed Serbs who cooperated (or were suspected thereof) with Albanians and international institutions. Allegedly, members of the group were also involved in crime (ICG 2002, 3–13; OSCE 2003, 12–14; 2007, 24–26; Zupančič 2019, 583).

6 The CZ was created by and subordinated to the Northern municipalities, while functioning under Serbia's funding through municipal budgets. Founded in 2006, it formally dealt with emergency response tasks, but also performed security and, allegedly, intelligence functions. Many CZ members had military background, and some were believed to be former Bridge Watchers (Stakić and Bjeloš 2015, 10–13).

7 MUP staff performed security, police-like activities and the issuing of Serbian documents. It was believed MUP officers were also involved in the organization of violent episodes

With contested state authority, rule of law was relatively weak, particularly in North Mitrovica. Crime (especially smuggling, often run in cooperation with Albanians) and political violence/intimidation, often directed against Serbs who cooperated with international or Kosovo institutions, became elements of the Northern society, generating insecurity and discontent among locals (Capussela 2016, 95–96; ICG 2011, 13–20; Insaider 2012).

The Serb-run North also had a party-political dimension. The Northern branch of Kosovo Serbs' Serbian National Council (*Srpsko nacionalno veće*, SNV) was the main local political organization. Through its leadership, it was linked to the nationalist-conservative Democratic Party of Serbia (*Demokratska stranka Srbije*, DSS), led by former FRY president (2000–2003) and Serbian prime minister (2004–2008) Vojislav Koštunica. During the 2000s, the DSS became the dominant party in the North. Despite some local discontent, the Northern Kosovo Serb leadership enjoyed popular legitimacy as administrators and community leaders (ICG 2009; Prelec and Rashiti 2015, 6–13).⁸

Local adherence to and dependence of this system among Northern Serbs can be attributed to several factors. First, there was the broad allegiance to the notion of a Serbian Kosovo. Second, employment and services provided by the Serbian institutions were perceived as good quality ones. Third, there was the question of inter-ethnic relations and Serb political (dis)enfranchisement in Kosovo. In the aftermath of the war, many Kosovo Serbs had experienced various forms of intimidation and violence, and their access and use of public services was often hindered. Amid this context, Kosovo Serbs often feared ethnic minorization and disrespected rights under Priština-centered institutions, even though the Constitutional Framework and the electoral system of the post-war international protectorate, in principle, guaranteed various rights for national communities

such as riots. Part of its officers worked covertly for the Kosovo Police (KP, known as Kosovo Police Service before Kosovo's declaration of independence). While the KP did function in the North with mostly Serb officers, it was influenced by the Northern Kosovo Serb leadership and largely ineffective and distrusted (being formally a Kosovo institution) (ICG 2005, 26–27; 2009, 5–6; 2011, 5, 16–19; OSCE 2003, 12–15; 2007, 24–27)

8 The DSS participated in ruling coalitions in Serbia for most of the first post-war decade after the fall of the Slobodan Milošević regime in October 2000. Although once favorable to EU accession, the party prioritized keeping Kosovo within Serbia over joining the bloc, as the EU was perceived as supportive of Kosovo's independence. This situation, coupled with the later recognition of Kosovo's independence by most EU member states, made the DSS shift to an ever more critical stance towards European integration (Vladislavljević 2019, 175–206). The SNV was founded by Kosovo Serbs in the late 1990s. Its Northern branch was led by Marko Jakšić, a former DSS local leader; and Milan Ivanović, head of North Mitrovica's regional hospital. The Northern SNV was involved in commercial and financial flows from Serbia, as well as local patronage networks. It was also believed to be behind political intimidation in the North (ICG 2005; 2009, 3–6).

(Bieber 2015, 290; Clark 2014, 538–539; ICG 2009; OSCE 2003; Vladisavljević 2012, 30–35). It can be said, thus, that the Serbian Northern Kosovo system emerged as a product of both the post-war conditions in the region and of the historical Serb-Albanian conflict in and over Kosovo.

To some extent, elements of this Serb-run system functioned somewhat precariously, as it often had limited capabilities and competed or overlapped with other institutional frameworks. Nevertheless, it often enjoyed the highest degree of authority among Northern Serbs, leading to a *de facto* partition in Kosovo. This situation was partially tolerated by international organs, which, fearing instability, sought accommodation with the North. In the long run, however, a non-partitioned Kosovo was sought by Kosovo Albanian leaders and the Western powers. There were failed attempts by Kosovo Albanian leaders and international officials to extinguish the Serbian Northern Kosovo system already in the early 2000s (ICG 2002; 2005; 2011; OSCE 2003, 2007).

Challenges to the North also appeared during discussions on Kosovo's final status. A multi-ethnic, non-partitioned Kosovo was one of the principles agreed by the Contact Group (France, Germany, Italy, Russia, the United Kingdom and the US) for the Belgrade-Priština negotiations (Ker-Lindsay 2009).⁹ While Serbia, supported mainly by Russia, pushed for “more than autonomy, less than independence” for Kosovo in the 2006–2007 talks, Kosovo Albanians wanted independence – a solution favored by the US, the leading European countries and part of the UN/UNMIK apparatus (Ker-Lindsay 2009; Roriz 2015). For the Western powers, only independence for Kosovo could avoid destabilization by the dissatisfied Albanian majority (Capussela 2016, 87–92; Vladisavljević 2019, 178).

The talks resulted in Martti Ahtisaari's (UN's negotiation envoy) “supervised independence” proposal for Kosovo in 2007. The plan was supported by the Western powers, who promised backing Kosovo's independence with control of the North in exchange for protection of minorities. The so-called Ahtisaari Plan envisioned autonomy and enhanced rights/competencies in administrative, educational, healthcare, financial and police affairs, as well as funding and cooperation with Serbia, for Serb-majority municipalities (during the talks, Kosovo Serbs indeed sought control over education, healthcare, security and freedom of movement). Suggestion of Kosovo's independence, however, meant rejection by Serbia and Northern Serbs. Throughout 2007, large Kosovo Serb-organized rallies took place in North Mitrovica and Belgrade against the Ahtisaari plan and Kosovo's independence (Bilbija 2007; Capussela 2016, 99; Ker-Lindsay 2009, 41–42, 53–62, 98, 147–165).

9 A formal partition along the North, nevertheless, was discussed during the status talks, although the idea was eventually discarded (Capussela 2016, 108; Ker-Lindsay 2009, 120).

Facing Serbia's rejection and Russia's blocking of independence at the UNSC, the Kosovo Albanian leadership, acting in coordination with the Western powers, unilaterally declared Kosovo's independence in February 2008. The Ahtisaari Plan became the core of Kosovo's constitution (Ker-Lindsay 2009, 1–7; Nogueira 2015, 77–80, 214–224). As expected, this was rejected in Belgrade and the North. Despite ruling out military action to enforce its claim over Kosovo, Serbia started campaigning against the international recognition of Kosovo, strengthening ties with Russia for that end. These efforts included the September 2008 request at the United Nations General Assembly (UNGA) for an advisory opinion of the International Court of Justice (ICJ) about the legality of Kosovo's declaration of independence (Bieber 2015, 294–295; Economides and Ker-Lindsay 2015, 1032–1038). In the context of Kosovo's declaration of independence, Northern Serbs were involved in protests, attacks on border posts and clashes with international forces in the North (ICG 2008; 2009). The government of Serbia demanded Kosovo Serbs boycott Kosovo and EU institutions and organized municipal elections in the North in May 2008 under the Serbian system. Without forceful Western intervention, Priština was unable to assert its authority in the North (Capussela 2016, 95–96; ICG 2008, 2011). *De facto* partition, thus, remained.

The Western powers saw overcoming partition as a crucial step for stability in the Balkans. For American officials, the North's separateness was a dangerous precedent for other ethnic-territorial conflicts in the region (Traynor 2010).¹⁰ According to such thinking, a North integrated into Kosovo would lend credence to multi-ethnic state-building and consequently dismiss secessionisms not supported by the West (Capussela 2016, 107–111). In this connection, American and EU officials crafted the "Strategy for the North", a Priština-supported plan launched in 2009/2010 aiming to weaken the Serbian Northern Kosovo system and strengthen Kosovo's authority in the North through peaceful means. It was strongly rebuffed by Northern Serbs (ICG 2011, 9–11).

¹⁰ American fears of a partitioned Kosovo date back to the war and its immediate aftermath. During talks on the international peace framework for Kosovo in 1999, Russian representatives sought a Russia-commanded security sector in Northern Kosovo. The operational plan around the June 1999 Priština Dash also envisioned the possibility of the independent establishment of a Northern Russia-controlled sector. Taking into account the implications for NATO's role in Kosovo of Russia's (potential) autonomous behavior and pro-Serbian inclinations, US officials feared such Russian presence could lead to a *de facto* partition along the North. Eventually, however, it was agreed that Russian troops would participate in KFOR without their own sector, deployed mainly in Albanian-populated rural areas (rather than in the North) and as part of a single NATO command structure. In 2003, the Russian government, alleging lack of strategic interests in the Balkans and implicitly acknowledging its relatively weak influence over KFOR's operations, withdrew the Russian contingent (Gus'kova 2013, 251–257; Headley 2008, 393–416, 462).

Challenges to the North were also sown in Belgrade. Following Serbia's May 2008 parliamentary election, the DSS was sidelined by the more pro-Western Democratic Party (*Demokratska stranka*, DS) led by president Boris Tadić. Under Western interference, the DS formed a coalition with the Socialist Party of Serbia (*Socijalistička partija Srbije*, SPS – formerly led by Slobodan Milošević), which embraced the European integration agenda on its path back to power (SPS 2010, 23–25; Trapara 2016, 213; Vladislavljević 2019, 202–206).

Although not all of its members recognize Kosovo's independence, the EU conditioned Serbia's integration with cooperative relations on/with Kosovo. The DS-led coalition, thus, despite not giving up the Serbian Northern Kosovo system and non-recognition of Kosovo's independence, started pursuing a more flexible Kosovo policy. This included acceptance of the EU's rule of law mission (EULEX) in the North and attempts to weaken the DSS-linked Northern Serb elite. Relations between the Northern Serb leadership and Belgrade started deteriorating (ICG 2011, 3–4; Vladislavljević 2019, 252–253).

More serious Serbian concessions came after the ICJ's July 2010 verdict, which did not consider Kosovo's declaration of independence a violation of international law. Under Brussels's pressure, the Serbian government proposed a joint resolution with the EU at the UNGA in September 2010 giving the EU a "status-neutral" mandate to mediate a Belgrade-Priština dialogue (Bieber 2015, 294–297; Vladislavljević 2019, 253). According to the document, the dialogue would be a "factor for peace, security and stability in the region", aimed to "achieve progress on the path to the European Union and improve the lives of the people" (UN 2010). Its approval signaled the beginning of the EU-mediated dialogue.

3. THE NORTH AND THE TECHNICAL DIALOGUE (2011–2012)

The EU-mediated, US-supported Serbia-Kosovo negotiations began with the so-called technical dialogue launched in March 2011. It dealt with seemingly neutral issues without explicitly addressing sensitive questions like Kosovo's statehood and its recognition by Serbia. Agreements were reached in 2011–2012 on freedom of movement, civil registry, custom stamps, cadastre, university diplomas and Kosovo's participation in regional cooperation initiatives (Đukanović 2013, 367–372; Emini and Stakić 2018, 4).

Despite its supposedly neutral nature, this phase did have serious implications for the North. In the context of trade talks, the government of Kosovo, aiming to enforce an embargo on Serbian goods (itself a retaliation for Serbia's refusal to accept goods with Kosovo customs stamps), force-

fully attempted to establish control over border points in the North with special police units in July 2011. The attempt met violent resistance, as the operation was widely regarded by Northern Kosovo Serbs as an invasion challenging their community. This prompted confrontations with Kosovo and, for the following 18 months, EULEX and KFOR forces (both effectively aligned with Priština during the crisis) (Capussela 2016, 102–104; ICG 2012, 1–10; 2013, 1).¹¹ Despite initial support for Northern Serb resistance, Serbia relented under Western pressure and withdrew its backing. In December 2011, a Belgrade-Priština deal was reached on Integrated Border-Boundary Management (IBM). Implemented by Serbia's next ruling coalition in 2012/2013, it effectively enhanced Priština's control over the Northern border and customs, triggering protests in the North (Đukanović 2013, 370–371; ICG 2013, 10–18; Mirović 2019, 54–58).

Amid this context, Northern Serbs, seeking protection, participated in a collective Kosovo Serb petition asking Russia for Russian citizenship in November 2011. Criticized by the Serbian government, the petition gathered about 20,000 signatures, but was eventually declined by the Russian government (which, on the other hand, sent humanitarian aid to Kosovo Serbs) (Politika 2011; Samedova 2012; Solov'ev 2011). In February 2012, a locally organized referendum on Kosovo institutions was held in the North. Rejected by official Belgrade, Priština and international actors, the voting had around 26,000 participants, of which 99.74% rejected Kosovo institutions (Bieber 2015, 304; RTS 2012).

Pressures of the EU and its leading states, coupled with Belgrade's awareness of economic dependence towards the EU, were crucial for Serbia's policy shift towards normalization negotiations after the ICJ opinion. German pressure was particularly strong: prime minister Angela Merkel openly demanded the abolition of Serbian "parallel structures" during a visit to Belgrade in August 2011 (Economides and Ker-Lindsay 2015, 1034–1039; ICG 2012, 6–14). This process generated a deepening Belgrade-North rift.

In 2012, Serbia went through political changes with significant implications for normalization. The Serbian Progressive Party (*Srpska napredna stranka*, SNS) won parliamentary elections and formed a coalition with the SPS and other minor parties, a scenario that would repeat itself following parliamentary elections in 2014 and 2016. SNS leaders Tomislav Nikolić and Aleksandar Vučić also won presidential elections in 2012 and 2017 respectively.

¹¹ Allegedly, vested interests of influential members of the Northern Kosovo Serb community in smuggling also significantly contributed to the escalation of the conflict (Insajder 2012).

The SNS was born in 2008 when Nikolić, followed by Vučić, left the traditionally ultranationalist, popular Serbian Radical Party (*Srpska radikalna stranka*, SRS) to form the new party of more moderate views on the Kosovo question and European integration (Vladislavljević 2019, 204–205, 277–289). Despite its leaders' past in the SRS, as well as the new party's declared non-acceptance of Kosovo's independence and of the abolition of the Serbian Northern Kosovo system, the SNS, which also criticized past governments' Kosovo policies, advocated EU accession and negotiations on Kosovo – even admitting openness to possible “painful concessions” on both sides in order to achieve a solution for the Kosovo question (SNS 2011, 37–42).

SNS's EU-amenable stances, including on Kosovo, made the party-led governments gain Western support (Vladislavljević 2019, 285–287). With discredited domestic rivals, the SNS, through its popular leadership centered on the figure of Vučić;¹² a large party and patronage network; cooptation and constraints towards opponents; and manipulation of state institutions and media, became Serbia's strongest political force, scoring expressive electoral victories and consolidating itself at the top of a regime with authoritarian features (Bieber 2020, 42–53; Pavlović 2020; Vladislavljević 2019, 277–313). The new Serbian leadership, increasingly centered on Vučić, started pushing an ambitious Kosovo agenda with serious implications for the North.

4. THE NORTH AMID THE POLITICAL DIALOGUE AND BEYOND (2012–...)

The Serbia-Kosovo so-called political dialogue started in October 2012, while in January 2013 the Serbian government announced and adopted its guidelines for the negotiations. The documents stated that Serbia would not accept Kosovo's independence. Tellingly, on the other hand, it was acknowledged that normalization had given a degree of legitimacy to Kosovo's institutions and that the talks should deal with the “overcoming of institutional parallelisms”. Serbia would implement past normalization agreements and seek an agreed, comprehensive solution for the Kosovo dispute, as well security and rights for Serbs inside Kosovo. Serbia would also seek autonomy for Serb-majority municipalities in Kosovo, which would have the right to cooperation with and financial support from

12 Although keeping ties with the party, Nikolić left the SNS after his 2012 presidential election victory, paving the way for Vučić's consolidation as SNS's sole leader (Bieber 2020, 50; Vladislavljević 2019, 286, 293–294). Before becoming president in 2017, Vučić was prime minister (2014–2017), first deputy prime minister (2012–2014) and minister of defense (2012–2013).

Belgrade. Finally, the negotiations should contribute to Serbia's EU integration (Serbia 2013b, 2013c).

This approach was reflected in the landmark Brussels Agreement (officially the "First Agreement of Principles Governing the Normalization of Relations") of April 2013, which stipulated the integration of Serbia-affiliated police, security and judiciary personnel into Kosovo institutions according to ethnic proportionality. A Kosovo-wide Association/Community of Serb-majority Municipalities (*Zajednica srpskih opština*, ZSO) would be established under Kosovo's laws – but allowing funding from Serbia – with overview of economic, education, healthcare, social, urban and rural policies. Finally, municipalities would be formed and elections held in the North within Kosovo's institutional framework (Serbia 2013a; 2015).¹³ As a reward for the agreement, Serbia started EU accession talks in January 2014, with normalization included in the 35th negotiation chapter (Bieber 2015, 316).

The Brussels Agreement and its complements, thus, directly challenged the Serbian Northern Kosovo system. Since 2013, despite varying speed and remaining implementation disputes, key structures like police, security (MUP and CZ) and judiciary faced dismantling, with Serb officers being absorbed into equivalent Kosovo institutions – which, in turn, became more present in the North.¹⁴ Meanwhile, ZSO's implementation has barely progressed (BPRG 2017; Dragojlov 2020; Emini and Stakić 2018, 6; Serbia 2018; 2019b).

These concessions did not mean, however, that Serbia fully accepted Kosovo's statehood and the complete extinction of the Serbian Northern Kosovo system. Serbia has kept an enduring policy of non-recognition of Kosovo's independence during the normalization process. The Brussels Agreement, for example, was not ratified by the Serbian parliament, thus avoiding the implication of it having an international nature. A

13 A controversial complement of the 2013 negotiations that relates to recent security incidents in the North is NATO's role as security guarantor in the region, obtained at Serbia's insistence (Đukanović 2013, 373). Serbia has claimed that Kosovo special police units and the Kosovo Security Force (KSF, Kosovo's army in the making), can enter the North only with KFOR's and Northern Serb representatives' consent. KFOR and NATO, however, have claimed such agreement exists only regarding the KSF and do not mention the need for Northern Kosovo Serb representatives' authorization (B92 2019; Serbia 2018, 10–12; 2019b; Tuhina 2019). An official letter made public in 2020 shows that in 2013 Hashim Thaçi, then Kosovo's prime minister, assured NATO that the KSF would operate in the North only with prior concurrence from KFOR. The letter also states that KFOR "may engage with legitimate representatives of the local community in Northern Kosovo" as part of such concurrence process (EWB 2020b).

14 According to some sources, however, integrated police, security and judiciary personnel kept receiving pensions and compensations from the Serbian government, and were still seen as influenced by Belgrade even after the Brussels Agreement (Dragojlov 2020, 5–8).

similar view was adopted by the Serbian Constitutional Court, which also affirmed that the Brussels Agreement did not determine Kosovo's final status (Bieber 2015, 307). Finally, Serbia has campaigned to block Kosovo's entry in some international organizations and for UN members to withdraw recognition of Kosovo's independence (Serbia 2019b). The Serbian government has at times shown a confrontational posture towards Priština, while pro-government tabloid media has often exhibited a chauvinistic rhetoric towards non-Serb nations in the regional neighborhood and a sensationalist discourse about supposedly imminent wars to be initiated by Kosovo Albanians (Đorđević 2019; Vladisavljević 2019, 304–310). Serbian national symbols remained filling the Northern landscape, visually signaling the region's enduring specificity.

Serbian institutions, on which Serbs still largely rely, kept functioning in Kosovo, including in the North – to a degree tolerated by Priština, but nevertheless criticized by Kosovo Albanian politicians (Andrić Rakić 2020; Loxha 2019; Prelec and Rashiti 2015, 30). Municipal administrative organs under the Serbian institutional system, whose officials sometimes simultaneously have posts in Kosovo institutions, still function (Kossev 2020; Loxha 2019). Serbian education, welfare and healthcare systems keep functioning, and the Serbian government has provided public spending and investments, donations and other kinds of support for Kosovo Serbs (sometimes in coordination with Priština and the EU) (Andrić Rakić 2020; HCHRS 2019; Kossev 2019c; Serbia 2018, 24–25; 2019b).

Finally, employment and income remained largely provided by Serbia. Estimates of Northern Kosovo Serbs relying on the Serbian budget range from 52.2% to as many as 80% (Jović and Nešović 2015, 22–23; Andrić Rakić 2017; Fazliu 2017; Prelec and Rashiti 2015). These factors, alongside the broad allegiance to the Serbian claim over Kosovo and potential problems regarding inter-ethnic relations and political (dis)enfranchisement under the Priština institutional system, contribute to the maintenance of the widespread Northern Serb sense of loyalty, belonging and dependence towards Serbia.

The Serbian government has attempted to offset normalization concessions through other channels of influence in Kosovo. This has been done mainly via Kosovo Serbs' participation in Kosovo's political system, taking advantage of the latter's ethnic representation and veto rights, as well as running Kosovo system municipalities with Serb majority. To this end, a new party-list controlled by the Serbian government, the Serbian List (*Srpska lista*, SL), was established in an attempt to unify Kosovo Serb politics under Belgrade's control. In the North, this meant the replacement of the old anti-integration leadership. This strategy was reinforced by the Kosovo Albanian elite's consent to engagement with the SL (since

its inception, the SL has participated in coalitions and/or taken ministerial posts under every government in Kosovo), as well as with the reconfigured Northern Kosovo Serb elite linked to the party (Bieber 2015, 308–310; Butcher 2020; EWB 2020a; Fazliu 2017; Kossev 2019b; Milivojević 2019; Mirović 2019, 119–128; Prelec and Rashiti 2015, 12–13; Zupančič 2019).

With impressive electoral results,¹⁵ the SL, labeled by the Serbian government as a “state project”, came to power in Serb-majority municipalities and virtually monopolized Serb parliamentary representation in Kosovo (RFE 2019; Kossev 2019b; Serbia 2019a). Therefore, while certain policies of the Serbian government indeed meant a degree of legitimization of Priština’s institutions, it can be argued, on the other hand, that the Kosovo Albanian leadership accepted a stake for Serbia in what Bieber (2015, 302) called a “de facto degree of shared sovereignty in parts of Kosovo”.

The North Mitrovica-based SL affirms support both for the normalization process and Resolution 1244 (implying alignment with the resolution’s reference to Serbia’s territorial integrity) (SL N.d.). SL’s rise can be partly attributed to genuine political loyalty towards Serbia among Northern Kosovo Serbs. However, this trajectory has also been marked by controversial circumstances that in some ways reproduce certain authoritarian features in Serbia’s recent political history. There is the question, for example, of the use of state resources to foster compliance with the SL. Vučić himself, ahead of the 2019 Kosovo parliamentary election, publicly associated SL’s electoral success with the maintenance of Serbian salaries in education and healthcare (RTS 2019), thus suggesting Belgrade’s awareness of public sector dependence as a source of political influence over Kosovo Serbs.

In this connection, there are also reports of pressures on employees at Serbian institutions in the North (and throughout Kosovo) through means like collective voting and threats of dismissal (Jović, Andrić and Marinković 2017, 44; Marinković, Timotijević and Kostić 2019, 33–34; Trivić and Loxha 2019). Similar practices attributed to SNS activists are also reported to have occurred during elections in Serbia (Pavlović 2020, 25–26).

Belgrade’s strategy of monopolizing Kosovo Serb politics was also accompanied by the SL’s portrayal of opponents and alternative political forces as traitors of the nation and a threat to Serbian unity in Kosovo. This has often been done in a language that resembles that of Serbian govern-

15 In Kosovo’s 2019 mayoral and parliamentary elections, for example, the SL got an average around 94% and 87% of votes, respectively, in the North (KCEC 2019a; 2019b). When it comes to Serbia’s elections, SL’s patrons in Belgrade scored similar degrees of electoral support. In the 2020 Serbian parliamentary election, the SNS-led electoral coalition received an average 85% of the votes in the North (Serbia 2020).

ment and SNS officials, as well as the virulent rhetoric of pro-government media towards opponents and critics of Vučić.¹⁶ Taking into account the strong political and material attachment many Northern Kosovo Serbs have towards Serbia, the aforementioned factors constitute important tools of influence with constraining effects for democracy and political pluralism in the North.

Finally, there are reports and accusations of pressure, intimidation and even physical attacks against citizens, politicians and political groupings not aligned or critical of the SL, the Serbian government and the shadowy informal power “structures” believed to be linked to the Serbian government and to actually run politics and crime in the North (Emini and Stakić 2018, 6; Milivojević 2019; Zupančič 2019, 581–587). Such reports also indicate that intimidation and political violence, as well as rule of law weakness, persist in the North, but not facing, as Zupančič (2019) noted, a strong rebuttal by the EU.

How do Northern Kosovo Serbs perceive these developments? Despite being among the ones most affected by normalization, Kosovo Serbs, including those from the North, were not meaningfully included in the process, a fact that shows an authoritarian facet of normalization. This happened despite the Serbian government stating that Kosovo Serbs would be heard during the negotiations (Jović and Nešović 2015, 11–12; Serbia 2013c). Additionally, there was ambiguity and lack of transparency, tricks the EU hoped would advance negotiations. Among Kosovo Serbs, this created sentiments of confusion, exclusion and the perception of being a mere bargaining chip in EU integration processes (Bieber 2015, 308–319; BPRG 2017, 24–26).

Public opinion surveys indicate that sentiments of this kind are widespread in the North. A 2016 poll, for example, found that around 70% of Northern Kosovo Serbs did not understand fully the ZSO agreement or see a citizens’ role in its implementation (BPRG 2017, 39–40). Usually, few people expected that the ZSO would improve Serbs’ position in Kosovo. Since 2015, support for the Brussels Agreement has on average reached about 15%. While a resigned majority in 2015 supported Serbs’ participation in Kosovo institutions, such support became minoritarian, averaging about 24% in 2016–2018. Usually fewer than 10% of citizens believed the Brussels Agreement unambiguously improved Kosovo Serbs’ rights and freedoms (Jović and Nešović 2015, 13–15, 35; Jović, Andrić and Ostojić 2016,

16 See, for example, SL’s *communiqué* in the aftermath of the 2019 Kosovo parliamentary election (SL 2019). For broader analyses of the rhetoric of representatives of the Serbian government, the SNS and pro-government media, as well as their relations, see Bieber (2020, 93, 126–128), Pavlović (2020, 26–29) and Vladisavljević (2019, 296–310).

14–22, 25, 31; Jović, Andrić and Marinković 2017, 4, 27–35, 39–40, 47; Jović, Waugh and Marinković 2018, 22–32, 40).

Finally, in 2019, 66% of Northern Kosovo Serbs, indicating a belief that (whole) Kosovo should be Serbian, opposed a “delineation” (*razgraničenje*) between Serbia and Kosovo – an idea commonly understood as containing an official territorial partition in the region with the North recognized as Serbia’s territory. Serbian and some EU, US and Kosovo Albanian officials have recently indicated openness to this idea as a basis for a final normalization agreement (Marinković, Timotijević and Kostić 2019, 53–56; Kolesnikov 2018; Surk 2019; Xharra, 2020).

Satisfaction with and trust in Kosovo’s and international institutions remained generally lower than in the Serbian government and Serb-run institutions, despite low trust rates in Kosovo Serb politicians and the existence of perceptions of the normalization-era, Belgrade-controlled Northern Serb leadership as illegitimate. The EU – often seen as biased, pro-Albanian – and the US are lowly rated as actors Kosovo Serbs can rely on in the pursuit of their interests. Both have sharply lower trust rates than Russia. The general political, security and economic environment in Kosovo has been rated overwhelmingly negatively,¹⁷ with acute perception of authoritarianism, criminality and weak rule of law. Since 2016, growing percentages of Northern Kosovo Serbs (as many as 78% in 2018) have claimed not to feel free to publicly express their political positions. Crime has constantly been cited among the top security risks/problems, sometimes ahead of ethnic-related and military issues (BPRG 2017, 35–36; CBS 2018; Jović and Nešović 2015, 28–30; Jović, Andrić and Ostojić 2016, 16–19, 28–34; Jović, Andrić and Marinković 2017; 25–31, 43–46, 51; Jović, Waugh and Marinković 2018, 20–25, 35, 39–40, 45; Marinković, Timotijević and Kostić 2019, 44).

These critical assessments are present in Northern Kosovo Serb political life and, like at the time of the technical dialogue, generated political mobilization. In 2013, for example, the Brussels Agreement was rejected by some Northern Serb representatives. Protests against normalization agreements led by the old Northern Kosovo Serb leadership were held in Belgrade and the North, attracting thousands of citizens (Al Jazeera 2013; Mirović 2019, 99–105). Despite Belgrade’s pressure for participation and the SL’s eventual (and controversial) victory, the first local elections under

17 Between around 2/3 to 4/5 of interviewed Northern Kosovo Serbs usually assessed the situation as bad or very bad in these three realms, with little expectation of life improvements for Kosovo Serbs in the near future. Polls also registered growing willingness to emigrate, especially among the youth (Jović and Nešović 2015, 12, 20, 27, 38; Jović, Andrić and Ostojić 2016, 9–11, 31–32; Jović, Andrić and Marinković 2017, 12–15, 49; Jović, Waugh and Marinković 2018, 10–12, 41–42; Marinković, Timotijević and Kostić 2019, 12–15)

Kosovo's system in 2013–2014 were largely rejected by the old Northern Serb leadership and the Serb community, often resulting in low turnouts (Bieber 2015, 309–310; Đukanović 2013, 378–379; Mirović 2019, 119–124; Zupančič 2019, 590). Criticism of the Serbian government, the SL and the “structures” based on above mentioned factors has been publicly voiced by some Northern Serb politicians, irrespective of their stance on Kosovo institutions (Fazliu 2017; Milivojević 2019). There have also been individual acts of resistance against the Serbian government's integration policy.¹⁸

Part of the old, weakened DSS-linked Northern Kosovo Serb leadership, like veteran politicians Marko Jakšić and Slaviša Ristić, regrouped in the hardline nationalist Otadžbina (“Fatherland”) National Movement of Serbs from Kosovo and Metohija (*Narodni pokret Srba sa Kosova i Metohije 'Otadžbina'*). Founded in 2017, Otadžbina advocates the boycott of Kosovo institutions, including elections. Harshly critical of Vučić, it joined the Alliance for Serbia (*Savez za Srbiju, SzS*), Serbia's main opposition group in the 2018–2020 period, which rejected recognition of Kosovo's independence (Kossev 2019a; SzS N.d.). Otadžbina also joined SzS's successor coalition, the United Opposition of Serbia (*Udružena opozicija Srbije, UOS*) (N1 2020). Otadžbina has urged Russia to take an assertive stance against Kosovo's independence as a counterweight to what the organization sees as the Serbian government's treasonous Kosovo policy under Vučić (Otadžbina 2018).¹⁹

Opposition in the North was also prominently represented by Oliver Ivanović. A former Bridge Watcher and state secretary at Serbia's ministry for Kosovo and Metohija (who later adopted more moderate stances, including competing in Kosovo system elections), Ivanović was the leader of the Civic Initiative Freedom, Democracy and Justice (*Građanska inicijativa Sloboda, Demokratija, Pravda – GI SDP*) and fierce critic of the political forces and trends in normalization-era North. His unresolved assassination in January 2018, commonly believed to be an intra-Serb politically motivated episode, became a symbol of political and security problems in normalization-era North (Milivojević 2019; Zupančič 2019, 582).²⁰

18 For example, North Mitrovica mayoral elections in 2013–2014 were rerun because of the winner's refusal to take the oath of office with Kosovo state symbols (Bieber 2015, 310). Years later, some Serb judges refused to work in Kosovo's institutions (Mirović 2019, 186–191).

19 In what are often believed to be politically motivated episodes, Otadžbina's headquarters in North Mitrovica were destroyed in a fire in 2017, and Jakšić and Ristić had their property attacked since 2012 (Milivojević 2019; Mirović 2019, 104; Zupančič 2019, 582).

20 Before his murder, Ivanović was harshly attacked in pro-government media in Serbia. Ivanović's family also suffered intimidation, and GI SDP's property was attacked. Four years before Ivanović's murder, his friend Dimitrije Jančićević, another Northern Kosovo Serb opposition politician, was assassinated in North Mitrovica (Milivojević 2019).

The Serbia-wide “1 out of 5 million” anti-government demonstrations launched in 2018, which protested mainly against the deteriorated state of democracy in the country, but also against the SNS-led governments’ policy on Kosovo, were also held in the North in 2019 with the participation of Otadžbina and other local political actors. Demonstrators also demanded the solving of the assassination of Oliver Ivanović (Kossev 2019d). Due to resource disparity, lack of external support, political divisions and the specificity of relations between the Northern Kosovo Serb community and Serbia, opposition activity did not grow so far to strongly impact the political *status quo* in the North. Nevertheless, it does point to latent challenges to the legitimacy and sustainability of normalization originating from dissatisfaction and insecurity with this process and associated trends.

5. CONCLUSION

North Kosovo emerged from the 1990s Kosovo war as the focus of a new dispute in the Balkans whose roots can be traced to the historical Serb-Albanian conflict within and over Kosovo. Defying the civilian and security authority framework under international auspices established in Kosovo in 1999, as well as Kosovo state authority and its Western backers after Kosovo’s 2008 declaration of independence, the North’s predominantly Serb population articulated with Belgrade to maintain a Serbia-supported self-rule system in the region. Highly integrated into Serbia’s political system, it included judicial, educational, welfare, healthcare, public administration and security structures, leading to a *de facto* partition in Kosovo.

This began to change from 2011, when the normalization dialogue aimed at EU accession was launched. The Serbian government, under Western pressure and aware of economic dependence towards the EU, made key concessions in exchange for the advancement of its EU accession negotiations. Successive deals, particularly elements of the Brussels Agreement, to a great extent dismantled the Serbian Northern Kosovo system. They also led to a degree of extension of Kosovo’s authority to the North and promoted local Serbs’ participation in Kosovo’s political system – goals long championed in Western conceptions of geopolitical stability in the Balkans.

This article analyzed political and security trends in the North during the normalization process, focusing on perspectives from the Northern Kosovo Serb community in the face of the interests and policies of the governments of Serbia, Kosovo and the US, as well as of the EU and its leading states. As the discussion indicated, normalization has had an authoritarian facet and generated discontent seen in several features of the region. Northern Kosovo Serbs and their old leadership overwhelm-

ingly rejected Kosovo state authority, a fact that meant that the legitimacy of normalization and its outcomes were locally contested from their very beginning. Additionally, Northern Serbs, which were among the ones most impacted by the agreements, were not meaningfully included in the negotiations. Already at the time of the technical dialogue, dissatisfaction with aspects of normalization and the possibility of the extension of Priština's authority to the North translated into resistance mobilization by local actors, including in violent forms.

Although their sources sometimes were not new phenomena, signs of discontent, dissatisfaction and insecurity in the North kept widespread during normalization, as shown by diverse survey data. These perceptions often had to do both with formal aspects of normalization, like the Brussels Agreement and its consequences; and tacit/political ones, like the way the Serbian SNS-led governments and their local allies asserted their dominance over Northern Kosovo Serb politics. Lack of improvement of security and rule of law were also strongly perceived. Such negative assessments about the political, economic and security environment in the North belie normalization's promises of improvements in the region. Unsurprisingly, in this context, the prestige of the EU and the US – normalization's key international promoters – is significantly tarnished among Northern Serbs.

Political opposition mobilization, although so far not able to strongly impact the *status quo* in the region due to factors like relative lack of political and organizational strength, has appeared in connection with the several perceived political and security problems in normalization-era North. In view of these factors, it can be said that the experience of normalization-era North indicates that “stabilocratic” arrangements can meet some of the interests of their promoters at the central government and international levels. On the other hand, however, the way the normalization dialogue and associated processes developed led to sources of dissatisfaction and political counter-mobilization at a local level, thus pointing to latent challenges to the legitimacy and sustainability of normalization and its outcomes in North Kosovo.

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PAUL COLLIER

THE FUTURE OF CAPITALISM:
FACING THE NEW ANXIETIES*Harper Collins. 2018. 248 stranica. ISBN 978-0-06-274865-2.*

Svoju najrecentniju knjigu Paul Collier nudi kao manifest za obnovljenu socijaldemokraciju utemeljenu koliko u ekonomskim toliko i u moralnim promišljanjima. Socijaldemokracija bi, smatra autor, mogla ponuditi rješenja za tri nove snažne društvene podjele koje, prema njemu, razaraju kapitalistička društva. Suvremeni kapitalizam, smatra, ne povećava blagostanje svih, već samo nekih. Svoj odgovor naziva onim „tvrdog centra”, te ga smješta u tradiciju pragmatizma, a suprotstavlja onima koji nude ideologije ali i, danas utjecajnim, karizmatičnim populistima. Upućuje čitatelja da se vrati centrističkom komunitarizmu koji je obilježio poratno razdoblje, te uzajamnim obvezama kao temelju za izgradnju etičnih odnosa između pojedinaca i grupa, uključivši onih političkih. U ovome djelu nudi poticajnu teorijsku analizu, pozivajući se na doista multidisciplinarni spektar ranijih istraživanja, primarno u područjima etike, društvene psihologije i ekonomije, ali i originalna rješenja koja iz njih proizlaze. Kroz knjigu se efektno provlači autorovo osobno iskustvo s trima podjelama koje analizira, što djelu daje osobniji i pristupačniji ton. Autor knjige Sir Paul Collier vrlo je utjecajan, često citiran i nagrađivan britanski razvojni ekonomist sa Sveučilišta Oxford. Osobito je poznat u području razvojnih i studija najsiromašnijih zemalja, posebno Afrike. Tako je vrlo zapažena njegova knjiga *The Bottom Billion* (2007), koja analizira probleme najsiromašnijih milijardu stanovnika na svijetu, te se smatra klasikom u području razvojnih studija.

Temeljna je ideja knjige da suvremeni kapitalizam neuspješno odgovara na tri nove goruće podjele u društvu: razvojno galopirajuće metropole i raspadajuće periferije, obrazovane i neobrazovane građane, te bogate i siromašne države.

Geografska je podjela, smatra autor, nastala relativno nedavno, 1980-ih, a uzrokovana je od ortodoksne ekonomske znanosti nepriznatih negativnih posljedica globalizacije, specijalizacijom, ekonomijama razmjera i eksplozijom znanja koje su, sinergijski, mnogim metropolitanskim područjima omogućile globalno dominirajuće ekonomske sektore. S druge strane,

poraženi, kao što je Collierov rodni grad Sheffield, nazadovali su uslijed raspadajućih zastarjelih industrija koje, suprotno očekivanjima desne ekonomske doktrine, nije zamijenila nova uspješna ekonomska aktivnost s visokom dodanom vrijednošću. Collier smatra da veća produktivnost i prihodi stanovnika metropola nisu samo njihova, već i zasluga kolektivnih javnih dobara koja su omogućila aglomeraciju. Stoga predlaže uspostavljanje poreza na metropole – na visoko plaćen rad, ali i na rentijersku dobit od zemlje. Prihod od ovog poreza koristio bi se nacionalno za obnavljanje periferija. Sredstva prikupljena ovim porezom ne bi se koristila za socijalna davanja u ranjivim područjima, već za podupiranje novih ekonomski živih zona, razvojnih banaka s lokalnim djelovanjem, agencija za promoviranje investicija i drugo.

Podjela između građana prema obrazovanju nastala je porastom mogućnosti za specijalizaciju rastom ukupno dostupnog znanja. Neki pojedinci i obitelji stekli su stoga veliku količinu utrživih vještina i znanja snažno se razlikujući od onih čije vještine gube na važnosti ili stagniraju, posebice starijih. Collier smatra da bi država trebalo jače podupirati ranjive obitelji, osobito one s malom djecom, kroz proces koji naziva *socijalni maternalizam*, a koji bi uključivao financijsku podršku, ali i šire oblike pomoći kao što bi bio program mentoriranja kojega bi provodili mladi umirovljenici. Zalaže se i za škole s društveno proporcionalnom zastupljenošću kako bi se izbjegao efekt getoizacije do kojega dovodi teritorijalni obuhvat škola, te za razvijanje strukovnog obrazovanja po uzoru na Njemačku.

U kontekstu podjela između bogatih i siromašnih zemalja Collier apostrofira od ortodoksne ekonomske znanosti nepriznate negativne strane globalizacije. Premda povećava agregatno blagostanje, u odsutnosti redistributivnih mehanizama to ne čini za svaki kraj ili zemlju. Problem su, smatra, i velike korporacije koje uspješno izbjegavaju plaćanje poreza, ali i imigracija koja koristi poslodavcima i samim migrantima, no ne nužno i domicilnom stanovništvu.

Druga je Collierova temeljna preokupacija analiza uspona i pada socijaldemokracije, te prezentacija vlastite vizije njene obnove u svjetlu navedenih suvremenih problema. Otvoreno je nostalgičan prema zlatnom dobu socijaldemokracije u poratnom razdoblju koje naziva razdobljem etične države. Kao centralno mjesto originalne socijaldemokracije vidi lokalne uzajamne obveze unutar kooperativa, te pragmatizam, a kao njene trajne zasluge široku lepezu ostvarenih politika koje su prihvatile i održavale sve stranke centra – u područjima zdravstva, mirovina, obrazovanja, osiguranja od nezaposlenosti itd. Ove su politike, smatra, tada bile široko prihvaćene i uspješne zbog zajedničkog iskustva razornog rata koji je stvorio kolektivno nacionalan i solidaran identitet.

No, suvremena je socijaldemokracija u očitoj egzistencijalnoj krizi, a Collier smatra da je etičnu državu zamijenila ona paternalistička. Kao temeljni uzrok njenog pada vidi napuštanje koncepta uzajamnih obveza, odbacivanje nacionalnog, stoga i kolektivnog identiteta obrazovanih i bogatih, te negativan utjecaj intelektualaca srednje klase koji su zadominirali ovim strankama. Collier smatra da su potonji, preuzevši ideje utilitarizma i one Johna Rawlsa, napustili prostor moralnih nagnuća većine stanovništva. Utilitaristi su zamijenili komunitarizam društvenim paternalizmom kojega su nastojali voditi kao svojevrsna „anđeoska avangarda”, zbrajajući „utile”, te kreirajući štetnu i nepreciznu sliku čovjeka unutar ekonomske znanosti, tzv. „ekonomskog čovjeka”. Posebno je ovdje zanimljiv spomen istraživanja Jonathana Haidta koji pokazuje da ljudi općenito imaju šest jednakih centralnih vrijednosti (lojalnost, poštenje, slobodu, hijerarhiju, brigu i svetost), a da se utilitarizam poziva tek na dvije (brigu i jednakost). Sljedbenici Johna Rawlsa, u prvom redu pravnici, kao intelektualno načelo koje bismo svi morali prihvatiti uzeli su ono o osnaživanju obespravljenih grupa. Posljedica je ovih silnica, prema Collieru, zanemari vanje individualnih uzajamnih obveza koje gajimo jedni prema drugima, te pretjerano usredotočivanje na prava koja nam, većinom, osigurava država. Nastalo stanje naziva „Rottweiler društvom” koje sve više naginje prema agresiji, poniženju i strahu.

Knjiga pokušava dati koherentan i moralno utemeljen nacrt za obnovljenu socijaldemokraciju na tragu *Budućnosti socijalizma* britanskog laburističkog zastupnika Anthonya Croslanda, koji je dao sličan doprinos tom pokretu na njegovu vrhuncu. Smatra da kapitalizam, premda je presudan za masovni prosperitet, mora radnicima dodatno nuditi i osjećaj smisla i pripadanja, a da je u tome trenutno zakazao. Potrebno je vratiti se pragmatičnim i općemoralno prihvatljivim politikama utemeljenim u kolektivnim, u prvom redu teritorijalnim identitetima. No, ne pojašnjava što bi danas moglo pridonijeti ovome procesu, slično onodobnom zajedničkom iskustvu razornog rata. Za Colliera je osjećaj teritorijalne pripadnosti, u cjelinama u kojima se politika i odvija, mnogo bolja osnova za uzajamnost od kozmopolitizma koji prečesto dovodi do odbacivanja obveza bez prihvatanja novih.

Uz već spomenuti utilitarizam i ideje Johna Rawlsa, Collierova je treća preokupacija u knjizi kritika intelektualnih pokreta i doktrina za koje smatra da su u suprotnosti s njegovim pragmatičnim centrističkim komunitarizmom, te da štetno djeluju na suvremeni kapitalizam i ljudsko blagostanje općenito.

Stoga je izrazito kritičan prema modelu čovjeka koji nam nudi ortodokсна ekonomska znanost, tj. koncepcija „ekonomskog čovjeka” – čovjeka potpuno sebičnog, lijenog i zainteresiranog isključivo za maksimizirati

ranje osobne koristi i konzumacije. Ovome modelu suprotstavlja svoju konceptualizaciju za koju smatra da bolje opisuje naša temeljna nagnuća – onaj „društvene žene” kojoj je na prvom mjestu samopoštovanje koje dobiva i (ali ne samo) radom, te uzajamni društveni odnosi koji joj daju osjećaj pripadanja i smisla. Stoga ona ne djeluje samo iz pukih želja, već i osjećaja dužnosti. Smatra da je ekonomska znanost pri stvaranju ovoga modela krivo protumačila Smithovo razumijevanje čovjeka, oslanjajući se isključivo na *Bogatstvo naroda*, a zanemarujući i pogrešno shvaćajući *Teoriju moralnih osjećaja*. U spoju s utilitarizmom, ekonomska je znanost potpuno i negativno zadominirala javnim diskursom i procesom konceptualiziranja javnih politika. Posebno je zanimljivo opisano istraživanje koje pokazuje kako studenti ekonomije preuzimaju model „ekonomskog čovjeka”, te da studijem ekonomije zaista postaju i sebičniji.

Nadalje, Collier smatra da suvremeni politički prostor, uslijed osjećaja krize, snažno obilježavaju populistički i ideološki pokreti i političari, kao što je to bio slučaj i u vrijeme posljednje velike krize 1930-ih. Ideologije ljevice i desnice, primjerice komunizam, fašizam i religijski fundamentalizam nas, smatra autor, vraćaju u zastarjele i arhaične oblike razmišljanja koji nude jednostavne moralne odgovore i pretjerano sveobuhvatne analize koje nastoje dati odgovor na svako pitanje. Ideologija, ističe, nasuprot univerzalnih ljudskih vrijednosti stavlja neki partikularan argument ili načelo s kojim bi se, gotovo tiranski, svatko trebao složiti ili pak uzdiže jednu vrijednost nasuprot svih ostalih.

Karizmatični populistu vuku, pak, svoju snagu iz ljutnje i strahova uzrokovanih novim podjelama, no ne nude nikakva suvisla rješenja osim jednostavnih i fundamentalno neučinkovitih moralističkih argumenata. Odbacuju praktično promišljanje u korist brzih skokova sa strasti na neuvjerljive politike. Smatra da je protekcionizam, glavni ekonomski cilj populista, osuđen na propast jer, osim što smanjuje produktivnost, za njega ne može biti širega globalnog konsenzusa. Zalaže se za odmicanje od načela „jedan član jedan glas” pri izboru stranačkih čelnika kao doprinos smanjenju broja populističkih stranačkih čelnika.

Nasuprot ovim pokretima, Collier kao rješenje koje može ponuditi konkretne odgovore na suvremene probleme nudi pragmatizam „tvrđog centra” čvrsto utemeljen u moralu i praktičnom promišljanju tradicije Smitha i Humea. Kao uspješne političare ove orijentacije spominje Lee Kwan Yewa (Singapur), Pierrea Trudeaua (Kanada), Paula Kagamea (Ruanda) i Emanuela Macrona (Francuska). Premda, kako je već rečeno, nostalgичno razmišlja o razdoblju vrhunca socijaldemokracije u poratnom razdoblju, ujedno smatra da je centralno načelo pragmatizma da ne postoje univerzalne istine, pa stoga ni onodobna socijaldemokracija to nije jer se društva, a onda i najbolje politike, mijenjaju.

Collier smatra da je suvremeni kapitalizam u krizi jer je moralno nedostatan ne nudeći osjećaj smisla, samopoštovanja i pripadanja koji bi ljudima omogućio da „cvjetaju”. Stoga je nužna obnova morala kroz reetabliranje moralne grupe u svim svojim pojavnostima: onima moralne države, tvrtke, obitelji i svijeta. Kapitalizmom se, smatra, mora upravljati, a ne ga poraziti. U kontekstu etične države ističe potrebu ponovnog uvođenja zdravog patriotizma koji je nužan s obzirom na to da su naše političke jedinice teritorijalne, a ne postoje indikacije da će to u budućnosti prestati biti. U kontekstu etične tvrtke smatra da se treba udaljiti od poimanja da je njena jedina svrha maksimiziranje dobiti za dioničare. Konkretnije, predlaže uvođenje progresivnog poreza ovisno o veličini tvrtke, te predstavljanje javnog interesa u nadzornim odborima. Smatra da je etična obitelj, prisutna u prošlosti, oslabljena usredotočivanjem na osobno ostvarenje te posljedično odbacivanje osjećaja uzajamne brige. Konačno, etičan svijet trebao bi se izgraditi primarno na uzajamnim odnosima između zemalja sa zajedničkim grupnim identitetom, u skladu s njihovim prosvijetljenim interesom, ali i obvezama spašavanja najranjivijih država.

Knjizi se može uputiti i nekoliko kritika. Prvo, analiza je previše utemeljena na iskustvu Engleske i SAD, stoga nije jasno bi li i zemljama iz drugih civilizacijskih krugova ovakva socijaldemokracija bila od koristi. U istom kontekstu, siromašnije, ali i dalje kapitalističke zemlje, sagledava isključivo kroz prizmu nužnosti pomoći, te kao izvor imigracije. Treće, upitno je jesu li tri navedene nove podjele ujedno i jedine o kojima moramo voditi računa. Četvrto, nejasno je zašto se njegova „pragmatična socijaldemokracija” ne bi također mogla shvatiti kao ideologija, te stoga patiti od istih problema kao i druge ideologije koje analizira. Konačno, čini se i kako su rješenja koja nudi, premda inovativna, obuhvatom nedostatna za rješavanje širokih problema koje analizira, te prečesto utemeljena na pozitivnim iskustvima malih, lokalnih nevladinih organizacija.

Zaključno, može se sa sigurnošću ustvrditi da će *Budućnost kapitalizma* biti poticajno štivo studentima i istraživačima društvenih znanosti koje zanima suvremena politička ekonomija i socijaldemokracija, a posebice onima s teorijskim interesom i zanimanjem za područje etike jer su to, uz multidisciplinarnost, najjači dijelovi knjige. Knjiga je pitko pisana te se stoga može preporučiti i političkim praktičarima, posebice onima socijaldemokratske orijentacije.

VEDRAN DUANČIĆ

GEOGRAPHY AND NATIONALIST VISIONS
OF INTERWAR YUGOSLAVIA

*Modernity, Memory and Identity in South-East Europe,
Palgrave Macmillan, Springer Nature
Switzerland AG (str. 286)*

Knjiga Vedrana Duančića dio je serije koja istražuje vezu između moderne povijesti i sadašnjosti jugoistočne Europe. U tom kontekstu, ova knjiga analizira isprepletene povijesti geografije u međuratnoj Jugoslaviji i o međuratnoj Jugoslaviji, a da pritom nikako nije još jedna knjiga o političkoj povijesti prve Jugoslavije. Naprotiv, Duančić koristi događaje iz 1918. kad je država stvorena, one iz 1941. kad je dezintegrirana pod naletom Osovine, te, dodatno, iz 1945. kad je ponovno uspostavljena pod komunističkom upravom. Na taj način stvara trovalentnu studiju o vezi između geografije kao znanosti u usponu unutar akademskih krugova koji izučavaju južnoslavenske zemlje, geografije kao zbroya radova koji se bave Jugoslavijom i nekolicine političkih projekata u ovom povijesnom razdoblju, a na što upućuje i sam naslov knjige: *Geografija i nacionalističke vizije međuratne Jugoslavije*.

Autor u središte svog interesa stavlja geografiju čiji su praktikanti, prema njegovoj polaznoj hipotezi, odigrali znakovitu ulogu u stvaranju i rušenju međuratne Kraljevine, prvo Srba, Hrvata i Slovenaca, a potom, od 1929. godine, Jugoslavije. Geografi su, kako Duančić prvo pretpostavlja, a potom vješto dokazuje kroz ovu knjigu, imali središnju ulogu u povezivanju vremena i prostora, odnosno povijesti i geografije. Na taj način su geografi istraživali fizičke i kulturološke karakteristike međuratnog krajobraza novonastale južnoslavenske državne zajednice, povezujući te zaključke s poviješću južnoslavenskih „plemena” i prosperitetom Jugoslavije. Ponekad su svoje nalaze komparirali sa sličnim europskim državama za koje su vjerovali da nalikuju Jugoslaviji po geografskoj lokaciji i kompoziciji, te na taj način dijele istu povijesnu sudbinu.

Jugoslavenski geografi bili su pod snažnim utjecajem njemačke geografske tradicije. Penckova geomorfologija i Ratzelova antropogeografija oblikovale su generaciju međuratnih jugoslavenskih geografa. Čak štoviše, antropogeografija je preuzela primat, a ispreplićući se istovre-

meno s geomorfologijom postala je snažno oružje u rukama europskih geografa koji su koristili svoj znanstveni autoritet kako bi stvarali geopolitičke diskurse korisne za ostvarenje političkih ciljeva.

Duančić u uvodnom prvom poglavlju jasno definira teorijske pretpostavke, kao i središnje istraživačko pitanje, pitajući se zašto je i kako je geografija odigrala tako važnu ulogu, a prilikom odgovaranja u obzir uzima različite geografske tradicije i trendove u Jugoslaviji, njihovu međusobnu komunikaciju i korespondenciju, te njihovu komunikaciju s inozemstvom, koja je omogućila prijenos ideja, posebice za vrijeme Pariške mirovne konferencije i stvaranja Kraljevine Srba, Hrvata i Slovenaca. Iako je ime Jovana Cvijića neprepoznatljiviji integralni element jugoslavenske, ali i velikosrpske geografije ovog razdoblja, Duančić ide nekoliko koraka dalje te čitatelja upoznaje s ostalim eminentnim geografima, njihovim idejama i političkim kontroverzama od Skopja, preko Zagreba, pa do Ljubljane. Prethodno navedeno čini Duančićevu knjigu vrijednim doprinosom ne samo hrvatskoj, ex-jugoslavenskoj i europskoj povijesti, nego i antropogeografiji, te brojnim politološkim disciplinama poput geopolitike, sigurnosnih i obrambenih studija ili međunarodnih odnosa u regiji i u svijetu.

U drugom poglavlju bavi se fenomenom jugoslavenske geografije kroz prizmu međuratne južnoslavenske dihotomije i pitanja hoće li jugoslavenska nacija biti stvorena od hrvatskog, slovenskog i srpskog plemena koji će se u jednom trenutku povezati u jednu naciju ili su Hrvati, Slovenci i Srbi tri slična, ali razdvojena naroda koja su međusobno koegzistirala u jednoj državi. S tim u skladu, a kako sam Duančić elaborira, mnogi jugoslavenski geografi bili su fokusirani na svoje nacionalne geografije, ali su isto tako svi imali i mišljenje o unutarnjim administrativnim granicama Jugoslavije, nejednakom kulturološkom i ekonomskom razvoju, kao i o versajskim granicama nove Kraljevine, a 1930-ih i o granicama Jugoslavije na Hitlerovoj karti Europe. U tom međuratnom razdoblju jednako problematična bila je etiketa *jugoslavenski*, kao i teritorijalne kategorije *Slovenija*, *Srbija* ili *Hrvatska*, ali to nije značajnije omelo etabliranje geografije na sveučilištima širom Kraljevine SHS i puno prije samog osnutka te državne zajednice. Čak štoviše, dihotomija je ostala prisutna u cijelom međuratnom razdoblju, a napredak geografije ni u kojem slučaju nije kaskao za europskim razvojem ove znanstvene discipline. Geografski sveučilišni centri Kraljevine, kako Duančić u ostatku poglavlja objašnjava, financijski su bili ograničeni pa su bili manje orijentirani na izradu karata, a više na vlastite percepcije, geografsko-povijesno-antropološke interpretacije i geopolitičke imaginacije prostora bivše Jugoslavije. Najeminentnije ime među njima svakako je ono Jovana Cvijića.

Jovan Cvijić u većoj ili manjoj mjeri utjecao je na sve sveučilišne centre tadašnje Kraljevine SHS od Ljubljane do Skopja, a njegova međunarodna

reputacija i politički angažirana antropogeografija pozicionirale su ga kao središnju geografsku ličnost predratne, ratne i međuratne povijesti jugoistočne Europe. Duančić treće poglavlje posvećuje upravo Cvijiću, te se bavi njegovim osnovnim teorijskim i metodološkim postavkama, kao i političkim kontroverzama koje se povezuju uz njegovo ime – pogotovo u kontekstu reduciranja njegovog opusa na isključivo znanstvenu verifikaciju velikosrpske ideologije. Duančić se ne slaže s takvim isključivim ocjenama argumentom da je Cvijić upoznao širu europsku javnost s „jugoslavenskom geografijom Jugoslavije” (str. 53), ali isto tako nedvosmisleno navodi kako su u Cvijićevoj antropogeografiji snažno zastupljene dvije teme: „razgraničenje – srpskog i jugoslavenskog nacionalnog prostora, te etnopsihologija balkanskih naroda, oba protumačena kao Cvijićev pokušaj da uspostavi primat Srba nad ostalim skupinama u Jugoslaviji i na Balkanu općenito” (str. 50).

U četvrtom poglavlju autor se bavi ostalim geografima koji su, prema njemu, jednako važni, a na trenutke čak i važniji od Cvijića u procesu političke izgradnje Jugoslavije. Njihova aktivna podrška političkim projektima svoje države započela je nakon Cvijićevo djela *La Péninsulebalkanique*, koja je postala zanimljivija čitateljima u Ljubljani i Zagrebu nego u Beogradu ili Parizu (u kojem je izdana na francuskom jeziku). Cvijićevo djelo tako je postalo središtem jugoslavenskog državnog projekta, a njegova uloga na Pariškoj mirovnoj konferenciji kao geografa okuražila je razvoj antropogeografskih ideja u novostvorenoj državnoj zajednici, te na taj način spustila geografske rasprave o Jugoslaviji s međunarodne razine na unutarjugoslavensku razinu, prepuštajući geografske teme Jugoslavije Jugoslavenima. Duančić navodi kako su slovenski i hrvatski geografi, poput Karla Capudera, Ive Juras, Antona Melika, Milana Šenoe i Filipa Lukasa preuzeli vodstvo u geografskom smislu izgradnje Jugoslavije.

Za srpsku inteligenciju, uključujući geografe, proces izgradnje nacionalnog prostora nije bio pod tolikim pritiskom kao kod njihovih hrvatskih i slovenskih kolega. Duančić tvrdi kako je Srbija u Kraljevinu SHS prenijela tradiciju neovisne države koja je teritorijalno određena i u sebi uključivala nikad veći broj Srba, a došlo je i do značajnijeg, iako usitnjenog, korpusa geografskih djela o toj temi. Osim negacije njihovog nacionalnog identiteta od strane unitarističkog jugoslovenstva, pogotovo nakon proglašenja Šestosiječanjske diktature, geografi iz Hrvatske i Slovenije suočili su se i sa stranim pretenzijama na njihov percipirani nacionalni teritorij. Hrvatski i slovenski geografi više su željeli da svoje nacionalne prostore potvrde ne samo kao zemljopisne, nego i kao etničke, kulturne i povijesne jedinice. To je, prema riječima autora ove knjige, dovelo do neravnoteže političke i znanstvene moći u Jugoslaviji.

Autor na jako precizan i razumljiv način objašnjava kontekst u kojem se spomenuta neravnoteža moći odvija. S jedne strane, navodi kako je

disbalans moći prisutan od samog početka stvaranja države, te kako se zameci toga disbalansa nalaze već u ranim fazama ranije spomenutih geografa, a s druge, na primjeru evolucije geografske znanosti u međuratnom razdoblju pokazuje kako su brojni hrvatski i slovenski geografi ipak dali priliku izgradnji zajedničke države, posebice u prvim godinama njenog postojanja. Kasnije, kako peto poglavlje prikazuje, brojni geografi, među kojima i Filip Lukas, nastojali su unaprijediti geografsku pismenost naroda u skladu sa Haushoferovom vizijom geopolitike kao učiteljice naroda. Geopolitičke ideje *Lebensrauma* Fridricha Ratzela, *heartlanda* i *rimlanda* Halforda Mackindera ili Ratzelovog učenika Rudolfa Kjelléna kasnih dvadesetih godina počele su se ugrađivati i u temelje političko-geografskih diskursa međuratne Jugoslavije. Najdalje je otišao upravo Lukas koji je kao predsjednik Matice hrvatske od 1928. do 1945. nudio geografske vizije hrvatskog nacionalnog pitanja.

Iako sam Lukas, kako Duančić elaborira u šestom poglavlju, nije mogao prihvatiti čisto biološko obrazloženje pa je ostao usidren u prostornim razmatranjima o povijesti, kulturi, naciji – ali i rasi – ipak je obrazovao hrvatsku nacionalističku inteligenciju unutar diskursa kojeg je teško razlikovati od ustaške ideologije. Nakon poništenja smrtne presude 2017. godine, koju je naredila komunistička vlast 1945. u nenazočnosti, Lukas i dalje ostaje kontroverzna povijesna ličnost u hrvatskoj javnosti, ali, kako Duančić navodi, njegov „doprinos povijesno-geografskom anti-jugoslavizmu svakako je obilježio promjenu smjera geografije u Jugoslaviji” (str. 232).

Duančić također povlači paralelu između Lukasove Matice hrvatske, te Hrvatske seljačke stranke i etnologa Milovana Gavazzija u kontekstu pitanja koja bi politička opcija predstavljala i vodila hrvatski narod. I dok je Lukas promatrao hrvatsku kulturu na superorganski način, kao nacionalni duh neraskidivo povezan sa zemljom koja je jasno odvojena od srpske, Gavazzi je stalno ukazivao na brojne zajedničke kulturne elemente, bez jasnog razgraničenja kod Južnih Slavena, te smještala seljaštvo, umjesto urbane, nacionalno svjesne inteligencije, u središte hrvatske nacije. Iz toga razloga Duančić u zaključku daje podsjetnik da nacionalna pripadnost nije jedina odrednica pozicija u sučeljavanju vizija znanstvenika međuratne Jugoslavije, pogotovo jer i sam u knjizi stavlja naglasak na komparaciju upravo takve razine znanstveno-(geo)političke konfrontacije.

Baš kao što i sam zaključak navodi, ova je knjiga pokazala kapacitet geografije da se angažira u međuratnoj politici nudeći mješavinu naizgled uvjerljivog zemljopisnog, povijesnog, kulturnog i biološkog objašnjenja krizi jugoslavenske države i cijele međuratne Europe. Oslanjajući se na primarne izvore u svom istraživanju, te fokusirajući se na ideju da na jednom mjestu sažme najvažnija imena i ideje antropogeografije među-

ratne Jugoslavije, autor knjige uspješno je strukturirao trovalentnu vezu između dvije razine geografije kao znanosti u usponu i jugoslavenske geografije, te najdominantnijih političkih projekata ovog razdoblja. Slažući poglavlja tematski, a ne kronološki, Duančić je postigao stilsku razumljivost i logičku konzistentnost svojih argumenata, te nedvosmisleno iznosi sveobuhvatni odgovor na istraživačko pitanje dokazujući na nekoliko mjesta kroz knjigu kako je međuratno razdoblje ključ za definiciju što je i gdje je bila Jugoslavija, a kako su geografi bili nositelji tih pokušaja definiranja.

Ova knjiga također predstavlja i izuzetan doprinos u kontekstu rasprave o ulogama pojedinih kontroverznih povijesnih ličnosti u južnoslavenskoj povijesti, posebice Filipa Lukasa i Jovana Cvijića. U tom smislu, posebno se ističe autorov odnos prema bivalentnoj ulozi koji su ova dva geografa odigrala u kontekstu stvaranja politika povijesti i geopolitičkih vizija prostora bivše Jugoslavije. I dok su Cvijićeve ideje rado koristili velikosrpski ideolozi, a Lukasove ustaški, Duančić im pristupa uvažavajući postojeće imaginacije, ali i istovremeno naglašavajući njihovu jugoslavensku dimenziju u djelovanju. Tim činom autor ne samo da zadržava objektivnost svog rada, već perfidno prepoznaje duh vremena u kojem su autori djelovali čime si ne dopušta pseudopovijesne interpretacije politički angažirane geografije.

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