

LEPL DAVID AGHMASHENEBELI  
NATIONAL DEFENCE ACADEMY OF GEORGIA

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ACADEMY OF GEORGIA**



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**Nº4**

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## THE IMPACT OF THE MILITARY INDUSTRY ON NATIONAL SECURITY

**Brigadier General**

**Mamia Balakhadze<sup>1</sup>**

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### ABSTRACT

In the contemporary international system, national security remains a paramount priority. Its enhancement is contingent upon the convergence of political and economic stability alongside military and technological capabilities. In this regard, the military industry serves as a fundamental pillar of a state's sovereignty, strategic independence, and defense sustainability. This paper aims to analyze the role of the military industry in the systemic reinforcement of national security, examining the circumstances under which its influence may emerge as both a stabilizing element and a potential source of risk.

The study is grounded in a comprehensive analysis of both theoretical frameworks and empirical sources, including the security theories articulated by Waltz, Nye, and Buzan, as well as contemporary examples of military-industrial policies practiced by various states. The findings indicate that the military industry exerts a multifaceted impact on national security through enhanced defense capabilities, strategic autonomy, technological advancement, and economic stimulation. Furthermore, the research reveals that excessive politicization or alignment with private interests can precipitate imbalances within the state's system.

In conclusion, the military industry should be regarded not merely as a tool of aggressive policy but as a mechanism for fostering peace, stability, and sovereign development. Its effectiveness is predicated upon political will, economic resources, and technological expertise, which collectively shape the state's position within the global security landscape.

**Keywords:** national security, military industry, strategic independence, defense capability, military-industrial complex.

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<sup>1</sup> Rector of LEPL-David Aghmashenebeli National Defence Academy of Georgia.  
Doctor of International Relations

## INTRODUCTION

National security constitutes one of the paramount challenges within the framework of contemporary international relations. Its key determinants encompass both political and economic stability, as well as military and strategic capabilities. In this context, the military industry serves not only as a provider of defense capabilities but also as a crucial factor in establishing a state's sovereignty, technological independence, and its position within the global security architecture. As noted by Waltz (1979), the stability of the security system is directly correlated with the military-political capabilities of states. The military industry is frequently regarded as an integral part of the "Military-Industrial Complex," a term first introduced by US President Dwight D. Eisenhower in 1961 during his farewell address. This concept underscores the notion that military production significantly influences state policy and international relations (Eisenhower, 1961). Beyond its military implications, the military industry plays an essential role in fostering a country's economic and technological advancement. As articulated in Fukuyama's analyses, military innovations often create the basis for civilian progress (Fukuyama, 2004).<sup>2</sup>

The military industry constitutes one of the foundational pillars of a national security framework. A state that possesses the capability to develop its own defense technologies and armaments significantly enhances its prospects for maintaining independence and sovereignty. As Franklin D. Roosevelt aptly stated, "A nation that cannot defend itself is not truly free." Consequently, the military industry not only acts as a safeguard for defense but also serves as a guarantee for freedom.

However, Dwight Eisenhower cautioned against the potential overreach of the military-industrial complex, emphasizing that, when excessive, state security could become vulnerable to private interests. In contemporary circumstances, as noted by Joseph Nye, the concept of security encompasses not merely an arsenal of weapons but also extends to economic, technological, and diplomatic capabilities. Therefore, the enhancement of the

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<sup>2</sup> K. Booth, *Theory of World Security*. Cambridge University Press. (2007).

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military industry should be directed towards fostering stability and peace rather than promoting aggression. Only by maintaining this balance does national security become an expression of responsibility, not power. The primary objective of this paper is to ascertain, through thorough analysis, the contributions of the military industry to national security. A comprehensive examination of this issue remains notably sparse within the existing literature, which predominantly focuses on economic and international political dimensions. The central question of this research seeks to elucidate the significance of the military industry in both the broader context of national security and within the realm of international relations. The topics and conclusions articulated herein reflect general considerations and provide a universal analysis, devoid of alignment with the perspectives of any specific state. The findings derived from the empirical analysis aim to cultivate an understanding of the military industry's importance in the context of national security.<sup>3</sup>

The military industry constitutes a fundamental component of national security. A robust defense sector enables a state to independently safeguard its sovereignty and prepare for crisis situations. However, there exists a critical perspective regarding the potential for the military industry to exert excessive influence. Such influence may lead to the transformation of national security into an avenue for economic gain, with defense serving as a mechanism for political manipulation. Therefore, to foster the military industry while mitigating associated risks, it is imperative to establish a balanced approach. This concept posits that sustainable national security is predicated on equilibrium: a strong military industry is essential, but its purpose should be to promote peacekeeping and stable development rather than aggression. The military industry's influence on national security manifests through several primary avenues.<sup>4</sup>

**a) Ensuring defense capability** - A well-established military industry enables swift and effective responses to crises, reduces reliance on imports, and bolsters strategic stability. In critical circumstances, this capability may prove essential for preserving national security.

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<sup>3</sup> B.Buzan, People, States and Fear: An Agenda for International Security Studies in the Post-Cold War Era. Boulder, CO: Lynne Rienner Publishers. Please use the same font as in the text above. (1991).

<sup>4</sup> B. Buzan, Hansen, L. The Evolution of International Security Studies. Cambridge University Press. (2009).

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The defense capability constitutes a fundamental component of the national security framework. In this regard, the military industry assumes a significant role, as it directly influences the capabilities of the nation's armed forces, the expediency of ammunition supply, and the overall strategic stability.

**b) Strategic independence** - Dependence on imports represents one of the most significant vulnerabilities within national security. An international embargo or geopolitical tensions can severely undermine a nation's defense capabilities, whereas a robust domestic military industry bolsters strategic sovereignty (Buzan, 1991). Strategic independence constitutes a critical element of national security, as it affects a state's sovereignty, its capacity for autonomous decision-making, and its position within the global security framework. The military industry is integral to this process, as the capability to produce and develop military resources grants the state greater resilience against external pressures.

**c) Technological progress and innovation** - Numerous scientific advancements have their origins in military applications. Technologies such as GPS, the Internet, and unmanned aerial vehicles exemplify how innovations initially developed for military purposes become integral to civilian life. Consequently, the military sector serves as a significant catalyst in the process of technological modernization. Historically, the military industry has played a vital role in driving scientific and technological progress. The challenges associated with military operations frequently necessitate the development of innovative technologies, which are subsequently adapted for widespread civilian use. Therefore, the enhancement of national security through the military sector is intrinsically linked to the overarching technological advancement of a nation.

**d) Economic importance** - The military industry plays an important role in the creation of new employment opportunities, the enhancement of the industrial base, and the expansion of export potential. However, there exists a concern that an excessive allocation of resources to the military sector may adversely affect social development (Kennedy, 1987). Furthermore, the military industry not only serves as a crucial component of national defense capability and strategic autonomy but also functions as a significant economic

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driver. Its influence extends both directly and indirectly to the economic framework of the nation, impacting various sectors, employment rates, and the overall dynamics of economic growth.<sup>5</sup>

## MAIN PART

### 1. How the Defense Industry Contributes to National Security

The development and evolution of the global military arms production and procurement system have emerged as pivotal factors in contemporary international relations. In the context of economic globalization, technological advancements, and the integration of the defense industry, the sector has become an essential element not only for economic growth but also for the maintenance of national security. In the twenty-first century, the significance of the defense industry has escalated, as the security strategies of nations increasingly rely on innovative military technologies, production autonomy, and networks that hinge on global partnerships.<sup>6</sup>

In this context, the role of the defense industry in national security can be articulated through two primary mechanisms. The first mechanism pertains to the facilitation of access to military goods, technologies, and services, which in turn influences the state's defense capabilities and strategic autonomy. The second mechanism involves the enhancement of a nation's international standing and influence, thereby contributing to the reinforcement of national identity, pride, and political cohesion.

This article seeks to conduct a comprehensive analysis of these two mechanisms, examining both their historical evolution and contemporary dynamics. The study will focus on the transformation of the defense industry's function, evolving from traditional military production into a technological and geopolitical instrument that shapes the state's security

### 2. Access to Military Goods, Technologies, and Services

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<sup>5</sup> K. N. Waltz, *Theory of International Politics*. Reading, MA: Addison-Wesley. (1979).

<sup>6</sup> B. Buzan, O. Wæver, *Regions and Powers: The Structure of International Security*. Cambridge University Press. (2003).

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The Cold War period, along with significant transformations in international relations, led to the development of the military industry and resulted in a substantial increase in arms procurement. Historically, North American and Western European enterprises predominantly led arms production during the Cold War. However, ongoing international and regional developments have given rise to new nations in the field of arms manufacturing and procurement, notably Brazil, India, South Korea, and Turkey. These countries are now recognized as prominent producers within the global arms market. Such shifts have contributed to the diversification of this market. These changes have led to the diversification of the global arms market. According to the new trend, the priority is on the buyer, which has made the global market buyer-oriented.

In recent years, the most significant transformations have been driven by the emergence of new technologies, particularly within the digital domain. This development has facilitated the integration and advancement of new technologies in military production, consequently leading to an increased demand for such innovations. Military analysts have referred to the advent of artificial intelligence (AI) within these technologies as the sixth revolution in military affairs. States are striving to reduce costs and diversify by collaborating with private companies within the military sector; these companies are oriented towards export opportunities while simultaneously witnessing growth in critical sectors of the domestic military industry. Notable trends remain evident within the international arms production and development market. The United States continues to maintain a dominant position in the global arms market. American arms companies enjoy considerable credibility and prestige in research and sales on the world stage. Any military procurement contract involving the United States is often regarded as a benchmark of success. Concurrently, new digital and high-tech companies have emerged in the global market, entities that previously had no affiliation with the defense industry; however, shifts in the nature of hostilities have prompted them to realign their priorities.<sup>7</sup>

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<sup>7</sup> B.Buzan, O.Wæver, de Wilde, J. Security: A New Framework for Analysis. Boulder, CO: Lynne Rienner Publishers. (1997).

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One of the main functions of the military industry is the development, production, and technical support of military goods, technologies, and related services. These processes enable the armed forces and other security agencies to attain the necessary material and technological capabilities. The operations of the military industry encompass both qualitative and quantitative dimensions. The qualitative dimension pertains to the technological complexity, innovativeness, and efficiency of the goods and technologies produced, as well as the overall level of professional competence within the industry. High levels of technological expertise are regarded as strategic assets that significantly enhance a state's defense potential and the operational capabilities of its armed forces (defense forces). Conversely, the quantitative aspect reflects the volume and scale of production that the industry can achieve, given its existing resources and infrastructure.

Although the defense sector is characterized by rigorous regulation and often benefits from government subsidies, it remains subject to the principles of market economics and competitive mechanisms. Consequently, conflicts of interest may arise in the production process between economic efficiency and strategic needs, for example, when balancing resource optimization and national security priorities.

The primary factor driving the development of defense industrial production is the level of perceived and actual threats to a state. In a high-threat environment, there is usually an acceleration in military innovation and an increased need to invest in new technologies. Consequently, countries that face greater external threats tend to develop stronger and more innovation-focused defense industries over time.<sup>8</sup>

A prominent example is Israel, which operates in a high-threat environment and has developed a robust domestic defense industry in response. Some of the latest military systems created by Israel include unmanned aerial vehicles (UAVs), the Iron Dome missile defense system, and advanced reconnaissance satellites. These innovations clearly illustrate how security challenges can serve as a catalyst for technological advancement.

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<sup>8</sup> D. Eisenhower, Farewell Address. Washington, D.C.: U.S. Government Printing Office. (1961).

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A similar trend has been observed in South Korea and Japan, both of which have significantly enhanced their defense production capabilities in recent decades, driven by escalating geopolitical tensions with China. The expansion of the defense sector in these nations has not only resulted in an augmentation of technological capabilities but has also led to a substantial increase in the economic scale of the industry and the volume of exports.

Furthermore, the strategic competition among leading powers, particularly the United States, China, and Russia, exerts a considerable influence on the dynamics of the global defense industry. This competition is especially prominent in sectors related to emerging technologies, including cybersecurity, artificial intelligence, hypersonic weapons, and autonomous systems. Consequently, the international security environment itself acts as a catalyst for innovation and a primary driver of military-technological advancement.<sup>9</sup>

The domestic armaments industry in numerous states relies significantly on technology transfer and the importation of components and subsystems. Actually, the acquisition of technology from foreign entities is a principal driver behind the advancement of domestic defense industries. This process enables states to enhance their production technology base and improve the quality of military products. One prevalent mechanism in this interaction is licensed production, which not only facilitates the manufacturing of specific weapon systems but also enables countries to acquire broader technological expertise and manufacturing experience. Furthermore, offset agreements are widely utilized, allowing purchasing nations to obtain technology transfer, access to advanced production techniques, and the development of new industrial capabilities. Consequently, technology transfers and licensed production frequently serve as strategic instruments for importing states aiming to modernize their industries and cultivate niche markets. Over time, this approach has empowered certain countries to establish themselves as reliable suppliers to prominent international arms manufacturers.<sup>10</sup>

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<sup>9</sup> M. Foucault, *Security, Territory, Population: Lectures at the Collège de France, 1977–1978*. New York: Palgrave Macmillan. (2007).

<sup>10</sup> F. Fukuyama, *State-Building: Governance and World Order in the 21st Century*. Ithaca, NY: Cornell University Press. (2004).

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Ultimately, domestic defense industries play a critical role in ensuring access to military products, technologies, and services; however, achieving this objective comprehensively remains a formidable challenge. A significant number of states lack the industrial infrastructure and capabilities required to establish and sustain a high-level defense sector. The simultaneous attainment of enhanced production quality, alongside increased technological and structural autonomy, presents particular difficulties.

Realizing these aspirations necessitates substantial financial investments and long-term commitments from domestic stakeholders, predominantly government agencies. Furthermore, in numerous instances, prolonged delays between research and development (R&D) phases and the subsequent commercialization of production may impose additional challenges on industrial advancement.<sup>11</sup>

In the context of less industrialized nations, the trade-offs between technological ambitions, production autonomy, and financial implications are especially pressing. Empirical evidence indicates that efforts to establish domestic arms production are successful only when a country's technological objectives are aligned with its economic and industrial capacities. A prevailing disconnect between the needs of the state and the capabilities of local industries can hinder the efficient production and supply of defense products. Consequently, most nations continue to rely heavily on foreign sources for weapons, components, and technological systems. Although domestic defense production can mitigate this reliance to a certain degree, its overall impact tends to be limited. The pursuit of independent industrial development represents a long-term and resource-intensive initiative that necessitates strategic planning, technological collaboration, and ongoing financial investment.

### **3. Enhancing Security Status and National “Pride”**

Domestic defense industries play a crucial role not only in enhancing military capabilities but also in bolstering national status and pride. This dimension can be viewed as a

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<sup>11</sup> J. H. Herz, Idealist Internationalism and the Security Dilemma. *World Politics*, 2(2), 157–180. (1950).  
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significant source of political influence, impacting both international and domestic policy frameworks and, consequently, shaping the entire national security infrastructure.<sup>12</sup>

Aspirations related to national status frequently serve as a significant motivator of state behavior within the realm of international relations. The endeavors of states to sustain or develop their defense industries often reflect a form of technonationalism, wherein the pursuit of technological advancement and enhanced status may take precedence over economic rationality or military efficacy. Thus, in certain circumstances, arms production fulfills not only defensive requirements but also acts as a manifestation of national prestige and autonomy.<sup>13</sup>

A prominent illustration of this strategy can be observed in the leading Asian nations, including China, India, Japan, South Korea, and Indonesia. These countries have, in recent decades, initiated extensive programs aimed at developing domestic defense industries and establishing policies to promote their advancement. Their objectives extend beyond mere military self-sufficiency; they also encompass the enhancement of regional power dynamics and the elevation of their international standing. Therefore, the defense industry may be regarded not only as a mechanism for ensuring security but also as a political emblem of national prestige and identity. This enables states to showcase their technological and strategic independence on the global stage.

Domestic defense production functions as a critical mechanism through which states can demonstrate their military-industrial capabilities and technological competence. Even in situations where states are not entirely self-sufficient in defense matters, the existence of domestic defense industries serves as a significant signal to other nations. This signal conveys that the state possesses the institutional and technological resources necessary to ensure national security and sustain military infrastructure. Particularly noteworthy is the variety and technical complexity of the military products produced, which serve as an

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<sup>12</sup> M. C. Horowitz, *The Diffusion of Military Power: Causes and Consequences for International Politics*. Princeton University Press. (2010).

<sup>13</sup> A. Wolfers, *Discord and Collaboration: Essays on International Politics*. Baltimore, MD: Johns Hopkins University Press. (1962).

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indicator of the level of military-technological expertise within the state. Consequently, the development of the defense industry can indirectly reflect the operational capabilities and innovative potential of a state's armed forces.<sup>14</sup>

The quantitative capabilities of the domestic defense industry, encompassing the scale of production and the capacity to mobilize resources, are indicative of a state's ability to sustain its armed forces during protracted military conflicts. Consequently, the domestic defense sector serves as a crucial measure of a nation's survivability and military resilience. Moreover, arms exports hold both economic and substantial political significance, functioning as an effective mechanism to advance national security interests. The exportation of defense products often contributes to the enhancement of military capabilities among allied states, thereby supporting them in countering common adversaries or geopolitical rivals.

The authorization of arms exports constitutes a significant political statement, reflecting support for the security objectives of another state and thereby establishing a strategic partnership. Such relationships can enhance the exporting country's influence on the international stage, promote defense cooperation, and strengthen diplomatic ties. Consequently, the defense industry and arms exports provide a state with the opportunity to cultivate a reputation as a reliable and influential actor in regional or global security policy. Simultaneously, these exports create a platform for establishing and maintaining political influence with specific partners. However, the process of arms exports is accompanied by considerable political and strategic risks that necessitate careful and deliberate management by the state.

The granting of an export permit may strain relations with rival nations of the importing country, while a denial of such permits may adversely affect diplomatic relations with both existing and prospective partners. Therefore, arms exports should be viewed not merely as economic or industrial transactions but as instruments of strategic balance. The effective

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<sup>14</sup> P. Kennedy, *The Rise and Fall of the Great Powers: Economic Change and Military Conflict from 1500 to 2000*. New York: Random House. (1987).

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management of these exports demands a high level of coordination in foreign and security policy.<sup>15</sup>

In conclusion, the domestic defense industry possesses the potential to significantly enhance the international standing of a nation and foster national pride, ultimately contributing to national security. However, accurately assessing the extent to which these nations can achieve such objectives presents considerable challenges. The attainment of international prestige through the defense sector is a protracted, resource-intensive, and costly endeavor that necessitates both technological excellence and substantial production capacity. In this context, the qualitative and quantitative standards of the weapons and military technologies produced by a nation serve as crucial indicators of its perceived strength and credibility. The more innovative and technologically advanced the systems developed, the greater the impact on the nation's status in the global arena.<sup>16</sup>

Thus, the defense industry can be seen as a complex system that has military, economic, and symbolic importance. Its success relies not only on industrial and technological abilities but also on how effectively the government converts these resources into strategic advantages that bolster national security and enhance international standing.

## CONCLUSION

The domestic military industry plays a crucial role in enhancing national security by integrating military, political, and economic functions, thereby serving as a strategic asset for the state. From a military perspective, this industry facilitates reliable domestic access to military goods, technologies, and services. Such access enhances the operational readiness of the armed forces (defense forces), fosters technological self-sufficiency, and bolsters the capacity of states to respond to both national and global threats effectively. The capability for high-quality and large-scale production significantly contributes to the

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<sup>15</sup> J. S. Nye, *Soft Power: The Means to Success in World Politics*. New York: PublicAffairs. (2004).

<sup>16</sup> C. Peoples, N. Vaughan-Williams, *Critical Security Studies: An Introduction* (3rd ed.). Routledge. (2021).

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efficient mobilization of domestic resources, thereby strengthening the state's resilience in conflict situations.

Second, within the framework of dependency and interdependence, the defense industry establishes a network of political and economic ties among states. It reinforces strategic partnerships with allies and enhances influence within regional or international security dynamics. Arms production and export reflect a state's willingness to support its partners; strengthen diplomatic positions and contribute to political influence in the long term.

Third, the dimension of status and national pride underscores the symbolic significance of the defense industry. A robust defense sector enables a state to exhibit its technological and strategic autonomy on the international stage, enhance its political and regional influence, and fortify its national identity. This aspect is particularly vital for smaller states striving to elevate their strategic prestige through industrial advancement.

Ultimately, the military industry contributes to national security by reinforcing military capabilities, augmenting the strategic influence of states, facilitating the establishment of international standing, and bolstering the foundation for national pride. However, the efficacy of this contribution is neither automatic nor flawless. It is contingent upon the political context of the state, economic resources, technological capabilities, and prevailing social values. Thus, the military industry functions as a multifaceted strategic instrument that simultaneously encompasses both practical and symbolic dimensions in the establishment of national security.

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## THE ROLE OF STRATEGIC MANAGEMENT IN MODERN ORGANIZATIONS

Givi Duchidze<sup>1</sup>

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### ABSTRACT

Strategic management is the cornerstone of success in modern organizations. Effective implementation of strategic management, the formation of an organizational vision, continuous analysis and adaptation to changes in the external environment help companies not only solve today's problems but also establish a sustainable position in the future. Strategic management is the key to achieving long-term success for an organization. It encompasses environmental analysis, goal setting, strategy development, and implementation. This article explores the fundamental concepts of strategic management and its significance in the contemporary business environment.

This paper describes the strategic management process, which involves analyzing the internal and external environment, utilizing SWOT analysis, setting goals, and developing strategies. The paper also emphasizes the importance of strategic management in creating a competitive advantage for the organization and ensuring its sustainability. The article also discusses the challenges of strategic management, such as globalization, technological advancements, and sustainability requirements. Moreover, it emphasizes that strategic management is a continuous process that requires adaptation to a changing environment.

The paper also argues that strategic management is a critical component of success in modern organizations, aimed at effectively utilizing organizational resources and achieving long-term goals in a competitive environment. In today's context, strategic management is not merely about creating a long-term plan but also about continuously analyzing and adapting it to the prevailing internal and external conditions.

The author discusses the key elements of strategic management and notes that strategic analysis is one of the main stages in the process of strategy formulation. This stage involves analyzing both the internal and external environment of the organization. It is important for the organization to identify current and future trends, changes in the market, technology, customer demands, and legislation. SWOT analysis (strengths, weaknesses, opportunities, and threats) is one of the most widely used tools in this process.

It is mentioned that SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) is one of the most widely used and effective tools used during strategic analysis. This analysis helps the organization to:

- **Strengths** – Identify and realize its internal strengths, such as technological advantages, resources, experience, skills, or a good reputation.
- **Weaknesses** – Recognize the organization's internal weaknesses, such as insufficient resources, procedural chaos, or lack of adequate experience.
- **Opportunities** – Analyze external opportunities in the environment, such as market growth, the adoption of new technologies, or regulatory changes that may benefit the organization.
- **Threats** – Pay attention to external threats, such as increased competition, economic recession, or new legislation that could impact the organization's operations.

<sup>1</sup>Associate Professor of Bachelor's program in Management of LEPL David Aghmashenebeli National Defence Academy of Georgia, Doctor of Business Administration

The study also delves into the various stages of strategy formulation, including the development of the strategy itself. It emphasizes that during this phase, the organization defines its primary objectives, directions, and aspirations. This may encompass expansion strategies, introducing new products or services, or diversifying operations. The strategy outlines the activities that enable the organization to compete and solidify its position in the market.

Furthermore, the study analyzes that strategy implementation is more than just a plan; it requires concrete actions. This process involves allocating resources, making decisions, and achieving specific objectives. For successful implementation, it is essential that all members are well-informed and that continuous monitoring is in place.

The article also delves into the challenges faced by strategic management, such as globalization, technological advancements, and sustainability requirements. Moreover, it emphasizes that strategic management is an ongoing process that necessitates adaptation to a dynamic environment. The significance of strategic management in creating a competitive advantage and ensuring the organization's sustainability is underscored.

**Keywords:** Strategic management, Strategies, Environmental analysis, -Goal setting, Organizations, Globalization, Technological development.

## INTRODUCTION

In today's dynamic and ever-changing business environment, organizational success hinges on the ability to adapt and anticipate future challenges. In this context, strategic management serves as a compass for organizational development, ensuring the achievement of long-term goals and a competitive advantage. Strategic management is a systematic process that encompasses environmental analysis, goal setting, strategy formulation, implementation, and evaluation. It is a dynamic process that requires continuous adaptation to a changing environment. When effectively implemented, strategic management not only contributes to an organization's profitability but also enhances its sustainability and enables it to successfully navigate challenges.

Strategic management plays a pivotal role in this process, serving as a compass for organizational development, facilitating the achievement of long-term goals, and fostering a competitive advantage. This research aims to investigate the significance of strategic management and explore effective implementation strategies to uncover how this process can contribute to organizational sustainability and success.

The research will be both theoretical and practical in nature. It will review the components of strategic management, including environmental analysis, goal setting, strategy formulation, and performance evaluation, and analyze how organizations can effectively utilize and adapt these components. Furthermore, the research will illuminate the dynamics of the strategic management process and its role in enabling organizations to not only overcome current challenges but also successfully navigate the unpredictable complexities of the future.

The implications of this research encompass novel approaches and ideas in strategic management that will assist organizations in successfully developing their operations, addressing global and local challenges, and achieving sustainable success, thereby enabling them to maintain their sustainability and competitive advantage.

## MAIN PART

Strategic management covers various topics and approaches, with each component involving separate processes that are carried out based on specific goals and resources.

The effectiveness of strategic management is crucially dependent on strategy formulation, which involves a system of planned actions aimed at achieving the organization's long-term goals. The strategy must be adapted to both the internal and external environments.<sup>2</sup> The process should include studying market trends, researching competition, and analyzing economic, political, and technological factors, as organizations must evaluate and define existing realities and identify potential development opportunities. Strategy formulation inherently involves setting the organization's goals, during which it is important to adhere to SMART (Specific, Measurable, Achievable, Relevant, Time-bound) criteria, ensuring clarity of goals, their relevance, and effective monitoring of the process. Defining goals is also significant because it allows for the development of specific strategies that align with the organization's mission and resources.

Strategy formulation begins with the analysis of the external environment, which is one of the central elements in the process of organizational strategic development. It allows for the identification of market trends, the level of competition, and the assessment of the impact of economic and political factors. External environment analysis is an essential process for any organization to correctly examine the external factors that may influence its activities and strategies. When a company properly studies and analyzes the external environment, it can better forecast potential problems, plan long-term strategies, and identify new opportunities.<sup>3</sup>

External environment analysis is a crucial part of the strategic management process, which involves studying and evaluating factors outside the organization that may impact its operations, strategy, and long-term goal achievement. The process aims to help the organization correctly perceive external changes and enhance its ability to adapt to them.

<sup>2</sup> "Strategic Management - Concepts and Situations", Fred R. David, Forrest R. David, Georgian translation of the fifteenth edition, 2018. 756 pages;

<sup>3</sup> Denise Lindsey Wells, Strategic Management for Senior Leaders: A Handbook for Implementation, (2015).

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External environment analysis includes both the micro-framework (directly related to the industry) and the macro-framework (which involves studying broader conditions such as tax, economic, cultural, and political factors). The goal of this process is to provide the foundation upon which a sustainable and effective strategy can be built. The main components of external environment analysis include:

1. **Political and Legal Environment** - The organization's activities are often dependent on political and legal conditions. This includes government policies, reforms, legislation, labor laws, and regulations that directly affect the organization's operations. For example, regulations related to labor rights, environmental protection, or tax policy may change and significantly impact market operations.
2. **Economic Environment** - This involves analyzing factors such as economic growth, inflation, exchange rates, unemployment levels, market conditions, and other economic parameters. Any economic changes, such as a recession or economic boom, can affect demand for products, production processes, and consumer expectations. The economic environment defines an organization's cash flow and its decisions regarding revenue and expense optimization.
3. **Sociocultural Environment** - The social and cultural environment represents significant factors for the organization's operations, as it includes societal values, behaviors, trends, and social expectations. Changes in social norms, cultural attitudes, and lifestyle can have a profound impact on market demands and consumer preferences. For instance, an increased trend towards healthy living can lead to a growing demand for organic products and a shift in consumer preferences toward products without harmful ingredients.
4. **Technological Environment** - Technological progress continuously changes the industrial and business landscape. New technologies create opportunities in new markets but also present challenges, such as the rapid pace of technological innovation, automation, data analysis, and digital transformation. Technological changes affect not

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only production processes but also ways of communicating with consumers. Organizations must respond promptly to these technological and innovation changes.

5. **Environmental Environment** - In today's world, environmental factors such as environmental protection, climate change, natural resource conservation, and sustainability initiatives are becoming increasingly important. Businesses must comply with ecological impact regulations and environmental laws, as this influences operations management, consumer expectations, and company reputation. Sustainability and social responsibility are also becoming critical in business strategies.
6. **Global Environment** - In the context of globalization, external environment analysis also includes international factors. These are defined by global market trends, international trade, foreign investments, and other global factors that impact organizational activities. Global competition, cultural and economic differences, international legal acts, and economic relations are critically important for organizations' strategic planning.

Effective strategic management requires a thorough analysis of the organization's internal environment. Through this process, the organization assesses its resources, competencies, and unique capabilities. Proper allocation of resources is also crucial for the implementation of an effective strategy. SWOT analysis is one of the most widely used and effective tools for strategic planning, which includes an assessment of strengths, weaknesses, opportunities, and threats.<sup>4</sup>

Internal environment analysis allows the organization to determine its internal condition, assist in goal setting, and improve the decision-making process for strategic choices. If an organization correctly analyzes its internal resources and competencies, it will be better positioned to develop effective strategies to overcome both internal and external challenges. Internal environment analysis is a crucial part of the strategic management process, which involves a detailed evaluation of an organization's internal

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<sup>4</sup> Philip Kotler, and Kevin Lane Keller. *Marketing Management*. 15th ed. Upper Saddle River, NJ: Pearson Education, 2015.

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resources and capabilities. This analysis aims to understand how the organization can leverage its strengths, competencies, and unique abilities to achieve its strategic objectives. The process of internal environment analysis is essential for the organization to accurately assess its current state, explore available opportunities, and implement actions that ensure long-term success. The main components of internal environment analysis include:

1. **Production Resources** - Resources are the factors necessary for the organization's operations. These can be physical (such as assets, technology, infrastructure), financial (credit capacity, capital, revenues), human resources (skilled workforce, management, leadership), and intellectual resources (e.g., brand names, patents, reputation). Each resource defines the organization's capabilities and operational effectiveness.
2. **Capabilities** - A capability is an organization's ability to effectively utilize its resources to gain a competitive advantage. Capabilities include unique skills that are focused on effectively managing processes, technologies, or other operational aspects. Organizations often identify their strongest capabilities, which give them an edge in their industry.
3. **Organizational Culture** - Organizational culture defines the values, beliefs, norms, and behavioral rules that guide the members of the organization. Culture influences how communication flows, how decisions are made, and how employees work together as a team. A strong, positive culture helps the organization achieve its strategic goals because employees recognize and share the company's values and objectives.
4. **Financial Position** - The organization's financial position represents its potential to achieve strategic goals. Financial reports, profits, resource allocation, assets, and liabilities are all crucial components of internal environment analysis. Assessing the financial position involves examining financial stability and profitability to determine whether the organization has sufficient resources and capabilities for implementing its strategies.
5. **Processes and Operations** - These refer to the internal workflows of the organization, relating to the planning, organization, execution, and control of work processes.

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Efficient processes and operations help the organization perform its duties quickly and cost-effectively, achieving maximum efficiency. Analyzing the organization's internal processes helps managers identify areas for improvement and cost reduction.

6. **Technological Capabilities** - The level of technological development and capabilities plays a significant role in internal environment analysis because, in today's world, technology is a leading factor that defines both product development and improvements in operational efficiency. An organization that invests in updating and integrating new technologies becomes more competitive and sustainable.
7. **Organizational Structure and Management** - The organizational structure defines how authority and responsibilities are distributed within the organization. A well-organized and efficient structure facilitates the smooth flow of information, quick decision-making, and effective management implementation. The quality of management, leadership style, and team management also significantly impact the organization's internal environment.
8. **Competitive Advantage** - Another important part of internal environment analysis is the organization's competitive advantage, which determines why the organization is competitive and what unique advantages it has compared to other players. If an organization successfully adapts to market demands, effectively uses its resources, and provides high-quality services or products, it will be more competitive.

The effectiveness of strategic management and the achievement of strategic goals depend on the development of a comprehensive strategy, which is possible only through a thorough analysis of the competitive environment. This analysis should clearly define the current state of the industry, and strategic decisions must be made considering both external and internal factors of the organization. Porter's Five Forces model helps organizations better understand the specific characteristics of an industry and develop strategies for achieving success in the market. The model affirms that strategic decisions

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should not only rely on internal resources and capabilities but also on an overview of the industry and external factors.<sup>5</sup>

- **Reducing Competition:** Organizations should choose strategies that allow them to significantly reduce existing competition, such as through product or service uniqueness or pricing strategies.
- **Creating Barriers to Entry:** Companies should invest in and take strategic actions that create difficulties for new entrants to the industry, such as building brand awareness or establishing high entry barriers.
- **Managing Supplier and Customer Relationships:** Companies need to establish strong relationships with their existing suppliers and customers to minimize price pressures and eliminate additional costs.
- **Collaboration Strategies:** To mitigate the threat of substitutes in the industry, organizations can develop collaboration strategies or innovative approaches that allow them to protect themselves from competition.

Michael Porter's "Five Forces Model" is one of the most famous and widely used frameworks for industry analysis. Porter first introduced this model in his 1979 book *Competitive Strategy: Techniques for Analyzing Industries and Competitors*, and it has since become a key tool in strategic management. The model aims to analyze an industry and help organizations understand its competitiveness, the factors that determine its profitability, and how companies should make strategic decisions in this environment.

Porter's Five Forces explains the factors that can influence an industry's profitability. The model consists of the following elements:

1. **Industry Rivalry** - This force describes the existing competition within the industry. When competition is strong, companies must fight for each customer, increase market share, and maximize profits. Typically, industries with many players are more competitive, leading to price cutting and service improvements, which ultimately

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<sup>5</sup> Shalva Machavariani, "Fundamentals of Management, Theories, Concepts and Practical Approaches", (2014), Tbilisi, "Si-Gies" Publishing House, TB, 625 pages.

negatively affect profits. The number of organizations operating in the same sector directly impacts competitiveness and the pricing process.

2. **Threat of New Entrants** - The threat of new entrants directly affects market stability and pricing. If new entrants face low barriers to entry, it can intensify competition and reduce market share for existing players. High entry barriers, such as large initial capital requirements, brand recognition, or regulatory constraints, create difficulties for new competitors, thereby protecting the positions of established players.
3. **Bargaining Power of Suppliers** - The bargaining power of suppliers depends on the number of suppliers in the industry and how essential their products or services are to organizations. If there are few suppliers and no direct competition, they have the leverage to demand higher prices. As a result, companies may face higher costs or lower profit margins.
4. **Bargaining Power of Buyers** If there are many buyers in the market with a wide range of options, they seek the lowest prices and the highest quality products. In such cases, buyers act as a force in determining prices. When there is strong demand or concentrated power (e.g., a few large clients), companies may have to make concessions and lower prices, which can result in weaker pricing structures and reduced profits.
5. **Threat Substitution** This force concerns the constant threat of new products or services that might be superior or cheaper. When substitute products or services become available, organizations must become more competitive or further refine their offerings to maintain their market position. The threat of substitutes has a significant impact on industries dependent on technological advancements and changes in consumer behavior.

Strategic planning involves several important stages that ensure the achievement of an organization's goals. The first stage of strategic planning is for the organization to study both the internal and external environment. This includes analyzing market trends, competition, technological, and economic changes. The goal of environmental analysis is to gather the necessary information to develop future plans.

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The next stage is goal setting, where the organization must define short- and long-term goals, identifying the direction in which the organization plans to develop. Goals should follow the SMART criteria (Specific, Measurable, Achievable, Relevant, bound).

Strategy formulation involves planning specific actions that align with the organization's goals. At this stage, strategic choices are made, and available resources are utilized effectively.

During strategy implementation, the organization carries out specific plans. This includes managing human resources, allocating financial resources, and effectively managing operational processes. Controlling strategy implementation and making necessary adjustments are important parts of this process.

The evaluation and control stage aims to monitor the strategic management process, compare results with set goals, and adjust strategies if necessary. This ensures that the organization can overcome any challenges and succeed in its field.

The principles and approaches of strategic management vary across different types of organizations, depending on their functions and goals.

For-profit organizations, such as corporations and other businesses, primarily aim for growth, increasing market share, and connecting with potential customers. In these organizations, strategic management is typically focused on financial profitability, service or product innovation, and constant operational efficiency.

Non-profit organizations, such as charities and NGOs, are often more focused on social goals rather than financial profit. In these organizations, strategic management involves the effective allocation of resources and maximizing social impact.

Government organizations often operate under stricter regulations, but strategic management is still essential. Their strategies primarily focus on improving public services, increasing efficiency, and fulfilling legal priorities.<sup>6</sup>

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<sup>6</sup> Charles W.L.Hill, R. Jones Gareth. *Strategic Management: An Integrated Approach*. 12th ed. Boston: Cengage Learning, 2013.

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In today's globalized world, strategic management faces numerous challenges and emerging trends:

- **Technological Changes:** The rapid development of technology and the emergence of new platforms require organizations to quickly adapt and implement innovative strategies.
- **Globalization:** The globalization of markets presents additional challenges, as organizations must interact with diverse cultures and economies.
- **Price Reevaluation:** In today's global economy, prices and resource distribution are frequently changing, significantly limiting the scope of strategic decision-making.
- **Social Strategies:** Environmental and social responsibility has become an important trend that businesses and non-profit organizations are increasingly embracing.

Strategic management in modern organizations is a powerful tool that determines their success and long-term development. It is crucial for organizations to continuously improve their strategic management processes and adapt to the rapidly changing environment.

## CONCLUSION

Strategic management is one of the key factors determining long-term success for modern organizations. A well-chosen and effectively implemented strategy enables organizations to remain competitive and successfully adapt to the constantly changing environment. The strategic management process, which includes environmental analysis, goal setting, strategy formulation, and performance monitoring, ensures the stability and efficiency of the organization. Although strategic management is based on the same principles, its implementation varies depending on the type of organization and its operational field.

The future development of strategic management is linked to technological innovations, globalization, and the strengthening of sustainability principles. The integration of new technologies such as artificial intelligence, data analysis, and digital transformation will bring changes to strategic management practices, enabling organizations to make faster decisions and better adapt to environmental changes. Globalization and expansion into

international markets require more attention to international strategies, taking into account cultural and political factors, which help in making sustainable decisions.

Economic success alone is no longer sufficient; social and environmental responsibility is also becoming an important component. Organizations are required to develop sustainable strategies that respond to environmental and societal changes. In this way, the future of strategic management will focus on technological, global, and sustainability aspects, enabling organizations to manage and develop their strategies effectively in a rapidly changing world.

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Hill, Charles W.L., and Gareth R. Jones. *Strategic Management: An Integrated Approach*. 12th ed. Boston: Cengage Learning, 2013.

## LARGE LANGUAGE MODELS AND THEIR ABUSE IN HIGH-LEVEL SOCIAL ENGINEERING CAMPAIGNS

Iveri Jajanidze<sup>1</sup>

Ioseb Kartvelishvili<sup>2</sup>

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### ABSTRACT

The rapid evolution and widespread accessibility of Large Language Models (LLMs) has transformed the cyber threat landscape. While LLMs deliver major benefits to productivity, code acceleration, knowledge augmentation, and domain translation, they simultaneously enable a new generation of high-level, linguistically precise cyber deception operations. This paper examines the shift in social engineering strategy induced by generative models, analyzing how adversaries now leverage AI to produce contextually aligned, psychologically adaptive, multilingual attacks at scale — bypassing traditional anti-phishing controls. The paper also conceptually integrates LLM-based social engineering with emerging research showing adversarial AI misuse inside CI/CD supply chains, demonstrating that human trust manipulation and machine trust manipulation are converging into a single strategic threat dimension. The result is a unified adversarial model, where linguistic credibility becomes a scalable commodity weapon across human and automated domains. This research proposes a taxonomy of LLM-augmented social engineering attack classes, maps cognitive persuasion levers to MITRE ATT&CK technique paths, and defines a dual-plane evaluation methodology measuring both behavioral technique disruption and cognitive persuasion disruption. Findings suggest that defensive strategy must shift toward AI-augmented detection, adversarial linguistics analysis, supply-chain integrity reinforcement, and continuous cognitive resilience engineering.

**Keywords:** Large Language Models, Social Engineering, Adversarial AI, Phishing, Deception, Human Vulnerabilities, CI/CD Security, Supply Chain

<sup>1</sup> Ph.D. student of the Faculty of Informatics and Management Systems of Georgian Technical University

<sup>2</sup> Professor of the Faculty of Informatics and Management Systems of Georgian Technical University

## INTRODUCTION

The scale, adaptability, and linguistic naturalness of modern Large Language Models has introduced a profound transformation in social engineering operations. Historically, cybercriminals executing high-value deception required domain familiarity, cultural intuition, specialized linguistic skill, and deliberate manual structuring of psychological influence. Today, these constraints are nearly eliminated. Generative AI systems can produce sector-appropriate communication aligned to executive voice, internal organizational tone, and professional lexical norms. These outputs are indistinguishable from legitimate business processes, contracts, communications, and governance language — enabling strategic exploitation of financial authorization, procurement, legal compliance, and risk governance decision flows.

Simultaneously, academic research has documented generative AI misuse within software supply chain pipelines, demonstrating that LLMs can influence configuration semantics inside automated CI/CD ecosystems to induce subtle but damaging integrity deviations.<sup>3</sup> These developments indicate that generative AI manipulation now transcends traditional domain boundaries: it can weaponize both human cognitive channels and automated DevSecOps trust channels. This paper investigates this convergence and proposes a structural model to evaluate and mitigate these threats.

### Unified Adversarial Model

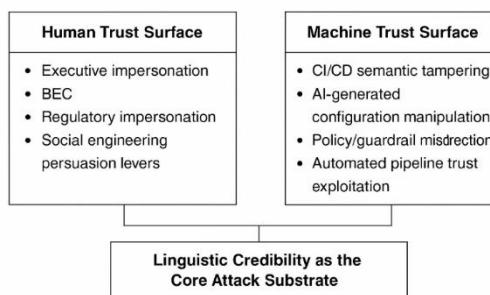


Fig.1. Unified Adversarial

Model

## MAIN PART

<sup>3</sup> I. Jajanidze, “The Use of Artificial Intelligence in CI/CD Systems: Enhancing Security and Managing Risks,” *Georgian Scientists / ქართველი მეცნიერები*, vol. 7, no. 3, 2025. doi: <https://doi.org/10.52340/gs.2025.07.03.0>.

## LITERATURE REVIEW

Early social engineering research focused heavily on linguistic anomalies, syntactic errors, and lexical signature patterns as detection opportunities.<sup>4</sup> Prior to generative AI, phishing and BEC campaigns frequently exhibited poor grammar, culturally non-native formulations, and structural inconsistencies. These markers provided defenders with implicit heuristics based on linguistic incongruence. However, LLMs now remove these protective artifacts. Recent work by Galinkin identified that AI-generated phishing can maintain domain-specific sublanguage fidelity while varying surface lexical form continuously.<sup>5</sup> This enables polymorphic linguistic deception, where traditional filtering based on static matching fails.

Cialdini's persuasion principles, historically applied in psychology, explain why specific deception vectors successfully bypass human rational filters. Principles such as Authority, Liking, Reciprocity, Commitment, Social Proof, Scarcity, and Unity systematically manipulate belief frames and compliance outcomes. The relevance of these models to modern cyber SE is amplified when combined with LLMs, because AI automates tailored persuasion - dynamically adjusting language per target persona, socio-economic context, industry semantics, and cultural background. Generative AI thus changes persuasion from a manual craft into a scalable industrial capability.

In parallel, research investigating adversarial machine learning traditionally focused on perturbation attacks against vision models, classifier destabilization, and prompt-based jailbreak manipulation. Current threat intelligence reporting indicates a shift from raw classifier evasion toward AI-driven deception operationalization.<sup>6,7</sup> This shift places natural language as the adversarial substrate itself, not merely an input vector.<sup>8</sup> The literature demonstrates fragmentation across three silos: psychological persuasion theory, technical cybersecurity TTP frameworks, and geopolitical influence operations. This paper's novelty lies in unifying them under a single systemic threat interpretation.

<sup>4</sup> S. Sheng, M. Holbrook, P. Kumaraguru, L. Cranor, J. Downs, "Who Falls For Phish? A Demographic Analysis of Phishing Susceptibility and Effectiveness of Interventions," Proceedings of the SIGCHI Conference on Human Factors in Computing Systems, ACM, 2010.

<sup>5</sup> A. Galinkin, "AI-Driven Social Engineering: The Next Evolution of Cyber Threats," Trend Micro Research, 2023.

<sup>6</sup> Microsoft Threat Intelligence, "Business Email Compromise Trends 2024," Microsoft Security Threat Intelligence Report, Microsoft Corporation, 2024. Available: <https://www.microsoft.com/security/blog>

<sup>7</sup> European Union Agency for Cybersecurity (ENISA), "ENISA Threat Landscape 2024," ENISA Publications, European Union, 2024. Available: <https://www.enisa.europa.eu/publications>

<sup>8</sup> Proofpoint Threat Research, "Threat Landscape Update: AI-Enhanced Social Engineering Campaigns," Proofpoint Research Intelligence Report, Sunnyvale, CA, USA, 2024. Available: <https://www.proofpoint.com>

## RELATED WORK

Prior studies of phishing automation and Business Email Compromise (BEC) trends reveal that AI-generated influence content increasingly bypasses lexical anomaly detection and static pattern heuristics.<sup>9</sup> Vendor threat reports have also documented attacker use of LLMs to rapidly generate persona-tailored variants during live attack progression, enabling adversaries to run multi-path deception branching in parallel. In psychology, research on susceptibility and cognitive bias indicates that social engineering is primarily effective because it exploits pre-programmed behavioral heuristics rather than technical vulnerabilities.<sup>10</sup> Meanwhile, CI/CD and DevSecOps research has begun identifying generative AI misuse not only as code synthesis risk, but as a pipeline trust manipulation vector.<sup>11</sup> However, the intersection of these domains remains underdeveloped academically: few works systematically examine how AI-powered persuasion at scale collapses the defense advantage of linguistic intuition while simultaneously eroding machine trust channels. This paper extends the literature by presenting a threat taxonomy based on persuasion levers aligned with MITRE ATT&CK, and by showing that the same linguistic deception patterns can apply to CI/CD configuration semantics.

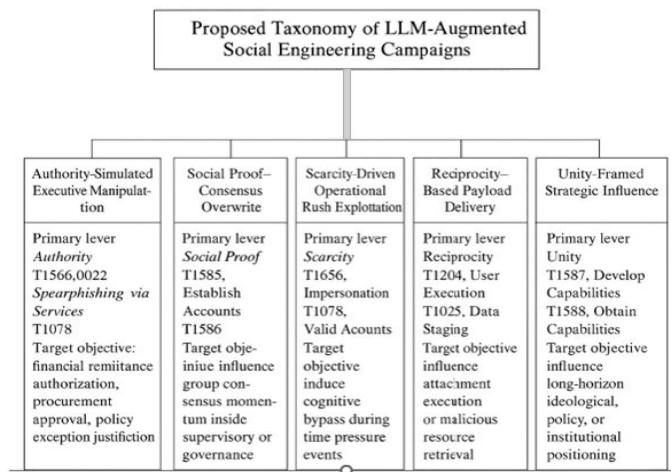


Fig. 2. Taxonomy of LLM-Augmented Social Engineering Campaigns

### Proposed Threat Taxonomy of LLM-Augmented Social Engineering Campaigns

Traditional phishing terminology (spam, spearphishing, BEC) is insufficient to characterize adversarial AI deception because these labels describe delivery channels rather than persuasion

<sup>9</sup> Ibid. Microsoft Threat Intelligence, 2024.

<sup>10</sup> Ibid. S. Sheng, M. Holbrook, P. Kumaraguru, L. Cranor, J. Downs, 2010.

<sup>11</sup> Ibid. I. Jajanidze, "2025.

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logic. The taxonomy proposed here classifies AI-driven SE based on (1) primary persuasion lever, (2) MITRE ATT&CK alignment, and (3) operational objective.

### **Authority-Simulated Executive Manipulation**

Primary lever: Authority.

MITRE alignment: T1566.002 Spearphishing via Services; T1078 Valid Accounts.

Target outcome: financial remittance authorization, procurement approval, policy exception justification.

Novel AI property: idiolect consistency replication across multi-email thread context.

### **Social Proof-Driven Consensus Overwrite**

Primary lever: Social Proof.

MITRE alignment: T1585 Establish Accounts; T1586 Compromise Accounts.

Target: influence group consensus momentum inside supervisory or governance decision loops.

Novel AI property: variant distribution per internal subgroup identity cluster.

### **Scarcity-Driven Operational Rush Exploitation**

Primary lever: Scarcity.

MITRE alignment: T1656 Impersonation; T1078 Valid Accounts.

Target: induce cognitive bypass during time pressure events.

Novel AI property: realistic regulatory deadline synthesis.

### **Reciprocity-Based Payload Delivery**

Primary lever: Reciprocity.

MITRE alignment: T1204 User Execution; T1025 Data Staging.

Target: induce attachment execution or malicious resource retrieval.

Novel AI property: jurisdiction-correct legal/contract template production.

### **Unity-Framed Strategic Influence**

Primary lever: Unity.

MITRE alignment: T1587 Develop Capabilities; T1588 Obtain Capabilities.

Target: influence long-horizon ideological, policy, or institutional positioning.

Novel AI property: narrative alignment with institutional identity markers. Cross-category observation: the taxonomy demonstrates that AI enables *persuasion operationalization*, not just message generation. Persuasion becomes modular, composable, and adaptive.

### Proposed Threat Taxonomy of LLM-Augmented Social Engineering Campaigns

	MITRE alignment	Target Outcome	Novel AI Property
<b>Authority-Simulated Executive Manipulation</b>	T1566,002 Spearphishing via Services T1076 Valid Accounts	financial remittance authorization, procurement approval, policy exception justification	idiolect consistency replication across multi-email thread context
<b>Social Proof-Driven Consensus Overwrite</b>	T1585 Establish Accounts T1586 Compromise Accounts	influence group consensus momentum inside supervisory or governance decision loops	variant distribution per internal subgroup identity cluster
<b>Scarcity-Driven Operational Rush Exploitation</b>	T1656 Impersonation T1078 Valid Accounts	induce cognitive bypass during time pressure events	realistic regulatory deadline synthesis
<b>Reciprocity-Based Payload Delivery</b>	T1587 Develop Capabilities T1588 Obtain Capabilities	induce attachment execution or malicious resource retrieval	jurisdiction-correct legal/contract template production

Fig. 3. MITRE-Aligned Threat Classification Table

## METHODOLOGY

This research applies a conceptual model construction approach based on triangulation across cybersecurity attack frameworks, persuasion psychology, and supply-chain adversarial AI literature. The evaluation framework defines two disruption planes: (1) ATT&CK technique chain interruption, and (2) persuasion lever interference. Controls must operate on both planes to achieve resilience at scale. Data sources include academic literature, industry threat intelligence reports, and documented public incident disclosures.<sup>12,13</sup> Analytical validity is determined by scalability across multilingual generative variation and independence from static lexical surface artifacts.<sup>14,15</sup>

## CASE STUDIES

### Finance Sector; AI-Optimized BEC Against Treasury Workflows

Microsoft Threat Intelligence (2024) documented multiple BEC campaigns in which adversaries used LLMs to generate CFO-style communication targeting financial approval workflows.<sup>16</sup> These

<sup>12</sup> Ibid. Microsoft Threat Intelligence, 2024.

<sup>13</sup> Federal Bureau of Investigation (FBI), Internet Crime Complaint Center (IC3), “IC3 Annual Report 2024,” U.S. Department of Justice, 2024. Available: <https://www.ic3.gov>

<sup>14</sup> Ibid. European Union Agency for Cybersecurity (ENISA), 2024.

<sup>15</sup> Ibid. Proofpoint Threat Research, 2024.

<sup>16</sup> Ibid. Microsoft Threat Intelligence, 2024.

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attacks demonstrated realistic vendor payment contextualization, multi-message chain continuity, and precise internal lexicon mimicry. IC3 2024 case aggregation showed that Authority and Scarcity combinations formed the highest-severity chain.<sup>17</sup> MITRE mapping aligns with T1566.002 and T1078.

#### **Government / Regulatory Domain; AI-Based Policy Mandate Impersonation**

ENISA's 2024 global threat landscape analysis identified AI-assisted impersonation of regulators and public sector authorities.<sup>18</sup> Attackers generated authoritative compliance notices referencing realistic legal frameworks, creating the appearance of legitimate enforcement instructions. Multilingual variant generation was a key bypass lever.

#### **Corporate Supply Chain; Procurement Manipulation at Scale**

Proofpoint Threat Research (2024) reported AI-augmented vendor deception campaigns distributing revised contract packages and invoice adjustments using realistic procurement narrative semantics.<sup>19</sup> Reciprocity was the dominant persuasion vector here. MITRE mapping: T1204 and T1585.

Cross-sector synthesis: All three sectors reflect identical underlying principle - LLMs industrialize credibility.

### **CONVERGENCE WITH CI/CD PIPELINE AI MISUSE**

While human-targeted deception is the most visible manifestation of LLM-enabled abuse, similar linguistic manipulation patterns are emerging inside automated software supply chain ecosystems. Prior research demonstrated generative AI capability to influence CI/CD trust assumptions by crafting realistic configuration edits and policy exemptions that appear semantically aligned with organizational norms.<sup>20</sup> In such cases, the adversarial vector is not procedural engineering complexity, but *linguistic semantic misdirection*. Since many pipeline guardrails evaluate human-readable policy text, commit messages, and exception rationale rather than pure machine byte-level signals, LLM-generated misconfigurations can bypass static scanners by hiding within domain-consistent natural language.

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<sup>17</sup> Ibid. Federal Bureau of Investigation (FBI), 2024.

<sup>18</sup> Ibid. European Union Agency for Cybersecurity (ENISA), 2024.

<sup>19</sup> Ibid. Proofpoint Threat Research, 2024.

<sup>20</sup> Ibid. I. Jajanidze, "2025.

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This convergence collapses the historical distinction between social engineering and supply-chain compromise. In the LLM era, both human deception and machine deception are achieved through the same substrate — linguistic persuasion. The same mechanisms that exploit cognitive bias in a CFO during BEC can exploit semantic trust bias in automated pipeline logic. This unification suggests that defensive strategy must treat linguistic inputs as a first-class attack surface across organizational domains.

## CONCLUSION

LLM-driven social engineering represents a structural escalation in adversarial capability. By eliminating prior linguistic and cognitive barriers, LLM-accessible attackers can deploy personalized, multilingual, psychologically-aligned influence campaigns without requiring cultural familiarity or expert domain knowledge. When combined with OSINT-driven profiling, identity simulation, and narrative adaptability, these campaigns generate historically unprecedented success potential, particularly in executive workflow, regulatory correspondence, and supply chain procurement ecosystems. Parallel developments in CI/CD semantic manipulation demonstrate that LLM misuse is not isolated to human deception: linguistic credibility can also subvert machine trust and automated security controls.

Therefore, cybersecurity strategy must expand from static domain-based filtering to adversarial cognitive resilience engineering, behavioral correlation analytics, AI-reinforced detection, and linguistic anomaly modeling. Cross-domain adversarial AI defense engineering is required to mitigate this next-generation threat class. LLM abuse is not a tactical phishing enhancement; it is a strategic cyber deception paradigm shift.

## LIMITATIONS AND FUTURE WORK

This research is conceptual and interpretive, not empirical measurement of incident frequency or attack prevalence. While real-world public case references demonstrate observed operational patterns, future studies should extend this model into formal experimental evaluation environments and adversarial simulation testbeds. More longitudinal metrics are required to quantify persuasion lever weighting, multi-step deception chain success rates, and defense disruption efficacy across control planes.

Additionally, future work should explore: (1) AI-driven protection models that automatically detect persuasion construction logic rather than lexical strings, (2) cognitive SE fatigue and inoculation studies, and (3) cross-pipeline semantic integrity enforcement that cannot be bypassed

via natural language coherence. A standardized benchmark for AI-augmented social engineering resilience measurement is a priority research need.

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## THE ROLE OF CRITICAL INFRASTRUCTURE IN REGIONAL SECURITY: AN ANALYSIS OF GEORGIA IN THE CONTEXT OF THE CAUCASUS REGION

Colonel Giorgi Jincharadze<sup>1</sup>

Colonel Levan Kavtaradze<sup>2</sup>

Lieutenant Colonel Irakli Buishvili<sup>3</sup>

<https://orcid.org/0009-0006-7196-4714>

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### ABSTRACT

This paper examines the current state of critical infrastructure and the security challenges faced by Georgia and the South Caucasus region. In accordance with Georgian legislation, critical infrastructure encompasses both public and private assets that provide services in sectors such as energy, water, agriculture, healthcare, finance, and communications. Hydropower serves as the cornerstone of the country's energy sector. The future of the Enguri hydroelectric power plant remains uncertain due to the situation in occupied Abkhazia, and the oil and gas pipelines (BTC and South Caucasus Pipeline) are potential targets for terrorists in the event of hostilities in the region. The East-West Highway is considered a critical investment in transportation infrastructure. The 2008 war highlighted the vulnerability of the country's digital infrastructure in terms of cybersecurity. Additionally, the regional context presents a complex power rivalry: Armenia is pursuing closer ties with Western nations, Azerbaijan aims to enhance economic diversification, and Russia, Turkey, and Iran are actively seeking to preserve their influence in the area. Special emphasis is placed on the Zangezur (Syunik) corridor. Within this geopolitical framework, the Zangezur corridor, which links the western part of Azerbaijan to Nakhichevan, has emerged as a significant issue of concern for regional and global security.

**Keywords:** critical infrastructure, regional security, geostrategy, Caucasus, Zangezur Corridor

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<sup>1</sup> student of the Military Engineering PHD Program at the Georgian Technical University, Commander of the 4th Infantry Brigade of the Eastern Command of the Defense Forces.

<sup>2</sup> student of the Military Engineering PHD Program at the Georgian Technical University, Deputy Commander of the Defense Forces' Training and Military Education Command.

<sup>3</sup> PHD of Military Sciences, Assistant Professor at the Faculty of Civil Engineering at the Georgian Technical University, Deputy Commander of the Combat Engineering Battalion of the Eastern Command of the Defense Forces.

## INTRODUCTION

Critical infrastructure serves as the foundation of modern states and regions, underpinning public welfare, economic efficiency, and national security. In Georgia and throughout the South Caucasus, infrastructure plays a particularly vital role due to the region's geopolitical position as a corridor connecting Asia and Europe, which presents both opportunities and threats. This study aims to analyze critical infrastructure in Georgia and the Caucasus region as an interconnected systemic complex, with its legislative framework, energy facilities, transport networks, cybersecurity, regional context, and geopolitical challenges. Special emphasis is placed on the Zangezur (Syunik) corridor, which has recently become a symbol of regional power distribution.

## MAIN PART

### Definition of Critical Infrastructure

According to the international definitions, various documents, doctrines, and concepts, critical infrastructure is considered to be systems and assets whose disruption directly affects the functioning of society and the economy. The Canadian Ministry of Public Security specifically describes it as "processes, systems, facilities, technologies, networks, assets, and services that are essential for health, safety, and economic well-being."<sup>4</sup>

The US National Institute of Standards and Technology (NIST) dictionary defines critical infrastructure as, "Systems and assets, whether physical or virtual, so vital that the incapacity or destruction of such systems and assets would have a debilitating impact on security, national economic security, or national public health.<sup>5</sup> Private sector blogs and cybersecurity companies (e.g., Palo Alto Networks) also emphasize that critical infrastructure includes the food and agriculture sector, transportation systems, water

<sup>4</sup> „Canada's Critical Infrastructure (CI)“, government of Canada. Public Safety Canada, <https://surl.li/nigjsy>, (Accessed 23.12.25)

<sup>5</sup> critical infrastructure, Computer security resource center , <https://surl.li/martir>, (Accessed 23.12.25)

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supplies, internet and mobile networks, public health, energy, financial services, and telecommunications.<sup>6</sup>

The definition of critical infrastructure sectors varies by country. Canada's critical infrastructure is categorized into ten sectors: energy and utilities, finance, food, government services, health, information and communications technology, manufacturing, security, transportation, and water.<sup>7</sup> The US Cyber and Infrastructure Security Agency (CISA) identifies 16 sectors, including chemical, commercial facilities, communications, critical manufacturing, dams, defense industry, emergency services, energy, financial services, food and agriculture, government facilities, public health sector, information technology, nuclear reactors/materials, transportation systems, and water and wastewater sector.<sup>8</sup> The EU NIS2 Directive identifies operators of essential services (energy, transport, banking, healthcare, water supply, and digital infrastructure) and digital service providers, which are subject to specific cybersecurity and incident reporting requirements.<sup>9</sup>

The energy sector constitutes a critical component of essential infrastructure and serves as a fundamental driver for various other sectors. According to the Cybersecurity and Infrastructure Security Agency (CISA), energy infrastructure "protects a network of diverse electricity, oil, and natural gas resources and assets to ensure uninterrupted energy supply and the health and well-being of the nation." A comprehensive analysis of the energy sector reveals that this infrastructure is vital for sustaining economic activity; Without it, the stability of public health and the economy is threatened.<sup>10</sup>

### Interdependencies and Risks

The strong interdependencies among critical infrastructure sectors render them particularly susceptible to vulnerabilities. In the contemporary, technology-driven

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<sup>6</sup> „What Is Critical Infrastructure?“, [Paloalto, https://surl.li/gajotu, \(Accessed 23.12.25\)](https://surl.li/gajotu)

<sup>7</sup>Ibid. government of Canada.

<sup>8</sup> „Homeland Security Presidential Directive 7“, Amerika's Cyber Defense Agency, [https://surl.li/eyimjg, \(Accessed 23.12.25\)](https://surl.li/eyimjg)

<sup>9</sup> Ibid. „What Is Critical Infrastructure?“.

<sup>10</sup> Ibid. „Homeland Security Presidential Directive 7“.

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landscape, where the Internet serves as a fundamental enabler, cyberattacks have the potential to trigger cascading disruptions across critical infrastructure systems.

Canada's National Strategy for Strengthening Critical Infrastructure Resilience adopts a risk-based framework, emphasizing the importance of partnerships, information sharing, and protection measures. Various initiatives have been established to mitigate the impacts of both intentional and unintentional incidents, as well as natural disasters. It is essential to implement business continuity procedures and contingency plans to guarantee minimal service disruptions.<sup>11</sup> CISA and NIST are actively enhancing digital security. Furthermore, the EU NIS2 Directive obliges member states to strengthen cybersecurity capabilities and ensure the implementation of security measures.<sup>12</sup>

### **Critical Infrastructure Analysis of Georgia and the Caucasus Region, Legislative Framework**

In Georgia, critical infrastructure refers to both physical and virtual assets owned or managed by the state or the private sector that provide essential services to society. These services include energy, fuel, water, agriculture, healthcare, finance, and communications. Georgia is currently updating its legislation, drawing on experiences from Europe. The report titled “Creating a Legislative Framework for the Protection of Strategic Assets” emphasizes the need to establish modern criteria and legal regulations. This will help identify critical infrastructure, analyze risks, and allocate responsibilities effectively.<sup>13</sup>

### **Energy, Oil and Gas Pipelines**

The energy sector constitutes a fundamental component of Georgia's critical infrastructure. The country derives approximately one-third of its electricity from the Enguri hydroelectric power station, which was commissioned in 1978 and remains the largest power generation source in the region. A part of the station is situated on Georgian-controlled territory, while the main power station building is located 15 kilometers away in the occupied Abkhazia. According to a 1996 agreement, Tbilisi supplies Abkhazia with

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<sup>11</sup> Ibid. government of Canada.

<sup>12</sup> Ibid. „What Is Critical Infrastructure?“.

<sup>13</sup> Economic Policy Research Center, EPRC <https://surl.li/cisbts>. (Accessed 08.12.25)

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approximately 40 percent of its hydroelectric power generation at no cost. In return, Abkhazia (along with Russian military forces) acknowledges Georgian ownership of the Enguri hydroelectric power station.

The Caucasus region serves as the center of the Southern Gas Corridor, which supplies natural gas to Europe. The most renowned oil pipeline in this area is the **Baku-Tbilisi-Ceyhan (BTC)** pipeline. Stretching 1,768 kilometers, it connects Baku and Ceyhan, passing through Tbilisi and Erzurum en route. The first shipment of oil occurred in May 2006. From a security standpoint, the BTC pipeline has faced multiple attacks. In 2007, Turkey enhanced the security measures surrounding the pipeline. On August 5, 2008, a significant explosion took place in the Refahiye district of Turkey, temporarily disrupting the flow of oil. The Kurdistan Workers' Party initially claimed responsibility for this incident.

Additionally, the **South Caucasus Pipeline** transports gas from Azerbaijan's Shah Deniz field to Turkey. This pipeline runs parallel to the BTC and is 692 kilometers long, with 248 kilometers located in Georgia. It was inaugurated in 2006, but in August 2008, it was closed for two days due to a military operation between Russia and Georgia. This incident highlighted how regional conflicts can directly threaten energy supplies.

### Transport and Logistics Infrastructure

Georgia and the South Caucasus serve as the basis of Eurasian transit routes. The **East-West Highway** connects the eastern and western regions of the country and is part of the E60 European transit route. The most challenging section of this highway, the Rikoti Pass, is 50 kilometers long. Construction of 97 bridges and 51 tunnels in this area is nearing completion. The project cost is approximately 3 billion GEL (around 1 billion euros), with key funding provided by the Asian Development Bank (ADB), the World Bank (WB), and the European Investment Bank (EIB). Chinese companies are responsible for the construction work. Once completed, the highway aims to double transport capacity and reduce travel times. Additionally, the extension of the Baku-Tbilisi-Kars railway line represents another vital freight corridor in the Caucasus.

### Cybersecurity

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During the 2008 Russo-Georgian War, significant cyberattacks targeted both private and state websites in Georgia. These attacks commenced on July 20 and reached their peak on August 8. As a result, most of the Georgian government's websites were taken down. To maintain communication, the government relocated essential internet resources to servers of the United States, Estonia, and Poland.<sup>14</sup>

In the 1990s and beyond, Georgia's telecommunications networks lacked adequate resilience. Ongoing reforms, along with integration with the European Union, aim to enhance the resilience of digital infrastructure and introduce consultative principles. However, cyber disruptions, particularly from Russia, continue to pose a significant threat.

### **Security Challenges**

The South Caucasus region serves not only as a vital transit corridor but is also characterized by significant security challenges. Although new geopolitical actors are increasingly involved in the South Caucasus, Moscow continues to wield influence through its established economic and cultural connections. However, this influence has become increasingly unequal and asymmetrical. Analysts specializing in Eurasian affairs observe that, despite existing tensions, Russia is actively seeking to consolidate its authority in the South Caucasus by pursuing new initiatives and seizing political opportunities, even as its influence appears to be waning in certain areas.<sup>15</sup>

**Georgia's Challenges.** The main challenges for Georgia still remain the occupied territories and the Russian military forces stationed there, as well as the legislative framework for critical infrastructure with its protection mechanisms, and cybersecurity.

**Armenia's Dilemma.** Yerevan's move toward Europe and America, as part of the 2025 deal, means less dependence on Russia; however, this strategic shift involves substantial economic and political risks. Armenia remains dependent on Russian energy supplies and remittances, and a rapid severance of trade and economic ties with Russia could damage the economy.

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<sup>14</sup> Andria Gotsiridze. „The Cyber Dimension of the 2008 Russo-Georgian War“, <https://surli.cc/nxlbir>, (Accessed 08.12.25)

<sup>15</sup> „South Caucasus: Strategic Security Risk and Russia's Geopolitical Dynamics“, <https://surli.li/yfuixf>, Accessed 08.12.25)

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**Azerbaijan's Balance.** Baku collaborates closely with Turkey but also maintains important economic ties with Russia. The country is striving to diversify its economy and expand its network of international partners. Severing ties with Russia could negatively impact trade, logistics, and overall international engagement.

**Russia's Asymmetrical Position.** Although the Kremlin's influence in the South Caucasus has somewhat diminished, it still remains significant. Analysts suggest that Russia is attempting to strengthen its power in the region. The opening of an airport in Abkhazia, the port of Ochamchir, and the military bases are examples of this.

This trend indicates that the region is actively seeking new partners while also reducing its reliance on traditional allies. The main security challenges stem from unresolved conflicts (such as those in Abkhazia and the Tskhinvali region), alongside great power competition and economic instability. Additionally, institutional weaknesses and socio-economic inequality further intensify these tensions, and implementing any significant investment and infrastructure project requires multilateral security guarantees.

### **The 2020 Agreement and the Corridor Idea**

The ninth paragraph of the ceasefire agreement between Russia, Armenia, and Azerbaijan, dated November 10, 2020, stated that all economic and transport communications in the region should be opened. Armenia was to provide security guarantees, and the Russian Federal Security Service (FSB)<sup>16</sup> would safeguard the transport route that passes through its territory. This provision hinted at the restoration of historical railways and roads linking the western region of Azerbaijan to its Nakhichevan region, as well as to Turkey. This would create a direct connection from Azerbaijan through the Syunik province of Armenia. However, despite the agreement's details, it has not been practically implemented.

### **American 100/99 Year Lease Proposal and Reactions**

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<sup>16</sup>. „Confusing and contradictory statements on Zangezur road“. Harut Sassounian. July 25, 2025. <https://surl.li/kjdggt>, Accessed 08.12.25)

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In July 2025, the United States proposed a new model for managing the Zangezur Road. Speaking to reporters in New York, U.S. Ambassador to Turkey and Special Representative for Syria, Tom Barrack, announced that the United States was prepared to take over the management of the 32-kilometer road through a 100-year lease with a private American company. Barrack stated, "Azerbaijan and Armenia have a disagreement over the 32-kilometer road, so grant us a 100-year lease on this stretch, and both sides will benefit." He emphasized that this corridor would help revitalize the main Asian-European trade route, known as the "Middle Corridor." Harut Sassounian. July 25, 2025. Confusing and contradictory statements on Zangezur road.

Yerevan promptly addressed this proposal. Government spokesperson Nazeli Baghdasaryan emphasized that Armenia is not considering transferring any parts of its sovereign territory to a third party. Therefore, control of the Syunik region cannot be handed over to another state or company. Turkey, in principle, supports the opening of the corridor, although Ankara claims it is not familiar with the specifics of the American plan.<sup>17</sup>

On August 7, 2025, in Washington, a peace treaty was signed at the initiative of the U.S. President between the President of the Republic of Azerbaijan and the Prime Minister of Armenia. According to this agreement, the management of the Zangezur Corridor was transferred to the American side for a period of 99 years. This treaty demonstrated that the Zangezur Corridor is not merely a logistical route; it also plays a significant role in influencing the balance of power among major players.

### **Military-strategic assessment: balance of power and distribution of influence Russia**

- **Operational objective:** Maintain/expand influence in the South Caucasus; Contain NATO on the Black Sea coast.
- **Active levers:** Occupied territories as a forward support; Support for the Black Sea Fleet; Energy/cyber pressure.

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<sup>17</sup>US floats 100-year lease on Zangezur corridor to break Armenia-Azerbaijan deadlock, <https://surl.li/ikqjsh>, Accessed 08.12.25)

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- Constraints: Sanctions; Technological/industrial deficits; Geopolitical overload.
- Trend 2025: Stable, high-reaction capability in maritime-airspace; Probable goal is to increase control of the East-West corridor of transit routes.

### Turkey

- Operational Objective: Consolidation of the South Caucasus transport/energy hub; Strengthening NATO's Black Sea vector.
- Active Levers: Integration with Azerbaijan; Reserve Logistics, Drone Umbrella, Experience.
- Constraints: Domestic Macroeconomics; Dependence on Western Technologies.
- Trend 2025: Increasing involvement in Georgian infrastructure nodes (peacekeeping/training activities, logistical access).

### USA/NATO

- Operational Objective: Black Sea Security, Russian Deterrence, Partner Resilience.
- Active Levers: Training (“Agile Spirit”, “Noble Partner”), ISR/Cybersecurity, Infrastructure Modernization.
- Constraints: Lack of a permanent base; Political/Legal Constraints on Direct Engagement.
- Trend 2025: Enhancing technological support and establishing regular sea and air visits, prioritizing the resilience of critical infrastructure.

### Iran

- Operational Objective: Northern Border Stability; Southern Corridor Strengthening; Western Influence Containment.
- Levers: Missile Potential; Economic-Logistical Channels; Asymmetric Instruments.
- Constraints: Sanctions; Regional Isolation; Limited Power in the Caucasus.
- Trend 2025: Cautious Economic-Logistical Expansion, with Low Probability of Direct Military Engagement.

### China (Indirect military factor)

- **Operational objective:** Provision of maritime-southern global logistics (“One Belt, One Road”).
- **Levers:** Investment/financial resources; Port/road financing.
- **Constraints:** Low level of military projection in the region; Risks of Western-Chinese confrontation.
- **Trend 2025:** Selective investments in ports/logistics; Dynamics strongly dependent on the security environment.

### SWOT Analysis - Military Strategic Positions of Major Players in Georgia and the Region

Player	Strengths (S)	Weaknesses (W)	Opportunities (O)	Threats (T)
Russia	<ul style="list-style-type: none"><li>• Direct military force in the region (occupied territories)</li><li>• Zones on the Black Sea coast</li><li>• Energy and hybrid pressure tools</li></ul>	<ul style="list-style-type: none"><li>• Economic sanctions and technological backwardness</li><li>• Exhaustion of resources by a large-scale war in Ukraine</li><li>• Isolation from the West</li></ul>	<ul style="list-style-type: none"><li>• Strengthening military control over the Caucasus transit routes</li><li>• Restoring influence over the former Soviet space</li></ul>	<ul style="list-style-type: none"><li>• Strengthening NATO in the Black Sea</li><li>• Trilateral cooperation between Turkey-Azerbaijan-Georgia</li></ul>
Turkey	<ul style="list-style-type: none"><li>• NATO membership and a strong army</li><li>• Close military alliance with Azerbaijan</li><li>• Control of strategic transit infrastructure</li></ul>	<ul style="list-style-type: none"><li>• Internal political and economic instability</li><li>• Dependence on Western military technologies</li></ul>	<ul style="list-style-type: none"><li>• Increasing engagement in Georgia's military infrastructure</li><li>• Strengthening the energy and transport hub in the region</li></ul>	<ul style="list-style-type: none"><li>• Risk of direct confrontation with Russia</li><li>• Tensions with Iran and Armenia</li></ul>
USA / NATO	<ul style="list-style-type: none"><li>• High-tech military support</li><li>• Training and education system</li><li>• Cybersecurity support</li></ul>	<ul style="list-style-type: none"><li>• Absence of a permanent base in Georgia</li><li>• Political constraints on direct intervention</li></ul>	<ul style="list-style-type: none"><li>• Strengthening the security of the Black Sea</li><li>• Modernizing Georgia's defense capabilities</li></ul>	<ul style="list-style-type: none"><li>• Direct military response from Russia</li><li>• Crossing of interests of regional partners (Turkey, Azerbaijan)</li></ul>
Iran	<ul style="list-style-type: none"><li>• Geographical proximity and transport links</li><li>• Missile capabilities</li></ul>	<ul style="list-style-type: none"><li>• International sanctions and economic weakness</li><li>• Limited military power in the Caucasus</li></ul>	<ul style="list-style-type: none"><li>• Strengthening the Southern Transport Corridor</li><li>• Expanding trade and economic relations</li></ul>	<ul style="list-style-type: none"><li>• Growing influence of Turkey and Azerbaijan</li><li>• Tightening of Western sanctions</li></ul>
China	<ul style="list-style-type: none"><li>• Strong economic and investment resources</li><li>• Global logistics strategy (“One Belt, One Road”)</li></ul>	<ul style="list-style-type: none"><li>• Absence of direct military influence</li><li>• Dependence on transit routes of Russia and Iran</li></ul>	<ul style="list-style-type: none"><li>• Involvement in Georgia's infrastructure projects</li><li>• Development of Black Sea ports</li></ul>	Strengthening the Western positions in the South Caucasus

### Geographic Subzones/Actors (intensity/trend)

Subzone / Actor	Russia	Turkey	USA/NATO	Iran	China
Georgia (controlled territories)	High (→)	Medium-high (↑)	Medium (↑)	Low (→)	Low (→)
Tskhinvali Region, Abkhazia Occupied territory of Georgia	Very high (→)	Low (→)	Very low (→)	Low (→)	Low (→)
Black Sea waters (GE sector)	High (↑)	Medium (↑)	Medium (↑)	Very low (→)	Low (→)
Azerbaijan	Medium (→)	Very high (↑)	Medium (↑)	Medium (→)	Low-medium (↑)
Armenia	High (↓)	Low-medium (→)	Low (→)	Medium-high (→)	Low (→)

**Notice:** Intensity. Very low/low/medium/high/very high; trend ↑ increasing, ↓ decreasing, → stable.

### CONCLUSION

Georgia and the South Caucasus serve as a bridge linking Europe and Asia through energy and transport networks. The energy sector relies on large hydroelectric power plants (Anguri, etc.) and a regional network of pipelines. The security and resilience of these systems are influenced by the political climate, natural conditions, and cybersecurity threats. Additionally, transport plays a vital role in facilitating transit, although geological factors (landslides and earthquakes) can make the region's infrastructure vulnerable.

Cybersecurity and regional conflicts present ongoing challenges. During the 2008 war, significant cyberattacks were launched that temporarily incapacitated Georgia's public information systems. To protect and modernize the country's critical infrastructure, it is essential to invest in technology, foster close international cooperation, ensure regional stability, and establish an effective legal framework.

The example of the **Zangezur Corridor** illustrates how a transport route can become the focal point for shifts in regional power. The 2020 agreement viewed the Syunik Road as a chance for economic integration and peace, but subsequent disputes have generated new tensions surrounding it. The proposal of a 100/99-year lease, suggested by the US, has captured significant attention in Georgian and Caucasian society. However, the legal and political controversies involved indicate that a final decision and its practical

implementation are still distant. Therefore, the long-term stability of critical infrastructure relies not only on financial resources but also on agreements that respect sovereignty, ensure regional security, and uphold international law.

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## GEORGIA'S MULTI-VECTOR CHOICE: BALANCING BETWEEN CHINA AND THE WEST

Lieutenant Colonel Levan Gozalishvili<sup>1</sup>

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### ABSTRACT

This research examines the strategic dilemmas facing Georgia in its deepening cooperation with China within the context of global power competition and Western security architecture integration. As China's Belt and Road Initiative expands into the South Caucasus, small states like Georgia face a critical challenge: how to leverage economic opportunities from the East while maintaining security guarantees from the West. The study analyzes whether a balanced and institutionally strengthened strategic model of Georgia-China cooperation can simultaneously enhance economic benefits and ensure compatibility with Western security structures.

The research employs neorealist theoretical frameworks, particularly focusing on hedging strategies and multi-vector foreign policy approaches suitable for small states operating between competing great powers. Through comparative analysis of Vietnam, South Korea, and Estonia—countries that have successfully balanced economic engagement with China while maintaining Western security orientations—the study identifies key principles for managing asymmetric relationships without falling into structural dependence.

The analysis reveals three critical dimensions of Georgia-China relations: economic cooperation, which offers trade and infrastructure benefits but carries risks of debt dependency and political leverage; technological engagement, particularly concerning 5G infrastructure and cybersecurity, where Chinese involvement raises sovereignty and data security concerns incompatible with NATO and EU standards; and geopolitical implications, where deepening ties with Beijing could be perceived as strategic drift by Western partners upon whom Georgia depends for security guarantees against Russian aggression.

The research demonstrates that economic cooperation with China becomes beneficial only under conditions of robust institutional oversight, transparent governance, competitive procurement processes, and clear strategic boundaries that prevent economic ties from transforming into political influence channels. The study emphasizes that technological integration with Chinese companies operating under state control poses critical risks to Georgia's information sovereignty and long-term compatibility with Western security systems. Furthermore, analysis confirms that China cannot serve as a security counterweight to Russia in the South Caucasus, making Western security architecture indispensable for Georgia's territorial integrity and sovereignty.

The main conclusion supports the hypothesis that a balanced and institutionally strengthened strategic model—characterized by transparent governance, multi-vector partnerships, and clear "red lines" in sensitive sectors—can enable Georgia to derive economic benefits from China while preserving strategic autonomy and Western security alignment. However, this requires Georgia to implement strict institutional controls, particularly in critical infrastructure and technology sectors; maintain full synchronization with EU and

<sup>1</sup> Chief of Master's Program in security study of LEPL David Aghmashenebeli National Defence Academy of Georgia

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NATO security standards; and adopt a hedging strategy that diversifies economic partnerships without compromising core security priorities.

The study recommends that Georgia: (1) institutionally separate economic cooperation with China from security policy, which must remain firmly anchored in Western architecture; (2) strengthen transparency and oversight mechanisms for all Chinese investment and infrastructure projects; (3) align technological policy fully with EU and US security standards, especially regarding 5G and critical infrastructure; and (4) deepen coordination with Western partners to ensure foreign policy positioning does not create strategic ambiguity. The research concludes that for small states in competitive geopolitical environments, survival depends not on choosing between great powers but on maintaining strategic autonomy through carefully calibrated balance—securing economic development opportunities while preserving sovereignty and security guarantees from reliable partners.

**Keywords:** Georgia-China relations, strategic hedging, small state security, Belt and Road Initiative, multi-vector foreign policy

## INTRODUCTION

The transformation of the international system in the 21st century has given particular significance to analyzing the behavior of states that are rapidly strengthening their economic, technological, and geopolitical capabilities. China's rise has radically altered the global distribution of power and significantly expanded its geographical sphere of influence, transcending regional boundaries to become a central factor in the global system. According to neorealist perspectives, rising powers consistently seek expansion and consolidation of their zones of influence, creating structural tensions with hegemonic powers.<sup>2</sup> Today, the relationship between China and the United States exists precisely in such a competitive configuration, which has gradually evolved into a systemic conflict.

China's role became particularly prominent in the Eurasian space following the launch of the "One Belt, One Road" initiative (hereafter "Belt and Road Initiative," BRI) in 2013. This project represents Beijing's long-term strategic concept aimed at establishing infrastructural, transit, investment, and technological connections linking Asia with Europe and other regions of the world. The initiative not only reshapes the architecture of global trade and transport but also substantially affects the foreign policy flexibility and strategic maneuvering capabilities of small and medium-sized states.

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<sup>2</sup> Waltz Kenneth, *Theory of International Politics* (Reading, MA: Addison-Wesley, 1979). No spacing between citations

For Georgia, this process has acquired particular significance because the country is located between Europe and Asia, along strategic transit routes, naturally making it a space where competing interests collide. Following the collapse of the Soviet Union, Georgia chose a Western foreign policy course; however, the need for economic diversification and changes in the global economy have strengthened cooperation with China. Diplomatic relations between Georgia and China were established in 1992,<sup>3</sup> but intensive development of the relationship began precisely in the 2010s, proportional to the growth of China's economic expansion. In 2017, a free trade agreement with China entered into force, further deepening economic ties. Since then, China has become one of Georgia's largest trading partners; Chinese investments in Georgia have increased, particularly in infrastructure and construction sectors, including projects implemented by Sinohydro and Hualing Group.<sup>4</sup> The "Joint Declaration on Strategic Partnership" signed on July 31, 2023, moved the relationship to a new stage. As Emil Avdaliani notes, the agreement is not merely a renewal of economic ties but deepens the structural dilemmas of Georgia's foreign policy, as the partnership was formalized in an extremely intensified environment of global competition.<sup>5</sup> The agreement covers economics, innovation, technology, the digital sphere, investments, logistics, energy, and humanitarian cooperation.

### **Research Problem**

The main problem lies in how Georgia can plan and implement economic and technological cooperation with China in a way that does not deepen structural dependence and does not compromise the country's alignment with Western security standards.

### **Relevance of the Research Topic**

The deepening of Georgia-China cooperation becomes particularly relevant against the backdrop of global power competition, technological transformation, and intensive development of Western security structures. Georgia, as a small state, must establish a

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<sup>3</sup> Ministry of Foreign Affairs of Georgia, "Relations between Georgia and the People's Republic of China," accessed November 30, 2025.

<sup>4</sup> Transparency International Georgia, *Increasing Chinese Influence in Georgia*, May 22, 2025.

<sup>5</sup> Emil Avdaliani, "What's Behind China's Strategic Partnership with Georgia?" *Carnegie*

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strategic balance between China's economic capabilities and Western security architecture to avoid structural dependence on any major power. This creates a need to assess how a balanced and institutionally strengthened policy can simultaneously ensure the country's economic benefits and security stability.

**Research Subject** - Georgia-China relations and their interaction with Georgia's Western security and foreign policy architecture.

**Research Object**- Georgia's strategic balancing policy in cooperation with China and compatibility with Western security structures.

### **Purpose and Objectives**

**Purpose:** The research aims to determine how a balanced and institutionally strengthened strategic model of Georgia-China cooperation can effectively reduce structural dependence risks, facilitate the realization of the country's economic development opportunities, and simultaneously ensure sustainable compatibility of Georgia's foreign policy course with Western security architecture.

### **Objectives:**

1. To assess the structural dependence risks that may arise from deepening economic, investment, and technological cooperation with China, particularly under the specific conditions of a small state.
2. To investigate the essence and characteristics of a "balanced and institutionally strengthened strategic model" as an intervening variable and determine its impact on increasing economic benefits and reducing security risks.

**Research Question** - How does a balanced and institutionally strengthened strategic model of Georgia-China cooperation affect the country's economic benefits and compatibility with Western security architecture?

**Hypothesis**- The hypothesis states that a balanced and institutionally strengthened strategic model of Georgia-China cooperation can simultaneously strengthen Georgia's economic benefits and ensure the country's compatibility with Western security architecture,

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because transparent governance and a multi-vector strategy reduce a small state's risk of structural dependence on any major power.

**Independent Variable:** Georgia-China cooperation.

**Intervening Variable:** A balanced and institutionally strengthened strategic model of cooperation.

**Dependent Variable:** Strengthening Georgia's economic benefits and the country's compatibility with Western security architecture.

### Theoretical Framework

Scientific analysis of foreign policy and security issues requires not only the study of empirical material but also the formation of a clear theoretical framework that defines the research's logical architecture and points of interpretation. Analysis of cooperation between Georgia and China is particularly important against the backdrop of global power redistribution, the classic dilemma of regional security, and parameters of economic interdependence.

### Neorealism and Structural Constraints

Neorealist theory, particularly Kenneth Waltz's approach, argues that the international system is anarchic and state behavior is primarily determined by the structural environment and distribution of power.<sup>6</sup> Small states with limited strategic resources are forced to constantly balance between external actors.

Small states in the anarchic environment of the international system employ various behavioral models to ensure security and strategic maneuver (see Comparative Table No. 1 of strategies). Such models include: **balancing**, aimed at containing threatening powers and restoring the balance of power; **bandwagoning** with a strong state, based on the hope of receiving security guarantees; and **hedging/strategic insurance**—a mixed strategy that combines simultaneous cooperation with great powers and taking precautionary measures so that the country maintains flexibility and avoids excessive dependence on any actor.<sup>7</sup>

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<sup>6</sup> Kenneth Waltz, "Structural Realism after the Cold War," *International Security* 25, no. 1 (2000): 5–41.

<sup>7</sup> Živilė M. Vaicekauskaitė, "Security Strategies of Small States in a Changing World," *Journal on Baltic Security* 3, no. 2 (2017): 7–15.

Some small states also pursue **multi-vector foreign policy**, which gives them the opportunity to simultaneously strengthen ties with various partners and maintain strategic maneuvering space. The choice among these strategies is determined by the distribution of power, the degree of external pressure, and the state's own vulnerability.

Considering Georgia's geopolitical environment, security challenges, and economic capabilities, the most optimal strategy may be **hedging**. It allows the country, on the one hand, to maintain a strategic course based on Western security architecture, and on the other hand, to use opportunities for economic cooperation with China and other actors without forming one-partner dependence.

The hedging model creates flexible maneuvering space, reduces vulnerability to external shocks, and allows Georgia to protect strategic autonomy—particularly important for a small state in a competitive environment between great powers.

Comparative Table No. 1: Strategies (Balancing – Bandwagoning – Hedging – Multi-vector Policy)

Strategy	Main Purpose	Behavioral Mechanism	Risk	Benefit
Balancing	Reducing threat from a strong actor	Military-political opposition; seeking partners	Escalation of conflict	Strengthening security; maintaining independence
Bandwagoning	Receiving security from the strong	Alignment with a strong state; following its agenda	Loss of strategic autonomy	Short-term increase in security
Hedging	Strategic insurance and maintaining flexibility	Cooperation + precautionary measures simultaneously; diversifying relationships	Difficulty of excessive balance; external distrust	Maneuvering capability; risk distribution; maintaining autonomy
Multi-vector Policy	Reducing dependence and expanding the circle of partners	Parallel relationships with several actors	Difficulty managing conflicting agendas	Maximizing economic and political benefits; strategic flexibility

## Research Methodology

Analysis of the security dimension of Georgia-China strategic partnership requires a multifaceted, integrated research approach encompassing both theoretical and empirical

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methods. The research methodology is based on qualitative analysis tools that correspond to international relations research standards.

## MAIN PART

Understanding Georgia-China strategic partnership requires comprehensive analysis of historical, economic, technological, and geopolitical factors. According to Georgia's strategic documents, the country is considered one of the most significant transit links in the direction of Turkey and Central Asia, while China uses these transport corridors as integrated components in its global initiatives. The contemporary phase of this relationship was significantly shaped by the expansion of the Belt and Road Initiative, which gave small states the opportunity to participate in a broad economic network while simultaneously creating new security and geopolitical challenges.

According to Carnegie Endowment assessments, the formalization of strategic partnership between Georgia and China in 2023 was conditioned by both regional and global strategic environment changes. Beijing's main motivation was the growing importance of the "Middle Corridor"—a route that allows China to use Georgia for connection with Europe, bypassing Iran and Russia, as a relatively safe and politically less risky transit space. For Georgia, the agreement represented a pragmatic response to global competition and geoeconomic uncertainty: Tbilisi seeks to strengthen its transit function, activate infrastructure projects, and diversify economic partnerships without damaging its European integration priority. The process gains additional significance from the tense US-China relations in 2023, making Georgia's choice even more sensitive and strategically distinctive. According to Carnegie's assessment, the signing represents the result of interests intersecting in a multi-layered structural environment and is based on pragmatic calculations rather than a reorientation of Georgia's foreign policy.<sup>8</sup>

Strategic documents pay particular attention to deepening Georgia-China economic cooperation, though the political dimension of this relationship is no less significant. China

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<sup>8</sup> Carnegie Endowment for International Peace, "What's Behind China's Strategic Partnership With Georgia?" August 17, 2023.

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views Georgia as a regional partner whose geographical location and transit route potential create strategic value for Beijing, while for Georgia, China represents a significant source of economic resources and investments.

However, activating economic cooperation cannot be considered without impact on Western security architecture—particularly when technological, financial, and infrastructure projects can become mechanisms of political influence.<sup>9</sup> Studies conducted in Western countries indicate that Chinese infrastructure and technological initiatives may be perceived as a competitive model compared to European Union standards, affecting the level of trust toward Georgia.<sup>10</sup> This situation creates a typical "security dilemma" for small states: Georgia seeks to receive economic benefits from the East while security guarantees come from the West, limiting its foreign policy maneuvering space. This dilemma is intensified by the fact that in the long-term perspective, the country cannot choose a sharp priority in either direction at the expense of the other, as such a case might result in losing either economic development opportunities or security guarantees. Several regional analysts drew attention to this pattern even in the twentieth century, noting that Georgia's geopolitical position does not allow for a sharply antagonistic choice.<sup>11</sup>

For Georgia's security architecture, it is critically important that strategic partnership with China represents an additional resource rather than a replacement for Western security mechanisms. This approach particularly relies on the doctrine that small states cannot rely on one actor's military-political umbrella in great power competition; **instead, they need multi-vector, balanced, and structurally strengthened policy.**

Based on the above circumstances, it is important to examine Georgia-China relations in three main directions that form the foundation for comprehensive assessment of the partnership. First, economic cooperation shows both the growth of trade and infrastructure capabilities and those institutional and financial risks that still represent a significant challenge for small states. The second dimension includes technological and cybersecurity

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<sup>9</sup> Nadège Rolland, *China's Eurasian Century?* (Washington: NBR Press, 2017).

<sup>10</sup> European Commission, "EU-China: A Strategic Outlook," Joint Communication, 2019.

<sup>11</sup> Zbigniew Brzezinski, *The Grand Chessboard* (Basic Books, 1997).

issues: Chinese involvement within the framework of the "Digital Silk Road" and 5G infrastructure simultaneously determines opportunities and raises critical security risks. The third direction is related to geopolitical consequences—expanding relations with China is economically beneficial, but its strategic interpretations may affect Georgia's Western integration trajectory. Precisely this comprehensive analysis of these three perspectives ensures a complete assessment of the partnership's essence, structural challenges, and long-term impacts.

### **Economic Cooperation: Benefits, Risks, and Systemic Characteristics**

Economic cooperation between Georgia and China has been steadily growing over the past decade. The free trade agreement created a significant market for Georgian products, particularly wine and agricultural products. Moreover, China has become one of Georgia's largest trading partners. According to international organizations' assessments, access to China's market gives Georgia a competitive advantage in the region.<sup>12</sup> However, economic cooperation cannot be assessed only by positive indicators. First, Georgia's trade balance with China remains negative, indicating that China remains a strong importer for Georgia, while Georgia's exports do not reach scales that would form a relatively equal structure in both directions. A significant part of international research emphasizes that China's economic activity abroad can become a source of political influence, especially in countries where asymmetric relationships exist. Examples often cited include Montenegro, Laos, and several African countries' infrastructure debts to China, which significantly strengthened China's political influence.

The systemic risks of cooperation with Chinese state companies are particularly symbolized by Montenegro's case, which has become a classic example of the widely discussed "debt trap" in international research. Montenegro turned to China Exim Bank loans to finance the Bar-Boljare highway worth over \$1 billion, followed by unexpectedly

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<sup>12</sup> Nino Javakhishvili, "The Impact of China–Georgia Free Trade Agreement on China Georgia Import and Export Trade" (2024).

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high debt, infrastructure delays, and project quality problems; as a result, the country was forced to turn to the European Union for assistance to avoid possible economic collapse.<sup>13</sup>

### **Comparative Analysis: Serbia, Hungary, Montenegro, Kazakhstan**

In comparative analysis, the examples of Serbia, Hungary, Montenegro, and Kazakhstan demonstrate that China's economic, technological, and financial projects in small and medium-sized states often become sources of political influence. In the case of the Western Balkans, according to European Union research service data, Chinese investments in the region exceeded €32 billion between 2009-2021, of which €10.3 billion was implemented in Serbia alone; investments are particularly concentrated in transport, energy, and communications/IT sectors, creating structural dependence and "debt trap" risks for small economies.<sup>14</sup> In Serbia and Hungary, the growth of Chinese capital and technological cooperation often coincides with pro-Chinese rhetoric of political elites and willingness to soften critical positions toward Beijing within the European Union, giving economic cooperation an additional dimension of political influence.<sup>15</sup> Montenegro's case is particularly illustrative with the Bar-Boljare highway project, for which Chinese loans significantly increased the country's debt burden and became a classic example of a small state falling into a "debt trap" in international debates.<sup>16</sup> In Kazakhstan, China's influence is related to BRI transit corridors and infrastructure investments: according to World Bank and other studies, the country is forming as one of the main platforms for China-Europe transport corridors, accompanied by both trade and investment benefits and growing dependence on infrastructure and logistics.<sup>17</sup>

Comparison of these four cases shows (see additionally Table No. 2: **Comparative Analysis**) that China's economic involvement in small and medium-sized states is rarely

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<sup>13</sup> Ibid.

<sup>14</sup> Branislav Stanicek, "China's Strategic Interests in the Western Balkans," European Parliamentary Research Service Briefing, June 24, 2022.

<sup>15</sup> Erik Brattberg et al., "China's Influence in Southeastern, Central, and Eastern Europe: Vulnerabilities and Resilience in Four Countries," Carnegie Endowment for International Peace, October 13, 2021.

<sup>16</sup> Lola Deron, "Montenegro, China, and the Media: A Highway to Misperceptions," SAIS-CARI Briefing Paper no. 7, 2021.

<sup>17</sup> World Bank, "South Caucasus and Central Asia: The Belt and Road Initiative – Kazakhstan Country Case Study," 2020.

purely economic in nature: in the long-term perspective, it often transforms into channels of political influence, especially when institutional sustainability is weak and foreign policy balancing is challenging—making the risk of similar asymmetric dependence a relevant issue in Georgia's case as well.

**Table No. 2: Comparative Analysis of Small and Medium-Sized States by Dependence on China**

Country	Main Chinese Involvement	Main Benefit	Risks/Forms of Dependence
Serbia	Large infrastructure projects (Belgrade-Budapest railway), energy, "Safe City" surveillance system (Huawei), foreign direct investment	Fast capital, infrastructure renewal, political support on the international arena	Asymmetric economic dependence; technological dependence; growth of political influence ("17+1" format)
Hungary	Investment and technology projects (CATL, BYD), transport infrastructure, university cooperation, Huawei regional hub	Job creation, high-volume investments, technological cooperation	Pro-China positioning in the EU; political convergence; risk of blocking critical EU decisions
Montenegro	Bar-Boljare highway, high-volume state loans from Chinese banks	Infrastructure benefit in a short time; transport system improvement	"Debt trap" risk; structural debt growth; excessive financial dependence on one partner
Kazakhstan	BRI transit corridors, logistics corridors, energy, transport infrastructure	Growth of transit revenues; economic diversification; regional hub function	Structural dependence on infrastructure and logistics; risk of forced choice in changing security environment; cautious hedging between Russia and China

This example is particularly relevant for Georgia, as it shows that excessive optimism toward Chinese investments may cause economic and political dependence that small states cannot quickly escape. This case underlines the main hypothesis of the work: for small and medium-sized states, the benefits of China's economic projects are real but only if risks are strictly controlled and the state has a strong institutional framework ensuring transparency, competition, and protection of strategic interests. Although Georgia's case is still different, assessment in this direction is still necessary.

Our analysis here also clearly shows that economic cooperation is beneficial for Georgia only under conditions when strong institutional oversight exists. Economic risks always

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make small states more vulnerable, especially when the volume of investments significantly exceeds the country's economic scale.

### Technological and Cybersecurity Risks in the Context of Georgia-China Strategic Cooperation

The technological sphere is one of the most sensitive directions in Georgia-China cooperation, as it is directly related to the country's critical infrastructure, data security, and long-term strategic independence. In the contemporary international security environment, technological integration is perceived not only as an opportunity for economic innovation but also as an instrument of influence and dependence. Precisely from this perspective, China's technological expansion is assessed by many states worldwide, particularly evident in 5G infrastructure, video surveillance systems, and data processing platforms.<sup>18</sup>

The EU's coordinated security assessments of 5G networks emphasize that "high-risk suppliers" may include companies operating under state control conditions and potentially subject to direct or indirect interference by a third country's government.<sup>19</sup> Although the document developed by the European Union does not name a specific country, according to expert assessments, these criteria particularly apply to Chinese telecommunications companies, which China's digital security legislation obliges to cooperate with state structures. Precisely this legal framework creates suspicion that for Chinese technology companies, ensuring complete operational independence on foreign territory may be limited, considered in EU assessments as a threat to critical infrastructure security.

According to Strand Consult's 2024 report, one of the significant challenges for 5G infrastructure security is the use of technology suppliers operating under strong state influence or control conditions.<sup>20</sup> The study emphasizes that Chinese telecommunications

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<sup>18</sup> Erik Baark, "China's New Digital Infrastructure: Expanding 5G Mobile Communications," *East Asian Policy* 14, no. 2 (2022): 124–136.

<sup>19</sup> European Commission and ENISA, *Report on EU-Wide Coordinated Risk Assessment of 5G Networks Security*, October 9, 2019, p. 26.

<sup>20</sup> Strand Consult, "Eight Risks for the 5G Supply Chain from Suppliers under the Influence of Adversarial Countries like China," December 10, 2024.

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companies, according to China's national security legislation, are obligated to cooperate with state structures when necessary, questioning their operational independence in foreign countries. As a result, the report notes that such legal circumstances increase geopolitical and cybersecurity risks for states using Chinese technologies in 5G networks.

According to Transparency International Georgia's 2025 assessment, Chinese technological involvement in Georgia is not yet large-scale, but is already evident in several critical directions—particularly video surveillance systems, telecommunications equipment, and network infrastructure. According to the study, a large part of state agencies use Chinese-made cameras and software, while Huawei technologies occupy a significant share in local telecommunications networks. Experts warn that such concentration may create technological dependence in the long-term perspective and deepen critical infrastructure security risks.<sup>21</sup>

It is also noteworthy that Western partners' approaches significantly affect Georgia's security strategic decisions. The positions of the USA and the European Union on technological security issues have sharply converged in recent years; both sides openly warn partners about the risks of state-controlled Chinese technological infrastructure.<sup>22</sup> Such warnings also affect Georgia's political choice, as the country needs appropriate integration with Western security systems, particularly in cybersecurity, intelligence cooperation, and critical infrastructure protection directions.

In summary, the technological and cybersecurity direction in Georgia-China relations represents one of the most sensitive and strategic spheres, as it is directly related to the country's critical infrastructure sustainability and data security. International practice demonstrates that contemporary technological integration is already perceived not only as economic development but also as an instrument of geopolitical influence, especially when technology suppliers operate under strong state influence conditions. The EU's coordinated 5G security assessment and Strand Consult's 2024 analysis unanimously indicate that state-

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<sup>21</sup> Transparency International Georgia, "Increasing Chinese Influence in Georgia," May 22, 2025.

<sup>22</sup> U.S. State Department, "Clean Network Program," 2020.

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controlled companies' participation in 5G networks increases cybersecurity and political penetration risks—a criterion directly relevant to Chinese technology companies' cases.

For Georgia, this issue takes on even more significant contours, as according to Transparency International Georgia's data, Chinese technological infrastructure is already present in video surveillance, telecommunications, and network systems, which may grow into technological dependence in the future and weaken the country's information sovereignty. At the same time, Western partners' strict position on risks related to Chinese technological infrastructure directly affects Georgia's strategic choice, as the country's security architecture is primarily based on cooperation with the European Union and NATO. Accordingly, Georgia finds itself in a structurally difficult situation: on the one hand, it needs technological development and accessible infrastructure, while on the other hand, compliance with Western security standards is necessary. Precisely this dilemma presents the technological-cybersecurity sphere as one of the defining factors for Georgia's foreign policy maneuver and long-term strategic security.

### **Geopolitical Consequences and the Trajectory of Relations with the West**

The geopolitical significance of Georgia-China strategic partnership cannot be assessed without considering the Western direction. Georgia's foreign policy fundamental priority remains integration into the European Union and NATO, repeatedly recorded both in strategic documents and official communications with international partners. Against this backdrop, deepening relations with China creates a complex diplomatic balance, as in the West's view, China's global policy is often considered as a form of structural competitor and systemic challenge.<sup>23</sup> US State Department assessments have repeatedly emphasized that China's expansive economic formats in some cases increase geopolitical asymmetries among small states, potentially affecting their foreign policy sovereignty.<sup>24</sup> The European Union has also developed a strict strategic framework regarding China, where it is defined

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<sup>23</sup> European Commission, "EU-China Relations Factsheet," 2022.

<sup>24</sup> U.S. Department of State, "2023 Investment Climate Statement: Georgia," 2023.

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as a "competitor," "partner," and "systemic rival" simultaneously<sup>25</sup>—demonstrating that the European approach is complex and varies according to partner state dependence. For Georgia, the main challenge lies precisely in correct positioning among these three different dimensions. The state needs, on the one hand, economic partnership with China, while on the other hand, strengthening security guarantees in Western institutional systems.

This structural difficulty is seen even more profoundly in regional analytical centers' assessments, including Rondeli Foundation. According to their analysis, for Georgia, it is critically important that economic and trade cooperation with China not be followed by deepening political influence, especially in the security sphere, where protecting autonomy is the highest priority for a small state.<sup>26</sup> Such assessments emphasize the importance of the circumstance that economic relations should not transform into a form of political leverage, potentially undermining Georgia's foreign policy orientation.

The geopolitical picture becomes even more complex considering the Russia factor. China cooperates with Russia in the region within the framework of strategic partnership, while Russia still represents the main military and security challenge for Georgia. A broad consensus of international researchers indicates that China does not act against Russia's interests in the South Caucasus and, accordingly, in cases of Georgia's security crises, Beijing is not considered a real balancing force.<sup>27</sup> In this circumstance, it becomes clear that economic ties and infrastructure cooperation cannot fulfill the function of security guarantee in a military-political context.

From this, we can assume that for Georgia, China's growing economic and political participation can be stable only when it clearly and in advance defines a strategic boundary—that critical point whose crossing is unacceptable and which excludes

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<sup>25</sup> European Parliament, "EU-China relations: De-risking or de-coupling – the future of the EU strategy towards China," Study PE 754.446 (Brussels: European Parliament, March 2024).

<sup>26</sup> Georgian Foundation for Strategic and International Studies (GFSIS), "Georgia's Dangerous Partnership with China," October 26, 2023.

<sup>27</sup> Rasmus G. D. Hardt and Anders Streubel-Kristensen, "Perspectives: Georgia to Be Disappointed if It Expects Security Guarantees from China," *Eurasianet*, June 28, 2024

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compromise on political or security issues. Precisely such institutionally defined "red lines" are a necessary defense mechanism for small states to protect their sovereignty, Western course, and security interests in a competitive geopolitical environment.

For Georgia, strategic cooperation with China is significantly related to economic and infrastructure capabilities, though its geopolitical interpretation requires particular caution. The converging assessment of the European Union, regional analytical centers, and international research indicates that for Georgia's security architecture, it is crucial to unwaveringly maintain the Western strategic direction, as economic ties with China cannot replace those security guarantees provided by the European Union and NATO formats. Accordingly, for Georgia, a stable and sustainable cooperation model is based on a clearly defined strategic boundary: economic interaction with China is possible and advisable, though the country's positioning in political and security directions must remain in full compliance with Western standards and partnership obligations.

### **Practical Models of Strategic Balance in Small and Medium-Sized States**

**(Examples of Vietnam, South Korea, and Estonia)**

In international relations, growing power competition forces small and medium-sized states to constantly revise their own foreign policy configurations to simultaneously ensure both the use of economic opportunities and maintenance of security guarantees. In this dynamic, the strategic balance model becomes particularly important, allowing a small state to avoid becoming dependent on any great power, maintain structural autonomy, and have flexible foreign policy maneuvering space. To assess the effectiveness of this model, it is important to analyze countries that have successfully balanced cooperation with China and compatibility with Western security architecture in practice.

Below we examine Vietnam, South Korea, and Estonia (see additionally analytical comparative Table No. 3) as three different but conceptually interconnected examples that clearly show how small states can maintain structural autonomy under conditions of deepened cooperation with China.

Their experience is particularly relevant for Georgia because these countries' examples clearly show that small and medium-sized states can simultaneously use economic relations with China as a development resource and still maintain clear orientation toward Western architecture in the security sphere. This model is based precisely on that kind of institutionally strengthened strategic balance that is also critical in Georgia's case: balance that ensures receiving economic benefits under conditions of cooperation with China and simultaneously excludes dependence on any great power. For precisely this reason, the experience of Vietnam, South Korea, and Estonia provides a significant analytical foundation for understanding how Georgia, similar to these countries, can maintain multi-vector, security- and economy-convergent foreign policy stability. From this, it can be said that an institutionally strengthened strategic balance can simultaneously strengthen economic benefits and ensure compatibility with Western security architecture.

### 1. Vietnam: The Strategic Architecture of "Bamboo Diplomacy"

Vietnam represents a significant example of how a small state can maintain strategic autonomy despite forced geopolitical proximity to China. The country's main foreign policy architect was considered Communist Party General Secretary Nguyen Phu Trong (2011-2024), whose formulated "Bamboo Diplomacy" term defines diplomatic strategy: strong roots (sovereignty), resilient stem (stable party governance), and flexible branches (multi-alignment partnerships), ultimately implying principled protection of national interests and flexibility in relations with great powers.<sup>28</sup>

During Trong's period, Vietnam maintained close economic ties with China, recorded cooperation at the party level, and tried to reduce maritime tension risks, particularly within the 2011 maritime agreement framework. However, in parallel, it deepened relations with the USA and its Asian allies. In 2013, the countries signed a partnership, and in 2023—a comprehensive strategic partnership at the highest political level. Such

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<sup>28</sup> Phan Xuan Dung, "Nguyen Phu Trong's Strategic Nous in Shaping Hanoi's Relations with the Great Powers," Fulcrum, 2024.

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diplomatic strategy is simultaneously based on using economic cooperation and strengthening relations with the USA and Japan in the security sphere.<sup>29</sup>

Vietnam's experience demonstrates that close economic relations with China do not automatically transform into structural dependence if the state ensures institutional control, multi-partner structure, and strategic diversification.

## 2. South Korea: The Institutional Model of Hedging Against the Backdrop of US-China Competition

South Korea's experience represents one of the most prominent examples of how a small and medium power can maintain balanced policy parallel to economic integration with China. According to Foreign Policy's 2025 analysis, China remains South Korea's largest trading partner, though Seoul timely implements diversification—redistribution of investments, entry into new markets, and strengthening strategic alliance with the USA in the security sphere.<sup>30</sup>

This imbalance is resolved by Korea through several instruments:

- Full synchronization with the USA in the security sphere (anti-missile architecture, intelligence, cooperation with AUKUS and QUAD);
- Economic integration with China under strict state oversight conditions;
- Protection of the technology sector and 5G core from high-risk suppliers (Huawei exclusion from the core network since 2019).

In Ezgi Kılıçarslan's research, Korea's foreign policy is clearly defined as hedging—a strategy aimed at maximizing economic benefits and maintaining security with minimal risk.<sup>31</sup>

South Korea's example is particularly relevant for Georgia: it shows that economic integration with China is possible if the state ensures institutional control and full synchronization with the West in the security sphere.

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<sup>29</sup> Ibid.

<sup>30</sup> Ramon Pacheco Pardo, "South Korea's China Ties Don't Amount to Dependence," *Foreign Policy*, February 10, 2025.

<sup>31</sup> Ezgi Kılıçarslan Gül, "South Korea's Foreign Policy: The Hedging Strategy" (master's thesis, Middle East Technical University, 2023).

### 3. Estonia: The European Standard Model of Technological Security

Estonia represents a high-tech small state example that clearly defined security priorities and thereby avoided technological and infrastructure dependence on China.

Estonia was among the first in the European Union to begin restricting high-risk suppliers from 5G infrastructure. The EU's official 5G Toolbox defines that high-risk suppliers—particularly companies subject to third-country state control—should not be allowed in core networks.<sup>32</sup>

Based on this framework, Estonia prepared legislation that restricts suppliers in complex technological infrastructure who are not from NATO and EU member states or do not meet high security standards. According to ERR's 2020 report, Huawei officially requested review of the law, confirming that the regulation directly affected Chinese companies.<sup>33</sup>

Estonia's model creates an example whereby strict institutional policy on technological security allows a small state to receive economic benefits from global relations but not become vulnerable in critical infrastructure.

**Analytical Comparative Table No. 3 (Vietnam – South Korea – Estonia)**

Criterion	Vietnam	South Korea	Estonia
Geopolitical Profile	Small/medium state; China's immediate neighbor; constant strategic pressure at sea	Medium power; USA's solid security ally; Asian economic hub	Small state; EU and NATO member; high security standards
Economic Relationship with China	High integration; significant trade and industrial ties	Very high trade dependence, but diversified structure	Moderate trade, but restrictions in critical sectors
Security Strategic Model	Neutral "Four Nos" doctrine; equal distance	Clear security alliance with USA	Full integration in Western security systems (NATO, EU)
Strategy Toward China	Bamboo diplomacy—flexible balancing	"Dual-track approach"—economy with China, security with USA	"Strategic distancing"—technological and security restrictions
Institutional Control in Critical Sectors	High; state controls technological infrastructure	High; strict screening and restrictions in 5G sphere	Very high; "secure supplier" model

<sup>32</sup> European Union, *Cybersecurity of 5G Networks: EU Toolbox of Risk Mitigating Measures*, 2020.

<sup>33</sup> "Huawei Asks Government to Review Communications Networks Regulation," ERR News, October 16, 2020.

			excludes Chinese technologies
Compatibility with Western Structures	Growing security cooperation with USA	Full security integration with the West	Full political, economic, and military compatibility
Strategic Balance Result	Economic benefit + maintaining strategic autonomy	Economic benefit + stable security guarantees	Technological sovereignty + high security standards
How It Supports Our Hypothesis	Institutional control + balance reduces structural dependence	Economic integration with China is fully compatible with Western security	Clear regulations ensure independence and sovereignty

All three examples—Vietnam, South Korea, and Estonia—present a unified logical conclusion: **A small state can engage in economic or technological cooperation with China without structural dependence if this process is managed with an institutionally strengthened and multi-vector strategic balance.**

This experience directly supports the work's hypothesis, according to which a balanced and transparent model can simultaneously strengthen economic benefits and ensure compatibility with Western security architecture.

For Georgia, these cases reflect three main practical lessons:

1. Economic relations with China can be beneficial if separated from the security sphere (Vietnam);
2. Full convergence with the West in the security sphere is possible parallel to economic diversification (South Korea);
3. Technological protection of critical infrastructure is a prerequisite for structural autonomy (Estonia).

Therefore, in Georgia's case, strategic balance policy is not only desirable but a necessary instrument under conditions of global competition.

## CONCLUSION

Multi-layered analysis of Georgia-China relations demonstrates that strategic cooperation creates both significant economic opportunities and systemic security challenges for the country. Georgia's geopolitical location, small states' security specifics,

and Western integration-based foreign policy present a complex dilemma whose management requires consistent, long-term, and structurally strengthened political steps.

Research shows that deepened economic ties with China can become an additional source of development, particularly in trade, transit, and investment directions. However, experience accumulated in many countries and Georgia's internal institutional weaknesses indicate that such cooperation contains risks related to the possibility of transforming economic influence into political leverage. In this context, contract transparency, standard compliance, competitive environment, and strong state oversight institutions have particular importance for Georgia.

Technological cooperation represents the most sensitive sphere, as it can directly affect the country's critical infrastructure and digital security architecture. International experience shows that Chinese technology companies are sometimes subject to obligations defined by state-imposed legislation, creating security concerns in other countries. For small states like Georgia, technological dependence may grow into long-term strategic vulnerability, directly contradicting the country's security principles.

From a geopolitical perspective, Georgia finds itself between Western security systems vital to Georgia and China's economic capabilities. The country's declared priorities toward European Union and NATO integration simultaneously oblige it to maintain political convergence with Western partners on strategic issues, including technological security and critical infrastructure protection. Deepening relations with China cannot become an alternative to these directions, as China does not represent a security strengthening instrument under Russia's aggressive policy conditions.

As a result, the work concludes that for Georgia's long-term stable development, a model is necessary that balances economic interests and security needs. Such a model requires a clear political framework, standard compliance, threat definition, and oversight of national interests. Georgia needs to form a policy capable of maintaining equilibrium between economic interests and security priorities. Precisely from this stems the need for

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recommendations that ensure responsible and risk-oriented management of strategic partnership.

## RECOMMENDATIONS

### 1. Institutional Strengthening of Multi-Vector Foreign Policy

Cooperation with China should remain in economic and commercial format, clearly separated from the security sphere. Political leadership should define strategic "red lines" whose crossing is unacceptable, to avoid creating a perspective where economic cooperation transforms into a security or political influence channel.

### 2. Strengthening Institutional Transparency and Oversight

All infrastructure, transport, and investment projects related to Chinese companies should be subject to transparent tenders, state and public monitoring mechanisms, and clear accountability, to reduce the risk of using economic influence as political leverage.

### 3. Strengthening Technological Security Structures

Georgia's technology policy should be in full convergence with EU and US security standards, particularly in 5G infrastructure, data protection, and critical systems security spheres. This is necessary for the country to avoid strategic technological dependence that threatens its sovereignty.

### 4. Deepening Coordination with Western Partners

Georgia's security policy should be based on constant coordination with NATO, the European Union, and relevant US structures. This ensures that the country's foreign policy positioning does not move into a zone that may be perceived by Western partners as a strategic deviation.

It should also be noted that considering Georgia's geopolitical location and structural vulnerabilities, the hedging strategy represents an optimal model for the country, as it simultaneously ensures maintaining a course based on Western security architecture and diversifying economic cooperation without losing strategic autonomy. The hedging mechanism allows Georgia to use economic resources offered by various global actors while

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maintaining clear priorities in the security sphere and avoiding dependence that would reduce its foreign policy maneuvering space.

Ultimately, research has shown that Georgia-China strategic cooperation creates both significant economic growth opportunities and complex security challenges, particularly evident under conditions of global power competition and the country's geopolitical vulnerability. Involvement in Chinese economic and technological formats can be a source of benefit only if Georgia implements effective institutional control, strengthens democratic governance, and maintains a foreign policy line convergent with Western security architecture. Otherwise, cooperation may grow into strategic dependence, limiting the country's sovereign choice and foreign policy maneuvering space. Accordingly, Georgia's stability is based on pragmatic, multi-vector, and risk-oriented policy aimed at containing external asymmetric influences and protecting national interests under competitive international environment conditions.

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## THE ROLE OF THE WEST IN THE RUSSIA-UKRAINE CONFLICT

Shota Otkhozoria<sup>1</sup>

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### ABSTRACT

This article offers an in-depth, multidimensional analysis of the role played by Western actors -the United States, the United Kingdom, the European Union, and NATO -in the full-scale Russia-Ukraine war, now widely regarded as the most consequential geopolitical rupture since the end of the Second World War. Although Western states are not direct belligerents, their strategic decisions, policy choices, and coordinated (or at times fragmented) actions have profoundly shaped the military, economic, and diplomatic trajectory of the conflict. The war has emerged as the principal arena in which the resilience of the so-called “rules-based international order” is tested against the revisionist ambitions of a nuclear-armed authoritarian state.

The study employs three principal theoretical frameworks -realism, liberal internationalism, and the collective security paradigm -to examine Western behaviour across key military, financial, political, and normative dimensions. Realism sheds light on shifting regional power balances and recalibrated deterrence principles; liberal internationalism highlights the imperative of defending sovereignty, territorial integrity, and democratic agency; and the collective security model elucidates NATO’s evolving role as it balances between non-escalation and robust deterrence.

The article provides a detailed assessment of Western assistance -ranging from the unprecedented scale of U.S. military and intelligence support, to the EU’s macro-financial and energy-sector interventions, the U.K.’s proactive defence partnership with Ukraine, and NATO’s reinforcement of the Eastern Flank. It also evaluates the long-term impact of Western sanctions, noting that although restrictive measures have substantially impaired Russia’s access to critical technologies and global financial markets, the Kremlin has partially offset these effects through alternative trade channels, third-country networks, and wartime economic restructuring.

A core part of the analysis examines the “28-point peace plan” associated with the Trump administration, which proposes a radically different model for a post-war settlement. The plan challenges several foundational principles of Western diplomacy, imposes extensive limitations on Ukraine’s long-term sovereignty, implicitly legitimizes territorial changes achieved by force, and diminishes NATO’s strategic role. As argued, such an approach establishes a dangerous precedent by normalizing territorial revisionism in the international system.

Ultimately, the study concludes that the role of the West in the conflict is both indispensable and structurally constrained. While Western support has been vital to preserving Ukraine’s statehood and preventing Russia’s rapid victory, internal divisions, delayed decision-making, sanction leakages, and growing societal fatigue pose significant challenges. The outcome of the war and the future architecture of European and global security will depend on the West’s ability to sustain a unified, proactive, and strategically coherent long-term approach.

**Keywords:** security; war; sanctions; peace plan; international order; energy; strategy.

<sup>1</sup> Assistant Professor of Bachelor’s Program in Defense and Security of LEPL David Agmashenebeli National Defense Academy of Georgia, Doctor of International Relations

## INTRODUCTION

Russia's full-scale invasion of Ukraine on 24 February 2022 not only disrupted the regional balance of power but also evolved into the largest and most intense military confrontation in Europe since the end of the Second World War. The conflict extends far beyond a bilateral military contest between two states, affecting the structural foundations of European security, the fundamental principles of international law, and the normative framework underpinning contemporary international relations -the so-called “rules-based order”. Within this crisis-ridden environment, the strategic behaviour and decision-making of the West -both as a collective bloc and as individual actors (the United States, the United Kingdom, the European Union, and NATO) -acquire particular significance.

Although Western states are not direct participants in the hostilities, their policies, military-legal decisions, financial assistance, sanctions regimes, and diplomatic engagement substantially determine both the course of the war and the direction of its potential outcomes. Western involvement is not limited to enhancing Ukraine's defensive capabilities; it also influences Russia's strategic calculus, the prospects for regional stability, and the future configuration of European security.

This article focuses on several key questions:

- ✓ How have Western policies and institutional responses evolved since Russia's invasion of Ukraine?
- ✓ What mechanisms -military, energy-related, financial, and diplomatic -are being used to deter Russia and support Ukraine?
- ✓ In what ways has Western action shaped Ukraine's defensive strategy, battlefield dynamics, and Russia's decision-making process?
- ✓ What structural constraints, internal contradictions, and strategic paradoxes characterise the West's role in the ongoing conflict?

The central argument advanced in this study is that Western involvement -particularly that of the United States, the United Kingdom, the European Union, and NATO -has been decisive in preventing Ukraine's rapid collapse and obstructing Russia's strategic objectives. Yet, at the same time, delayed decision-making, political disagreements within the

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Western camp, and the partial effectiveness of sanctions considerably limit the West's capacity to achieve maximal strategic outcomes.

## MAIN PART

### Theoretical and Analytical Framework

Understanding the West's role in the Russia-Ukraine war requires a rigorous theoretical foundation, as the conflict extends far beyond a conventional military confrontation. It represents a complex process of power reconfiguration, normative contestation, and structural transformation in the international security system. From this perspective, three principal theoretical approaches are particularly salient: realism, liberal internationalism, and the collective security model.

#### **1. Realism and the Structural Balance of Power**

The realist school conceives international politics as a continuous struggle for power, security, and influence. From this standpoint, the war in Ukraine is both a manifestation of a disrupted balance of power and a classic illustration of the security dilemma. Russia's actions, viewed through realist logic, are driven by its aspiration to reassert dominance over the post-Soviet space, obstruct NATO and EU enlargement, and curtail Western military-political presence in its perceived geopolitical sphere of influence.

Within this context, the responses of the United States, the United Kingdom, the European Union, and NATO can be interpreted not merely as value-driven commitments, but also as a reactivation of traditional deterrence strategies. The war has become a crucial test case for realism: can the West maintain an effective deterrence posture in the twenty-first century, especially when facing a nuclear-armed revisionist state willing to deploy large-scale military force?

#### **2. Liberal Internationalism and the Normative Order**

Liberal internationalism interprets the conflict not solely as a power struggle but as a confrontation between democratic and authoritarian governance models. The public statements of Western leaders consistently reflect this normative framing: support for Ukraine is presented as a defence of sovereignty, territorial integrity, democratic agency,

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and the foundational principles of international law -most notably the prohibition of the use of force and the inviolability of borders.<sup>2</sup>

Within this theoretical lens, a Russian victory would create a dangerous global precedent, emboldening other revisionist states -regional or global-to justify aggressive military action. Consequently, the fate of Ukraine is perceived as a litmus test for the future credibility of democratic norms and the stability of the “rules-based order”.

### 3. Collective Security and NATO’s Role

Based on the principle of collective defence, NATO’s security system faced extraordinary challenges from the outset of the invasion. As Ukraine is not a member of the Alliance, Article 5 does not apply to it; nevertheless, NATO’s Eastern Flank - particularly the Baltic States, Poland, and Romania -faces direct security risks emanating from Russia’s aggression.

In this environment, NATO has sought to maintain a delicate balance. On the one hand, the Alliance refrains from direct military engagement with Russia to avoid escalating the conflict into a nuclear confrontation. On the other hand, Western states have provided significant military, technological, and diplomatic support to Ukraine. This model of “indirect engagement” has effectively become a defining feature of the Western strategy.<sup>3</sup>

## The Role of the United States

### 1. Military Assistance

The United States has been the most significant and strategically indispensable provider of military assistance to Ukraine. Between 2022 and 2024, Washington allocated tens of billions of dollars in military support, encompassing advanced weapons systems, combat platforms, intelligence capabilities, and operational technologies. These assistance packages

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<sup>2</sup> Council on Foreign Relations, “Three Years of War in Ukraine: Are Sanctions Against Russia Making a Difference?”, 2025. <https://shorturl.at/ocxRr> (Accessed 08.12.2025).

<sup>3</sup> NATO, “Relations with Ukraine,” 2025. <https://shorturl.at/KzxsU> (Accessed 08.12.2025).

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supplied Ukraine with modern artillery, tanks, multiple-launch rocket systems, cyber-defence capabilities, and sophisticated air-defence systems.<sup>4</sup>

Patriot and NASAMS systems played an essential role in strengthening Ukraine's air-security architecture, establishing a protective shield that significantly reduced the impact of Russian missile and drone strikes. The HIMARS multiple-launch rocket system proved transformative in 2022-2023: its precision and range enabled Ukraine to degrade Russia's logistical hubs and alter operational dynamics on several fronts.<sup>5</sup>

However, the continuity of U.S. military support has repeatedly been influenced by domestic political disagreements. Increasing scepticism within segments of the Republican Party, technological and production-capacity limitations in the American defence industry, as well as growing societal fatigue, all created periodic obstacles to approving new assistance packages. As a result, temporary capability gaps emerged -periods during which the Ukrainian armed forces lacked the necessary resources for sustained military operations, particularly large-scale counter-offensives.<sup>6</sup>

## 2. Financial and Budgetary Support

American involvement extends far beyond the military dimension. The United States is one of Ukraine's most important financial lifelines, providing direct budgetary assistance essential for maintaining core state functions. U.S. decisions at both legislative and executive levels resulted in substantial multi-billion-dollar support packages used to finance public-sector salaries, pensions, social services, and the restoration of critical infrastructure.<sup>7</sup>

Such assistance enables the Ukrainian state to maintain a minimum threshold of administrative and social stability under wartime conditions. Without consistent budgetary support, the collapse of Ukraine's civilian governance mechanisms would be as strategically

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<sup>4</sup> U.S. Department of State, U.S. Security Cooperation with Ukraine, Fact Sheet, 2025. <https://shorturl.at/BoTPo> (Accessed 08.12.2025).

<sup>5</sup> Ibid.

<sup>6</sup> Congressional Research Service, *U.S. Direct Financial Support for Ukraine*, IF12305, 2025. <https://shorturl.at/pa3qz> (Accessed 08.12.2025).

<sup>7</sup> Ukraine Oversight, *Funding for Ukraine*, Office of Inspector General, U.S. Government, 2025. <https://shorturl.at/arMqk> (Accessed 08.12.2025).

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devastating as military defeat. The functioning of public institutions is indispensable for maintaining domestic order, political legitimacy, and societal resilience; thus, U.S. financial assistance has become one of the foundational pillars of Ukraine's wartime statehood.

### **3. Sanctions Policy and Global Leadership**

The United States has spearheaded the strictest and most comprehensive sanctions regime against the Russian Federation. Washington introduced multilayered sanctions targeting key sectors of Russia's economy: partial exclusion of major Russian banks from the SWIFT system; restrictions on the export of high-technology components and microchips; and stringent limitations on the import of Russian hydrocarbons, particularly crude oil.<sup>8</sup>

These measures aim to erode the economic foundation of Russia's war machine by restricting access to advanced technologies, diminishing investment inflows, constraining financial operations, and undermining Russia's long-term economic stability. However, evidence shows that Moscow has partially mitigated the effectiveness of sanctions by reorienting trade towards alternative partners -notably China and Iran -and developing extensive parallel-import schemes and wartime industrial adjustments. Consequently, sanctions have shifted from an expected "shock measure" to a protracted strategic confrontation, with delayed and incremental effects.<sup>9</sup>

### **4. Domestic Political Debates**

The Ukrainian question has become one of the most polarising issues in contemporary U.S. domestic politics. The majority of the Democratic Party view support for Ukraine not merely as a foreign-policy priority but as an investment in the long-term security of the democratic world. For them, Ukraine's resilience serves both strategic interests and normative commitments, reinforcing the credibility of Western security guarantees.

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<sup>8</sup> European Commission, "Sanctions Adopted Following Russia's Military Aggression Against Ukraine," 2022–2025. <https://shorturl.at/VAjq6> (Accessed 08.12.2025).

<sup>9</sup> Council on Foreign Relations, "Three Years of War in Ukraine: Are Sanctions Against Russia Making a Difference?", 2025. <https://shorturl.at/dGikL> (Accessed 08.12.2025).

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In contrast, a considerable faction within the Republican Party regards U.S. support for Ukraine as an excessive financial burden or as an unjustified “outsourcing” of a European problem to American taxpayers. The central sceptical argument is distilled around two themes: Why should American taxpayers fund a war on another continent?; Should U.S. resources not prioritise domestic challenges instead of external conflicts?

This political polarisation has repeatedly obstructed the timely approval of new assistance packages. Delays in congressional voting and recurrent procedural blockages reveal the extent to which Ukraine’s support has become intertwined with partisan competition and domestic electoral cycles.<sup>10</sup>

## 5. Attempts at Conflict Regulation and the Evolution of U.S. Peace Proposals

Efforts to formulate a peace framework around Ukraine have been among the most contested and politically sensitive issues within the United States. Although the Trump administration did not present a fully formalised, official peace document during its term, public statements, advisory-level messaging, and the rhetoric of allied congressional groups collectively indicated a distinct vision of conflict resolution.

Between 2023 and 2025, Donald Trump’s remarks significantly influenced global security debates, especially given the centrality of U.S. support to Ukraine’s survival. Against this backdrop, Ukrainian officials were presented with a draft identified as the so-called “28-point peace plan”.<sup>11</sup> While the document continues to undergo adjustments, its core architecture reflects the strategic preferences associated with the Trump political camp.<sup>12</sup>

This “28-point model” diverges sharply from traditional Western diplomatic doctrine. Rather than relying on collective security mechanisms, multilateral frameworks, or synchronised Western unity, it centres the peace agreement around a highly personalised,

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<sup>10</sup> Pietro Bompuzzi et al., *Ukraine Support After Three Years of War: Aid Remains Low but Steady and There Is a Shift Toward Weapons Procurement*, Kiel Institute, 2025. <https://shorturl.at/0Fte1> (Accessed 08.12.2025).

<sup>11</sup> Mariam Khan, “Trump administration’s 28-point Ukraine-Russia peace plan presented to Zelenskyy”, ABC News, November 21, 2025. <https://shorturl.at/XgNo7> (Accessed 08.12.2025).

<sup>12</sup> World Politics, “Trump orders peace envoy to meet Putin in Moscow to progress Ukraine plan”, November 25 2025. <https://shorturl.at/VUI8I> (Accessed 08.12.2025).

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U.S.-dominated architecture. The plan proposes significant restrictions on Ukraine's future strategic choices, acknowledges portions of Russia's territorial gains, and re-conceptualises the role of NATO. It thus represents not merely a technical proposal but a conceptual departure from decades of Western security practice.

#### **A. General Characteristics of the “28-Point Peace Plan”**

The so-called “28-point peace plan” represents a document that fundamentally alters Ukraine's security landscape and restructures the trajectory of its long-term political development. Its architecture incorporates several critical dimensions:

**1) A drastic alteration of Ukraine's strategic orientation** -Under the logic of the plan, Ukraine would be required to formally renounce its ambitions for NATO membership (Point 7), while its armed forces would be subjected to strict quantitative and functional limitations (Point 6). Such constraints would effectively transform Ukraine into a “neutral state” with restricted security guarantees and limited strategic autonomy.

**2) De facto recognition of Russia's strategic gains** -The plan effectively legitimises territories annexed or occupied by Russia: Crimea, Luhansk, and Donetsk are recognised as de facto Russian regions (Point 21), while in Kherson and Zaporizhzhia the existing line of control is “frozen” and codified as a provisional status (Point 22). Added to this is a sanctions-relief mechanism (Points 13–14), which offers Russia substantial strategic relief.

**3) The unilateral dominance of the United States within the agreement's architecture** - According to the plan, the United States becomes the sole guarantor of Ukrainian security (Point 10), while U.S.-Russia economic and technological cooperation would be reintroduced in areas such as energy, natural resources, artificial intelligence, and Arctic development (Point 13). The proposed mechanism for managing frozen assets strengthens U.S. influence even further: 50 per cent of returns from the joint investment fund would go directly to the United States (Point 14).

**4) A significant reduction of NATO's strategic role** -The plan requires NATO to formally renounce Ukraine's prospect of membership (Point 7) and to refrain from

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deploying any NATO military contingents on Ukrainian territory (Point 8). As a result, the Alliance is structurally excluded from Ukraine's long-term security framework.

### **B. Territorial Provisions (Points 21, 22, 28)**

The territorial provisions represent the most sensitive and politically consequential part of the plan.

*1) De facto legitimisation of annexed territories* -Points 21 and 22 effectively endorse Russia's control over Crimea, Donetsk, and Luhansk, while freezing the status of the occupied areas of Kherson and Zaporizhzhia along the current line of contact. This would entail the loss of approximately 23 per cent of Ukraine's internationally recognised territory.

Such provisions violate one of the foundational principles of Western diplomacy -the norm that borders must not be altered by force. The precedent created by this plan would strengthen the logic whereby a nuclear-armed aggressor may ultimately secure international acceptance of territorial conquest.

*2) Accumulation of long-term strategic risk* -Territorial concessions provide Russia with a “strategic pause,” granting the Kremlin time to rebuild its military capabilities and prepare for potential renewed aggression. In effect, the plan institutionalises a temporary cessation of hostilities rather than a durable peace.

### **C. Security Provisions**

The security elements pose particularly severe risks to Ukraine's statehood and long-term resilience.

*1) Strict limitations on Ukraine's armed forces (Point 6)* -A 600,000-person cap on the armed forces would severely undermine Ukraine's defence capacity, rendering large-scale operations -either defensive or offensive -virtually impossible. This transforms Ukraine from an active security actor into one with markedly constrained capabilities.

*2) A constitutional prohibition on NATO membership (Point 7)* -The plan obliges Ukraine to incorporate into its constitution a permanent renunciation of NATO accession.

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This eliminates the country's most credible long-term security pathway and denies it the protection of the West's most robust collective defence structure.

***3) U.S. as the sole guarantor (Point 10)*** -Security guarantees become exclusively dependent on the United States, and therefore contingent upon the foreign-policy preferences of a single administration. This personalises security assurances and exposes Ukraine to significant political volatility.

***4) Russia's formal pledge of "non-aggression" (Point 16)*** -The plan requires Russia to commit legally to "non-aggressive behaviour," yet such a commitment lacks enforceability. Given Moscow's track record of violating international agreements, this provision offers no meaningful security.

#### **D. Economic and Energy Provisions**

***1) Allocation of frozen Russian assets (Point 14)*** -The plan proposes allocating USD 100 billion to Ukraine, an equivalent sum to the European Union, and transferring the remainder into a U.S.-Russia joint investment fund -half of whose profits would go to the United States. This unprecedented arrangement creates a unique geopolitical and economic asymmetry: Russia regains partial access to its frozen reserves; the United States acquires leverage over Russia through shared economic mechanisms; Ukraine becomes structurally dependent on Western financial channels.

***2) Restoration of U.S.-Russia energy and technological cooperation (Point 13)*** -The plan envisages restoring cooperation in areas including energy, natural resources, the Arctic, artificial intelligence, and data infrastructures. Such a development would effectively facilitate Russia's economic reintegration into global circuits, undermining the purpose and credibility of Western sanctions.

#### **E. Educational and Social Provisions**

Point 20 relates to domains that directly influence Ukraine's internal identity and societal structures. It includes mechanisms for monitoring ideological processes, which could resemble external oversight of Ukraine's informational and educational space.

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Particularly concerning is the inclusion of a broadly defined prohibition of “Nazi ideology,” a narrative long instrumentalised in Russian propaganda. Such wording could facilitate political manipulation, discredit domestic opponents, and erode Ukraine’s legitimacy, both domestically and internationally.

## F. Legal Components

*1) Comprehensive amnesty* -Point 26 envisions a blanket amnesty for all parties, including individuals responsible for grave crimes during the conflict. This contradicts the core principles of international criminal law, undermines accountability, and entrenches a culture of impunity. It directly violates the rights of victims and obstructs prospects for justice.

*2) A “Peace Council” chaired personally by Donald Trump (Point 27)* -The plan establishes a “Peace Council” headed personally by Donald Trump. This renders the entire architecture highly personalised, reliant not on institutional mechanisms but on the will of a single political figure. Such an arrangement is inherently unstable and vulnerable to shifts in U.S. domestic politics.

## G. Expected Outcomes

### *1) For Ukraine*

The plan entails severe consequences:

- ✓ loss of approximately one quarter of its territory;
- ✓ weakened defence capacity due to armament limitations;
- ✓ long-term dependence on the United States;
- ✓ elimination of NATO prospects;
- ✓ Russia gains time and strategic space for potential renewed aggression.

Short-term benefits include a temporary ceasefire, humanitarian corridors, financial support, and retaining the possibility of EU accession.

### *2) For Russia*

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Russia emerges with numerous strategic gains: territorial legitimisation (Point 21), prospects for sanctions relief, renewed economic cooperation with the United States, and potential re-engagement with Western structures such as the G8.

### ***3) For the West***

The positive aspect is largely limited to the temporary cessation of hostilities and reduced financial burden. Negative consequences, however, are substantial:

- ✓ weakening of NATO's role;
- ✓ fragmentation of Western unity;
- ✓ erosion of international law;
- ✓ emboldening of authoritarian regimes observing that military aggression yields tangible rewards.

## **H. Summary of Advantages and Risks**

***Advantages*** -The plan offers a rapid halt to military hostilities, reduces casualties, and provides a short-term window for humanitarian and economic assistance.

***Risks*** -The risks overwhelmingly outweigh the advantages:

- ✓ violation of Ukraine's territorial integrity;
- ✓ legitimisation of Russian territorial conquest;
- ✓ structural weakening of NATO;
- ✓ reduction of Ukraine's sovereignty;
- ✓ dangerous global precedent encouraging future aggression;
- ✓ long-term instability due to a personalised security model dependent on a single political actor.

In essence, the plan codifies many of Russia's wartime objectives into a formal agreement and represents a departure from long-established principles of Western diplomacy.

## **The Role of the European Union**

### **1. Financial Assistance**

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The European Union has emerged as one of Ukraine's principal financial supporters, particularly in sectors essential for economic resilience and the functioning of state institutions. According to the European Commission, the EU has allocated multi-billion-euro macro-financial assistance packages, concessional loans, and targeted grants. These resources fund Ukraine's budgetary expenditures, the restoration of energy infrastructure, the enhancement of humanitarian assistance, and the implementation of state reforms required under EU conditionality.<sup>13</sup>

In this regard, the EU has assumed the role of a “financial super-donor”, complementing the United States, whose support is primarily military. This division of labour reflects a clear functional specialisation: the United States bolsters Ukraine's defence capabilities, while the European Union strengthens the country's economic foundations, social stability, and institutional resilience under wartime conditions.

## 2. The Multi-Package Sanctions System

The EU has implemented one of the most comprehensive sanctions regimes in its history, targeting Russia's financial, technological, transport, and industrial sectors. These sanctions include restrictions on the Russian Central Bank's reserves, the freezing of assets belonging to major state-owned enterprises, bans on the export of dual-use and high-technology goods, and sweeping limitations on Russian aviation, maritime logistics, and road transport.<sup>14</sup>

In addition, the EU imposed an embargo on Russian oil and introduced price-cap mechanisms aimed at drastically reducing the Kremlin's energy revenues. However, the sanctions also produced domestic “blowback” across Europe: energy price increases, inflationary pressure, and economic turbulence provided fertile ground for political debates and social tensions in several Member States.<sup>15</sup>

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<sup>13</sup> European Commission, “EU Financial Support to Ukraine,” 2024–2025. <https://shorturl.at/SUise> (Accessed 08.12.2025).

<sup>14</sup> European Commission, “Sanctions Adopted Following Russia's Military Aggression Against Ukraine.” <https://shorturl.at/iFcZO> (Accessed 08.12.2025).

<sup>15</sup> Ibid.

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Although sanctions have weakened Russia's military-industrial capacity over time, they have become a protracted struggle rather than a short-term disruptive measure. Their effectiveness depends on sustained EU cohesion and continuous closure of sanctions-avoidance loopholes.

### **3. Reducing Energy Dependence and Building Strategic Autonomy**

Prior to the invasion, a substantial portion of the EU's energy supply -especially natural gas -originated from Russia. The events of 2022 triggered a profound transformation of European energy policy. Measures included diversification of gas imports, expansion of LNG terminals, development of alternative pipeline networks, and acceleration of energy-efficiency initiatives.<sup>16</sup>

By 2024–2025, these efforts produced tangible outcomes: Russia's share in the EU's energy mix declined dramatically. This shift reduced Moscow's ability to deploy energy as a geopolitical coercive instrument and contributed to a more resilient long-term security environment.

At the same time, debates on European strategic autonomy gained unprecedented momentum:

- ✓ To what extent should Europe rely on external -particularly non-democratic -energy suppliers?
- ✓ How can the EU strengthen its own defence industrial base?
- ✓ What degree of technological and energy independence is necessary to ensure long-term resilience?

Such discussions reflect a growing European geopolitical self-awareness, in which the war in Ukraine has served as a critical catalyst.<sup>17</sup>

#### **The Role of the United Kingdom**

Following Brexit, the United Kingdom has sought to demonstrate that its departure from the European Union has not diminished its geopolitical weight, and that London

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<sup>16</sup> European Commission, *REPowerEU: Joint European Action for More Affordable, Secure and Sustainable Energy*, Communication COM(2022)108. <https://shorturl.at/Y5YOK> (Accessed 08.12.2025).

<sup>17</sup> Ibid.

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remains a central actor in European security. The war in Ukraine provided an opportunity to translate this ambition into practice: the United Kingdom has become one of Ukraine's most rapid, proactive, and consistent partners -militarily, diplomatically, and legally.

### **1. Early and Substantial Military Assistance**

The United Kingdom belongs to the small group of states that supplied military assistance to Ukraine even before many other Western partners had made firm decisions. From the earliest stages of the war, London provided modern tanks, long-range artillery, air-defence systems, precision-guided equipment, and large quantities of ammunition. Official estimates indicate that British assistance amounts to several tens of billions of pounds, with military support constituting the majority of this sum.<sup>18</sup>

Britain's actions served not only as practical support but also as a political precedent. The UK's early and decisive contributions placed pressure on other European states - particularly Germany -to accelerate their own assistance. London thus helped shape a broader Western consensus, establishing a faster and more assertive tempo of support.

### **2. Bilateral Security Agreements**

The long-term security agreement signed between the United Kingdom and Ukraine in 2024–2025 is among the most comprehensive arrangements that Ukraine has secured during the war. The agreement encompasses sustained military assistance, systematic training for Ukrainian forces, intelligence and operational cooperation, support for security-sector reform, and expanded defence-industrial collaboration.<sup>19</sup>

This partnership functions as a de facto security guarantee for Ukraine, bridging the gap until full NATO membership becomes achievable. British involvement strengthens Ukraine's defensive capabilities and demonstrates that Western support is not a temporary reaction to crisis, but a strategic commitment to long-term stability.

### **3. Legal Leadership and Political–Symbolic Commitment**

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<sup>18</sup> Government of the United Kingdom, *UK Support to Ukraine: Factsheet*, Foreign, Commonwealth & Development Office, 2024/2025. <https://shorturl.at/E6nAx> (Accessed 08.12.2025).

<sup>19</sup> Government of the United Kingdom, “UK–Ukraine Agreement on Security Cooperation,” 2024. <https://kntn.ly/aff9c8a2> (Accessed 08.12.2025). GOV.UK – “UK and Ukraine Sign New Defence Pact”. <https://kntn.ly/a80d04ff> (Accessed 08.12.2025).

The United Kingdom is one of the most active states advocating for legal accountability in relation to Russian aggression. London supports investigations into war crimes, crimes against humanity, and, crucially, the crime of aggression itself. It provides both financial and institutional assistance to the International Criminal Court, endorses the creation of a special tribunal, and contributes to the collection and documentation of evidence.<sup>20</sup>

This reflects a value-based approach in British foreign policy: the war in Ukraine is viewed not only through the lens of geopolitical competition but also as a struggle for the preservation of international law and fundamental moral norms. By emphasizing accountability, the UK positions itself as a state committed to transforming justice principles into practical instruments of international security.

### **NATO: Efforts Beyond Direct Engagement, in Support of Ukraine**

#### **1. The Deep Evolution of NATO–Ukraine Relations**

Cooperation between NATO and Ukraine significantly intensified after 2014, when Russia's annexation of Crimea compelled the Alliance to shift from a posture of limited engagement to more robust and structured support. The full-scale invasion in 2022 elevated this partnership to an entirely new level.

NATO expanded joint training programmes, increased the scale and scope of military preparation for Ukrainian forces, established multi-year assistance frameworks, and designated Ukraine as a “global partner” within its official documents. This status reflects a strategic long-term perspective: Ukraine is treated as a future member of the Alliance, even though a precise timeline for accession has not yet been defined.<sup>21</sup>

Thus, NATO–Ukraine relations have evolved from peripheral cooperation to a structural, long-term strategic partnership, in which Ukraine is viewed not merely as a recipient of support but as an emerging pillar of European security architecture.

#### **2. NATO's “Red Lines” and the Strategy of Non-Direct Engagement**

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<sup>20</sup> Ibid.

<sup>21</sup> NATO, “Relations with Ukraine,” 2025. <https://shorturl.at/P9DwX> (Accessed 08.12.2025).

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Since the outset of the invasion, NATO member states have maintained a clear position: the Alliance would not deploy troops directly onto the battlefield in Ukraine, nor would it impose a no-fly zone, as such actions could risk escalation into a direct confrontation with a nuclear-armed Russia.

This decision is grounded in a strict assessment of nuclear risks and reflects NATO's foundational principle that the Alliance's primary obligation is to its own members. Ukraine, despite its deepening partnership, remains outside NATO's collective defence guarantees under Article 5.

However, this does not imply NATO's disengagement. On the contrary, member states -whether individually, bilaterally, or through multinational coalitions -have supplied Ukraine with advanced military systems that have reshaped the operational environment: from long-range artillery to air-defence platforms and specialized training missions. In practice, NATO exhibits a dual nature: institutionally it is not a party to the conflict, yet substantively it is one of the central architects of Ukraine's defence capability.

NATO thus maintains a hybrid strategic posture: formal restraint combined with extensive operational support, ensuring significant assistance to Ukraine while avoiding direct military confrontation with Russia.

### **3. Strengthening the Eastern Flank**

Following the invasion, the Alliance undertook an unprecedented reinforcement of its Eastern Flank. Additional battlegroups were deployed to Poland, the Baltic States, Romania, and Bulgaria; readiness levels of command structures were increased; stockpiles of military equipment expanded; and air and maritime patrols intensified.<sup>22</sup>

These measures form part of a broader deterrence strategy: to send Moscow an unequivocal message that while attacking Ukraine may be a calculated choice, any aggression against a NATO member state would trigger a collective and immediate response. In this sense Ukraine functions as a strategic buffer, serving dual purposes: -

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<sup>22</sup> NATO Secretary General's press conference 23.09.2025, <https://shorturl.at/x59wa> (Accessed 08.12.2025).

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protecting Eastern Flank member states from direct Russian aggression; reducing the likelihood of a direct military confrontation between Russia and NATO forces.

### Critical Assessment of the West's Role

Evaluating Western involvement in the Russia–Ukraine war requires a balanced approach that takes into account both achievements and systemic limitations. The conflict highlights the strengths of Western strategic engagement as well as its structural vulnerabilities, each of which shapes the degree of support provided to Ukraine and the long-term effectiveness of Western strategy.

#### 1. Assessment of Achievements

***Preservation of Ukrainian Statehood*** -Western military, financial, and technological assistance has been indispensable to Ukraine's survival as a functioning state. This assistance prevented the rapid collapse of Ukrainian state institutions and halted Russia's initial strategic objectives during the earliest phase of the invasion.<sup>23</sup> Intelligence sharing and real-time operational information significantly enhanced Ukraine's defensive effectiveness.

***Prevention of a Rapid Russian Victory*** -In the early stages of the war, it became evident that Ukraine's ability to sustain resistance relied heavily on Western-supplied advanced military systems -from HIMARS to sophisticated air-defence platforms. Without such support, Russia would likely have achieved key operational goals far more swiftly.

***Constraining Russia's Economic and Military Capacity*** -The comprehensive sanctions regime, combined with the mass withdrawal of Western corporations from the Russian market, has weakened Russia's access to critical technologies, reduced investment flows, and forced the Kremlin into a wartime economic model. Although sanctions produce uneven and delayed effects, they have undeniably restricted Russia's long-term military-industrial development.<sup>24</sup>

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<sup>23</sup> Council on Foreign Relations, “Three Years of War in Ukraine: Are Sanctions Against Russia Making a Difference?”, 2025. <https://shorturl.at/dGikL> (Accessed 08.12.2025).

<sup>24</sup> Pietro Bomprezzi et al., Ukraine Support After Three Years of War: Aid Remains Low but Steady and There Is a Shift Toward Weapons Procurement, Kiel Institute, 2025. <https://shorturl.at/0Fte1> (Accessed 08.12.2025)

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***Strengthening European Defence Structures*** -The conflict has catalyzed a renewed focus on European security, prompting the EU and NATO to expand defence budgets, modernize preparedness frameworks, and reinforce capabilities against hybrid threats.<sup>25</sup> Concepts that had long remained dormant regained strategic relevance through the impetus generated by the war.

## **2. Structural Limitations and Exposed Vulnerabilities**

***Consistent Delays in Strategic Decision-Making*** -Many critical weapons systems -tanks, long-range artillery, advanced fighter aircraft -were supplied only after significant delays, often when battlefield conditions had already deteriorated.<sup>26</sup> This reactive rather than proactive approach prolongs the war and increases its human and financial cost.

***Multiple Channels of Sanctions Evasion*** -Russia has adapted to sanctions by rerouting supply chains through third countries, employing “shadow fleets,” and using re-export systems and offshore trading networks.<sup>27</sup> These mechanisms undermine the sanctions’ intended impact and reveal gaps in global enforcement.

***Ambiguity in the Global South*** -Numerous non-Western states -particularly in Africa, Asia, and Latin America -have maintained a posture of strategic neutrality, declining to join sanctions or condemn Russia unequivocally. This has allowed Moscow to cultivate new economic and political partnerships, mitigating the effects of Western isolation efforts.

The West has struggled to universalize the narrative of “global justice” in relation to Ukraine; for many, the conflict remains a regional rather than a universal concern.

***Growing Societal Fatigue in Western States*** -As the war endures, signs of “Ukraine fatigue” have become more pronounced in the United States and Europe. Inflation, rising energy prices, migration pressures, and domestic socio-economic issues compete with Ukraine for political priority. This creates the risk that long-term support may become increasingly vulnerable to domestic political pressures.

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<sup>25</sup> NATO, “Defence Expenditure of NATO Countries (2014–2024),” 17 June 2024. <https://shorturl.at/GAfyl> (Accessed 08.12.2025).

<sup>26</sup> Government of the United Kingdom, *UK Support to Ukraine: Factsheet 2024/2025*; Congressional Research Service, U.S. Direct Financial Support for Ukraine, IF 12305, 2025

<sup>27</sup> CSIS, Seth G. Jones, *Russia’s Shadow War Against the West*, 2025. <https://kntn.ly/f44d53d1> (Accessed 08.12.2025).

## CONCLUSION

The Russia-Ukraine war has not only reshaped the security configuration of Eastern Europe but has also posed a fundamental question for the international system: will the world continue to operate on the basis of agreements, legal norms, and collective security, or will it regress into an era defined by coercive power, where the aggression of a nuclear-armed state produces tangible geopolitical rewards? Western involvement in the conflict constitutes an ongoing attempt to answer this question -an attempt that reveals both the maximum potential and the inherent constraints of Western strategic action.

The West successfully disrupted Russia's initial military calculations and prevented a rapid conquest scenario. The preservation of Ukraine's statehood was made possible not only through the determination and resilience of its armed forces, but also through the extensive military, financial, and intelligence support provided by the United States, the United Kingdom, the European Union, and NATO. Western assistance constituted the decisive counterweight that halted Russia's advance and forestalled a radical alteration of Europe's geopolitical landscape.

At the same time, the internal divergences within Western policy exposed structural weaknesses that continue to undermine strategic coherence. Repeated delays in critical decision-making, divergent national preferences, domestic political fluctuations, and emerging signs of societal fatigue illustrate that the West still struggles to uphold a unified, long-term strategic posture in response to major international crises.

The Trump administration's "28-point peace plan" symbolises many of these challenges. The plan departs from longstanding Western diplomatic principles and proposes a personalised security model that relies heavily on the decisions of a single political actor rather than collective institutional guarantees. Its logic - de facto recognition of territorial changes achieved by force, the granting of significant strategic benefits to Russia, the structural limitation of Ukraine's security capacity, and the downgrading of NATO's role - sets a dangerous precedent that could embolden other revisionist actors.

This scenario underscores that the West's principal challenge is not limited to assisting Ukraine militarily or financially. The deeper challenge lies in whether the West can adapt

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itself to the geopolitical realities of the twenty-first century -a world in which authoritarian states make use not only of traditional military power but also cyber instruments, energy leverage, disinformation campaigns, and opaque economic mechanisms.

Unless the West formulates a unified, coherent, and multi-year strategy, it is highly likely that the pressure on Kiev will not diminish; indeed, every fracture in the security architecture will become an added burden in its confrontation with Russia and other authoritarian challengers. In such a scenario, the defence of Ukraine will no longer represent merely an act of international solidarity; it will become an essential component of Western self-defence.

Accordingly, the West must adopt several strategic measures:

- ✓ the permanent strengthening of NATO's Eastern Flank;
- ✓ the institutionalisation of military assistance to ensure that Ukraine's security is not dependent on electoral cycles;
- ✓ the achievement of full energy independence to prevent the use of energy resources as geopolitical weapons;
- ✓ the enhancement and global coordination of sanctions mechanisms;
- ✓ deeper engagement with the Global South to elevate the Ukraine crisis from a regional conflict to a universally recognised challenge to the international order.

If these objectives are met, the war in Ukraine could become a catalyst for the emergence of a more resilient international order -one in which the use of force by nuclear-armed states cannot produce legitimate political outcomes. However, if the West fails to respond effectively, the international system may slide back into a world defined by power politics, where law functions merely as an instrument of the strong rather than the foundation of global stability.

In sum, Ukraine's struggle is not solely the struggle of a single nation for survival. It is a test of Western political will, strategic capability, and the long-term viability of the “rules-based international order”. The consequences of this test are likely to become one of the key factors shaping the geopolitical reality of the twenty-first century.

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## THE NEW REALITY OF U.S.–IRAN RELATIONS AND STABILITY IN THE MIDDLE EAST: CHALLENGES AND OPPORTUNITIES

Colonel Giorgi Lagiashvili<sup>1</sup>

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### ABSTRACT

This article examines the evolving relationship between the United States and Iran and its impact on regional stability in the Middle East. While historically characterized by antagonism and mistrust, the bilateral relationship is now shaped by new geopolitical realities, including Iran's growing regional influence, the rise of multipolarity, and shifting alliances among Gulf states. The study examines the evolution of U.S.–Iran relations from the 1979 revolution to the present, emphasizing how these dynamics intersect with conflict zones in the Gulf, Yemen, Syria, Iraq, and the Israel–Palestine region. The paper concludes by exploring policy options that could support regional stability, emphasizing diplomatic engagement, multilateral frameworks, and crisis management strategies.

**Keywords:** U.S.–Iran relations; Middle East stability; Iran regional influence; Gulf security; Israel–Palestine; American foreign policy; proxy conflicts.

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<sup>1</sup> Head of the Scientific Research Center of LEPL David Aghmashenebeli National Defence Academy of Georgia, Doctor of International Relations

## INTRODUCTION

The relationship between the United States and Iran has long been one of the most complex and consequential in international relations. From the 1979 Iranian Revolution and hostage crisis to the ongoing disputes over Iran's nuclear program, U.S.–Iranian interactions have consistently influenced regional security and global geopolitics. Although the bilateral relationship has been largely defined by confrontation, recent years have introduced a new set of dynamics. The Middle East is increasingly shaped by multipolar competition, the rise of regional powers, and the strategic activism of non-state actors. As such, the U.S.–Iran relationship must be analyzed not only in terms of bilateral dynamics but also in terms of its broader implications for regional stability.

The purpose of this article is to explore these evolving dynamics, examining the historical background of U.S.–Iran relations, the current geopolitical environment, and the interplay between bilateral tensions and regional security concerns. In particular, it will assess Iran's role in the Gulf, its involvement in the Israel–Palestine conflict, and the broader implications of shifting alliances and emerging multipolarity. By analyzing these issues, the article seeks to provide a nuanced understanding of how U.S.–Iran relations are likely to influence the stability of the Middle East in the near and medium term.

### Historical Context

To fully understand contemporary U.S.–Iran relations, it is necessary to review their historical trajectory. The bilateral relationship was fundamentally altered by the 1979 Iranian Revolution, which led to the overthrow of the pro-Western Shah and the establishment of the Islamic Republic of Iran. The subsequent hostage crisis, during which fifty-two American diplomats were held for 444 days, marked the beginning of an era of deep mistrust and hostility between the two nations.<sup>2</sup> In response, the United States imposed a series of economic sanctions, which have been repeatedly expanded over the decades.<sup>3</sup>

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<sup>2</sup> Mark J. Gasiorowski, *U.S. Foreign Policy and the Shah: The Limits of Intervention* (Cambridge: Cambridge University Press, 2012), 145.

<sup>3</sup> Kenneth Katzman, *Iran Sanctions* (Washington, DC: Congressional Research Service, 2023), 3–6.

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The 1980s and 1990s saw Iran consolidating its influence in the region through alliances with non-state actors, laying the foundations of what scholars call the “Axis of Resistance.”<sup>4</sup> This network included Hezbollah in Lebanon, various militias in Iraq, and later groups in Yemen and Syria. These proxy relationships allowed Iran to project power asymmetrically and challenge U.S. interests without engaging in direct state-to-state conflict. At the same time, U.S. policy during this period focused primarily on containment, economic sanctions, and strategic partnerships with Gulf states to counterbalance Iran’s influence.<sup>5</sup>

The 21st century has introduced new dimensions to the relationship. The U.S.-led invasion of Iraq in 2003 inadvertently strengthened Iran’s regional influence, allowing Tehran to establish deep ties with Iraqi political factions and security forces.<sup>6</sup> The 2015 Joint Comprehensive Plan of Action (JCPOA) represented a temporary thaw, offering a framework to limit Iran’s nuclear program in exchange for sanctions relief.<sup>7</sup> However, the U.S. withdrawal from the agreement in 2018 under the Trump administration’s “maximum pressure” campaign reignited tensions, leading to renewed confrontations in the Gulf, drone strikes, and attacks on oil infrastructure.<sup>8</sup>

In this context, the contemporary U.S.–Iran relationship is shaped by three key legacies: long-standing mistrust, the proliferation of proxy networks, and the interplay between nuclear ambitions and regional power calculations. These factors, combined with a shifting global order and regional instability, create a complex environment for policymakers in both Washington and Tehran.

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<sup>4</sup> Marina Ottaway, Iran’s Proxy Strategy in the Middle East (Washington, DC: Carnegie Endowment for International Peace, 2020), 12–15.

<sup>5</sup> Ray Takeyh, *Guardians of the Revolution: Iran and the World in the Age of the Ayatollahs* (Oxford: Oxford University Press, 2009), 78–82.

<sup>6</sup> Fawaz Gerges, *The Far Enemy: Why Jihad Went Global* (Cambridge: Cambridge University Press, 2005), 109–111.

<sup>7</sup> Michael Eisenstadt, *The Iran Nuclear Deal: Implications for the Middle East* (Washington, DC: Washington Institute for Near East Policy, 2016), 22–25.

<sup>8</sup> Suzanne Maloney, *Maximum Pressure and Its Discontents* (Brookings Institution, 2019), 7–10.

## MAIN PART

### The Shifting Dynamics of U.S.–Iran Relations

In recent years, the U.S.–Iran relationship has entered a period of significant flux. While historically characterized by binary antagonism—hostile sanctions, proxy conflicts, and diplomatic isolation—the current landscape is more complex. Several factors contribute to this new dynamic. First, Iran’s domestic politics, economic pressures, and nuclear ambitions shape its foreign policy behavior. Second, the U.S. is navigating a changing strategic environment where the Middle East is no longer a unipolar arena dominated by Washington, but a multipolar space influenced by China, Russia, and regional actors such as Saudi Arabia and the UAE.<sup>9</sup>

The United States continues to employ a combination of sanctions, military presence, and selective engagement to contain Iran. Yet, the effectiveness of these measures is increasingly debated. Economically, Iran has adapted to sanctions through alternative trade networks and alliances with non-Western powers.<sup>10</sup> Militarily, the proliferation of Iranian-backed proxies in Iraq, Syria, Yemen, and Lebanon allows Tehran to influence outcomes without direct confrontation, creating a form of asymmetric deterrence.<sup>11</sup>

A critical element shaping current dynamics is the partial normalization of Gulf states’ policies toward Iran. While historically aligned with the U.S., some Gulf countries have begun limited engagements with Tehran to reduce tension and ensure regional stability, particularly in the aftermath of energy crises and conflicts in Yemen.<sup>12</sup> These shifts complicate the U.S. strategic calculus, as Washington must now navigate a more fragmented regional order while managing relations with traditional allies.

The role of nuclear negotiations also remains pivotal. Although the JCPOA collapsed in 2018, continued efforts by regional and international actors to re-engage Tehran on nuclear constraints demonstrate that diplomatic avenues remain open. Yet, mutual mistrust and

<sup>9</sup> Suzanne Maloney, *Iran and the Changing Middle East* (Washington, DC: Brookings Institution Press, 2024), 45–48.

<sup>10</sup> Karim Sadjadpour, *Iran’s Adaptive Sanctions Strategy* (Carnegie Endowment for International Peace, 2023), 12–15.

<sup>11</sup> Marina Ottaway, *Iran’s Proxy Strategy in the Middle East* (Washington, DC: Carnegie Endowment, 2020), 18–22.

<sup>12</sup> Kristian Coates Ulrichsen, *Gulf States and Iran: Diplomatic Recalibrations* (London: Chatham House, 2024), 33–36.

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domestic political pressures in both countries constrain flexibility.<sup>13</sup> This combination of diplomatic stasis, asymmetric influence, and regional recalibration characterizes the “new reality” of U.S.–Iran relations.

### Iran’s Role in the Gulf

Iran’s influence in the Gulf region is multi-dimensional, encompassing political, military, and economic instruments. Tehran’s ability to capitalize on its strategic geography, particularly the Strait of Hormuz, grants it considerable influence over global energy markets. Approximately one-fifth of global oil exports pass through the Strait, granting Iran the potential to disrupt energy flows as a means of strategic signaling.<sup>14</sup>

Beyond geography, Iran has cultivated an extensive network of political and military proxies across the Gulf. In Iraq, Iran-backed militias exercise considerable influence within the political system, often shaping security policy and aligning with Tehran’s strategic objectives.<sup>15</sup> In Yemen, the Houthi movement, supported by Iran, has been able to sustain a prolonged insurgency against Saudi-led coalitions, exemplifying Tehran’s ability to project power indirectly.<sup>16</sup>

These operations have tangible implications for U.S. interests and for regional stability. Military escalations in the Gulf, such as drone attacks or naval confrontations, can have immediate economic consequences, particularly for energy markets. They also increase the risk of unintended escalation between Iran, the U.S., and allied Gulf states. Consequently, Washington must balance deterrence with diplomacy, a challenge complicated by the multiplicity of actors and overlapping conflicts in the region.<sup>17</sup>

Iran’s economic strategy also underpins its regional influence. Despite sanctions, Tehran has pursued partnerships with China, Russia, and regional actors to maintain trade and investment. These relationships not only mitigate the effects of sanctions but also provide

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<sup>13</sup> Michael Eisenstadt, *The Iran Nuclear Program: Diplomatic Challenges* (Washington, DC: Washington Institute for Near East Policy, 2023), 27–30.

<sup>14</sup> F. Gregory Gause, *The International Politics of the Persian Gulf* (Cambridge: Cambridge University Press, 2021), 50–52.

<sup>15</sup> Anthony Cordesman, *Iranian Influence in Iraq* (Washington, DC: CSIS, 2022), 14–17.

<sup>16</sup> Elisabeth Kendall, *The Houthis and Iran: Proxy Dynamics in Yemen* (Oxford: Oxford University Press, 2023), 29–32.

<sup>17</sup> Suzanne Maloney, *Iran and the Gulf Security Dilemma* (Brookings, 2024), 40–43.

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Iran with alternatives to U.S.-dominated global institutions, reinforcing its strategic autonomy.<sup>18</sup>

### Iran, Israel–Palestine, and Proxy Networks

Iran's influence extends beyond the Gulf to the broader Levant, particularly in the context of the Israel–Palestine conflict. Tehran has long positioned itself as a champion of Palestinian causes, supporting Hamas, Palestinian Islamic Jihad, and Hezbollah in Lebanon.<sup>19</sup> This strategic posture serves both ideological and practical purposes: it bolsters Iran's regional legitimacy and provides leverage against Israel and its U.S. ally.

The proxy network allows Iran to project power asymmetrically, challenging Israel indirectly through missile capabilities, military training, and intelligence support for non-state actors.<sup>20</sup> The risks of escalation are significant: localized conflicts can escalate quickly into broader confrontations, as evidenced by periodic clashes between Israeli forces and Iran-backed groups in Gaza and southern Lebanon.<sup>21</sup>

Moreover, Iran's network complicates U.S. policy in the region. While the U.S. maintains strong ties with Israel, its efforts to mediate in the Palestinian territories are constrained by Iran's involvement and influence. The entrenchment of proxy actors across multiple conflict zones—including Syria, Iraq, and Yemen—means that Tehran is simultaneously a regional power broker and a source of instability.<sup>22</sup>

The strategic interplay of Iran's Gulf activities and Levantine proxies underscores the multidimensional nature of regional security. U.S. and allied policy must account for this complexity, recognizing that unilateral actions may provoke broader escalation, while multilateral approaches require careful coordination among Gulf states, Israel, and international actors.

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<sup>18</sup> Trita Parsi, *Losing an Enemy: Iran's Strategic Autonomy* (New Haven: Yale University Press, 2022), 65–68.

<sup>19</sup> Matthew Levitt, *Hezbollah: The Global Footprint of Iran's Proxy* (Washington, DC: Washington Institute, 2021), 22–25.

<sup>20</sup> Nadav Pollak, *Iranian Influence in Gaza and Lebanon* (Tel Aviv: Institute for National Security Studies, 2023), 18–21.

<sup>21</sup> Uzi Rubin, *Missile Threats from Iran-Backed Actors* (Jerusalem: Begin-Sadat Center, 2022), 12–16.

<sup>22</sup> Suzanne Maloney, *The Middle East Security Complex* (Brookings, 2023), 36–40.

## Emerging Multipolarity in the Middle East

The contemporary Middle East is increasingly characterized by multipolar competition, which has profound implications for U.S.–Iran relations and regional stability. Whereas the post–Cold War era was largely defined by U.S. hegemony, the current geopolitical environment is shaped by the active engagement of multiple state actors pursuing competing interests. Among these actors, China and Russia are increasingly prominent, frequently offering diplomatic support or economic alternatives to U.S.-led initiatives.<sup>23</sup>

China’s growing involvement, particularly in energy and infrastructure projects, allows regional actors—including Iran—to mitigate the economic impact of sanctions and assert greater autonomy.<sup>24</sup> Russia, through its military intervention in Syria and arms sales to regional actors, has positioned itself as a power broker, often mediating between Iran, Turkey, and other regional actors.<sup>25</sup> This multipolar framework reduces the efficacy of traditional U.S. leverage and creates new strategic challenges.

Within the region, states such as Saudi Arabia, the UAE, and Turkey are recalibrating their policies to navigate these shifts. While historically aligned with the United States, Gulf states are increasingly exploring bilateral and multilateral engagement with Iran to reduce tension, ensure energy security, and respond to evolving threats.<sup>26</sup> These moves reflect a pragmatic approach to regional security, wherein containment is balanced by dialogue and localized agreements, further complicating the U.S.–Iran bilateral equation.

The emergence of multipolarity also alters the dynamics of proxy conflicts. As Iran and other regional actors benefit from support from non-Western powers, the balance of power in conflicts such as Syria, Yemen, and Lebanon shift in favor of actors resistant to U.S. influence.<sup>27</sup> Consequently, U.S. policymakers face a complex calculus: maintaining

<sup>23</sup> F. Gregory Gause, *The International Politics of the Persian Gulf* (Cambridge: Cambridge University Press, 2021), 65–68.

<sup>24</sup> Marina Ottaway, *Iran’s Proxy Strategy in the Middle East* (Washington, DC: Carnegie Endowment, 2020), 25–28.

<sup>25</sup> Suzanne Maloney, *Iran and the Gulf Security Dilemma* (Brookings Institution, 2024), 50–54.

<sup>26</sup> Kristian Coates Ulrichsen, *Gulf States and Iran: Diplomatic Recalibrations* (London: Chatham House, 2024), 45–49.

<sup>27</sup> Matthew Levitt, *Hezbollah: The Global Footprint of Iran’s Proxy* (Washington, DC: Washington Institute, 2021), 28–32.

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deterrence while navigating a landscape where traditional instruments of power may be insufficient.

### Diplomatic and Strategic Challenges

Several interrelated challenges define the current strategic environment for U.S.–Iran relations. First, nuclear proliferation concerns remain central. Iran’s advanced uranium enrichment programs and regional nuclear ambitions continue to provoke anxiety among U.S. allies and international actors. While diplomatic negotiations remain possible, mutual distrust and domestic political pressures in both countries limit the scope for compromise.<sup>28</sup>

Second, proxy conflicts continue to destabilize the region. Iran’s extensive network of non-state actors enables it to exert influence without direct confrontation, but also heightens the risk of miscalculation. In Yemen, the Houthi conflict remains unresolved, while in Iraq and Syria, Iran-backed militias continue to shape political and military developments.<sup>29</sup> These conflicts complicate U.S. efforts to secure its interests and stabilize the region, requiring careful coordination with allies and regional partners.

Third, economic and energy considerations are critical. The Gulf remains a global energy hub, and disruption of oil and gas flows could have cascading consequences for the global economy. U.S. policy must therefore balance sanctions and deterrence with mechanisms to prevent escalation that could threaten energy security.<sup>30</sup>

Fourth, regional rivalries—particularly between Iran and Saudi Arabia—remain a persistent source of instability. While recent diplomatic efforts have attempted to reduce tensions, competition for regional influence continues to manifest in Yemen, Syria, and Lebanon. The complex interplay of sectarian, ideological, and strategic factors means that even localized conflicts have the potential to trigger broader regional crises.<sup>31</sup>

Finally, the Israel–Palestine conflict introduces additional volatility. Iran’s support for Hamas, Palestinian Islamic Jihad, and Hezbollah ensures that any deterioration in the

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<sup>28</sup> F. Gregory Gause, *The International Politics of the Persian Gulf* (Cambridge: Cambridge University Press, 2021), 65–68.

<sup>29</sup> Marina Ottaway, *Iran’s Proxy Strategy in the Middle East* (Washington, DC: Carnegie Endowment, 2020), 25–28.

<sup>30</sup> Suzanne Maloney, *Iran and the Gulf Security Dilemma* (Brookings Institution, 2024), 50–54.

<sup>31</sup> Kristian Coates Ulrichsen, *Gulf States and Iran: Diplomatic Recalibrations* (London: Chatham House, 2024), 45–49.

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situation could rapidly involve multiple state and non-state actors. The U.S., as Israel's principal security guarantor, faces the dual challenge of containing escalation while engaging in diplomatic initiatives aimed at conflict resolution.<sup>32</sup>

### **Policy Options and Recommendations**

Given these challenges, a multi-faceted policy approach is necessary to promote regional stability while addressing U.S.–Iran tensions. Several key options merit considerations:

**Enhanced Diplomatic Engagement** – Direct and multilateral diplomacy with Iran is essential. Reviving or revising nuclear agreements, even incrementally, can provide a framework for reducing tensions and verifying compliance. Engaging Gulf states in parallel discussions ensures that regional stakeholders retain a sense of ownership over security arrangements.<sup>33</sup>

**Crisis Management Mechanisms** – Establishing hotlines, confidence-building measures, and military-to-military communication channels can reduce the risk of unintended escalation in hotspots such as the Gulf or Syria.<sup>34</sup>

**Proxy Conflict Mitigation** – Coordinated efforts to reduce the intensity of proxy wars, including third-party mediation in Yemen and Lebanon, can stabilize conflict zones and reduce the risk of broader confrontation.<sup>35</sup>

**Economic and Trade Incentives** – Incorporating economic incentives and sanctions relief in a calibrated manner can provide leverage for positive engagement while avoiding abrupt destabilization. This may include facilitating Iran's access to humanitarian goods and energy markets, contingent on compliance with agreed frameworks.<sup>36</sup>

**Regional Security Architecture** – Developing a multilateral regional security framework, including Gulf Cooperation Council (GCC) states, Iran, and external powers, could institutionalize conflict resolution and crisis management. Such frameworks would

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<sup>32</sup> Matthew Levitt, Hezbollah: The Global Footprint of Iran's Proxy (Washington, DC: Washington Institute, 2021), 28–32.

<sup>33</sup> F. Gregory Gause, The International Politics of the Persian Gulf (Cambridge: Cambridge University Press, 2021), 65–68.

<sup>34</sup> Marina Ottaway, Iran's Proxy Strategy in the Middle East (Washington, DC: Carnegie Endowment, 2020), 25–28.

<sup>35</sup> Suzanne Maloney, Iran and the Gulf Security Dilemma (Brookings Institution, 2024), 50–54.

<sup>36</sup> Kristian Coates Ulrichsen, Gulf States and Iran: Diplomatic Recalibrations (London: Chatham House, 2024), 45–49.

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complement U.S. security guarantees while promoting local ownership of security solutions.<sup>37</sup>

These policy options highlight the necessity of a nuanced and multidimensional approach. Unilateral actions, excessive military reliance, or rigid sanctions may exacerbate instability, whereas calibrated engagement combined with regional partnerships offers a pathway toward sustainable stability.

### Future Prospects for U.S.–Iran Relations

The trajectory of U.S.–Iran relations over the coming decade will largely be shaped by three interrelated factors: domestic politics, nuclear negotiations, and regional power dynamics. Domestically, Iran faces significant economic and social pressures, including inflation, unemployment, and public discontent. These internal challenges constrain Tehran’s foreign policy options, creating both incentives for cautious engagement and the risk of aggressive posturing to consolidate internal legitimacy.<sup>38</sup>

In the United States, policymakers must balance domestic political considerations with international strategic interests. In the United States, policymakers face the challenge of reconciling domestic political pressures with broader international strategic interests. While there is bipartisan backing for sanctions and deterrence, there is also an acknowledgment that fully isolating Iran is neither practical nor beneficial for regional stability.<sup>39</sup> Consequently, future policy may involve calibrated engagement, selective sanctions relief, and multilateral frameworks to manage risk. The success of these initiatives will depend on sustained diplomatic efforts and credible verification mechanisms.<sup>40</sup>

Nuclear negotiations remain the central pivot of U.S.–Iran relations. While the collapse of the JCPOA in 2018 heightened tensions, renewed talks—whether under a revised agreement or phased engagement—present a pathway to reduce the risk of nuclear

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<sup>37</sup> Matthew Levitt, *Hezbollah: The Global Footprint of Iran’s Proxy* (Washington, DC: Washington Institute, 2021), 28–32.

<sup>38</sup> Suzanne Maloney, *Iran and Domestic Pressures: Implications for Foreign Policy* (Brookings Institution, 2024), 60–64.

<sup>39</sup> Kenneth Katzman, *Iran: U.S. Policy and Strategic Interests* (Congressional Research Service, 2023), 15–19.

<sup>40</sup> Michael Eisenstadt, *Diplomatic Frameworks for Managing Iran* (Washington Institute for Near East Policy, 2023), 32–35.

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proliferation. Such agreements could also offer a means to influence Iran's regional activities indirectly, by tying compliance to sanctions relief and broader economic integration.<sup>41</sup>

The influence of non-state actors will continue to complicate bilateral relations. Iran's support for proxies in Iraq, Syria, Lebanon, Yemen, and Gaza ensures that regional conflicts are intertwined with Tehran's strategic objectives. Any negotiation framework must therefore consider these networks, incorporating mechanisms to reduce conflict intensity and prevent escalation.<sup>42</sup>

### Comprehensive Regional Stability Analysis

The stability of the Middle East depends on a combination of bilateral U.S.–Iran dynamics, intra-regional rivalries, and the influence of external powers. Iran's role as both a destabilizing force and a strategic actor highlights the duality of its impact. On one hand, Tehran's support for proxy actors contributes to violence, sectarian tension, and strategic uncertainty. On the other, its integration into diplomatic frameworks can provide avenues for regional conflict resolution and energy security.

The Gulf remains a critical theater. While Iran and Saudi Arabia have engaged in intermittent dialogue, competition over influence in Yemen, Iraq, and Syria persists. These rivalries are amplified by sectarian dynamics and differing strategic priorities. U.S. engagement must therefore strike a balance between supporting allies and facilitating conflict mitigation through multilateral frameworks.<sup>43</sup>

The Levant, particularly the Israel–Palestine conflict, also remains a source of potential instability. Iran-backed actors, including Hezbollah and Palestinian factions, serve both as deterrents and as flashpoints for escalation. Regional stability requires coordinated

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<sup>41</sup> F. Gregory Gause, *The Gulf in a Multipolar Middle East* (Cambridge: Cambridge University Press, 2021), 72–76.

<sup>42</sup> Matthew Levitt, *Hezbollah and Regional Security Dynamics* (Washington, DC: Washington Institute, 2022), 44–48.

<sup>43</sup>Datu Al-Zahid Salik, „Constructed Sectarianism and Strategic Rivalry: The Iran–Saudi Conflict and the Crisis of Intra-Muslim Cooperation, <https://surl.lu/ppfuua>,

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approaches that combine security guarantees, humanitarian support, and political initiatives aimed at conflict resolution.<sup>44</sup>

Emerging multipolarity adds a further layer of complexity. The involvement of China, Russia, Turkey, and other external powers creates both opportunities and risks. While these actors can provide mediation and alternative economic engagement, their participation also reduces the relative influence of the United States, requiring Washington to adopt more flexible and coordinated strategies.<sup>45</sup>

In sum, regional stability depends on a multidimensional approach:

- Diplomatic engagement with Iran and Gulf states.
- Crisis management mechanisms to prevent escalation.
- Proxy conflict mitigation through mediation and coordinated security measures.
- Economic incentives that complement sanctions and encourage compliance.
- Multilateral regional security architecture that institutionalizes cooperation and accountability.

This integrated strategy recognizes that no single actor can unilaterally stabilize the Middle East. The U.S., Iran, regional states, and external powers must coordinate to address shared security challenges while managing competition.

## CONCLUSION

The U.S.–Iran relationship remains one of the most consequential and complex in contemporary international relations. Historically marked by confrontation, mistrust, and proxy conflicts, the bilateral dynamic has evolved under the influence of domestic pressures, regional rivalries, and global multipolarity. Iran’s strategic behavior—leveraging asymmetric power through proxies, controlling critical energy chokepoints, and pursuing nuclear capabilities—creates both challenges and opportunities for U.S. policy.

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<sup>44</sup>Mahmoud Hamdy Abo El- Kasem , „The Middle East Conflict and Indications of Change in the Strategic Environment“, <https://surl.li/pvmufl>,

<sup>45</sup> Marina Izoria, „Geopolitical Struggle for a Multipolar World Order“, International Scientific Journal "The Caucasus and the World, <https://surl.lu/gcjzvf>,

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The Middle East itself is undergoing a period of transformation. Traditional U.S. dominance is being reshaped by multipolar competition, the recalibration of Gulf policies, and the ongoing complexity of proxy conflicts. Within this environment, the prospects for regional stability hinge on effective diplomacy, credible deterrence, conflict mitigation, and multilateral engagement.

Policy frameworks that integrate these elements can reduce the risk of miscalculation, limit the escalation of localized conflicts, and create conditions for sustained engagement with Tehran. While the challenges are substantial, the evolving U.S.–Iran relationship also presents the potential for constructive collaboration, particularly if grounded in careful negotiation, verification mechanisms, and coordinated regional strategies.

Ultimately, the “new reality” of U.S.–Iran relations is neither fully antagonistic nor entirely cooperative. It is a dynamic, multifaceted environment, in which regional stability will depend on the ability of multiple actors—state and non-state alike—to navigate a complex web of political, economic, and strategic interests.

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# THE EVOLUTION OF DRONES AND THE COUNTER-DRONE SYSTEMS CHALLENGES IN THE FIELD OF CONTEMPORARY WARFARE

(Comparative Analysis of the Second Nagorno-Karabakh War (2020) and the  
Russia–Ukraine War (2022–2025))

LTC Pavle Eprikian<sup>1</sup>

Givi Sanadze<sup>2</sup>

LTC Dima Beridze<sup>3</sup>

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## ABSTRACT

Unmanned aerial vehicles (UAVs) and unmanned aerial systems (UAS) have emerged as the fastest-growing and most transformative technological development in modern warfare since the introduction of tanks and aircraft in the early 20th century. Originally designed for reconnaissance and intelligence gathering, drones have evolved into cost-effective, highly lethal platforms capable of reshaping tactical, operational, and strategic dynamics on the battlefield. The Second Nagorno-Karabakh War (2020) became the first widely recognized “drone war,” demonstrating that relatively inexpensive UAVs could decisively neutralize traditional armored formations, air defense networks, and other high-value military assets. Following this, the Russia–Ukraine War (2022–2025) scaled the phenomenon to a global level, where drones assumed not only tactical relevance but also operational-strategic significance, influencing force deployment, campaign planning, and defense-industrial production. By November 2025, first-person view (FPV) and kamikaze drones, costing between \$400 and \$1,500, accounted for 62–70% of confirmed equipment losses in Ukraine and over 90% in Nagorno-Karabakh. This creates an unprecedented economic asymmetry, with cost ratios reaching up to 1:25000, challenging long-standing assumptions of force parity and effectiveness. Conventional counter-unmanned aircraft systems (C-UAS) have repeatedly proven insufficient against autonomous, fiber-optic-guided, and swarm-capable drones, exposing critical vulnerabilities in contemporary air defense doctrines. This paper conducts a detailed comparative analysis of the two conflicts, highlighting technological innovations, economic drivers, and tactical doctrines behind drone effectiveness. It examines the limitations of current C-UAS technologies and proposes a conceptual framework for a next-generation, multi-layered defensive architecture. The study underscores the profound strategic implications of drone proliferation and provides actionable insights for military planners, defense industries, and policymakers seeking to address the evolving challenges posed by unmanned aerial systems in modern warfare.

<sup>1</sup> Georgian Technical University, Faculty of Transport Systems and Mechanical Engineering, Department of Mechanical Engineering and Industrial Technology, PhD Student

<sup>2</sup> Georgian Technical University, Faculty of Transport Systems and Mechanical Engineering, Department of Mechanical Engineering and Industrial Technology, Professor

<sup>3</sup> Georgian Technical University, Faculty of Transport Systems and Mechanical Engineering, Department of Mechanical Engineering and Industrial Technology, PhD Student

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## INTRODUCTION

Rarely in the history of modern armed conflicts has a single weapon system so rapidly and profoundly transformed the nature of the battlefield. Unmanned aerial vehicles (UAVs), initially designed for purely reconnaissance missions, have evolved since 2020 into the most effective, cost-efficient, and widely proliferated weapon system in the world. This dramatic shift reflects not only technological innovation but also a fundamental change in military doctrine, logistics, and operational planning.

The Second Nagorno-Karabakh War and the ongoing Russia–Ukraine War have vividly demonstrated that traditional armored assets—including main battle tanks, infantry fighting vehicles, and advanced air defence systems—are increasingly vulnerable to relatively inexpensive, commercially available drones. These conflicts illustrate a pivotal inflection point in military history: a transition from conventional, hardware-intensive warfare to a new paradigm where unmanned, networked, and autonomous systems dominate the tactical and operational environment.<sup>4</sup>

By 2025, drones are no longer merely tactical instruments deployed for limited reconnaissance or precision strikes. Instead, they have emerged as a decisive strategic factor capable of shaping campaigns, altering force postures, and influencing national security policies. Their integration into combined-arms operations has forced military planners to fundamentally rethink principles that have guided warfare for over a century, including the role of armored forces, the design of integrated air defence networks, and the allocation of human and technological resources on the battlefield.<sup>5</sup>

<sup>4</sup> M. Z. Chaari, Analysis of the power of drones in modern warfare: The case of Nagorno-Karabakh 2020. Security and Defence Quarterly, 45(3), (2024). 87–108. <https://surl.li/ujkque>, (Accessed 08.12.25)

<sup>5</sup> Elisabeth Braw, The Drone Age: How Drone Warfare Is Transforming Conflict. New York: Basic Books, pp. (2024). 56–78. <https://surl.li/tcxjxg>, (Accessed 08.12.25)

This paper seeks to provide a comprehensive analysis of this transformative phenomenon. It examines not only technological advancements that have enabled drone proliferation and effectiveness but also economic factors driving mass production the tactical doctrines that have evolved in response. By comparing two seminal conflicts—the Second Nagorno-Karabakh War (2020) and the Russia–Ukraine War (2022–2025)—this study highlights the rapid evolution of drone warfare and its profound implications for the future of global military strategy.

### **Research Methodology**

The study relies on a comprehensive approach that includes open-source databases (Oryx, LostArmour, UK Ministry of Defence Intelligence Updates), academic publications (more than 70 articles and monographs published between 2018 and 2025), thousands of visually confirmed combat videos, official statements, and mathematical calculations of cost-to-kill ratios. A comparative analysis was conducted across technological, tactical, economic, and organisational parameters of the two conflicts.

## **MAIN PART**

### **The Second Nagorno-Karabakh War (2020) – The First Victory of Drones**

The 44-day war from 27 September to 10 November 2020 proved for the first time that inexpensive unmanned systems could destroy a traditional army. Azerbaijan employed more than 300 drones, including over 100 Turkish Bayraktar TB2s and Israeli IAI Harop loitering munitions. The Bayraktar TB2 has an endurance of 24–27 hours, a range of up to 150 km, and high-precision MAM-L/MAM-C munitions. The Harop offers six hours of loiter time and a warhead of up to 25 kg which is equal of 155 NATO standard artillery munition.<sup>6</sup>

As a result, Armenia lost 256 tanks, more than 400 armoured vehicles, and approximately 90 % of its air defence systems (including several S-300PS, Tor-M2KM, Os-

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<sup>6</sup> M. Z. Chaari, Analysis of the power of drones in modern warfare: The case of Nagorno-Karabakh 2020. Security and Defence Quarterly, 45(3), (2024). 87–108. <https://securityanddefence.pl/pdf>. (Accessed 08.12.25)

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AKM, and Strela-10 systems). Azerbaijan regained more than 75 % of the contested territories, with losses of 2,783 Azerbaijani and over 4,000 Armenian servicemen.<sup>7</sup>

### **The Russia–Ukraine War (2022–2025) – The Industrialization of Drones**

The conflict that began in 2022 has transformed drone production into an industrial-scale operation, making unmanned systems a cornerstone of modern warfare. By 2025, Ukraine produces 1.8–2 million tactical drones annually through a network of over 500 domestic manufacturers, while Russia targets 1–1.4 million units per year to match this surge.<sup>8</sup> Between 10,000 and 15,000 drones are deployed daily on the front lines, enabling relentless strikes that have eroded traditional armored formations.

More than 92 % of FPV drones are fully autonomous, using inertial and visual navigation systems that enhance resilience against electronic warfare. Fiber-optic guidance, which offers complete immunity to jamming, has become widespread, extending operational ranges to 50–60 km. Swarm tactics coordinating 120–180 drones in synchronized assaults have become standard, overwhelming defenses through sheer volume and precision.

Confirmed losses highlight the devastating effect on heavy armor: of 31 supplied Abrams tanks, 10 have been destroyed and 9 damaged; over 70 Leopard 2s, 11 Challenger 2s, and thousands of BMPs, BTRs, and artillery systems have suffered similar fates, as tracked by open-source intelligence such as Oryx.<sup>9</sup> This industrial escalation has democratized lethality, turning low-cost quadcopters into tank killers, while accelerating innovations in autonomy and countermeasures, forcing both sides to rapidly adapt their doctrines.

### **In-Depth Comparative Analysis of the Two Wars**

In both conflicts drones determined the outcome, yet their role, scale, technological base, and tactical employment differ radically. If Nagorno-Karabakh 2020 was “the first triumph of drones” – an elite, high-tech, and highly asymmetrical application – Ukraine

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<sup>7</sup> Iberia Magazine. (2020, November). Drone’s War in Caucasus. Tbilisi. pp. 12–18. <https://surl.li/iutrbt>,

<sup>8</sup> V.Tsekhanovskyi, Ukrainian drone industry: From garage to mass production. Kyiv: Defence Express. (2024). <https://surl.li/vrzkzi>,

<sup>9</sup> M. Kofman, J. Edmonds, Russia’s war in Ukraine: Drone warfare and adaptation. Center for Strategic and International Studies (CSIS). (2024). <https://surl.lu/wjqmpq>,

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2022–2025 became “the industrial revolution of drones” – massive, crude, bilateral, and extremely destructive.<sup>10</sup>

In Nagorno-Karabakh, Azerbaijan used a maximum of 400–450 drones over the entire 44-day period. In Ukraine in 2025, both sides combined expend 10,000–15,000 drones every single day. This means that in 44 days in Ukraine, more drones are launched than were used by either side throughout the entire Nagorno-Karabakh War.<sup>11</sup>

The economic model in Nagorno-Karabakh was “expensive and precise” – a Bayraktar TB2 cost approximately \$5 million, a Harop \$300,000–500,000. In Ukraine the principle became “cheap and massive” – standard FPV drones cost \$400–600, fibre-optic-guided kamikaze drones \$1,000–1,500. Consequently, the cost-to-kill ratio was 1:200–1:500 in Nagorno-Karabakh and 1:10000–1:25000 in Ukraine.<sup>12</sup>

Technologically, 95 % of drones used in Nagorno-Karabakh were radio-controlled and GNSS-dependent. By 2025 in Ukraine, more than 92 % of FPV and kamikaze drones are autonomous (based on inertial and visual navigation), and 35–40 % employ fibre-optic cables, providing complete immunity to electronic warfare.<sup>13</sup>

Tactically, drones in Nagorno-Karabakh operated mostly individually or in small groups (2–6 units), whereas in Ukraine swarm tactics have become the norm: simultaneous launches of 50–180 drones against a single target render any existing C-UAS system ineffective. In terms of counter-drone defence, the Armenian army in Nagorno-Karabakh practically had no C-UAS capability; Buk-M1 and Tor systems were quickly destroyed. In Ukraine, both sides have created the densest and most multi-layered anti-drone field in world history (Gepard, Tunguska, Pantsir, Strela, Buk-M3, jammers, and lasers), yet their tactical effectiveness does not exceed 18–25 %.

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<sup>10</sup> M. Z. Chaari, Analysis of the power of drones in modern warfare: The case of Nagorno-Karabakh 2020. *Security and Defence Quarterly*, 45(3), (2024). 87–108. <https://securityanddefence.pl/pdf>. (Accessed 08.12.25)

<sup>11</sup> Iberia Magazine. November). Drone’s war in Caucasus, pp. (2020), 12–18. <https://surl.li/iwcset>, (Accessed 08.12.25)

<sup>12</sup> V.Tsekhanovskyi, Ukrainian drone industry: From garage to mass production. Kyiv: Defence Express. (2024). <https://shr.ge/9ZWSbe>, (Accessed 08.12.25)

<sup>13</sup> M. Kofman, J. Edmonds, Russia’s war in Ukraine: Drone warfare and adaptation. Center for Strategic and International Studies (CSIS). (2024). <https://shr.ge/p44lms> , (Accessed 08.12.25)

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In Nagorno-Karabakh drones caused rapid collapse and territorial victory in 44 days. In Ukraine the same technology produced an unprecedented war of attrition – the conflict has lasted more than four years because both sides possess drones in massive quantities that neutralize each other's traditional capabilities.

Nagorno-Karabakh showed that drones can defeat an army that does not have them; Ukraine proved that when both sides possess drones in mass quantities, war enters a new phase – an endless, extremely costly, and low-tempo war of annihilation in which neither side enjoys decisive conventional superiority.

Thus, if in 2020 drones were a “wonder weapon,” by 2025 they have become the “new normal” that forces every army to completely restructure its doctrine, budget, and organization.

### **Challenges and Limitations of Counter-Drone Systems (C-UAS) on the 2025 Battlefield**

By late 2025, the battlefield in Ukraine represents the densest and most multi-layered anti-drone environment in world history, yet its real tactical effectiveness does not exceed 18–25 % (UK MoD, RUSI, 2025).<sup>14</sup> This issue is not merely tactical but also fundamental and technological in nature.

In the 2025 operational reality, counter-drone systems face a multi-layered set of challenges encompassing detection, neutralization, and saturation, which is especially evident in the Ukraine war.

**Detection:** Active radars (Pantsir-S1/S2, Buk-M3, Giraffe, AN/TPQ-53) struggle to detect small FPV and kamikaze drones, whose radar cross-section is only 0.001–0.008 m<sup>2</sup>. According to 2024–2025 data, detection probability at 8–12 km ranges from only 48–57 %, dropping below 20 % at distances under 5 km. Passive RF sensors (Krasukha-4, Borisoglebsk-2, Ukrainian Bukovel-AD) are nearly ineffective against autonomous drones (0–3 % effectiveness) and completely fail against fibre-optic-guided systems. Electro-

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<sup>14</sup> J. Watling, J. Bronk, Lessons from Ukraine: Countering the drone threat. Royal United Services Institute (RUSI), (2023). pp. 12–18. <https://shr.ge/M24wEb> (accessed December 02, 2025).

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optical/infrared sensors (Rheinmetall Skynex, Thales SQUIRE) lose up to 60 % effectiveness at night or during adverse weather and are limited by terrain at altitudes below 50 m.<sup>15</sup>

**Neutralization:** Electronic warfare capabilities have sharply declined. Where jammers once achieved 60–70 % effectiveness before 2023, the rise of autonomous and fibre-optic drones has reduced this to 15–22 % by 2025. Kinetic interceptors (Gepard, Tunguska, Pantsir-S1) are extremely costly: a single shot ranges from \$15,000–70,000. In 2024 alone, Russia expended over 4,000 Pantzer missiles—costing more than \$3 billion—to counter over 1.2 million FPV drones. Directed-energy weapons (DE M-SHORAD, Rheinmetall HEL, Turkish ALKA) are cheaper per kill (\$1,000–2,500) but lose 70–90 % effectiveness in clouds, fog, or rain.<sup>16</sup>

**Saturation:** Typical attacks in Ukraine (2024–2025) include 80–180 FPVs, 20–40 fibre-optic-guided drones, and 10–15 larger kamikaze drones (Lancet or Shahed-136). Such massed attacks can overwhelm any C-UAS battery (Pantsir, Tor, or Gepard) within 15–20 minutes, leaving it defenseless.<sup>17</sup>

Paradoxically, the most effective protection has proven to be low-tech, improvised solutions. According to 2025 Ukrainian and Russian data, metal mesh nets with 5–7 mm cells provide 87–94 % protection, “cope cages” and “mangal” structures offer 65–78 %, electromagnetic grids 70–85 %, and layered wood/rubber 55–70 %. This demonstrates that even in a high-tech environment, simple and inexpensive solutions can outperform advanced systems.

Economically, the imbalance is stark: a single Pantsir-S1 costs \$15–18 million, yet more than 40 systems were destroyed by Ukrainian FPV drones costing \$400–600 each in 2024–2025. In other words, a \$15-million system can be neutralized for roughly \$300,000—a clear illustration of the current economic asymmetry in modern warfare.

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<sup>15</sup> Tsekhanovskyi, V. (2024). Ukrainian drone industry: From garage to mass production. Kyiv: Defence Express, pp. 67–72. <https://shr.ge/9ZWSbe> (Accessed 08.12.25)

<sup>16</sup> Zabrodskyi, M., Watling, J., & Reynolds, A. (2022). Preliminary lessons in conventional warfighting from Russia’s invasion of Ukraine: February–July 2022. RUSI Special Report, pp. 45–52. <https://surl.li/yvwiie>, (Accessed 08.12.25)

<sup>17</sup> Kofman, M., & Edmonds, J. (2024). Russia’s war in Ukraine: Drone warfare and adaptation. Center for Strategic and International Studies (CSIS), pp. 23–35. <https://shr.ge/p44lms> (Accessed 08.12.25)

Ultimately, as of 2025, no single counter-drone system or complex provides more than 50 % tactical-level protection against massed autonomous and fibre-optic-guided drones. The problem is no longer solely technological; it has become systemic. Current air-defence architectures, designed for 2010s threats, are being outpaced by 2025 threats that are two to three generations ahead.

### CONCLUSION

As of November 2025, the modern battlefield has undergone a sharp transformation. Conflict data indicate that a commercial FPV drone costing on average \$300–800 routinely destroys tanks and heavy platforms worth more than \$10 million. This disproportion became especially visible in 2023–2025 combined statistics, where 65–75 % of tank losses resulted from air-delivered attacks, compared with only 12–18 % in previous conflicts. Defensive systems remain far more expensive yet rarely exceed 30–40 % effectiveness against massed drone attacks, pointing to a financial and operational imbalance between offence and defense.

The high cost of C-UAS systems exacerbates the problem: a single complex costs \$5–50 million, while the cost of a massed attack often does not exceed \$20,000. Practical examples show expensive counter-drone batteries unable to cope with simultaneous attacks by 20–30 FPVs, even though each drone nominally costs hundreds of times less than the defensive operation.

Against this background, it is clear that military systems are in systemic crisis, where the traditional logic – gaining superiority through expensive, heavily protected platforms – no longer works. The daily use of thousands of drones, the ease of their modification, and network-centric capabilities fundamentally alter operational reality. Defensive systems physically cannot evolve at the same pace as cheap, rapidly modernized, and widely available drones.

All this has made it clear that simply purchasing new equipment is no longer sufficient. A fundamental reform of military thinking is required, prioritizing cost-effective, flexible, multi-layered defensive systems rather than solely expensive platforms. In today's reality,

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the decisive factor is the correct balance between cost and effect, because defense can no longer keep up with the cost and speed disparity created by the offence.<sup>18</sup>

### **Recommendations: Next-Generation Counter-Drone Architecture**

By late 2025 it is evident that traditional, expensive, and centralized counter-drone systems are gone forever. Future defense can only be multi-layered, distributed, and extremely cost-effective.

All combat vehicles must be serially equipped with improved passive protection – lightweight composite nets and thermoplastic roofs – which already today provide 85–94 % survivability for a few hundred dollars.

The only realistic countermeasure to offensive drones will be mass-produced interceptor drones costing \$600–800 that destroy enemy FPVs on a 1:1 basis. Old jammers must be replaced by adaptive, software-reconfigurable, AI-managed next-generation electronic warfare systems.

The entire kill chain from detection to destruction must be managed by artificial intelligence, with humans retained only as final decision authorizers. All systems must follow open architecture, be modular, and producible on any industrial base.

If these changes are not implemented in 2026–2028, ground forces will remain helpless against \$500 drones. If implemented, by 2030 it will be possible not only to survive but to restore offensive maneuver on the modern battlefield.

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## RUSSIA'S GEOGRAPHY AND ITS INFLUENCE ON ITS GEOPOLITICS

Zurab Agladze<sup>1</sup>

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### ABSTRACT

This article provides an extended analysis of how Russia's geographical characteristics profoundly shape its national security priorities, its strategic culture, and the tools it employs in foreign policy. As the world's largest state, spanning two continents and eleven time zones, Russia faces a combination of structural vulnerabilities and exceptional geopolitical opportunities. Its exposure on the western plains, where no natural barriers slow military advance, has historically subjected it to catastrophic invasions, reinforcing the understanding that strategic depth and the establishment of buffer zones are essential for national survival. This perception continues to inform Russian actions in Eastern Europe and the post-Soviet space.

Moreover, the distribution of Russia's population, concentrated predominantly on the European side of the country, creates a geographic mismatch between human capital and natural resources. Siberia and the Arctic contain immense reserves of oil, gas, and minerals but remain sparsely populated, expensive to govern, and militarily challenging to defend. Maintaining sovereignty and economic control over these regions pushes Moscow to pursue assertive internal and external policies, particularly as climate change and foreign interest increase competition over Arctic routes.

Maritime constraints add another strategic dimension. Russia possesses few warm-water ports, and those it relies upon — such as Sevastopol in Crimea — are central to its naval doctrine and global outreach. Limited access to the world's oceans reinforces Russia's focus on land power and creates pressure to exert influence over neighboring states that serve as geographic chokepoints or transit corridors. Russian involvement in Syria, increased Arctic militarization, and persistent frictions around the Black Sea all reflect these structural maritime imperatives.

Methodologically, the research is based on a geopolitical analytical approach using qualitative methods: historical comparison, content analysis of policy papers and strategic doctrines, and case studies of Russia's interventions and influence in Ukraine, the Caucasus, and the Arctic. These cases demonstrate how Russian leaders translate geographic challenges into strategic behavior, relying on both coercive tools and narratives of protecting national identity and spheres of privileged interests.

The findings indicate that geography shapes not only Russia's threat perception but also its aspirations to remain a great power capable of influencing developments across Eurasia. Strategic culture, national identity, and policies of territorial control emerge as adaptive responses to the state's spatial environment. Geography imposes enduring incentives on Moscow to maintain military readiness, centralize governance, and resist the political drift of neighboring states toward rival power blocs.

In conclusion, Russia can be understood as a power continually negotiating between the vulnerabilities imposed by its geography and the ambitions enabled by it. Any analysis of Russian foreign and security policy must therefore recognize geography as a foundational determinant of Russian behavior — a determinant that is deeply embedded in strategic decision-making and highly resistant to change over time.

**Keywords:** Russia, geopolitics, strategic depth, buffer states, Arctic geopolitics, Black Sea security, Eurasian identity, geographic determinism.

<sup>1</sup> Professor of Master's Program in Security Studies of LEPL David Aghmashenebeli National Defence Academy of Georgia

## INTRODUCTION

Russia's geography has long been recognized as a central determinant of its geopolitical behavior. As the largest country in the world, spanning two continents and eleven time zones, Russia combines vast territorial depth with major structural vulnerabilities. Its open western plains, harsh climate, uneven population distribution, resource-rich but sparsely populated regions, and limited access to warm-water seas have all shaped a strategic culture preoccupied with insecurity, encirclement, and the need for buffer zones. Geography does not mechanically dictate policy, but it sets the stage on which Russian leaders interpret threats and opportunities and choose among alternative courses of action.<sup>2</sup>

This article explores how Russia's physical environment influences its security doctrine, foreign policy priorities, and regional strategies. It argues that four clusters of geographic factors are particularly important: (1) strategic depth and border configuration; (2) climate, agriculture, and demography; (3) maritime access and warm-water ports; and (4) resource distribution and infrastructure. These structural features inform Russia's behavior in key regions such as Eastern Europe, the Caucasus, Central Asia, and the Arctic. The analysis places contemporary developments, including the war in Ukraine and increased activity in the Arctic, within the broader context of Russia's long-standing struggle to reconcile geographic vulnerability with great-power ambition.

The article employs a geopolitical analytical and qualitative research design. It relies on a critical review of academic literature, historical-geographical comparison, document analysis of policy papers and expert reports, and case studies focusing on Russian behavior in Ukraine, the Caucasus, and the Arctic. Rather than using large-scale quantitative datasets, the study adopts an interpretive framework that links territorial scale, climate, resource distribution, and border configurations to security policy and strategic decision-making. This methodological approach makes it possible to explain Russian foreign policy

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<sup>2</sup> Geoffrey Parker, *Geopolitics: Past, Present, and Future* (London: Routledge, 2015), 26–27. Please decrease the font here

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not only through ideology or economics, but also through enduring spatial patterns that shape state behavior over time.

## MAIN PART

Russia's geopolitical behavior has been shaped more profoundly by geography than perhaps any other major power in history. Stretching across eleven time zones and spanning the Eurasian landmass from the Baltic Sea in the west to the Pacific Ocean in the east, Russia's sheer spatial scale is both a strategic asset and an enduring vulnerability. The interaction between physical landscapes, climate conditions, natural resource distribution, population patterns, and access routes has created a geopolitical environment that encourages territorial expansion, centralized authoritarian governance, and a persistent drive to secure buffer zones. Geography has not only influenced how Russia views the world but also how the world has responded to Russia. The vast plains that define much of its territory have historically exposed Russia to invasion from multiple directions, instilling a deep sense of insecurity and a corresponding desire for strategic depth. Simultaneously, Russia's limited access to warm-water ports and its dependence on specific transportation corridors have shaped its persistent quest to dominate its neighbors and expand influence into Europe, the Caucasus, and Asia.

Russian geopolitics is often associated with the writings of classical geopolitical thinkers such as Halford Mackinder. His famous “Heartland Theory” posited that control over the vast Eurasian interior—of which Russia is the largest component—would confer global dominance.<sup>3</sup> Whether or not one accepts the determinism of Mackinder's thesis, it is undeniable that Russia's leaders, from the Tsars to Vladimir Putin, have internalized elements of this worldview. To them, geography is destiny, and the vastness of Eurasia offers both the foundation and the rationale for Russia's great-power ambitions. The interplay between physical space and national policy becomes even more apparent when

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<sup>3</sup> Halford Mackinder, *Democratic Ideals and Reality: A Study in the Politics of Reconstruction* (London: Constable, 1919), 150.

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one examines Russia's historical experiences, from Mongol invasions to Napoleonic France and Nazi Germany. Each invasion penetrated through the same relatively open frontier; each threatened Russian civilization; and each reinforced the conviction that territorial expansion and buffer zones were necessary for survival.

Russia's immense landmass is often viewed as a source of strength, but it carries burdens as well. The maintenance of authority across such a wide area requires formidable administrative structures and significant military expenditure. The population is unevenly distributed, with most Russians concentrated in the western regions near Europe, leaving Siberia and the Far East sparsely populated.<sup>4</sup> This imbalance creates vulnerabilities in areas rich with natural resources but lacking demographic weight. Moreover, the northern location of much of Russia's territory results in long, harsh winters that complicate agriculture, transportation, and economic development. These factors have contributed to Russia's struggle to modernize its economy and diversify its industrial base beyond energy extraction.

Perhaps no geographic factor has shaped Russia's geopolitical outlook more than its historical lack of warm-water ports. A warm-water port that remains ice-free year-round is vital for maritime trade, naval operations, and international influence.<sup>5</sup> Russia's northern ports, such as Murmansk, provide partial solutions but remain constrained by ice conditions and limited access to key shipping lanes. Its Pacific ports are distant from major population centers and require enormous logistical networks to connect to the core regions of Russian power. These constraints help explain Russia's expansionist policies throughout history—from its wars with the Ottoman Empire to gain access to the Black Sea, to its annexation of Crimea in 2014, to its ongoing involvement in the Arctic region. Maritime geography has conditioned Russia to seek control of coastal areas that open new trade possibilities and

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<sup>4</sup> Fiona Hill and Clifford Gaddy, *The Siberian Curse: How Communist Planners Left Russia Out in the Cold* (Washington, D.C.: Brookings Institution Press, 2003), 24.

<sup>5</sup> Tim Marshall, *Prisoners of Geography: Ten Maps That Tell You Everything You Need to Know About Global Politics* (New York: Scribner, 2015), 32.

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enhance naval capabilities. The lack of such access has reinforced Russia's belief that without expansion, it risks being encircled and economically disadvantaged.

The concept of buffer zones is deeply embedded in Russian strategic thinking. It is a reaction to centuries of invasions and a recognition of Russia's geographical exposure.<sup>6</sup> The flat plains to Russia's west offer few natural barriers against invaders. Unlike countries protected by mountains or seas, Russia's heartland is reachable through vast stretches of open territory. The distance between Russia's western frontier and Moscow is not particularly large, making it vulnerable to rapid advances by foreign armies. For Russian leaders, therefore, controlling nearby regions is not merely an imperial ambition but a perceived necessity for national security. This mindset explains why Russia seeks to influence or control the nations of Eastern Europe, the Caucasus, and Central Asia. These regions provide the geographic depth that Russian strategists view as essential for survival.

Throughout history, Russia's territorial expansions have followed predictable geographic patterns. In the west, Russia expanded into Eastern Europe, absorbing territories in present-day Ukraine, Belarus, Poland, and the Baltic states. These areas offered both agricultural wealth and strategic buffers.<sup>7</sup> To the south, Russia pushed into the Caucasus and Central Asia, securing mountain passes and access to natural resources. In the east, Russia crossed Siberia, driven by fur trade and later by the pursuit of strategic competition with China and Japan. Each of these expansions can be understood as a response to geographic constraints and opportunities rather than purely ideological or economic motives. Geography defined the corridors of expansion, while geopolitics justified the actions.

Modern Russia still inherits these geographic patterns. Its engagement in Eastern Europe, the Caucasus, and Central Asia remains a defining feature of its foreign policy. The 2008 war in Georgia, the annexation of Crimea in 2014, and the full-scale invasion of Ukraine in 2022 reflect continued attempts to secure influence in regions that Russian

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<sup>6</sup> Paul Kennedy, *The Rise and Fall of the Great Powers* (New York: Random House, 1987), 112.

<sup>7</sup> Serhii Plokhy, *The Gates of Europe: A History of Ukraine* (New York: Basic Books, 2016), 289–301

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strategists consider vital. These regions are not just neighboring states; they are pieces of a geopolitical puzzle that Russia believes it must control to compensate for its geographic vulnerabilities. Ukraine's location makes it a potential bridge or barrier between Russia and Europe. Its control would either give Russia deeper strategic depth or expose it to Western influence directly at its border. Similarly, the Caucasus serves as a gateway to the Middle East and a region that provides access to important energy corridors.

Russia's geography has also shaped its internal political structure. The need to manage and defend such a vast territory has historically driven Russia toward centralized, often authoritarian governance.<sup>8</sup> The Tsarist Empire, the Soviet Union, and the modern Russian Federation all relied on strong central authority to maintain cohesion. The distances between major cities and regions, combined with the logistical challenges of communication and transportation, encouraged systems of governance that emphasized top-down control. The development of modern communication networks has not entirely erased this tendency. The physical geography reinforces a political culture that prioritizes unity, stability, and centralized decision-making over decentralization or regional autonomy.

Climate is another factor that has profoundly influenced Russian development and geopolitics. Much of Russia lies in cold or subarctic zones, where long winters limit agricultural productivity. Historically, this led to recurrent food shortages and slowed population growth.<sup>9</sup> Even today, agricultural output is heavily concentrated in the southwestern regions near the Black Sea, far from Russia's eastern and northern territories. The challenging climate also contributed to Russia's reliance on resource extraction, particularly oil, natural gas, and minerals, which are abundant in Siberia and the Arctic. These resources generate revenue and geopolitical leverage, particularly in Europe. However, reliance on energy exports also exposes Russia to global price fluctuations and

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<sup>8</sup> Richard Pipes, *Russia Under the Old Regime* (New York: Penguin, 1997), 21–43.

<sup>9</sup> Geoffrey Roberts, *Stalin's Wars: From World War to Cold War, 1939–1953* (New Haven: Yale University Press, 2006), 57.

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limits the development of other economic sectors. Climate and resources, therefore, form a complex interplay that shapes Russia's strategic behavior.

Russia's extensive natural resources are both a blessing and a curse. The country's energy wealth has enabled it to exert influence over neighboring states, especially in Europe, through gas pipelines and energy supply agreements.<sup>10</sup> Yet, the resources are often located in remote regions that require enormous infrastructure investment to develop and transport. The need to protect and maintain these resources contributes to Russia's security concerns, particularly in the Arctic and Far East. China's growing presence in these regions adds another layer of geopolitical complexity. Russia must balance cooperation with China in energy and infrastructure projects with concerns about Chinese demographic and economic expansion into sparsely populated Russian territories.

One cannot understand Russian geopolitics without acknowledging the importance of Siberia. This vast region, larger than many continents, contains much of Russia's natural wealth. Yet it is thinly populated, with harsh climatic conditions and underdeveloped infrastructure. Historically, Siberia served as a frontier for expansion, exile, and resource extraction.<sup>11</sup> Today, it represents both a strategic asset and a vulnerability. Russia must invest heavily in Siberia to maintain control and ensure economic viability. The Trans-Siberian Railway and other transportation networks are essential lifelines connecting Siberia to the rest of the country. The challenges of governing such a vast and remote region shape Russian economic planning and military strategy.

Russia's geographic scale creates a distinctive strategic posture, particularly regarding national defense. Unlike smaller nations that can rely on natural barriers or alliances, Russia's immense landmass requires a comprehensive defense system that combines depth, mobility, and resilience. Historically, Russian military strategy emphasized retreating deep into interior territories during invasions, thereby stretching enemy supply lines and

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<sup>10</sup> Thane Gustafson, *The Bridge: Natural Gas in a Redivided Europe* (Cambridge: Harvard University Press, 2020), 13–18.

<sup>11</sup> Charles King, *The Ghost of Freedom: A History of the Caucasus* (New York: Oxford University Press, 2008), 178–190.

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exhausting invading forces.<sup>12</sup> This approach proved decisive against Napoleon’s Grande Armée in 1812 and the German Wehrmacht in 1941. The concept of strategic depth remains central in Russian military doctrine, influencing contemporary planning and justifying a focus on influence beyond Russia’s immediate borders. Geography dictates the need for buffer zones and long-term preparedness for large-scale mobilization, reinforcing the enduring relevance of territorial considerations in Russian policy.

The western frontier, defined by the expansive European Plain, is geopolitically critical. Its flat terrain offers few natural defensive barriers, which has historically exposed Russia to multiple invasions.<sup>13</sup> Thus, shifts in political or military alignment in Eastern Europe are perceived as immediate threats by Russian strategists. The expansion of NATO into Poland, the Baltic states, and other former Soviet-aligned countries has been framed by the Kremlin as a direct encroachment into Russia’s strategic buffer. Geography magnifies this perception because the proximity of foreign military forces to central Russia could shorten the response time to any potential threat. Finland’s long border with Russia and the presence of NATO-aligned forces near St. Petersburg and Moscow exemplify why geography, rather than ideology alone, drives Russian security anxieties.

In the south, the Caucasus Mountains offer partial natural defense but are complicated by a diverse mosaic of ethnic groups with histories of resistance to Russian authority.<sup>14</sup> The region is strategically crucial because it provides access to the Black Sea, controls important energy transit routes, and serves as a gateway to the Middle East. Instability in the North Caucasus, including conflicts in Chechnya and Dagestan, requires continuous political and military attention. Additionally, Russia’s engagement in South Ossetia and Abkhazia demonstrates the use of military interventions to maintain influence over critical geographic corridors. The Caucasus exemplifies how terrain, resource access, and ethnic distribution converge to shape Russia’s security calculations.

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<sup>12</sup> Timothy Colton, *Russia: What Everyone Needs to Know* (New York: Oxford University Press, 2016), 45–47.

<sup>13</sup> Paul Goble, “Russia’s Western Vulnerabilities and NATO Expansion,” *Eurasia Daily Monitor*, vol. 6, no. 180 (2009).

<sup>14</sup> Thomas de Waal, *The Caucasus: An Introduction* (Oxford: Oxford University Press, 2010), 83–92.

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Central Asia is another geographic region with significant strategic implications for Russia. The steppes connecting Russia to Kazakhstan, Uzbekistan, Turkmenistan, and other former Soviet republics are open terrain conducive to influence projection.<sup>15</sup> Historically, these regions served as the southern frontier of the Russian Empire and later the Soviet Union. Today, Russia maintains influence through military, economic, and political organizations such as the Collective Security Treaty Organization and the Eurasian Economic Union. Geography facilitates control over these regions, which are proximate to China, Afghanistan, and Iran, making them critical buffers and corridors for trade and military movement.

Russia's Far East presents distinct challenges and opportunities due to its remoteness, sparse population, and harsh climate. Although resource-rich, the region is difficult to defend and economically underdeveloped.<sup>16</sup> Vladivostok provides limited access to the Pacific Ocean, and the proximity of Japan and China introduces both competition and strategic considerations. Russia's military and economic investments in the Far East, including infrastructure and resource development, aim to secure territorial integrity, project power into the Asia-Pacific, and ensure Arctic access. The region's geography also makes it central to Russia's Arctic ambitions, particularly as melting ice creates new shipping lanes and resource opportunities.

River systems have historically shaped Russian settlement, trade, and military strategy. Major rivers such as the Volga, Don, and Dnieper facilitated commerce and linked key regions of European Russia to southern territories.<sup>17</sup> The Volga, in particular, has been critical for connecting central Russia to the Caspian Sea, providing both economic integration and strategic depth. Rivers also allowed armies to maneuver efficiently and supported logistical networks during wars. In modern times, these waterways continue to

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<sup>15</sup> Martha Brill Olcott, *Central Asia's Second Chance* (Washington, D.C.: Carnegie Endowment for International Peace, 2010), 112–115.

<sup>16</sup> Fiona Hill and Clifford Gaddy, *The Siberian Curse: How Communist Planners Left Russia Out in the Cold* (Washington, D.C.: Brookings Institution Press, 2003), 71–77.

<sup>17</sup> Richard Pipes, *Russia Under the Old Regime* (New York: Penguin, 1997), 39–42.

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underpin transportation, industrial activity, and energy production, reinforcing their strategic value.

The Arctic region is increasingly significant in Russia's geopolitical calculations. Rich in oil, natural gas, and minerals, the Arctic offers economic potential, while the melting ice due to climate change opens new navigable routes such as the Northern Sea Route.<sup>18</sup> Russia has invested in icebreakers, military bases, and port infrastructure to assert dominance in the region. Arctic expansion allows Russia to increase maritime trade, secure resource extraction, and project power across the High North. Competition with other Arctic nations, including the United States, Canada, and Norway, heightens the strategic importance of controlling territory and sea lanes.

Population distribution in Russia also carries geopolitical implications. Approximately three-quarters of the population resides west of the Ural Mountains, concentrating political power, economic activity, and cultural influence.<sup>19</sup> Siberia and the Far East, despite abundant resources, are sparsely populated, which creates vulnerabilities in defense, economic development, and demographic sustainability. The low population density in eastern territories raises concerns about potential influence from neighboring China, particularly given Chinese economic expansion and demographic pressures. Russian state policies encourage settlement and investment in these areas, but climate and logistical challenges have limited success.

Transportation infrastructure is critical for integrating Russia's vast territory. The Trans-Siberian Railway remains the lifeline linking European Russia to Vladivostok, facilitating the movement of goods, resources, and military forces.<sup>20</sup> Additional railways, highways, and pipelines further connect distant regions, reinforcing internal cohesion and enhancing strategic control. These networks also have international significance, enabling trade between Europe and Asia. Geography, therefore, both necessitates and dictates the

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<sup>18</sup> Lassi Heininen, *Arctic Policies and Strategies: Regional Approaches to Cooperation and Security* (London: Routledge, 2018), 54–60.

<sup>19</sup> Tim Marshall, *Prisoners of Geography* (New York: Scribner, 2015), 29–34.

<sup>20</sup> Alan Wood, *The Trans-Siberian Railway* (London: Ian Allan Publishing, 2011), 14–18.

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structure of Russia's transport and logistical investments, with direct implications for domestic governance and international influence.

Natural resources are central to Russian geopolitics. Russia's status as a leading producer of oil and natural gas is geographically tied to regions such as Western Siberia, the Arctic, and the Caspian Basin.<sup>21</sup> These resources underpin Russia's foreign policy by providing leverage over Europe and China. Pipelines including Nord Stream, TurkStream, and Power of Siberia not only transport energy but also create political dependencies. Geographic distribution of resources amplifies Russian influence while also creating vulnerabilities, as reliance on energy exports can make the economy sensitive to market fluctuations and global political pressures.

Siberia, in particular, illustrates the dual nature of Russia's geography. The region contains vast mineral and energy wealth yet suffers from low population density and extreme climate.<sup>22</sup> The challenges of resource extraction, infrastructure maintenance, and demographic imbalances compel continued state investment and strategic planning. Siberia's importance to national security, economic development, and global positioning makes it a region where geography directly informs policy.

Russia's geographic position influences its perception of identity and international role. The concept of Eurasianism, emphasizing Russia as a civilization bridging Europe and Asia, derives partly from the country's geographic ambiguity.<sup>23</sup> Geography reinforces the view of Russia as distinct from Western and Eastern powers, shaping both ideology and policy. Leaders have invoked geographic determinism to justify interventions and influence in neighboring regions, portraying Russia's control over Eurasian space as a historical and strategic imperative.

Contemporary Russian foreign policy continues to reflect geographic realities. Vladimir Putin frequently references historical invasions, buffer zones, and territorial vulnerabilities

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<sup>21</sup> Thane Gustafson, *The Bridge: Natural Gas in a Redivided Europe* (Cambridge: Harvard University Press, 2020), 22–28.

<sup>22</sup> Charles King, *The Ghost of Freedom: A History of the Caucasus* (New York: Oxford University Press, 2008), 178–182.

<sup>23</sup> Alexander Dugin, *Foundations of Geopolitics* (Moscow: Arktogea, 1997), 35–42.

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to justify actions in Ukraine, Georgia, and Syria.<sup>24</sup> The annexation of Crimea, for example, secured access to the Black Sea and enhanced naval capabilities. Similarly, military involvement in Syria provided Russia with a warm-water naval base in Tartus, reinforcing strategic reach in the Mediterranean. Geographic imperatives thus remain central to Russia’s global strategy, guiding decision-making beyond ideology or immediate economic concerns.

Russia’s geography continues to influence its strategic culture in ways that extend beyond immediate military considerations. The country’s enormous size, combined with varied terrain, forces it to develop a layered approach to defense and projection of power. Mountains, plains, rivers, and seas shape not only the movement of armies but also the development of transportation infrastructure and trade networks. The need to manage remote territories, such as Siberia and the Far East, affects both domestic governance and foreign policy priorities.<sup>25</sup> These geographic realities create a pattern in which Russia consistently seeks to extend influence over adjacent regions to compensate for vulnerabilities inherent in its physical layout.

One of the most enduring geographic influences on Russia’s foreign policy is its relationship with Europe. While geographically part of Eurasia, the western portion of Russia lies close to Europe, creating opportunities and threats alike.<sup>26</sup> The European Plain, which stretches uninterrupted from Germany through Ukraine to western Russia, offers little natural protection against invasion. This flat terrain has historically allowed foreign powers to penetrate deep into Russian territory, prompting a defensive mentality focused on controlling buffer states. The incorporation of Ukraine, Belarus, and the Baltic states into Russia’s sphere of influence has long been justified as a means of ensuring national security, and geographic proximity continues to make these regions strategically vital.<sup>27</sup>

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<sup>24</sup> Dmitri Trenin, *Should We Fear Russia?* (Washington, D.C.: Carnegie Endowment for International Peace, 2016), 57–60.

<sup>25</sup> Timothy Colton, *Russia: What Everyone Needs to Know* (New York: Oxford University Press, 2016), 47–50.

<sup>26</sup> Paul Goble, “Russia’s Western Vulnerabilities and NATO Expansion,” *Eurasia Daily Monitor*, vol. 6, no. 180 (2009).

<sup>27</sup> Serhii Plokhy, *The Gates of Europe: A History of Ukraine* (New York: Basic Books, 2016), 310–318.

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The historical memory of invasions from the west has a direct impact on Russia's contemporary security doctrine. From Napoleon's invasion in 1812 to Hitler's Operation Barbarossa in 1941, foreign armies have repeatedly exploited the open terrain of the European Plain.<sup>28</sup> These experiences have reinforced the Russian emphasis on strategic depth as a core military principle. Even modern missile defense systems, troop deployments, and military exercises reflect this geographic consideration, highlighting the belief that the western frontier cannot be ignored. Russia's insistence on maintaining a buffer zone in Eastern Europe is thus not merely political posturing but a response to centuries of geographic vulnerability.

Beyond the west, Russia's southern regions also illustrate the interplay of geography and strategy. The Caucasus Mountains form a natural boundary, yet their rugged terrain contains numerous passes that have historically been contested.<sup>29</sup> Control over these passes is essential for securing access to the Black Sea and for protecting southern approaches to central Russia. Energy infrastructure, such as pipelines carrying Caspian oil and gas, further underscores the strategic importance of the south. Russia's military engagements in Chechnya, South Ossetia, and Abkhazia are not simply reactions to internal unrest; they are deliberate efforts to maintain control over geographically critical areas. Geography here informs policy directly, linking terrain, resources, and security concerns.

Central Asia also exemplifies geographic determinants in Russian strategy. The vast steppes connecting Russia to Kazakhstan, Kyrgyzstan, Tajikistan, and other former Soviet republics create open corridors that can be used for trade, migration, and military operations.<sup>30</sup> Russia has historically sought to dominate this region to prevent rival powers, including China and Turkey, from gaining influence. Membership in regional organizations such as the Collective Security Treaty Organization allows Russia to

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<sup>28</sup> Geoffrey Roberts, *Stalin's Wars: From World War to Cold War, 1939–1953* (New Haven: Yale University Press, 2006), 67–72.

<sup>29</sup> Thomas de Waal, *The Caucasus: An Introduction* (Oxford: Oxford University Press, 2010), 101–110.

<sup>30</sup> Martha Brill Olcott, *Central Asia's Second Chance* (Washington, D.C.: Carnegie Endowment for International Peace, 2010), 115–119.

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formalize control over these territories. Geography enables Russia to project power efficiently, and the lack of natural barriers makes sustained influence both feasible and necessary for strategic stability.

The Far East, by contrast, presents a different set of geographic challenges. The region is remote, sparsely populated, and climatically harsh.<sup>31</sup> Yet it contains vast natural resources, including oil, gas, minerals, and timber, which are critical to Russia's economic and strategic planning. The port of Vladivostok provides a gateway to the Pacific, but proximity to China, Japan, and Korea introduces geopolitical tension. Russia's investment in infrastructure and military capabilities in the Far East demonstrates a recognition that geography creates both opportunities and vulnerabilities. The Arctic, adjacent to the Far East, adds an additional dimension, as melting ice and new shipping routes expand the region's global significance.<sup>32</sup>

Waterways, including the Volga, Don, and Dnieper rivers, have historically been central to Russia's internal cohesion and external trade.<sup>33</sup> Rivers facilitate movement of goods, support population centers, and act as strategic corridors. Control over major waterways has allowed Russia to maintain influence over critical regions and connect distant territories. Even in contemporary times, river networks complement railway and pipeline infrastructure, reinforcing Russia's ability to integrate its vast landmass and project economic and military power. Geographic control of these corridors directly affects national security and regional influence.

The Arctic is increasingly central to Russia's geopolitical ambitions. The region contains vast untapped resources, including oil, natural gas, and rare earth minerals.<sup>34</sup> Climate change is opening new navigable routes, such as the Northern Sea Route, which reduces shipping distances between Europe and Asia. Russia has invested in icebreakers, port

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<sup>31</sup> Fiona Hill and Clifford Gaddy, *The Siberian Curse* (Washington, D.C.: Brookings Institution Press, 2003), 79–83.

<sup>32</sup> Thane Gustafson, *The Bridge: Natural Gas in a Redivided Europe* (Cambridge: Harvard University Press, 2020), 28–35.

<sup>33</sup> Tim Marshall, *Prisoners of Geography* (New York: Scribner, 2015), 35–40.

<sup>34</sup> Alan Wood, *The Trans-Siberian Railway* (London: Ian Allan Publishing, 2011), 18–23.

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facilities, and military installations to secure dominance over these routes. The geographic proximity of other Arctic nations, including the United States, Canada, and Norway, has intensified competition. Russia's policy in the Arctic demonstrates how geography can drive both economic planning and strategic military deployment, making the region a focal point of 21st-century geopolitics.

Population distribution continues to play a critical role in strategic calculations. Most Russians live west of the Ural Mountains, near Europe, while Siberia and the Far East remain sparsely populated.<sup>35</sup> This uneven distribution poses challenges for defense, economic development, and demographic sustainability. Low population density in resource-rich areas creates vulnerabilities, particularly in regions bordering China, Mongolia, and the Arctic. The Russian government has implemented programs to encourage settlement and development in these regions, though harsh climatic and geographic conditions limit the effectiveness of these measures. Geography and demography together shape both policy priorities and regional vulnerabilities.

Transportation networks are a direct response to geographic scale. The Trans-Siberian Railway, along with other railways and highways, is critical for moving goods, energy, and military forces across Russia's vast territory.<sup>36</sup> Pipelines carrying oil and natural gas, such as Nord Stream and Power of Siberia, provide additional connectivity and strategic leverage. Geography dictates the structure and function of these networks, which in turn influence both domestic policy and international relations. Control over transportation corridors allows Russia to integrate its territory, maintain security, and influence neighboring regions.

Resource wealth is geographically determined and central to Russian power. Russia is a leading producer of oil, gas, and minerals, with reserves concentrated in Siberia, the Arctic, and the Caspian Basin.<sup>37</sup> These resources provide economic leverage over Europe and Asia,

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<sup>35</sup> Thane Gustafson, *The Bridge*, 31–36.

<sup>36</sup> Fiona Hill and Clifford Gaddy, *The Siberian Curse*, 85–92.

<sup>37</sup> Alexander Dugin, *Foundations of Geopolitics* (Moscow: Arktogea, 1997), 40–47.

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enabling the Russian state to pursue geopolitical objectives. Resource-rich regions are often remote and underpopulated, requiring investment in infrastructure and security. Russia's reliance on energy exports creates both opportunities and vulnerabilities, as fluctuations in global prices and political sanctions can affect its strategic options. Geography thus shapes the economic foundation of Russian power and the tools used to project influence abroad.

Siberia exemplifies the dual role of geography in Russian geopolitics. It is a source of vast natural wealth but remains underdeveloped and sparsely populated.<sup>38</sup> Maintaining control over Siberia requires significant investment in transportation, energy, and security infrastructure. Its strategic significance lies not only in resources but also in providing depth against external threats. Siberia's geography directly informs Russia's economic planning, security doctrine, and demographic strategies, illustrating the intertwined nature of space, power, and policy.

Geographic positioning also influences Russian identity and ideology. Concepts such as Eurasianism emphasize Russia's unique location bridging Europe and Asia. Geography reinforces the perception of Russia as distinct from both Western and Eastern powers, shaping its political narratives and foreign policy decisions. Leaders often invoke geographic determinism to justify territorial expansion, buffer-zone policy, and influence over neighboring states. The connection between physical space and ideology highlights how deeply geography informs Russia's strategic worldview.

Contemporary Russian foreign policy demonstrates the enduring influence of geography. Vladimir Putin's interventions in Ukraine, Georgia, and Syria reflect geographic priorities, including securing strategic depth, maintaining warm-water ports, and controlling critical energy and transportation corridors. The annexation of Crimea, for instance, enhanced Russia's Black Sea presence and provided access to key naval infrastructure. Similarly, military involvement in Syria ensured continued access to Tartus,

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<sup>38</sup> Dmitri Trenin, *Should We Fear Russia?* (Washington, D.C.: Carnegie Endowment for International Peace, 2016), 61–67.

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a critical Mediterranean port. Geography, therefore, continues to shape the contours of Russian strategy, underpinning both regional and global ambitions.

Russia's geographic position has long fostered a sense of vulnerability and shaped a defensive strategic culture. While the country possesses immense natural depth, much of its territory is exposed to potential threats. The combination of flat plains in the west, mountain passes in the south, and long maritime borders creates a complex security environment.<sup>39</sup> As a result, Russian military doctrine emphasizes flexibility, rapid mobilization, and layered defense, often incorporating lessons from historical invasions into contemporary planning. The relationship between geography and strategy is not abstract; it has concrete implications for force deployment, infrastructure investment, and foreign policy decisions.

One of the most significant geographic influences on Russia's policy is the perceived threat of encirclement. Surrounded by NATO member states to the west, China to the east, and a cluster of potentially unstable or foreign-aligned neighbors to the south, Russia perceives itself as at risk of isolation.<sup>40</sup> Geography intensifies this perception, as many neighboring states lie within striking distance of critical Russian cities. For example, St. Petersburg and Moscow are relatively close to the Baltic states and Poland, making control over surrounding regions a top strategic priority. The expansion of Western military alliances into territories historically within Russia's sphere of influence is therefore interpreted as a geographic vulnerability requiring a proactive and often assertive response.

The western frontier has historically been the most contested and politically sensitive. The European Plain offers minimal natural barriers, and Russia's leaders have repeatedly experienced invasions through this corridor.<sup>41</sup> Napoleon, the German Empire, and the Soviet Union's adversaries all exploited these open plains, reinforcing the need for strategic depth. Contemporary Russia maintains significant military presence and infrastructure in

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<sup>39</sup> Timothy Colton, *Russia: What Everyone Needs to Know* (New York: Oxford University Press, 2016), 50–54.

<sup>40</sup> Paul Goble, “Russia's Western Vulnerabilities and NATO Expansion,” *Eurasia Daily Monitor*, vol. 6, no. 180 (2009).

<sup>41</sup> Serhii Plokhy, *The Gates of Europe: A History of Ukraine* (New York: Basic Books, 2016), 320–330.

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its western regions, from Kaliningrad to Belarus, to compensate for geographic vulnerability. Geography, in this context, directly shapes military posture, alliance strategy, and geopolitical perception.

The Caucasus and southern borderlands are equally critical to Russian security. Mountains, rivers, and passes create a complex terrain that provides both protection and strategic challenge.<sup>42</sup> Control over these regions ensures access to the Black Sea and energy transit corridors, while also mitigating threats from insurgencies and foreign influence. The ongoing Russian presence in South Ossetia and Abkhazia, as well as periodic interventions in Chechnya and Dagestan, reflects the enduring geographic importance of the south. Geography drives policy by connecting territorial control, energy security, and military necessity.

Central Asia represents a distinct strategic opportunity due to its geographic openness and historical integration with Russia.<sup>43</sup> The vast steppes linking Kazakhstan, Kyrgyzstan, and Uzbekistan to Russia allow for efficient military, economic, and political influence. Russia's leadership views the region as essential for maintaining a buffer against competing powers, including China, Turkey, and the Middle East. Membership in organizations such as the Collective Security Treaty Organization formalizes influence, while infrastructure investments, such as pipelines and railways, leverage geography to consolidate regional dominance. The open terrain also enables Russia to monitor migration, trade, and security flows, illustrating how geography informs both hard and soft power.

The Far East presents another geographic challenge with strategic implications. While rich in natural resources, the region is sparsely populated and climatically harsh.<sup>44</sup> Vladivostok provides Russia with a Pacific outlet, but the proximity of China, Japan, and Korea introduces potential competition. Geography necessitates significant investment in infrastructure, military deployment, and economic integration to maintain control over

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<sup>42</sup> Thomas de Waal, *The Caucasus: An Introduction* (Oxford: Oxford University Press, 2010), 115–125.

<sup>43</sup> Martha Brill Olcott, *Central Asia's Second Chance* (Washington, D.C.: Carnegie Endowment for International Peace, 2010), 120–125.

<sup>44</sup> Fiona Hill and Clifford Gaddy, *The Siberian Curse* (Washington, D.C.: Brookings Institution Press, 2003), 90–97.

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this remote territory. The Far East also connects to the Arctic, where melting ice and new shipping routes expand both economic and strategic opportunities. Geography, in this sense, is both a constraint and a source of potential influence.

Russia's river systems have long facilitated internal cohesion and strategic mobility. The Volga, Don, and Dnieper rivers enable trade, transport, and military movement across vast distances.<sup>45</sup> Control over these waterways is critical for connecting the heartland to peripheral regions and for projecting influence beyond borders. Rivers complement railway and road networks, allowing Russia to integrate remote areas economically and militarily. Geographic mastery of these corridors has historically been and continues to be central to Russian power.

The Arctic has emerged as a new focal point of Russian strategy. Its ice-covered seas contain untapped energy and mineral resources, and the gradual retreat of ice due to climate change is opening new shipping lanes.<sup>46</sup> Russia has invested heavily in icebreakers, military bases, and port infrastructure to secure dominance in the Arctic. The region's geography, combined with climate trends, creates both opportunity and vulnerability. Competing Arctic nations, including the United States, Canada, and Norway, introduce geopolitical competition, making control over territory, resources, and maritime routes a strategic imperative.

Population patterns also reflect geographic determinants of power. Most Russians live in the west, near Europe, leaving vast eastern and northern regions sparsely inhabited.<sup>47</sup> This imbalance affects economic development, defense planning, and regional influence. Low-density areas, while rich in natural resources, are vulnerable to external influence or economic underdevelopment. Russia has sought to mitigate these geographic and demographic challenges through targeted settlement policies, infrastructure investments, and regional incentives. Geography and demography together shape internal cohesion and external influence.

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<sup>45</sup> Richard Pipes, *Russia Under the Old Regime* (New York: Penguin, 1997), 45–48.

<sup>46</sup> Lassi Heininen, *Arctic Policies and Strategies* (London: Routledge, 2018), 72–78.

<sup>47</sup> Tim Marshall, *Prisoners of Geography* (New York: Scribner, 2015), 40–45.

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Transportation networks are central to connecting Russia's vast territory. The Trans-Siberian Railway, extensive highways, and pipelines enable the movement of goods, resources, and military assets across thousands of kilometers.<sup>48</sup> These networks integrate remote regions with the core of Russian political and economic power. Geography dictates where infrastructure must be built, what form it should take, and which areas are most strategically important. Control over transportation corridors allows Russia to maintain cohesion internally while projecting influence externally.

Resource geography also underpins Russia's economic and geopolitical power. Oil, natural gas, and minerals are concentrated in Siberia, the Arctic, and the Caspian region.<sup>49</sup> These resources generate revenue and create leverage over neighboring countries, particularly in Europe. Pipelines such as Nord Stream, TurkStream, and Power of Siberia are geographic tools, linking resource-rich regions to markets and creating interdependence. The remote locations of resources, however, require significant investment and defense, highlighting the interplay of opportunity and vulnerability in Russian geography.

Siberia illustrates the dual nature of Russian geography: abundant resources but low population and challenging terrain.<sup>50</sup> Control over Siberia requires significant state investment in infrastructure and security, while its vastness provides strategic depth. The region's geography influences economic planning, security doctrine, and long-term demographic strategies, demonstrating the inseparability of space and policy. Strategic control of Siberia remains essential to Russian power projection in Asia and the Arctic.

Russian identity and ideology are also shaped by geography. Eurasianism emphasizes Russia's unique position as a bridge between Europe and Asia, reinforcing a sense of distinctiveness.<sup>51</sup> Geography underpins these narratives, justifying influence over

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<sup>48</sup> Alan Wood, *The Trans-Siberian Railway* (London: Ian Allan Publishing, 2011), 23–28.

<sup>49</sup> Thane Gustafson, *The Bridge: Natural Gas in a Redivided Europe* (Cambridge: Harvard University Press, 2020), 36–42.

<sup>50</sup> Fiona Hill and Clifford Gaddy, *The Siberian Curse*, 100–108.

<sup>51</sup> Alexander Dugin, *Foundations of Geopolitics* (Moscow: Arktogea, 1997), 45–52

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neighboring territories and supporting a vision of Russia as a major continental power. Leaders have used geographic reasoning to legitimize interventions, buffer-zone policies, and expansionist ambitions.

Modern Russian foreign policy demonstrates the continuing influence of geography. Actions in Ukraine, Georgia, and Syria reflect priorities rooted in terrain, resource access, and strategic depth.<sup>52</sup> The annexation of Crimea enhanced control over the Black Sea and provided access to critical naval infrastructure. Engagement in Syria ensured access to Tartus, a key Mediterranean port. Geography, therefore, remains a fundamental driver of Russia's strategy, influencing the selection of objectives, methods, and spheres of influence.

Russia's geography is inseparable from its geopolitical strategy, and understanding this connection is essential for interpreting both historical and contemporary Russian behavior. Its vast landmass, spanning Europe and Asia, imposes both constraints and opportunities, influencing national defense, resource management, economic planning, and foreign policy.<sup>53</sup> Geography shapes not only the state's strategic choices but also the perceptions and behaviors of Russian leaders, contributing to a persistent security culture centered on buffer zones, territorial depth, and control of critical corridors. The historical memory of invasions through flat plains, southern passes, and limited maritime access reinforces the contemporary emphasis on preemptive control and strategic influence over neighboring states.

The western border remains the most geopolitically sensitive region due to the lack of natural barriers and the proximity of European powers.<sup>54</sup> The European Plain allows rapid military movement, making states such as Ukraine, Belarus, and the Baltic nations critical to Russian strategic calculations. Russia's historical experience of repeated invasions through this corridor has solidified a doctrine that emphasizes preemptive influence and the maintenance of buffer zones.<sup>55</sup> Modern military deployments, missile defense

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<sup>52</sup> Dmitri Trenin, *Should We Fear Russia?* (Washington, D.C.: Carnegie Endowment for International Peace, 2016), 68–75.

<sup>53</sup> Timothy Colton, *Russia: What Everyone Needs to Know* (New York: Oxford University Press, 2016), 54–58.

<sup>54</sup> Paul Goble, “Russia's Western Vulnerabilities and NATO Expansion,” *Eurasia Daily Monitor*, vol. 6, no. 180 (2009).

<sup>55</sup> Serhii Plokhy, *The Gates of Europe: A History of Ukraine* (New York: Basic Books, 2016), 335–342.

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initiatives, and political alignments in these areas demonstrate the continuing impact of geography on policy. The perception of Western encroachment, often amplified by geographic proximity, reinforces the Kremlin's insistence on controlling or influencing these regions.

In the south, the Caucasus Mountains and associated river valleys create a complex strategic environment.<sup>56</sup> Control over mountain passes, energy pipelines, and border regions is central to Russian security, providing access to the Black Sea and protecting southern approaches to the heartland. Military operations and political interventions in Chechnya, South Ossetia, and Abkhazia are manifestations of geographic imperatives, linking terrain, resources, and strategic necessity. Geography in this context is not merely a backdrop but an active driver of policy and intervention.

Central Asia's open terrain and proximity to Russia's southern borders further highlight geographic determinants of strategy.<sup>57</sup> The steppes connecting Kazakhstan, Kyrgyzstan, and Uzbekistan allow efficient projection of influence, facilitating trade, energy transit, and military operations. Russia maintains its dominance through regional alliances, infrastructure investments, and monitoring of migration and security flows. Geography enables and constrains policy: the absence of natural barriers encourages engagement, while the vast distances require sustained administrative and logistical investment.

The Far East and Arctic regions illustrate both opportunity and challenge in Russian geopolitics.<sup>58</sup> These regions are rich in resources, including oil, gas, minerals, and timber, yet sparsely populated and climatically harsh. Investment in infrastructure, transportation, and military installations is essential to secure control and facilitate economic development. Arctic melting trends and new shipping lanes, such as the Northern Sea Route, have expanded Russia's strategic horizons, creating both potential leverage and international

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<sup>56</sup> Thomas de Waal, *The Caucasus: An Introduction* (Oxford: Oxford University Press, 2010), 125–134.

<sup>57</sup> Martha Brill Olcott, *Central Asia's Second Chance* (Washington, D.C.: Carnegie Endowment for International Peace, 2010), 125–130.

<sup>58</sup> Fiona Hill and Clifford Gaddy, *The Siberian Curse* (Washington, D.C.: Brookings Institution Press, 2003), 97–104.

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competition. Geography directly shapes military deployment, infrastructure planning, and resource management, highlighting the inseparability of terrain and strategy.

Population distribution remains a crucial geographic factor. Most Russians reside west of the Ural Mountains, concentrating political, economic, and cultural influence, while Siberia and the Far East remain sparsely populated.<sup>59</sup> This demographic reality affects defense, economic planning, and regional governance. Low population density in resource-rich areas increases vulnerability to external influence and necessitates investment in settlement, infrastructure, and security. Geography and demography together influence the feasibility of sustained control over vast territories and the strategic calculus of state policy.

Transportation networks demonstrate the interplay of geography and state capability. The Trans-Siberian Railway, pipelines, highways, and river systems connect remote regions to the political and economic core.<sup>60</sup> Control over these networks allows Russia to integrate distant territories, secure resource flows, and project influence abroad. Geography dictates where infrastructure must be built, how it is maintained, and which areas are strategically prioritized. Transportation networks serve as both enablers of internal cohesion and instruments of external power projection.

Resource distribution is a decisive factor in Russia's geopolitics. Oil, natural gas, and minerals concentrated in Siberia, the Arctic, and the Caspian region form the foundation of economic power and geopolitical leverage.<sup>61</sup> Energy exports provide influence over Europe and Asia, while the remote and harsh locations of these resources require protection and logistical investment. Geography determines both the location of wealth and the means by which it can be exploited, linking terrain directly to economic and strategic objectives.

Siberia exemplifies the dual character of geography as both an asset and a challenge.<sup>62</sup> Its resources enhance national power, yet its low population, extreme climate, and logistical

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<sup>59</sup>Tim Marshall, *Prisoners of Geography* (New York: Scribner, 2015), 45–50.

<sup>60</sup>Alan Wood, *The Trans-Siberian Railway* (London: Ian Allan Publishing, 2011), 28–32.

<sup>61</sup>Thane Gustafson, *The Bridge: Natural Gas in a Redivided Europe* (Cambridge: Harvard University Press, 2020), 42–48.

<sup>62</sup>Fiona Hill and Clifford Gaddy, *The Siberian Curse*, 108–115.

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difficulties require significant state investment. Maintaining control over Siberia ensures strategic depth, secures energy resources, and provides a buffer against potential eastern threats. The management of Siberia demonstrates how geographic factors influence economic, security, and demographic policy simultaneously, reflecting the complexity of Russian statecraft.

Geography also informs Russia's conceptualization of identity and global role. Eurasianism, emphasizing Russia as a bridge between Europe and Asia, derives legitimacy partly from geographic position.<sup>63</sup> Geography reinforces the narrative of Russia as a distinct civilization, shaping both domestic political ideology and foreign policy. Territorial expansion, buffer-zone control, and regional influence are often justified through geographic reasoning, highlighting the centrality of space in strategic thinking.

Modern Russian foreign policy continues to reflect geographic imperatives. Actions in Ukraine, Georgia, and Syria demonstrate the priority of strategic depth, access to warm-water ports, and control of critical energy and transportation corridors.<sup>64</sup> Crimea's annexation secured Black Sea access and naval infrastructure, while intervention in Syria ensured influence over the Mediterranean port of Tartus. Geography dictates the objectives, methods, and scope of Russia's global engagement, emphasizing that territorial considerations remain central to strategy even in the 21st century.

The interaction of geography with climate, demography, and resources underscores the complexity of Russian geopolitics. Harsh winters, sparsely populated resource-rich regions, and uneven population distribution create both vulnerabilities and opportunities.<sup>65</sup> Geography dictates the location of infrastructure, the focus of military deployments, and the selection of foreign policy priorities. Russian strategic culture is fundamentally shaped

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<sup>63</sup> Alexander Dugin, *Foundations of Geopolitics* (Moscow: Arktogea, 1997), 52–59.

<sup>64</sup> Dmitri Trenin, *Should We Fear Russia?* (Washington, D.C.: Carnegie Endowment for International Peace, 2016), 75–82

<sup>65</sup> Geoffrey Roberts, *Stalin's Wars: From World War to Cold War, 1939–1953* (New Haven: Yale University Press, 2006), 80–88.

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by these physical realities, reinforcing centralization, preemptive influence, and territorial ambition.

## CONCLUSION

Russia's geopolitical behavior cannot be separated from its geography. Strategic depth, open plains on the western frontier, harsh climate, concentrated population, remote resource-rich regions, and constrained maritime access all contribute to a structural environment in which insecurity and ambition coexist. The state seeks to compensate for geographic vulnerabilities by creating buffer zones, controlling critical transit routes, investing in military capabilities, and projecting influence into neighboring regions.

The cases of Ukraine, the Caucasus, Central Asia, and the Arctic demonstrate how geography shapes both the objectives and instruments of Russian policy. While history, leadership, ideology, and economic factors all matter, they operate within a spatial framework that channels and constrains choices. Understanding Russia as, in part, a “hostage” or “prisoner” of its geography does not absolve decision-makers of responsibility, but it highlights why certain patterns—such as the pursuit of strategic depth and buffer zones—recur over time.

For scholars and practitioners of security studies, this implies that any analysis of Russian policy must integrate geographic factors into its explanatory toolkit. For policymakers, it suggests that stable relations with Russia require not only deterrence and diplomacy, but also a realistic appreciation of the geographic pressures under which the Russian state operates.

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## INVESTMENT ENVIRONMENT: RISKS, CHALLENGES AND DEVELOPMENT OPPORTUNITIES FOR GEORGIA

Natia Zhozhuashvili<sup>1</sup>

<https://orcid.org/0009-0008-4882-3467>

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### Abstract

Investments are one of the important components of the modern economic system. It determines both the economic and social development of countries. Investment is directly related to capital accumulation, employment growth, and technological progress. The implementation of large-scale projects is a prerequisite for strengthening the economy for a small country. Due to Georgia's geopolitical location, there is a great potential for the development of sectors such as logistics, tourism, and agriculture. The attractiveness of Georgia's investment environment is confirmed by international ratings. They evaluate the flexible tax system in the country, investment promotion programs, and the investment climate in general. Therefore, the priority of the Georgian state is to create a favorable environment for investors. This article offers an analysis of risk factors that hinder investment activity in the country. Such risk factors include global economic and political instability, a need to improve the legislative framework, lack of infrastructure with international standards, bureaucratic procedures, less access to finance, rapidly growing technological progress, etc. The study is based on international ratings and confirms that despite the presence of negative risk factors, Georgia has taken significant steps to improve the business environment, however, the conclusion states that foreign investors in Georgia face systemic and institutional difficulties, which include administrative, structural and political factors. Problems with accessing foreign markets, compliance with international standards, logistical costs, and inefficiency of export promotion instruments are the risk factors analyzed in the study. The process of managing these risks requires the state to refine its policies, ensure regulatory stability, and increase institutional support. All of this will lead to a strengthening of the country's investment attractiveness in the long-term and will contribute to sustainable economic development.

**Key words:** investments, investment environment, investment risks, risk management, international rating, investor, International ranking, economic indicators;

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<sup>1</sup> Associate Professor of Gori State University, Doctor of Economics

## INTRODUCTION

Investment environment - a set of political, economic, social and legal conditions that create equal conditions for both local and foreign investors to carry out investment activities. The investment environment is a set of factors that are characteristic of a given country and determine the investment potential of this country. The investment environment is a complex of economic, political and regulatory environments that significantly determine business decisions to invest capital and is influenced by factors such as political stability, the effectiveness of regulations and the protection of property rights.<sup>2</sup>

Georgia is one of the leading countries in the region in terms of ease of doing business, tax legislation, economic freedom index, and fight against corruption. However, there are risk factors in the country that hinder investment activity and, accordingly, the country's economic development. In order to assess the investment environment, it is necessary to determine the risks associated with investing in Georgia. First of all, foreign investors, when investing, pay special attention to political factors. As you know, Georgia does not have a favorable political situation, since 20% of the country is still occupied by Russia and its actions in the future are still unpredictable. The second important factor is economic instability. This includes such economic parameters as inflation, fluctuations in the national currency exchange rate, low income of the population, management of external debt, high trade deficit, and others. The analysis of each economic parameter better shows the state of Georgia's investment environment in relation to risks. Inflation is a general increase in the price level. It is characterized by an increase in costs, which deals a strong blow to society, especially low-income families. Also worth noting are such components as a decrease in the purchasing power of the national currency, a decrease in returns on investments, and an increase in interest rates. Inflationary processes pose a threat to any business. It is precisely because of price instability that investors avoid investing in Georgia. According to Geostat, prices in Georgia have been unstable in recent years, the reason for this is the internal economic situation and external shocks.

<sup>2</sup>Investment climate. *Financial Dictionary*. Farlex, Inc.

The following economic parameters are important for assessing the investment environment: fluctuations in the national currency exchange rate, the level of income of the population, excessive debt, foreign trade deficit, etc. In recent years, the exchange rate of the GEL, both against the US dollar and the euro, has been characterized by frequent fluctuations,<sup>3</sup> which indicates the influence of the international currency environment and the increased sensitivity of the GEL to external economic factors. The instability of the GEL exchange rate increases currency risks and emphasizes the importance of effective monetary policy and macroeconomic stability. The next economic indicator is the relatively low level of income of the population compared to international standards, which is due to the structural features of the labor market, regional economic inequality, and limited rates of economic development. Over-indebtedness is a significant socio-economic problem in Georgia, which is associated with the relatively low level of incomes of the population, the growth of consumer lending and the insufficient level of financial education. The debt service burden of low- and middle-income households often exceeds their solvency capabilities. Over-indebtedness has a negative impact on the financial stability of households and the economic environment as a whole, as it increases solvency risks, reduces consumption and hampers economic activity. This problem emphasizes the importance of responsible lending policies, effective regulations and raising the financial awareness of the population. The export and import indicators in Georgia are increasing every year, although according to the National Statistics Service, the growth rate of imports is higher, which leads to a foreign trade deficit in the country. From this we can conclude that Georgia is dependent on foreign consumer goods and is sensitive to changes in global demand. Based on this data, significant problems are identified that cannot be addressed by investors alone. This requires government involvement to enable local and foreign investors to export as many products as possible to international markets, which will provide an incentive for investors to launch new, substantially important projects in Georgia or develop existing ones.

<sup>3</sup> National Statistical Service of Georgia, Monetary Statistics 2025.

## MAIN PART

Investors in Georgia face bureaucratic procedures such as: **Business registration**. Investors must register their business entity with the National Agency for Public Registry (NAPR). This involves submitting the necessary documentation, such as the company's charter, identification documents of the founders, and proof of legal address. **Tax Registration**: After registering a business, investors must obtain a Tax Identification Number (TIN) from the Georgian Revenue Service. This is necessary to fulfill tax obligations. **Permits and Licenses**: Depending on the nature of the business, investors may need specific permits or licenses to operate legally. This may vary depending on the company's industry and activities. **Land and Property Registration**: If the business involves owning or leasing property, investors may need to register the property rights with NAPR or the relevant local authority. **Employment Regulations**: Hiring employees requires compliance with labor laws and regulations. This includes registering employees with the Social Service Agency and complying with the requirements of the employment contract. **Environmental Permits**: Some industries may require an environmental permit from the Ministry of Environment and Agriculture to ensure compliance with environmental standards. **Import/Export Regulations**: It is crucial for businesses involved in international trade to understand and comply with import/export regulations administered by the Internal Revenue Service and other relevant agencies. **Intellectual Property Protection**: Registering trademarks, patents, and copyrights with the National Intellectual Property Center (Sakpatenti) can protect intellectual property rights. **Financial Reporting and Auditing**: Companies may be required to file financial statements and undergo an audit annually, depending on their size and type of business entity. **Compliance and Monitoring**: Ongoing compliance with various regulatory authorities and monitoring changes in legislation that may impact business operations.

Investments will be made in the country where there are better conditions for receiving benefits. Accordingly, countries compete with each other to see who will offer more favorable conditions to potential investors. International ratings serve to compare countries

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with each other according to favorable conditions, which, at the same time, are a good way to assess the effectiveness of government work.

We will begin the analysis of the international rankings for 2025 with per capita income. In addition to the fact that the size of the population's income shows the level of economic development of the country, it is also an indicator of the solvency and economic sustainability of the population, which is an interesting circumstance for potential investors. The average per capita income of a country is determined by the ratio of the size of the economy (gross domestic product - GDP) to the number of population. In order to compare data from different countries, income is calculated in so-called PPP dollars, which takes into account differences in the purchasing power of money between countries. In one Per capita Medium Annual Income In the ranking Georgia 70th in the world Ranked 188th among countries Between . The average income per capita in a country is calculated using different methodologies, and each has its own purpose. When the goal is to compare the income per capita of different countries, the most appropriate is to use GDP calculated according to purchasing power parity (PPP). The PPP methodology considers a country's income in terms of its purchasing power. Since, in general, prices are lower in low-income countries than in high-income countries, the purchasing power of income in poor countries is always higher. PPP in dollars Depicted One Per capita Income Growth No is Dependent Only Country Economic on growth, as well Depends Country Population Number On change, inflation In Georgia , in the USA And Lari Dollar Towards Exchange On the course. The level of economic freedom is determined by observing 12 criteria divided into 4 groups, these are: 1. Rule of law (property rights, court efficiency, level of corruption), 2. Size of government (tax burden, government spending, fiscal stability), 3. Effectiveness of regulations (business freedom, labor freedom, monetary freedom), 4. Open markets (freedom of foreign trade, freedom of investment, financial freedom). **If we consider the Heritage** Index of Economic Freedom,<sup>4</sup> according to it, Georgia is ranked 35th in the world ranking (out of 176

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<sup>4</sup> The Heritage Foundation. <https://www.heritage.org/>, (Accessed 08.12.25)

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countries) with 69 points. In the European region, Georgia is among the top 20 countries, which increases its competitiveness in the regional market in terms of investment attractiveness. Georgia is in the group of "moderately free" countries. This is a higher score than the average in the world and the European region. Factors such as a relatively low tax burden, open market policies, and reforms to improve regulatory efficiency play an important role in this assessment, although increasing public spending remains a challenge.

**The Fraser Economic Freedom** Index assesses a country's economic freedom based on the size of government and budget expenditures, the legal system and protection of property rights, the quality of money, freedom of international trade, and various regulatory burdens. Georgia's position in the index has improved recently. Georgia has a strong position in terms of monetary stability. It receives high marks in terms of tax policy, freedom of banking transactions in foreign currency, and financial openness. All of this is a positive factor for foreign investment.<sup>5</sup>

**Georgia According to** the international property protection rating,<sup>6</sup> it is in 49th place out of 126 countries. The level of property protection is assessed by indicators of the rule of law, physical and intellectual property protection. Georgia is in a relatively stable position in this regard. This refers to the quality of physical and intellectual property protection, legal and political environment. In the economic globalization rating, Georgia is represented in a fairly high position worldwide and is in 22nd place in the world. The assessment is based on various international globalization indices that assess international trade, financial integration and other economic indicators. The level of economic globalization is determined by international trade, foreign capital movement and migration. More globalization means more development potential. Georgia has relatively low scores in financial globalization. This position indicates that Georgia has high international economic integration and the country creates significant structural

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<sup>5</sup> Cato Institute and Fraser Institute. *Economic Freedom of the World: 2025 Annual Report*. Washington, DC: Cato Institute, September 25, 2025.

<sup>6</sup> Gygli, Savina, Florian Haelg, Niklas Potrafke, and Jan-Egbert Sturm. 2019. *The KOF Globalization Index – Revisited*. Review of International Organizations 14 (3): 543–574.

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connections. **Corruption Perceptions Index**<sup>7</sup> The German-based organization Transparency International publishes the ranking. The results are based on more than a dozen different studies. Georgia has the lowest scores in issues related to high-level corruption and concentration of power.

**Global Freedom Rankings.**<sup>8</sup> Georgia has strengthened its position and moved up three places. The global freedom rating is published by the American organization Freedom House. The rating includes 195 countries. In this rating, Georgia is rated with 55 points, with the status of "partly free" and ranks 110th. The assessment is based on political rights, civil liberties, fair elections and media independence.

**Human Development Index.**<sup>9</sup> The Human Development Index is published annually by the United Nations Development Program (UNDP). The latest report of the index covers 190 countries and ranks 57th worldwide. The reports use data on various components of human development - life expectancy, education and income. Georgia's status reflects the country's progress in the areas of quality of life, education and economic opportunities.

These ratings represent a map for any investor, guiding them when implementing investment projects.

A country's investment risk is measured by several variables and takes into account issues such as:

- ✓ Political risk: form of government/state structure, corruption, level of conflicts.
- ✓ Legal risk: degree of property rights protection, contractual rights.
- ✓ Economic risk: Diversification of the economy.
- ✓ Default risk

were identified by **Aswath Damodaran**,<sup>10</sup> a professor at New York University's Stern School of Business and one of the leading experts on investment management. The

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<sup>7</sup> Transparency International Georgia. *Corruption Perceptions Index 2024: Georgia's Score Remains Unchanged*.

<sup>8</sup>Freedom House. *Freedom in the World 2025: Georgia Profile*. Freedom House, 2025.

<sup>9</sup>United Nations Development Programme. *Georgia's Very High Human Development Challenged by Inequality*. Press release, May 6, 2025. United Nations Development Programme.

<sup>10</sup>Damodaran, Aswath. *Investment Risk and Valuation*. New York: NYU Stern School of Business, 2025.

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investment risk rating is based on research published by. Damodaran's methods use tools such as CAPM (Capital Asset Pricing Model), Beta and Discounted Cash Flow Models (DCF), which allow for the assessment of key investment risks and expected returns. The Beta number, which he has studied, determines the market risk of an asset, while (DCF) analysis is used to assess the value of a company, which includes immediate risks under different conditions. The investment risk rating is the main tool for assessing the capabilities of financial assets, companies and countries, which reflects the stability, security and expected risks of investment. This rating is based on components such as sensitivity to market changes, financial transparency and political and economic stability. The 2025 Global Investment Risk and Resilience Index - a rating of <sup>11</sup> investment risk and resilience developed by Henley & Partners and AlfaGeo - determines the position of countries according to investment risk factors. Switzerland takes first place, followed by Denmark, Norway and Sweden - countries with very low risk and high economic resilience. Georgia's situation has not yet been assessed in this rating. This rating combines the risks of inflation, political instability, exchange rate changes, climate change, social progress, and state governance.

UNCTAD 's World Investment Report - 2025, <sup>12</sup> we can highlight several key findings. The dynamics of foreign direct investment in the world have sharply decreased, both in developed and developing countries. Investment circulation is slowing down, especially in developed countries, which indicates that political and economic risks and inequality have increased. Investment capital is not flowing to those sectors and regions where it is needed most. Investments are concentrated in market segments that are already developed. The report highlights the process of digitalization of the economy, where the volume of investments varies but still occupies a large place. Managing artificial intelligence, strengthening the environment for the development of innovations, strategic partnerships,

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<sup>11</sup> Henley & Partners and AlphaGeo. *Global Investment Risk and Resilience Index 2025*. Henley & Partners press release, October 21, 2025.

<sup>12</sup> United Nations Conference on Trade and Development. *World Investment Report 2025: International Investment in the Digital Economy*. Geneva: United Nations, June 19, 2025.

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a high level of data management – are necessary for countries to be able to better absorb investments in the field of digitalization and achieve sustainable economic development. The report warns that political and global instability risks, trade tensions, and changes in financial flows are significantly reducing investment prospects in the future, as a result of which investors are preferring a more cautious approach. Finally, the research report confirms that global foreign direct investment is not at the level needed to implement the Sustainable Development Goals (SDGs) and support economic growth. This is especially felt in developing countries such as Georgia. The report recommends reorienting investments towards more effective, inclusive, and sustainable development.

## CONCLUSION

### **Investment risks and opportunities in Georgia**

When making any investment decisions, an investor faces certain types of risks. That is why it is necessary to assess and define these risks in advance. Although it is impossible to fully manage risks, it is more or less possible to manage predetermined risks through proper risk management. Knowledge of predetermined risks makes it easier for an investor to take steps to implement investment activities. Based on the research and study-analysis of investment risk management and related issues, the following conclusions can be drawn: In order to reduce investment risks, it is first necessary to eliminate problems at the institutional level, which can be achieved by developing financial and capital markets, developing effective management mechanisms for external shocks, and ensuring the stability of the national currency. At the institutional level, the lever for solving the problem is, of course, in the hands of the government, which can work together to reduce risk factors, especially in such issues as currency and price stability, overindebtedness, inflation, trade deficit, and per capita income. However, Georgia still has a relatively attractive investment environment for both local and foreign investors, as confirmed by international ratings. A flexible tax system, investment promotion programs, a general

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investment climate, and geopolitical location are precisely these conditions that encourage investors to implement investment projects in the country.

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## THE MARCH 1921 BATTLE FOR BATUMI AND THE PEOPLE'S GUARD

Lieutenant Colonel Gocha Batadze<sup>1</sup>

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### ABSTRACT

The First Democratic Republic of Georgia, which tried to maintain its independence, found itself in a difficult situation at the beginning of 1921. In February and in March, Georgia was surrounded by Soviet Russia. The 11th Red Army attacked from the southeast, the 9th Army from the north, through the Mamisoni Pass, and the 13th Army from the Black Sea coast. Budyonny and Zhloba's cavalry units also joined the fight against Georgia. In addition there was the threat from the Ottoman Empire from the southwest.<sup>2</sup> While Turkey was formally presenting itself as a "friend" of Georgia, it was simultaneously trying to seize the city of Batumi and the Batumi region. When „... Georgia was tied up on three sides in the battle with the Russian whale, at that time the Ottoman government promised Georgia's alliance and at the same time silently advanced its army towards the Artaani region and seized Georgian territory...“<sup>3</sup> This is confirmed by the information reflected in the "Selected Notes" of the then Chairman of the Mejlis of Muslim Georgia (the governing body of Batumi and the Batumi region), Memed Abashidze that a delegation of the Angora government appeared in Batumi and suggested him, as the Chairman of the Mejlis, that they review the issue of joining Georgia and, on behalf of the Mejlis, issue a resolution that the Batumi region would be transferred to the Angora government on the basis of autonomy.<sup>4</sup>

Unfortunately, the democratic government of Georgia realized the Kemalists' treachery too late. Before emigrating, Noe Zhordania said in a statement to the population that a new issue had arisen: should Batumi be given to Georgia, even if the Bolsheviks rule there, or should it remain with the Ottomans? There could be no two opinions on this question. Their decision was that in any case Batumi should remain with Georgia, not with the Ottomans.<sup>5</sup>

The two imperialist states (Turkey and Russia), which appeared on the world stage with the slogans of democracy and socialism, in fact, acted completely oppositely. This article concerns the period when the above-mentioned countries, with their insidious plan, divided the territory of the first democratic Georgia. The article will present the relations between democratic Georgia and Turkey and Russia, and the struggle for the liberation of Batumi, where the problematic issue of the role of the People's Guard will be presented.

**Keywords:** Democratic Georgia, Kemalist Turkey, Soviet Russia, People's Guard, regular army

<sup>1</sup> Commander of the 104th Territorial Defense Battalion of the 10th Territorial Defense Brigade of the National Guard of the Georgian Defense Forces, PhD Candidate, Faculty of Humanities, Sukhumi State University

<sup>2</sup>Otar Turmanidze, The Forced Sovietization of Georgia and the Struggle Against the Separation of Adjara from the Motherland (February–March 1921), in the book: Essays on the History of South-Western Georgia, Adjara, Volume IV, Batumi Shota Rustaveli State University, Niko Berdzenishvili Department of Humanities and Social Sciences, Batumi, 2012, p. 34.

<sup>3</sup> Grigol Lortkipanidze, Thoughts on Georgia, Tbilisi University Publishing House, Tbilisi, 1995, p.

<sup>4</sup> Memed Abashidze, Selected Writings, Tbilisi, 1967, p

<sup>5</sup> Noe Zhordania to the "Cities, Nations, Communities of Georgia" regarding the Batumi issue, regarding the government's departure from the territory of Georgia (pencil note), 24.02.1921, SCSA, f.2113 an.

## INTRODUCTION

At the end of the existence of the First Democratic Republic of Georgia, on the night of February 11-12, 1921, Soviet Russia began a war against Georgia by attacking Georgian armed forces stationed in Lore.<sup>6</sup> The Georgian army was soon forced to retreat. The newly appointed Commander-in-Chief, General Kvinitadze, who had been appointed on February 16, decided to leave Tbilisi on February 24 in agreement with the government.

The government of Democratic Georgia made a number of mistakes in terms of political calculations as well as military ones. Prominent military figures do not shy away from talking about this. It is precisely these mistakes that the Georgian general (who fought bravely on almost all fronts during the period of the Democratic Republic of Georgia for the independence of the homeland as a worthy commander) Giorgi Mazniashvili drew attention to in his memoirs that the great mistake of the government of the Democratic Republic of Georgia was to dismiss from the army those soldiers who had served for two years at a critical moment for the country.<sup>7</sup> The decision to suddenly evacuate Tbilisi and retreat without prior discussion with the leaders of the fronts, who in turn unexpectedly received the order to retreat, was also unjustified. The retreat, in fact, was more like an escape.

Giorgi Mazniashvili, who was the head of one of the fronts during the Tbilisi defense operation, openly expressed his dissatisfaction with this decision in his memoirs and considered the evacuation of the capital and the retreat in that form to be completely unjustified. In his memoirs, he said that one circumstance surprised him most of all: the evacuation of Tbilisi was such a big issue that it was impossible to explain the decision so hastily, so thoughtlessly.<sup>8</sup> The general also noted that the commander-in-chief did not invite the front commanders to the meeting called to discuss the withdrawal from Tbilisi and the retreat. The army retreating from Tbilisi was unable to implement the commander-in-chief's plan to meet the enemy at fortified defensive positions near Sajavakho. The

<sup>6</sup> Mikheil Bakhtadze, From the History of the Military Operations of the Russo-Georgian War of 1921, Publishing House "Artanuj", Tbilisi, 2013, p. 15.

<sup>7</sup> Giorgi Mazniashvili, Memories 1917-1925, "State Publishing House", Tiflis, 1927, pp. 153-154.

<sup>8</sup> Ibid., p. 175.

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reason for this was the activation of the Turks in Batumi, which ended with the capture of the city by the Turkish army. At this time, the government of the First Democratic Republic of Georgia, after Kutaisi, was finally located in Batumi.

## MAIN PART

The rapprochement between Soviet Russia and Kemalist Turkey proved fatal for the First Democratic Republic of Georgia. The union of the two imperialist countries was conditioned by the fact that the victorious "Entente" wanted to destroy the Bolshevik regime and divide the Ottoman territories. It was the union of these two resistance movements that became the reason for the rapprochement of the Turks and Russians for the first time in history.<sup>9</sup>

The goal of the new Ottoman government was to seize southwestern Georgia and the city of Batumi. The transfer of the Batumi region and the city of Batumi to Georgia by the British government was followed by protests from the Turks. On July 25, 1920, the Ottoman Grand National Assembly, headed by Mustafa Kemal, sent a letter of protest to the Minister of Foreign Affairs of the Democratic Republic of Georgia, E. Gegechkori, in which the Turkish side clearly expressed surprise and dissatisfaction with the capture of Batumi by the Georgian armed forces.

Turkish authors also spoke about the relationship between Kemalist Turkey and Soviet Russia in their works; the Soviet Russian government provided Turkey with financial and military assistance so that the Ottoman Empire would not fall under British control. In this way, the Kemalists managed to find a common language with Soviet Russia, from which they received 8.4 million gold rubles and even military assistance in 1920-1921. <sup>10</sup>The same was confirmed by another author; in 1919-1921, Lenin's Russian government provided the

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<sup>9</sup> Afanasian Serge. L'Arménie, l'Azerbaïdjan et la Géorgie de l'indépendance à l'Instauration du Pouvoire Soviéтиque 1917-1923, édition l'Armatan, Paris, 1981, p.89.

<sup>10</sup> Bolat Mehmet Ali. Milli mücadele dönemi'nde Türkiye'nin Kafkasya siyaseti (1919-1921), doktora tezi, İstanbul, 2017, s. 338.

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Turks with financial and military assistance so that the Ottoman Empire would not fall under British control.<sup>11</sup>

Canadian historian Andrew Anderson also spoke about the dubious deal between Bolshevik Russia and Kemalist Turkey and the illegal possession of the Batumi region by the Ottomans that how could the Ottomans "cede" to Georgia what they did not own, while Georgia did own it.<sup>12</sup>

Meanwhile, Western countries soon changed their policy towards the Bolsheviks and Kemalists. On March 9-13, 1921, the Turks signed an economic and political agreement in London first with France, and then with Italy, although nothing beneficial to Georgia was said in these documents.<sup>13</sup> Unfortunately, the Georgian government of that time did not pay attention to Angora-Moscow and concentrated its main forces in the West, which were striving to establish diplomatic relations with the governments of Western states, while the latter was accountable to both Russia and Turkey, while simultaneously maintaining their interests in Georgia and, in particular, in Batumi.<sup>14</sup>

Turkey assured the Georgian government that, if necessary, it would not back down from an open confrontation with Russia. Noe Zhordania said about the new Ottoman government's deal with the Bolsheviks that as soon as the war began, they also conducted political work... The Ottoman ambassador, Kyazim Bey, appeared to him the very next day and declared categorically that their interest was the independence of Georgia, and to achieve this goal they would not hesitate to go to war against the Bolsheviks.<sup>15</sup> Unfortunately, it was at this time that Russia ceded Artaani and Artvin to the Ottomans in exchange for the Ottomans taking a neutral position in Georgian-Russian relations.

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<sup>11</sup>Mustafa San. Türkiye-Kafkasya ilişkilerinde Batum (1917-1921). Sakarya üniversitesi, sosyal bilimrel enstitüsü doktora tezi, Mart 2010, s. 571.

<sup>12</sup>Andrew Anderson, Georgia and International Agreements: Memories 1918-1921, Mtsignobari Publishing House, Tbilisi, 2000, p. 403.

<sup>13</sup>Otar Janelidze, The expulsion of the Turkish army from Batumi, where the fate of Batumi was decided, in the book: The battle for Batumi, March 18-20, 1921. 2011, pp. 124, 132.

<sup>14</sup>Zurab Avalishvili, Georgian Independence in Politics of 1918-1921, Tbilisi, 1924, p. 228.

<sup>15</sup>Noe Zhordania, My Past, Publishing House "Sarangi", Tbilisi, 1990, p. 123.

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Georgian émigré historian Alexander Manvelishvili, referring to the trade agreement signed between England and Russia on March 16, 1921, wrote that a person would have to be blind not to notice the scattered clouds in the Georgian sky.<sup>16</sup> The fate of the first democratic republic of Georgia was actually decided. It was in this format that Kemalist Turkey acted, in order to seize quickly and as much territory as possible, before Soviet Russia completely reddened Georgia. In fact, a line would be drawn between the territory seized by Turkey and the rest of Georgia. After which the ally would try to legalize the seized territories of Georgia on the basis of an agreement with Russia.

On June 9, 1920, Mustafa Kemal announced mobilization in Eastern Anatolia and appointed Kızılm-Karabekir as the commander-in-chief of the Caucasus Front. While the new democratic Georgia was waging a fierce struggle to preserve its freedom and existence, at this very time, the Great National Assembly decided to attack Georgia.<sup>17</sup> A Turkish author also speaks of these events, stating that the government of the Democratic Republic of Georgia, realizing the imminent danger from the so-called "friendly" Ottoman Empire, strengthened its military forces on the Georgian-Ottoman borders. All the efforts of the Georgian government were directed towards preventing the occupation of the Batumi region by the Turks.<sup>18</sup>

In February-March 1921, the Georgian Democratic Republic opposed the military aggression of Soviet Russia with units of the regular army and the People's Guard. The invading army "fought with great dedication and courage for the name and profit of its people and the Russian homeland."<sup>19</sup> In the Kojori-Tabakhmela area, the enemy was met with particular resistance by the cadets of the Tbilisi Military Academy, who temporarily stopped the enemy's advance. On February 19, about 1,600 Russian Red Army soldiers were

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<sup>16</sup> Alexander Manvelishvili, *Russia and the Independence of Georgia*, San Francisco, 1984, pp. 277-278.

<sup>17</sup> Victor Nozadze, *The Struggle for the Restoration of Georgia over Meskheti*, Publishing House "Union of Georgian Theater Workers", Tbilisi, 1989, pp. 84, 94-95.

<sup>18</sup> Mustafa San. *Türkiye-Kafkasya ilişkilerinde Batum (1917-1921)*, Sakarya üniversitesi, sosyal bilimler enstitüsü, doktora tezi, Mart, 2010, s. 528.

<sup>19</sup> Grigol Lortkipanidze, *Thoughts on Georgia*, Tbilisi, 1995, p. 215.

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captured near Soganlughi, but Tbilisi could not be defended. On the night of February 24, the Georgian combat units were ordered to retreat and leave the capital.

The abandonment of the capital had a depressing effect on the Georgian cavalry. The morale and psychological mood of the retreating army noticeably deteriorated. Discipline decreased, desertion appeared here and there. In the words of the famous Georgian political figure, émigré Revaz Gabashvili, after Tbilisi, our army fought only “small” battles with the enemy near Avchala and Mukhatgverdi, then near Gori, a battle took place near the village of Osiauri and “a little more at the Kutaisi station.”<sup>20</sup>

Soon Turkey will reveal its insidious plans. This is also evident from the fact cited in the work of the Turkish author; Kızım Karabekir informed the General Staff in a telegram sent on March 9 that he had issued an order to seize Batumi on March 9, based on Directive No. 1/8 of March 8. He also informed the Red Army command about the decision. However, he also indicated that, based on the results of the London Conference, the agreement reached with the Georgian government was not long in coming.<sup>21</sup> Which sheds light on the so-called "friendship" of Turkey towards Georgia.

On March 12, 1921, at 12:00, the 3rd Battalion of the Ottoman 7th Regiment, led by Captain Talat Bey, and the Chorokhi detachment, created for the purpose of capturing Batumi, under the command of Major Ali Riza Bey,<sup>22</sup> entered Batumi. On March 12, approximately 1,200 Turkish troops were in Batumi.<sup>23</sup> After the true goals of the Turks were revealed and it became clear to the government of Noe Zhordania that the war with the Red Army was lost, the government of the Democratic Republic of Georgia was forced to agree to negotiations with the Georgian Revolutionary Committee.<sup>24</sup>

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<sup>20</sup> Revaz Gabashvili, What I Remember, in the book - Return, vol. 3, Tbilisi, 1992, p. 536.

<sup>21</sup> Serpil Sürmeli, Türk-Gürcü İlişkileri (1918-1921), Ankara, 2001, s. 65.

<sup>22</sup> Roin Kavrelishvili, The Batumi Issue (March 1921) in Turkish Historiography, in the book: “The Battle for Batumi”, Tbilisi, 2011, p. 46.

<sup>23</sup> Bolat Mehmet Ali. Milli mücadele dönemi'nde Türkiye'nin Kafkasya siyaseti (1919-1921), doktora tezi, İstanbul, 2017,

ss.574-575.

<sup>24</sup> Otar Gogolishvili, The Batumi Issue in the Kutaisi Negotiations of March 17-18, 1921, in the book: The Battle for Batumi, March 18-20, 1921, Tbilisi, 2011, p. 111.

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On March 17-18, 1921, negotiations were held in Kutaisi between the government of the Democratic Republic of Georgia and representatives of the Revolutionary Committee. They signed the following agreement: "1. To cease hostilities; 2. The democratic government liquidates the front against the Soviet troops; 3. The democratic government also leaves that part of the territory that it has occupied so far and allows the troops under the command of the Revolutionary Committee to enter the Batumi region to protect it from Turkish invasions; 4. From Sajavakho to Batumi, the administration of the Republic of Georgia still remains, and the army of the Revolutionary Committee is entering here as a force friendly to the democratic government."<sup>25</sup>

Soon, the democratic government of Georgia departed abroad through the port of Batumi, having overtaken the Red Army division under the command of D. Zhloba, which was also tasked with overthrowing the Menshevik government of Georgia.<sup>26</sup> V. Lenin expressed regret about this fact in his work, while at the same time noting the annexation of Batumi to Soviet Georgia that they acquired territory not for the Russians, but for Soviet Georgia - Batumi and its environs, and also that they lost the Mensheviks who had left for Constantinople, not a small number.<sup>27</sup>

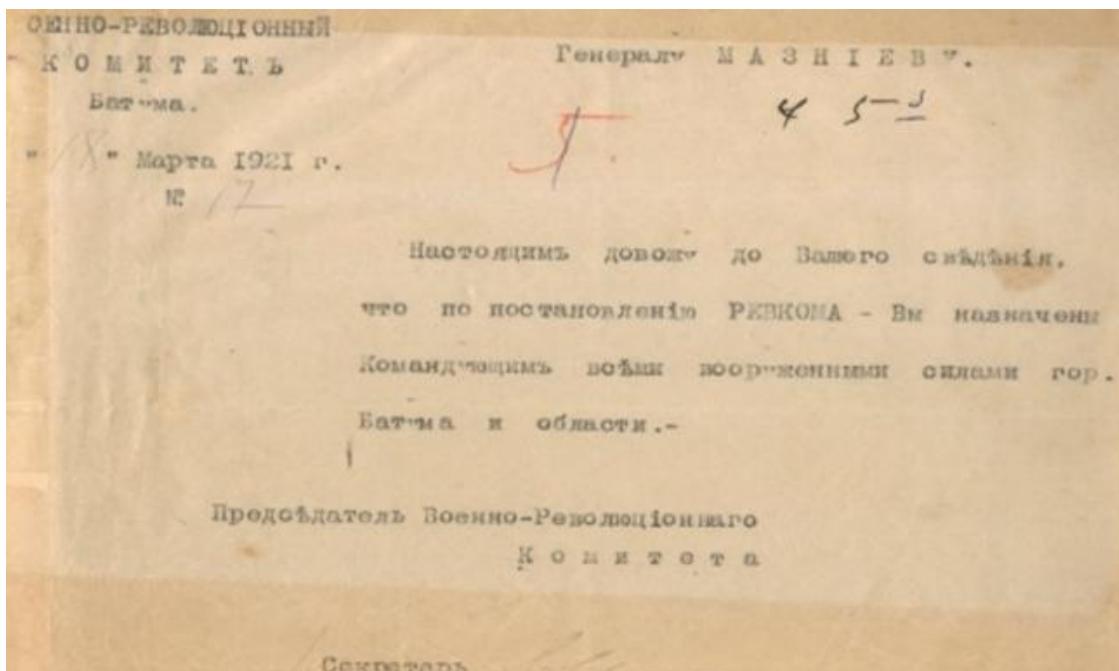
As it is known, Giorgi Mazniashvili, who had been in Batumi since March 17, 1921, after some hesitation, agreed with the Bolsheviks to lead the liberation of Batumi from the Turks. The chairman of the Revolutionary Committee, S. Kavtaradze, confirmed and informed G. Mazniashvili of the appointment of the general leader of the military units in Batumi.

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<sup>25</sup> Levan Toidze, Intervention, Occupation, Forced Sovietization, and Actual Annexation, Tbilisi, 1991, pp. 137-138.

<sup>26</sup> Jemal Karalidze, The Mission of the Zhloba Division, in the book: The Battle for Batumi, March 18-20, 1921, Tbilisi, 2011, p. 169.

<sup>27</sup> Vladimir Lenin, Works Volume 45, Tbilisi, 1972, p.



Picture. 1,<sup>28</sup>

As noted, initially, G. Mazniashvili even refused S. Kavtaradze's offer, but realizing the difficult current situation, he made the absolutely right decision and agreed to the Bolshevik government of the city, to head the operation to expel the Ottomans from Batumi. G. Mazniashvili appealed to the leadership of the Batumi Revolutionary Committee, if the new Georgian government would not consider their service to the Fatherland during the Menshevik rule as evil and would give them a guarantee that not a single soldier, from the general to the ordinary soldier, would be punished for his previous service, he was ready to continue his military service and from that day he would begin military action against the Ottomans.<sup>29</sup>

Initially, the Aspindza battalion, which was stationed in the city's barracks and strategic forts, was tasked with protecting Batumi.<sup>30</sup> The Kemalists also used Georgians against their native country, which unfortunately characterized all eras of Georgian history. Akaki Vasadze confirms this in his memoirs, when he talks about the participation of Georgians

<sup>28</sup> ATSSA, Fund I-67, Anastas. 1, Sak. 53, F. 5-A.

<sup>29</sup> Giorgi Mazniashvili, Memories 1917-1925, "State Publishing House", Tiflis, 1927, p. 200.

<sup>30</sup> Akaki Vasadze, Memories, Thoughts, Tb., 1977, p. 99

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living in Javakheti in the Turkish army. Akaki Vasadze, who was in Batumi and was enlisted in the Aspindza battalion as a machine gunner, even offered a Javanese soldier a cigarette and had a short conversation in his native language.<sup>31</sup>

By that time, several military fortresses had been set up in Batumi and its surroundings. Among them: Anari, Stefanovka, Bartskhani, Kakhaberi, Hamidiye, Didi and Patara Sameba, etc. The most important strategic fortress in the battle for Batumi was the Kakhaberi Fort. With the capture of this fort, the Ottomans became the de facto owners of Batumi. That is why G. Mazniashvili turned all his attention here. He also sent a relief unit to Kakhaberi, because his reserves were scarce. The commander-in-chief, in agreement with the commander of the Red Cavalry, D. Zhloba, temporarily stationed Russian horsemen at the Anari and Stefanovka forts, and ordered the Georgian garrisons stationed there to reinforce the Kakhaberi Fort by leaving the city.<sup>32</sup> These units had to overcome a number of obstacles on various streets of Batumi and engage in brief battles with Turkish soldiers. Nevertheless, the Georgian army successfully completed the task and joined the garrison of the Kakhabri Fort.

The battles between the Georgian army and the Turkish soldiers, whose number by that time was already about 3,500 people,<sup>33</sup> took place in several other places. The Turks were unable to capture the baggage station, which had become the front line, because here the Georgian troops bravely faced the enemy. The soldiers' attempt to seize the building where the Revolutionary Committee was located also ended in vain. The newly formed Georgian cavalry unit turned the Ottomans back.<sup>34</sup>

G. Mazniashvili divided the fortified area of Batumi into two combat zones. He subordinated the Kakhabri and Bartskhani forts to General Varden Tsulikidze, and the second part of the city with the Stepanovka and Anaria forts to General Data Artmeladze. On March 18, the Turkish army stopped and disarmed the first echelon of Soviet troops

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<sup>31</sup> Ibid. Akaki Vasadze, *Memories, Thoughts*, Tb., 1977, p. 103.

<sup>32</sup> Ibid. Otar Janelidze, March 18-20, 1921. 2011, pp. 147.

<sup>33</sup> Ibid. Levan Toidze, 1991, pp. 137-138.

<sup>34</sup> Ibid. Otar Janelidze, March 18-20, 1921. 2011, pp. 148.

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advancing towards Batumi. The Georgian cavalry seized this opportunity to storm the port of Bartskhani, destroying the entire Turkish garrison and capturing 218 soldiers.<sup>35</sup>

The main battle took place on March 19, 1921. In the morning, the Turkish soldiers went on the offensive. The defense of the Kakhabri Fort was of particular importance. If the Georgian army were defeated here, there would be a real threat of losing Batumi. The command of the Georgian army properly assessed the importance of the Kakhabri Fort and strengthened its defense. The Ottomans launched an intensified attack on the Kakhabri front, where the battery of the 2nd artillery division was located under the command of Major Petre Karumidze. The artillerymen especially distinguished themselves in this battle. <sup>36</sup>The Georgian army successfully repelled the enemy attacks and inflicted great damage on the Turkish occupants. This combat unit also included Petre's half-brothers, officers Lado and Davit Karumidze. <sup>37</sup>The Georgian artillerymen performed brilliantly, the Turks could not organize against them, but the losses were also significant. The officers were already responsible for firing from cannons. It became necessary to find soldiers with some experience in firing from cannons. By order of G. Mazniashvili, about 20 such volunteers were gathered from among the residents of Batumi, who were immediately sent to rescue P. Karumidze.

The enemy, defeated at Kakhabri, retreated to the Stepanovka fortress, but the 4,000th regiment that had been ambushed there opened fire, after which the Ottoman unit was completely broken and scattered. <sup>38</sup>The Turks suffered heavy losses. They lost many soldiers and two prominent staff officers. The gorges of Kakhabri were full of the corpses of killed soldiers G. Mazniashvili recalled.<sup>39</sup>

The Ottoman soldiers, confused by the bravery of the Georgian artillerymen and the rest of the army, spread rumors that the Georgians were rescued by the French and English, that the foreign cruisers were shelling the forts, and that was why the Ottomans suffered

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<sup>35</sup> Ibid. Giorgi Mazniashvili, 1927, p.

<sup>36</sup> Ibid. Otar Turmanidze, 2012, p. 34.

<sup>37</sup> Geronti Kikodze, Notes of a Contemporary, Tbilisi, 2003, p. 60.

<sup>38</sup> Newspaper."Socialist-Federalist", 1921, May 13.

<sup>39</sup> Giorgi Mazniashvili, Memories, Batumi, 1990, p.207.

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greatly.<sup>40</sup> The same information was confirmed by the words of the commander of the Russian army, Zolotov, who came out of the Mamison Pass and a destroyer warship sailing under the French flag appeared on the Black Sea, which approached them within machine-gun range and opened fire on their units.<sup>41</sup>

Of course, both pieces of information were outright lies and did not correspond to the truth. Moreover, Zolotov was clearly lying in his memoirs when he named Gobelia, not S. Kavtaradze, as the chairman of the Revolutionary Committee that as soon as the clashes ended, a delegation from Batumi, led by Comrade Gobelia, arrived to negotiate with them. Before that, they declared themselves the new government of the city, that was, the Military Revolutionary Council.<sup>42</sup> The French squadron, by order of Admiral Dumenil, did indeed provide artillery support to the Democratic Republic of Georgia in repelling the Red Army units that invaded Abkhazia, bombarding their positions near Gagra, in the village of Pilenkovo (Gantiadi), in the Gudauta and New Athos regions,<sup>43</sup> but foreign ships did not participate in the battle for Batumi.

The entire burden of liberating Batumi and its region fell on the patriot general and officers, soldiers, volunteers and the local population. According to the chairman of the Batumi Revolutionary Committee, Sergo Kavtaradze, the units of the People's Guard, who were in the city with their commanders (Al. Dgebuadze, V. Jibladze), did not participate in the battle. They only demanded money for the demobilization of the Guard, which was not granted.<sup>44</sup> However, this information must be objective, because in his own memoirs he notes that General Mazniashvili was planning to flee to Turkey with his family before he was offered to gather and command an army to fight against the Turks.<sup>45</sup> This fact is not and could not be presented in other sources, because General G. Mazniashvili arrived in

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<sup>40</sup> Ibid., p.206.

<sup>41</sup> Davit Alaverdashvili, Ivane Zolotov's Memories of Crossing the Mamisoni Pass, Taking Kutaisi and Batumi, and Establishing Soviet Power in Adjara, in the book: The Occupation of Georgia, Bolshevik Interpretations (1921), Tbilisi, 2017, p.15.

<sup>42</sup> Ibid., p. 16.

<sup>43</sup> Temur Chachanidze, French Squadron Operations Off the Coast of Georgia, Journal "Arsenal", 2006, No. 6, June, pp. 41-42.

<sup>44</sup> Sergo Kavtaradze, 1921, February, Journal "Mnatobi", 1957, No. 11, p. 149.

<sup>45</sup> Ibid., p. 147.

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Batumi from Sajavakho, from fortified positions, and how could his family approach him?! Accordingly, the information about the non-participation of the Guard units in the battle cannot be objective either. I think that this information is due more to the downgrading of the role of the Guard than to the transmission of objective information. For the Bolsheviks, the People's Guard was the most dangerous force and a sworn enemy. This is confirmed by Pavel Sytin, a resident of Soviet Russian military intelligence, who, in his secret reports while developing plans for the occupation of Georgia, considers the People's Guard to be the main opponent and the most effective combat formation.<sup>46</sup>

It was the People's Guard that suppressed a number of Bolshevik speeches in the country. Therefore, the information about the Guard conveyed by S. Kavtaradze must have been deliberately concealed. At a time when G. Mazniashvili was gathering troops by name and at that time not using the Guard units in the city is unthinkable; especially when the Guard units were relatively better supplied in every way and the generals themselves confirm this in their memoirs. If we add to all this the existence of those units that were supporting the democratic government abroad, in fact, there was a sufficient force in Batumi in the form of the People's Guard.

Several facts support the participation of the People's Guard in the liberation of Batumi; before boarding a ship for a tour abroad, Noe Zhordania instructed the Commander-in-Chief of the Military Forces, General Giorgi Kvinitadze, to issue an order to demobilize the Georgian army. However, in G. Kvinitadze's words, "this strange order" was "unrealistic and unfulfillable." The order was not transmitted to the general in Sajavakho, because the telegraph station was already in the hands of the Turks at that time, and it was found impossible to send the document by rail. It is noteworthy that the commander-in-chief did not issue an order to demobilize the Batumi garrison either, because it "did not correspond to the situation due to the aggression shown by the Turks." Moreover, Giorgi Kvinitadze

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<sup>46</sup> David Khvadagiani, Foreword, in the book: The Heavy Cross (Records of a People's Guard), Publishing House "Ziari", Tbilisi, 2022, p. 13.

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also instructed the army units stationed at the forts to firmly defend their positions in the event of hostile action by the Turks.<sup>47</sup>

## CONCLUSION

After three days of brave fighting under the command of G. Mazniashvili, the Georgian army defeated the Kemalists on March 20, 1921. Not a single Soviet soldier took part in the battle, and this is confirmed by the representatives of the Bolshevik government themselves; in the words of the Chairman of the Georgian Revolutionary Committee Filipe Makharadze, that the Georgian army, decided to return Batumi to Soviet Georgia and did it with its own blood.<sup>48</sup> G. Lortkipanidze<sup>49</sup> also confirmed the samethat the remnants of the Georgian army, having fought the enemy, turned him back and with their own blood and bones, they tied the steel flag of Georgia to the former Aziziye and now Patriots Square.<sup>50</sup> In the battle for Batumi, 84 Georgian soldiers died. The Ottomans lost about 150 officers and soldiers. Although Batumi remained part of Soviet Georgia,<sup>51</sup> if it had not been for the development of events, in which the Georgian fighters under the leadership of General Mazniashvili played a major role, Batumi and Adjara in general would most likely have remained in Turkish hands forever.

It is regrettable that no scholarly work has yet provided a concrete fact about the participation of the People's Guard units in the battle for the liberation of Batumi in March 1921. This issue is the subject of future research; it is necessary to answer the questions: How many People's Guard units and personnel were in Batumi in March 1921? In what composition did the mentioned units participate in the liberation of Batumi? If not, then why? Despite my detailed study of the materials preserved in the Central Archives of Adjara, no source could be identified regarding the participation of the People's Guard in

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<sup>47</sup> Giorgi Kvinitadze, *My Memories*, Vol. II, Tbilisi, 2014, pp. 89-90.

<sup>48</sup> Geronti Kikodze, *Tamedrov's Notes*, Tbilisi, 2003, p. 60.

<sup>49</sup> Deputy Chairman of the Government and Minister of Defense of the Democratic Republic of Georgia.

<sup>50</sup> Grigol Lortkipanidze, *Thoughts on Georgia*, Tbilisi, 1995, p. 210.

<sup>51</sup> Lela Salaridze, *Batum during the Democratic Republic of Georgia (1918-1921)*,

გამომცემლობა „ფავორიტი“, თბილისი, 2023, გვ. 394.

the Battle of Batumi. However, I believe that the People's Guard units would definitely have been involved in the battle for the liberation of Batumi.

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## THE CHALLENGES OF IRAN'S FOREIGN POLICY AFTER THE ISLAMIC REVOLUTION

Lieutenant Colonel Omar Turmanidze<sup>1</sup>

<https://orcid.org/0009-0000-3957-4472>

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### ABSTRACT

This article examines the transformation of Iran's foreign policy and international relations in the aftermath of the 1979 Islamic Revolution. It also reconstructs the pre-revolutionary period, focusing on U.S.-Iran relations and demonstrating the extent to which the two states were bound by a close strategic partnership. The study analyzes the reorientation of Iran's external behavior following the Revolution, a process that began in earnest with the U.S. embassy hostage crisis and has continued to shape bilateral relations up to the present day. The article places particular emphasis on the evolution of U.S.-Iran relations, the formation and consolidation of anti-American ideology, and the gradual institutionalization of a sanctions-based regime. It offers an in-depth examination of how pre-revolutionary Iran, under the rule of Shah Mohammad Reza Pahlavi, came to occupy the position of one of the United States' principal strategic partners in the Middle East. This partnership rested on far-reaching political, economic, and military cooperation, including U.S.-UK involvement in the 1953 coup, support for the peaceful development of nuclear energy under the "Atoms for Peace" program, substantial American investment in Iran's oil sector, and extensive military-technical collaboration. The article also explores the post-revolutionary period, focusing on the systematic dissemination of the Islamic Revolution's ideas both within Iran and across the broader region. At its core, the article seeks to explain how profoundly Iran's external orientation was transformed in the wake of the Islamic Revolution. U.S.-Iran relations shifted from a de facto strategic partnership to a relationship characterized by open hostility and rivalry. From the hostage crisis onward, successive U.S. administrations progressively tightened sanctions against Iran. Under these conditions, the post-revolutionary leadership in Tehran has grounded the country's foreign policy in explicitly anti-American and anti-Western rhetoric and practice, while simultaneously deploying this ideology domestically as a key instrument for consolidating personalized, centralized rule.

**Keywords:** Islamic Revolution; foreign policy; United States; Iran; sanctions nuclear program; governance.

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<sup>1</sup> Head of the Bachelor's Program in Defence and Security at LEPL David Aghmashenebeli National Defence Academy of Georgia, Ph.D. student of political science at the Caucasus International University

## INTRODUCTION

The Islamic Revolution in Iran in 1979 did not begin as a religious revolution. At that time, the economic stagnation in Iran, the disillusionment of the middle class with the Shah's corrupt and repressive regime were important factors that led to the revolution. These internal factors were accompanied by the rise of nationalist sentiments as a result of unequal partnership relations with the United States (US). This period of the 20th century is characterized by the emergence of nationalist sentiments and interests. The Islamic Revolution in Iran gave a very strong impetus to the strengthening of the Shi'a branch of Islam. Iran's Shi'a population was an active and growing supporter of the revolution, and it can be said that here the religious factor played a major role. The religious factor and the involvement of the Shi'a united completely different elements and social groups into a single fist around a common goal. The symbol of this unity and the consolidation of different social strata became the clearly defined, charismatic leader Ayatollah Ruhollah Khomeini<sup>2</sup>. It can be said that, unlike other revolutions in the world, the Iranian Revolution was a truly popular revolution. The final victory and the achievement of the set goals became possible only thanks to the unprecedented activity of the broad masses.

## MAIN PART

Prior to the 1979 Islamic Revolution, relations between Iran and the United States were exceptionally close and strategic. Their mutual cooperation began in the aftermath of the Second World War, and especially intensified following the 1953 coup d'état in Iran, during which the United States and the United Kingdom supported the overthrow of Prime Minister Mohammad Mossadegh<sup>3</sup> and facilitated the consolidation of power by Shah Mohammad Reza Pahlavi. Subsequently, a strategic alliance was forged between Iran and the United States, which for Washington also functioned as a counterweight to the Soviet Union in the Middle East during the Cold War. In addition, they shared significant

<sup>2</sup> Ayatollah Ruhollah Khomeini - (1902-1989) Iranian Shiite spiritual leader. Political and spiritual leader of the 1979 Iranian Islamic Revolution, which led to the overthrow of Mohammad Reza Pahlavi, the last Shah of Iran.

<sup>3</sup> Mohammad Mossadegh - (1882-1967), democratically elected Prime Minister of Iran from 1951 to 1953, who attempted to implement progressive reforms, including the nationalization of the oil and gas sector, but was overthrown by US and British intelligence services in a coup d'état.

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economic interests, largely tied to the oil sector. The United States played an active role in Iran's petroleum industry and was one of the largest investors in this domain. Iran, for its part, was heavily dependent on American capital and technology, which it actively employed in an effort to transform the country from a regional actor into a global player. U.S.-Iranian relations also encompassed intensive military cooperation. The United States supplied Iran with advanced weaponry and equipment, which made Iran's armed forces among the most powerful in the region.

As noted above, the Shah rose to power with the support of the British and U.S. intelligence services and, throughout his reign, benefited from Washington's active backing. In turn, he was regarded as a loyal ally of the United States. However, it is important to underline that the Shah's authoritarian rule, coupled with deeply entrenched corruption, generated a grave socio-economic environment, which progressively intensified public discontent with his regime. In summary, until 1979 U.S.-Iranian relations were characterized by profound political, economic, and military cooperation. Yet this partnership also contributed to the escalation of popular dissatisfaction, which became one of the main driving forces behind the Islamic Revolution.

Active U.S. support for the Shah was followed by the launch of a large-scale nuclear program in Iran in the first half of the 1970s. Iran's nuclear energy program initially began in the late 1950s, at the level of scientific research only, with the encouragement of the United States. At that time, the U.S. was implementing the "Atoms for Peace" program, within the framework of which, in March 1957, the United States and Iran signed an agreement "On Cooperation in the Civil Uses of Atomic Energy," which was subsequently renewed in 1964. Under this agreement, the U.S. Atomic Energy Commission transferred a 5-megawatt nuclear reactor to the Nuclear Research Center of the University of Tehran<sup>4</sup>.

The analysis of the historical context of U.S.-Iranian bilateral relations discussed above is considered essential for drawing analogies with contemporary dynamics, since the role

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<sup>4</sup> Lasha Bazhunaishvili, "Nuclear Syndrome and US Strategy in the Persian Gulf", Universal Publishing House. Tbilisi 2014.

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of the United States in shaping Iran's domestic and security policy is not only a subject of debate among various expert circles, but has also been decisive at different stages of history, particularly in the period following the Second World War and up until the Islamic Revolution.

The Islamic Revolution of Iran, which began in January 1978 and ended with the overthrow of the Shah in April 1979, was an attempt at religious, ideological, political, and social transformation in Iranian history.

At the forefront of this revolution stood Ayatollah Ruhollah Khomeini, whose influence was grounded both in his charismatic leadership and his innovative politico-theological doctrine. From exile in Najaf and later from Paris, Khomeini mobilized a broad opposition through a populist interpretation of Shi'a Islam, criticizing the Shah's authoritarianism, Western cultural penetration, and economic inequality, while simultaneously calling for the restoration of Islamic values and governance.

The overthrow of the last Shah in Iran inflicted a significant blow to Washington's influence in the Middle East. In the aftermath of the revolution, the policies pursued under Ayatollah Khomeini's leadership, combined with the revolutionary zeal displayed by the new authorities and the countermeasures undertaken by the United States against Khomeini, further exacerbated bilateral tensions between the U.S. and Iran. Revolutionary Iran initially adhered firmly to a policy of "neither East, nor West," rejecting the prevailing bipolar global order.

On November 4, 1979, students supporting Ayatollah Khomeini stormed the premises of the United States Embassy in Tehran and took the majority of the embassy staff hostage. In the morning of November 4, hundreds of young Iranian students, backed by a crowd of 3,000–5,000 people, scaled the embassy walls and entered the compound. They blindfolded and detained dozens of U.S. citizens—members of the embassy staff—many of whom remained in captivity for 444 days. Naturally, this attack resulted in a severe deterioration of U.S.-Iranian relations and triggered a major diplomatic crisis. The hostage-taking of U.S. Embassy staff in Tehran was followed by the freezing of Iranian assets in the U.S. banks.

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These were the sides' immediate actions and countermeasures. Added to this was the support extended by the United States and the broader West to Iraq during the Iran-Iraq War, which further exacerbated the resentment of Iran's revolutionary leadership and rendered U.S.-Iranian relations increasingly strained.

The Iran-Iraq War proved extremely burdensome for the revolutionary leadership. Following the deterioration of relations with the United States and the West, the architects of the Islamic Revolution under Ayatollah Khomeini increasingly lost diplomatic footholds on the international stage. The war with Iraq inflicted enormous damage on the economy of the Islamic Republic, leading to the impoverishment of ordinary Iranians and a drastic decline in living standards. Individual incomes fell by at least 35-40% compared to 1978.

On the other hand, however, the war became an important factor in consolidating national unity: ordinary Iranians developed, and increasingly internalized, a sense of citizenship of the Islamic Republic. This was the first conflict since the nineteenth century in which large numbers of ordinary Iranian citizens were directly involved<sup>5</sup>.

During the Iran-Iraq War, the United States and Iran formally severed diplomatic relations; however, it later became known that secret negotiations regarding arms supplies were taking place between the two states. As a result of these talks, in 1986 Washington, through the mediation of Israel—whose interests did not include the strengthening of Saddam Hussein's regime—sold Iran spare parts for military equipment. The funds received from these transactions were then used by the United States to finance the opposition to the pro-communist regime in Nicaragua. The disclosure of this fact dealt a major blow to the then U.S. administration and caused serious resonance among American foreign-policy circles. This episode indicates that, despite the absence of formal diplomatic relations, when the strategic interests of great powers are at stake, they consistently find space and form for cooperation.

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<sup>5</sup> G.Sanikidze, Alasania G. Gelovani N. "History of the Middle East and its Relations with the South Caucasus" (XIX century - beginning of XXI century), Tbilisi 2011, pp. 317-320

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With regard to the foreign policy priorities of the Islamic Republic of Iran, it should be noted that the new leadership, which came to power on a revolutionary wave, effectively and fundamentally transformed Iran's foreign policy priorities, characteristics, and geopolitical strategies from 1979 onward. Prior to the revolution, during the rule of the Pahlavi dynasty, Iran maintained a firm alliance with the West—particularly with the United Kingdom and the United States—and sought to preserve the regional leadership status quo.

After the revolution, the country's foreign policy trajectory changed dramatically: close cooperation and *de facto* strategic partnership with the West were replaced by a strategy of "maximizing revolutionary influence." This entailed reorienting the functioning of all state institutions, as well as education in universities and schools, from serving national/state interests towards the dissemination of revolutionary ideology within Iran. At the same time, the leadership set as a goal the export of the Islamic Revolution not only within Iran, but across the broader region—throughout the Middle East, primarily in its Shi'a spheres. Their aim was to extend this revolutionary approach and thereby promote a revision of the regional order. Another explicit objective was the export of the Iranian Revolution to neighboring countries in order to strengthen Islamic movements and, in turn, ensure the security and consolidation of the revolution itself.

Ayatollah Khomeini's well-known slogan—"Neither East nor West, the Republic only Islamic"—articulated the core line of Tehran's foreign policy: to refrain from joining any great power bloc and to preserve Iran as an independent Islamic republic.

It is noteworthy that anti-American sentiments in Iran did not originate with the Islamic Revolution; rather, they are conditioned by a range of historical-political factors. One of the main foundations is the Iranian collective memory of the 1953 military coup, when, as noted above, with the support of British and American intelligence services, the

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democratically elected Prime Minister Mohammad Mossadegh was removed from office and the Shah's rule was restored<sup>6</sup>.

U.S. interference in Iran's domestic politics and the subsequent active support for the Shah's regime, including in military and economic terms, generated among Iranians a profound sense of violated sovereignty. In the 1960s, the pro-Western reforms known as the Shah's "White Revolution" provoked protests from conservative clerical circles and the religious elite. The then opposition leader, Ayatollah Khomeini, openly declared that the Shah was a "poor, miserable man" and a "puppet of the American and Israeli governments." Iranians were particularly angered by the "capitulatory" agreements with the United States, which granted special immunities to American personnel in Iran—an arrangement perceived by many Iranians as an affront to the country's sovereignty.

As noted above, the hostage crisis further intensified the confrontational rhetoric between the United States and Iran. Anti-American sentiment became one of the ideological pillars of the Islamic Republic. Ayatollah Khomeini and his followers effectively instrumentalized anti-Americanism to suppress domestic opposition and consolidate their own power and legitimacy. Anyone who criticized the regime was branded an enemy of Iran and, first and foremost, an "agent" of the United States. In this way, anti-American rhetoric became a central ideological line for the regime in the Islamic Republic of Iran. On the one hand, it served to unify supporters of the Islamic Republic; on the other hand, against the backdrop of a crisis of legitimacy and diplomatic isolation, it redirected public attention from domestic problems to external threats through the construction of an enemy image. This approach left virtually no space for dissenting or critical opinion within the country.

In U.S.-Iranian relations, beyond political grievances and ideological factors, subsequent measures adopted by Washington further reinforced anti-American sentiments within Iran. One such example was the support extended by the United States to Iraq during the

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<sup>6</sup> Hasan, Moinul. Nuclear program of Iran and concerns of USA. Department of International Relations Jahangirnagar University. 2019.

Iran-Iraq War, which was perceived in Iran as a policy directed against the Iranian people themselves. U.S. backing of Saddam Hussein was interpreted by both the Iranian population and the country's leadership as an explicitly hostile political move. Moreover, even prior to the war, U.S. sanctions and security policies towards Iran contributed to the alienation of decision-makers on both sides. It should also be noted that within Iranian society there existed various strata and social groups—particularly among the younger generation—that were relatively well-disposed toward the United States and the West. Nevertheless, the official rhetoric of Tehran sought, at the national level, to vilify the United States and to promote a political and propaganda narrative according to which America behaved toward Iran as a "Great Satan." The regime pursued this approach in order to preserve internal cohesion and consolidate popular support.

Following the Islamic Revolution, the shift in rhetoric towards the United States and the regime's de facto designation of Washington as an enemy gradually led Iran into recurrent diplomatic crises and placed the country under an expanding sanctions regime. In the U.S. policy, sanctions became the main instrument of its external strategy towards Iran, with their goals and scope evolving over time. The initial U.S. sanctions imposed in response to the 1979 hostage crisis were aimed at pressuring Tehran to release the embassy staff held hostage and at punishing the revolutionary regime for its violation of international norms. Subsequently, during the 1980s and 1990s, the sanctions were broadened and came to serve several declared objectives: preventing Iran's support for terrorism and curbing its destabilizing role at the regional level. Later, from the 2000s onward, U.S. sanctions expanded further, with their primary declared aim becoming the limitation of Iran's nuclear program. Officially, the main purpose of these sanctions was to compel Iran to comply with international security measures in the nuclear domain. For example, after 2006 it emerged that Iran continued uranium enrichment despite multiple UN resolutions; in response, the UN Security Council and the European Union imposed a

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wide array of sanctions on Iran, designed to force Tehran to allow experts from the International Atomic Energy Agency (IAEA) to monitor and oversee its nuclear activities<sup>7</sup>.

As already noted, Khomeini's rise to power in 1979 brought about a radical ideological transformation in Iran's foreign policy. The new Islamic Republic proclaimed the rejection of both U.S. and Soviet influence in favor of Islamic independence and unity. Khomeini's Shi'i Islamist worldview depicted the United States as the "Great Satan" for the Muslim world, and he adopted an overtly hostile stance toward both superpowers of the Cold War. Initially, hostility was not directed solely against the United States; the other pole of the Cold War, the Soviet Union, was likewise deemed unacceptable.

The leaders of the revolution declared it their duty to support oppressed Muslims and to export the ideals of the Islamic Revolution to other Muslim countries of the Middle East. In a 1980 address, Ayatollah Khomeini stated: "We must endeavor to export our revolution to the world... Islam does not regard different Islamic countries differently and stands in support of all the oppressed peoples of the world." Indeed, after the revolution, the constitution adopted in Iran even codified the objective of disseminating the Islamic vision of the revolution beyond Iran's borders. This revolutionary zeal and religious mission shaped Iran's international conduct under Khomeini's leadership, reinforcing its confrontation with Western powers and its strategy of supporting Islamist movements across the Middle East.

The United States responded to the Islamic Revolution's attempts to disseminate its ideology by imposing economic sanctions on Iran. In April 1980, the U.S. oil corporations severed their ties with Iran within the framework of these sanctions. The economic and diplomatic isolation initiated by Washington was subsequently tightened. The crisis "enhanced Khomeini's prestige" domestically, while at the same time irreparably damaging Tehran-Washington relations. By 1984, matters had reached the point where the United States officially designated Iran as a state sponsor of terrorism and supported Iran's

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<sup>7</sup> D.Mohammadi, US-led economic sanctions strangle Iran's drug supply. 2013. <https://surl.lu/wuxogy>, (Accessed 08.12.25).

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adversaries in regional conflicts<sup>8</sup>. Nevertheless, certain complications emerged—most notably the Iran–Contra affair of 1985–1986, when U.S. officials secretly sold arms to Iran (despite the existing embargo) in the hope of securing the release of American hostages held in Lebanon by pro-Iranian militants. This covert arrangement stood in stark contradiction to the prevailing atmosphere of enmity between the two nations. Overall, however, the period from 1979 to 1989 was characterized by relentless hostility: formal diplomatic relations were absent, while U.S. sanctions and a comprehensive trade embargo remained in force.

U.S. efforts were aimed at containing Iran's influence. Towards the end of the Iran-Iraq War, the United States even undertook military intervention in the Persian Gulf to protect oil shipments, bringing it into direct confrontation with Iranian forces. Tensions reached their peak in 1988, when the U.S. Navy shot down Iran Air Flight 655, a civilian airliner—an event that further underscored and deepened the antagonism between the two states<sup>9</sup>.

With regard to Iran's relations with Western Europe during this period, they were likewise confrontational in nature, albeit somewhat more attenuated. Initially, certain European states welcomed the Islamic Revolution in Iran—for example, France granted Khomeini asylum in exile in 1978—however, Tehran's subsequent actions soon alarmed European capitals. The hostage crisis and the execution of officials from the Shah's regime by the new authorities elicited strong condemnation from European leaders. In April 1980, the nine member states of the European Economic Community joined the United States in imposing sanctions on Iran, declaring an embargo on trade and threatening the withdrawal of diplomats unless the hostages were released. Throughout the 1980s, Iran remained largely isolated from Europe. European governments viewed Khomeini's revolutionary methods and human rights violations with caution, while Iran, for its part, regarded Europe with suspicion. The main point of contention was Iran's war with Iraq. Western European powers openly tilted towards Baghdad. France, the United Kingdom, and West Germany

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<sup>8</sup> M. M. Mottale, *The Islamic Republic of Iran: The Genesis of its Foreign Policy since 1979*. (2015).

<https://surl.li/oqgadj>, (Accessed 08.12.25)

<sup>9</sup> Ibid,

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became major arms suppliers to Saddam Hussein's regime, providing aircraft, missiles, and even components for chemical weapons—an issue to which Iran strongly objected. France, for instance, sold Iraq more than a hundred fighter jets and anti-ship systems that were subsequently used against Iranian oil tankers<sup>10</sup>.

By the late 1980s, relations had further deteriorated due to terrorism and ideological conflict. Iran was implicated in the assassination of dissidents on European soil. Europe consistently condemned Iran's sponsorship of terrorism and its violations of international norms in this regard. In sum, from 1979 to 1989, Iran's relations with the West were characterized by hostility and mutual distrust. In stark contrast to the Shah's era, the Islamic Republic under Khomeini positioned itself against Western influence, a stance that resulted in diplomatic isolation, sanctions, and recurrent crises in its relations both with the United States and with Europe.

Alienated from the West and effectively locked in a hostile standoff with it, Khomeini's Iran redirected its focus towards reshaping the regional order in the Middle East. In the post-revolutionary period, Tehran pursued an assertive, ideologically driven regional policy aimed both at safeguarding the revolution and at disseminating it across the broader Middle East. This strategy rested on two main pillars: Iran's prosecution of the Iran-Iraq War and its support for Islamist movements and militant proxies as instruments for the "export" of the revolution<sup>11</sup>.

## CONCLUSION

Thus, the present article analyzes the consequences of the Islamic Revolution in Iran and the foreign-policy challenges of post-revolutionary Iran. It examines the onset of a new phase in the country's history following the Islamic Revolution—both in terms of foreign policy and the military-political environment. The article offers a comprehensive analysis

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<sup>10</sup> M. M. Milani *The making of Iran's Islamic revolution: From monarchy to Islamic republic* (2nd ed.). Boulder, CO: Westview Press, (1994). <https://surl.li/nsdqr>, (Accessed 08.12.25)

<sup>11</sup> H.Safavi, *The crisis in relations between Iran and European countries: Future prospects*, (2023). <https://studies.aljazeera.net> (Accessed 08.12.25)

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of the problems and challenges Iran faced under the sanctions regime, as well as the domestic political reforms it undertook in order to cope with international sanctions.

In a broader perspective, the article examines the Islamic Revolution in Iran and the new stage in revolutionary Iran's foreign policy. It covers the period from the Islamic Revolution up to the death of Ayatollah Khomeini, with the primary focus placed on the repercussions of the revolution in international politics: the diplomatic isolation triggered by the hostage crisis, the impact of the Iran-Iraq War on Iran's domestic and external affairs, and the evolution of Iran-West relations. The post-revolutionary decade, 1979–1989, may be regarded as the most challenging period for the revolutionary government, as multiple internal and external political factors coincided. On the one hand, Iran faced international isolation and U.S. sanctions on the other, the war with Iraq inflicted substantial damage on the country, both at the regional and global levels—particularly given that, during the Iran-Iraq War, the United States and the broader West largely assumed the role of supporters of Iraq.

In conclusion, it may be stated unequivocally that the Islamic Revolution in Iran, together with the political course pursued on the international stage, relegated the country to a state of international isolation. This isolation, in turn, led to the imposition of a multilayered sanctions regime, leaving virtually no sector of Iran's economy and public life untouched by restrictive measures.

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## THE IMPACT OF HYBRID THREATS ON NATIONAL SECURITY: MECHANISMS FOR CONFLICT PREVENTION AND TRANSFORMATION

Sophiko Metreveli<sup>1</sup>

<https://orcid.org/0000-0001-8480-2024>  
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### ABSTRACT

The contemporary security environment is characterized by the growing dominance of hybrid threats, where military and non-military (cyber, information, economic) instruments are simultaneously utilized to dismantle the internal stability of an opposing state. This paper, from the perspective of the Conflict Studies discipline, analyzes the impact of hybrid warfare on national security, focusing on mechanisms for conflict prevention and long-term transformation.

The core objective of the research is to substantiate that the ultimate target of hybrid aggression is social solidarity and institutional legitimacy, which necessitates the transformation of the defense concept from purely military deterrence to national resilience building. The research employs a qualitative analysis method, including frameworks from escalation theory and conflict transformation.

Key findings reveal that effective prevention requires the use of strategic communications as a means of cognitive defense, which reduces society's media-vulnerability. The most effective long-term response is resilience building, which strengthens institutional accountability and social cohesion, thereby causing the coercive instruments of the hybrid actor to lose political power. The paper recommends rethinking defense doctrine, where social cohesion is defined as critical infrastructure. The guarantee of national security in the hybrid era is the transformation of the state-society relationship and the creation of a strong, internal front.

**Keywords:** Hybrid Warfare, Conflict Studies, National Security, Resilience, Conflict Transformation, Strategic Communications, Grey Zone.

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<sup>1</sup> Assistant Professor of Bachelor's Program in Defense and Security of LEPL David Aghmashenebeli National Defence Academy of Georgia

## INTRODUCTION

The contemporary national security environment is characterized by the transformation of threats, which increasingly moves away from the traditional model of large-scale military confrontation between states. Today, the concept of hybrid warfare has become a central problem of security studies, which denotes the merging of technological, economic, informational, and psychological instruments with military actions, in order to disrupt the stability of an opposing state without crossing the threshold of direct, open aggression. Hybrid threats aim not only at the neutralization of military potential but also at the erosion of public trust, institutional legitimacy, and social unity. As a result, this type of conflicts is carried out in the "Grey Zone," where the boundary between military and non-military efforts is practically blurred.

This complexity of hybrid warfare creates the necessity for defense and security strategies to encompass not only military but also social and political dimensions. It is precisely in this context that the conflict studies perspective gains decisive importance. Traditional defense theories are mainly focused on military deterrence and the development of defense capabilities, while conflict studies provide the analysis of the fundamental social and political tensions that hybrid operation actors skillfully use for their destructive goals. The main role of the conflictologist in this new environment is the identification of covert manipulation, the assessment of social vulnerabilities, and the development of such conflict transformation mechanisms that will prevent the enemy from escalating existing internal divisions within the country into open conflict.

The goal of the article is to analyze in detail the multidimensional impact of hybrid threats on national security and the effectiveness of conflict-transformation-based prevention and transformation mechanisms in countering these threats. The research will study how hybrid warfare transforms traditional models of conflict prevention and what role the building of "national resilience" plays in ensuring long-term security. Specifically, we will focus our attention on the role of strategic communications, economic deterrence, and social dialogue as instruments for the de-escalation of potential conflicts.

Based on the goal, the research tasks are:

- Systematization of the main methods and targets of hybrid threats;
- Identification of hybrid vulnerabilities using conflict analysis instruments;
- Development of specific conflictological mechanisms (e.g., mediation in the "Grey Zone") for threat prevention;
- Substantiation of the importance of national resilience as the main approach to hybrid conflict transformation.

Within the framework of the article, a qualitative analysis method will be used, which is based on the in-depth study of existing scientific literature, reports of international organizations, and cases of hybrid operations implemented in the Post-Soviet space. Ultimately, the paper offers a holistic vision that connects defense strategies with the conflict studies discipline, thereby contributing to the development of a more effective and sustainable national security policy.

## MAIN PART

### 1. Hybrid Threats in a Conflict Studies Perspective

Contemporary national security science is forced to go beyond the Clausewitzian concept, where conflict takes place only through the use of military force. The growing dominance of hybrid threats demands the full integration of not only military but also conflict studies discipline instruments. This section aims at a conceptual analysis of the phenomenon of hybrid warfare through the prism of conflict studies, in order to ensure a thorough theoretical framework for the article's practical recommendations.

Hybrid warfare is defined as a strategic approach aimed at paralyzing the target state's decision-making cycle through various means: the synchronized use of traditional military tactics, special forces, economic coercion, disinformation campaigns, and cyberattacks. From the standpoint of conflict studies, hybrid conflict is a process of instrumentalization of violence and coercion, which is carried out in the "Grey Zone of war and peace".<sup>2</sup> This

<sup>2</sup> Aleksandre Margvelashvili „Hybrid Conflict and Geopolitics: Analysis of New Threats „ (Tbilisi: Security Studies Center, 2023), 45-47.

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zone allows the opposing side to achieve strategic goals without triggering Article 5 of NATO or other collective defense mechanisms. The main theoretical problem here is the paradox of ambiguity. The hybrid actor deliberately maintains the obscurity of actions to make accountability maximally difficult. Conflictological analysis views this paradox as an attempt at escalation control, where the aggressor precisely doses the level of pressure in order to deliberately exacerbate internal tensions but not cross the threshold that would provoke a traditional military response.<sup>3</sup> Thus, the task of the conflictologist becomes not only the establishment of the fact of conflict but also the diagnosis of the level of violence and its political intensity.

The effectiveness of hybrid strategies is directly proportional to the depth of the target society's internal weaknesses. Conflict studies offer conflict analysis instruments that focus on root causes, relationships, and social structures. Hybrid operations do not create conflicts in a vacuum; they exploit existing vulnerabilities: ethnic divisions, social inequality, political polarization, and institutional corruption.<sup>4</sup> Conflict analysis methods, such as the "ABC Triangle" (Attitudes, Behaviors, Context) analysis, help us determine how an external actor transforms simple differences into confrontation. Specifically, hybrid agents work to change societal attitudes through disinformation, in order to present internal political opponents as "internal enemies" or external agents. This creates a deep crisis of trust, which ultimately destroys the state's ability to manage its own critical situations. This process can be called the erosion of social solidarity, which is the most fundamental threat to national security.<sup>5</sup>

The conflict studies approach, which is oriented towards transformation, offers a response to the long-term challenge of hybrid threats. If conflict resolution aims at eliminating symptoms, transformation seeks to change the structural causes that trigger the

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<sup>3</sup> Ronald Azarov, *Escalation Theory and the Gray Zone: New Conflict Models* (London: Routledge, 2022), 198–201.

<sup>4</sup> John Paul Lederach, *The Moral Imagination: The Art and Soul of Building Peace* (New York: Oxford University Press, 2005), 89–92.

<sup>5</sup> Elisabeth Devdariani, "Social Cohesion as a Strategic Asset in Hybrid Warfare," *Journal of Defense and Security Studies* 15, no. 2 (2024): 112–118

conflict.<sup>6</sup> In the hybrid context, this means a transition from passive defense to active national resilience building. Resilience in this case is no longer just a technical or military capability; it is the societal, institutional, and political ability to withstand multilateral shocks, maintain functional integrity, and quickly adapt. The goal of conflict transformation is to create such internal conditions where the manipulative instruments used by the hybrid actor lose their effectiveness. For example, if there is strong political pluralism in the state, media literacy is high, and there is trust in institutions, disinformation will no longer be able to divide society. Accordingly, resilience building through conflict transformation is not only a security policy but also a deep democratic and social development project.<sup>7</sup> This theoretical rethinking creates the foundation for the subsequent chapters of the article, where specific mechanisms of prevention and transformation will be discussed.

## 2. Main Mechanisms and Impact of Hybrid Threats on National Security

If the theoretical framework defines the nature of hybrid conflict and its conceptual targets (social solidarity, legitimacy), this chapter focuses on the specific instruments and mechanisms through which destructive impact on national security is realized. Conflictological analysis allows us to consider these mechanisms not as separate actions, but as a synchronized effort to dismantle the structural integrity of the target state. The most prominent aspect of hybrid warfare is the weaponization of information. Disinformation is not just the spread of false news; it is a strategic communication campaign aimed at utilizing existing societal vulnerabilities and divisions for geopolitical goals. The conflict studies approach to analyzing this phenomenon emphasizes not the content of the false information itself, but its function in the conflict dynamics.<sup>8</sup> Functional analysis shows that the goal of disinformation is:

<sup>6</sup> Hugh Miall, *Conflict Transformation: Definition and Practice* (Boston: Sage Publishing, 2017), 44-50.

<sup>7</sup> Tamar Abuladze and Giorgi Beridze, *Societal Resilience and National Defense* (Tbilisi: State University Press, 2021), 60-65.

<sup>8</sup> Aleksandre Margvelashvili „*Hybrid Conflict and Geopolitics: Analysis of New Threats* „, (Tbilisi: Security Studies Center, 2023), 88-95.

- ✓ Deepening polarization (for example, fanning historical grievances between ethnic groups),
- ✓ Creating a crisis of trust towards state institutions (military, judiciary, government),
- ✓ Discrediting political processes (undermining the legitimacy of elections).<sup>9</sup>

In this way, the enemy creates an internal front, where citizens perceive each other as opponents, which weakens the state's collective defense capability. This mechanism is directly related to the erosion of social solidarity discussed in section Cyberattacks are one of the most effective, non-military instruments of hybrid warfare. From the perspective of conflict studies, a cyberattack represents an act of coercion carried out without inflicting physical harm, but aiming to paralyze the military and civilian interface. Attacks on critical infrastructure (energy systems, financial services, transport networks) not only cause enormous economic damage but primarily disrupt the state's ability to function.<sup>10</sup>

The shutdown of the civil sector as a result of a cyberattack directly causes a wave of social shock and internal chaos, which further reinforces the hybrid aggressor's disinformation narrative about the state's incompetence. The analysis of this mechanism shows that traditional defense, which focuses on physical borders, is not sufficient to protect digital sovereignty, because cyber threats simultaneously act as a military attack and a civil security crisis.<sup>11</sup> The use of economic and financial instruments for hybrid coercion involves utilizing economic dependence (for example, trade in energy resources) to achieve political and geopolitical goals. Economic coercion includes the use of sanctions, trade barriers, and, primarily, strategic contracts and subsidies that hold the target state's national interests hostage.<sup>12</sup> From the perspective of conflict studies, economic dependence creates a structural conflict between interests: short-term economic gain often contradicts long-term national security. Manipulation of energy supply or disruption of the delivery of

<sup>9</sup> Elisabeth Devdariani, "Social Cohesion as a Strategic Asset in Hybrid Warfare," *Journal of Defense and Security Studies* 15, no. 2 (2024): 120-125.

<sup>10</sup> David Gogochuri, *Cybersecurity as an Integral Part of National Defense* (Tbilisi: Military Analysis Institute, 2023), 55-59.

<sup>11</sup> Ronald Azarov, *Escalation Theory and the Gray Zone: New Conflict Models* (London: Routledge, 2022), 210-215.

<sup>12</sup> Tamar Abuladze and Giorgi Beridze, *Societal Resilience and National Defense* (Tbilisi: State University Press, 2021), 78-83.

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vital products leads to social discontent and economic shock, which, as noted above, is easily used to reinforce strategic disinformation campaigns. Economic mechanisms ensure that the aggressor can influence the target country's social tranquility and political orientation without any military risk. Therefore, ensuring national security requires the reduction and diversification of economic dependence as the main way of conflict prevention.

### 3. Conflictological Mechanisms of Conflict Prevention Against Hybrid Threats

The non-physical and ambiguous nature of hybrid threats, as noted in section, requires that defense policy abandon reliance solely on military deterrence and integrate the principles of preventive conflict studies. Prevention in the hybrid context means not only stopping an attack but also creating the conditions where the aggressor's attempts cannot achieve a political goal. Traditional military deterrence is based on the demonstration of force, whereas hybrid deterrence primarily demands the demonstration of truth and credibility. Strategic communications from a conflict studies perspective is not simply an anti-propaganda campaign; it is a targeted effort to manage the national narrative, one that responds to society's fundamental needs for security and justice.<sup>13</sup> Preventive StratCom must be proactive and aimed not only at refuting the enemy's disinformation but also at neutralizing it. This involves proactively identifying the opponent's potential messages and preparing the public for their reception, thereby reducing their psychological impact.<sup>14</sup> At the same time, StratCom must focus on eliminating the social divisions discussed in Chapter 3 by disseminating inclusive messages, which promotes internal cohesion and reduces the hybrid actor's target zone. Effective conflict prevention is impossible without early warning. The specificity of hybrid threats (speed, ambiguity) requires the transformation of traditional intelligence models. Conflictologists must be actively involved in modeling

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<sup>13</sup> Elisabeth Devdariani, "Social Cohesion as a Strategic Asset in Hybrid Warfare," *Journal of Defense and Security Studies* 15, no. 2 (2024): 120-125.

<sup>14</sup> Tamar Abuladze and Giorgi Beridze, *Societal Resilience and National Defense* (Tbilisi: State University Press, 2021), 78-83.

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the information space, where data received from open sources (OSINT), social media analysis, and sociological surveys are combined.<sup>15</sup>

This mechanism makes it possible to identify escalation indicators at a level where the threat is not yet military in nature. For example, the artificial instigation of protest sentiments in social media against the background of expected economic coercion in the energy sector is considered as part of a potential hybrid attack and not simple internal dissatisfaction.<sup>16</sup> Thus, prevention is directed not at the final outcome of the conflict, but at managing the process and maintaining the possibility of de-escalation.

Despite the fact that hybrid warfare is a form of external aggression, it still leaves space for dialogue and mediation, especially in the Grey Zone. Conflictological mediation can be used to reduce escalation, even when official political relations are suspended. This involves utilizing informal communication channels in the economic, energy, or cybersecurity spheres.<sup>17</sup> Dialogue in this context does not mean agreeing to the aggressor's demands, but rather clear communication of "red lines" and the delineation of areas of cooperation based on mutual interests (for example, against large-scale international cybercrime). Such channels allow opposing parties to avoid miscalculations, which often cause the involuntary escalation of conflict. Conflictological intervention aims to ensure that hybrid warfare does not escalate into open, high-intensity conflict, a risk that constantly exists due to the ambiguity of the grey zone.

#### **4. National Resilience Building as the Main Instrument of Transformation**

The conflict studies discipline teaches us that achieving sustainable peace requires not only stopping the conflict but also the transformation of its root structures.<sup>18</sup> In the context of hybrid threats, where the opponent constantly seeks internal weaknesses, national resilience becomes the most effective strategic response. Resilience is the ability of the state

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<sup>15</sup> Ronald Azarov, *Escalation Theory and the Gray Zone: New Conflict Models* (London: Routledge, 2022), 210-215.

<sup>16</sup> Jocelyn S. Mitchell, *Preventive Conflict Resolution: Tools for a Digital Age* (New York: Cambridge University Press, 2018), 45-50.

<sup>17</sup> David Gogochuri, *Cybersecurity as an Integral Part of National Defense* (Tbilisi: Military Analysis Institute, 2023), 65-70.

<sup>18</sup> Hugh Miall, *Conflict Transformation: Definition and Practice* (Boston: Sage Publishing, 2017), 44-50.

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and society to withstand shocks, maintain functionality, and quickly restore itself without disintegration.<sup>19</sup> This paper analyzes the main dimensions of resilience building as a mechanism for long-term conflict transformation. Institutional resilience refers to the ability of state governance systems to maintain legitimacy and functionality under conditions of strategic attack. Hybrid actors often target governance weaknesses (corruption, inefficiency) to increase public digital and economic discontent. Conflict transformation at this level requires the strengthening of the principles of inclusiveness and accountability.<sup>20</sup> From a strategic point of view, this means improving the management of critical infrastructure, strengthening cybersecurity protocols, and, most importantly, depoliticizing decision-making processes.<sup>21</sup> When citizens have high trust in state institutions, a disinformation campaign aimed at discrediting the system automatically loses its effectiveness. Thus, the transformation of governance becomes a direct form of security.<sup>22</sup>

Societal resilience is an ability directly related to the prevention of the erosion of social solidarity discussed in Chapter 2. This requires active efforts to strengthen social cohesion and raise media literacy. Media literacy, from a conflict studies perspective, is viewed as a means of cognitive defense that reduces citizens' vulnerability to propaganda and manipulation.<sup>23</sup>

For the purpose of conflict transformation, it is essential to foster the deepening of civil-military relations, so that society understands the importance of defense and trust in the armed forces increases.<sup>24</sup> Furthermore, educational programs oriented towards pluralism and platforms for social dialogue ensure that internal disagreements do not become objects

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<sup>19</sup> Tamar Abuladze and Giorgi Beridze, *Societal Resilience and National Defense* (Tbilisi: State University Press, 2021), 60–65.

<sup>20</sup> Alexander J. L. Winder, "Governance and Legitimacy in the Digital Age," *Journal of International Security Studies* 40, no. 1 (2020): 215–225.

<sup>21</sup> Jocelyn S. Mitchell, *Preventive Conflict Resolution: Tools for a Digital Age* (New York: Cambridge University Press, 2018), 75–80.

<sup>22</sup> Peter M. Tufano, "Resilience as a Core Component of National Security Strategy," *International Security Affairs Quarterly* 12, no. 3 (2023): 45–55.

<sup>23</sup> Ronald Azarov, *Escalation Theory and the Gray Zone: New Conflict Models* (London: Routledge, 2022), 230–235.

<sup>24</sup> David Gogochuri, *Cybersecurity as an Integral Part of National Defense* (Tbilisi: Military Analysis Institute, 2023), 90–94.

of exploitation by external actors. Thus, the strengthening of society, despite its internal divisions, is the most robust defensive barrier against hybrid attacks. National resilience in the hybrid context is not sufficient to cope with threats on a global scale. Conflict transformation at this level requires the building of collective resilience with international partners and alliances.<sup>25</sup> This includes the exchange of intelligence information about hybrid tactics, joint cybersecurity exercises, and a coordinated response against economic coercion.<sup>26</sup> International cooperation from a conflict studies perspective also represents a mechanism of normative deterrence. The consistent denunciation and joint response to hybrid aggression by democratic states increases the cost of action for the aggressor and reduces the effect of its ambiguity, thereby making hybrid warfare less appealing. Collective resilience, accordingly, ensures that transformative efforts are broad, effective, and long-term.

## CONCLUSION

The paper has thoroughly analyzed the multidimensional impact of hybrid threats on national security and developed conflictological mechanisms for prevention and transformation. The central finding of the research is the fact that hybrid warfare is based on the paradox of ambiguity, and its ultimate target is not military force, but social solidarity and the legitimacy of state institutions. Hybrid actions be they strategic disinformation, cyberattacks, or economic coercion are synchronized with the aim of weaponizing society's internal divisions, which creates a state of permanent tension and instability.

The analysis clearly shows that deterrence of hybrid aggression through traditional military means is ineffective; an effective response requires the conflictological transformation of the defense concept. This transformation is carried out in two main directions: prevention and resilience building. Preventive measures, discussed in paper ,

<sup>25</sup> Elisabeth Devdariani, "Social Cohesion as a Strategic Asset in Hybrid Warfare," *Journal of Defense and Security Studies* 15, no. 2 (2024): 130–135.

<sup>26</sup> NATO Strategic Communications Centre of Excellence, *Building Resilience to Hybrid Threats: A Whole-of-Society Approach* (Riga: StratCom COE Press, 2021), 15–20.

are oriented towards proactive deterrence. Specifically, strategic communications must function as a means of cognitive defense that reduces citizens' media-vulnerability. Simultaneously, early warning systems that combine social and intelligence data are essential for the timely identification of escalation indicators and the avoidance of miscalculations.

The most important finding relates to national resilience, which is considered the main instrument of long-term conflict transformation. Resilience building is a holistic approach that includes institutional legitimacy, the strengthening of social cohesion, and international cooperation. When state institutions operate with high accountability and transparency, and the level of trust in society is high, the coercive mechanisms of the hybrid actor (e.g., disinformation) lose their political energy. Furthermore, collective resilience, through integration into alliances, ensures normative deterrence and increases the cost of hybrid aggression for the external actor.

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## INDIA'S FOREIGN POLICY IN MULTIPOLAR WORLD

Levan Gegeshidze<sup>1</sup>

Tomas Baranec<sup>2</sup>

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### ABSTRACT

The modern international system is in a process of transition, which is changing the political behavior of both the status quo and the rising powers. India is emerging as one of the great powers whose foreign policy is based on the principle of strategic autonomy and aims to balance relations with other great powers.

The article aims to answer the following research questions: 1. What impact have the tariffs imposed by the United States had on India's foreign policy? 2. How does India allocate political priorities in a multipolar system and what is the role of the doctrine of "strategic autonomy"?

India is trying to simultaneously maintain a security partnership with the United States, energy and defense cooperation with Russia, and control economic interdependence with China.

However, the growing confrontation between the US and China, as well as Western sanctions against Russia, are reducing the space for maneuver necessary for India's strategic autonomy. India's modern foreign policy is a multi-vector approach aimed at protecting national interests in the conditions of a new uncertain multipolar order.

India participates in both Western formats (QUAD) and broader associations (BRICS, SCO), thereby trying to satisfy its own interests. Its main goal is to promote the country's economic growth. As a result, its economy has been growing steadily in the past few years. Jaishankar believes that strategic autonomy implies multilateral partnerships, including with opposing powers. This is precisely what explains India's membership in radically different organizations.

In 2025, the Trump administration imposed fifty percent tariffs on India for its oil purchases from the Russian Federation. However, relations with Washington in the field of self-defense have reached a new level after the parties signed a ten-year agreement.

**Keywords:** foreign policy, strategic autonomy, national interests, tariffs.

<sup>1</sup> Professor of Bachelor's Program in Defense and Security of LEPL David Aghmashenebeli National Defence Academy of Georgia

<sup>2</sup> Strategic Analysis think tank Bratislava

## INTRODUCTION

The international system is in the process of transitioning from a unipolar to a multipolar system. The diffusion of wealth, knowledge, and technology has created different centers of attraction across the planet. So, it's vital to study the new power centers' foreign policies and their connections and trends. International politics and security researchers primarily focus on China's rise and Russia's aggressive war. However, India has demonstrated significant demographic, economic, and military growth trends in the last few years. Its population is the largest in the world.<sup>3</sup> And its economy is growing steadily.

During his rule, Prime Minister N. Modi has strengthened relations with the United States and its allies while maintaining political and economic ties with Russia and China.<sup>4</sup> However, border incidents have periodically strained relations with Beijing. A clash in the Galwan Valley claimed the lives of 20 Indian military personnel in June 2020.<sup>5</sup> This fact has significantly complicated Sino-Indian relations.

Western strategic circles view India as a key player in containing China's growing power. There have been many predictions that their relationship will develop into a close alliance. But suddenly, in the second half of 2025, relations between India and the United States began to deteriorate. Since August, the Trump administration has increased tariffs on exports from India.<sup>6</sup>

The reason for this was the fact that India was buying large quantities of oil from the Russian Federation. In 2024, India imported approximately 88 million tons of Russian oil.<sup>7</sup> Although for Trump, tariffs are primarily a means of maximizing American economic benefits, in this case they also serve Washington's geopolitical goals.

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<sup>3</sup> World Population Review, "Total Population by Country 2025," World Population Review, accessed November 26, 2025, <https://surl.li/oyrurq>, (Accessed 08.12.25)

<sup>4</sup> Basrur, Rajesh. "Modi's Foreign Policy Fundamentals: A Trajectory Unchanged." *International Affairs* 93, no. 1 (January 1, 2017): 7–26. <https://doi.org/10.1093/ia/iiw006>.

<sup>5</sup> BBC News. "Galwan Valley: China and India Clash on Freezing and Inhospitable Battlefield." June 17, 2020. <https://surl.li/uabdjm>, (Accessed 08.12.25)

<sup>6</sup> Donald J. Trump, Addressing Threats to the United States by the Government of the Russian Federation, Executive Order, August 6, 2025, The White House, accessed November 26, 2025, <https://surl.li/otqaiw>, (Accessed 08.12.25)

<sup>7</sup> Kozul-Wright, Alex. "Why Is the US Sparing China, but Not India, for Importing Russian Oil?" Al Jazeera, August 20, 2025. Accessed November 26, 2025. <https://surl.li/spifjz>, (Accessed 08.12.25)

The personal and ideological rapprochement between Modi and Trump was also evident. However, Trump's imposition of tariffs has created an uncomfortable tension between New Delhi and Washington. The article aims to answer the following research questions:

1. What impact have the tariffs imposed by the US had on India's foreign policy?
2. How does India allocate strategic political priorities in a multipolar system, and what is the role of the doctrine of "strategic autonomy"?

The paper is a review article covering India's strategic policy from 2022 to the present. India's relations with the United States, the Russian Federation, and the People's Republic of China are used as research cases.

## MAIN PART

### Modi's maneuver

After Trump's second term as president, relations between India and the US started positively. On February 10-12, 2025, N. Modi was on a working visit to Washington. According to leaders, they agreed to deepen the strategic partnership. To increase trade turnover to \$500 billion by 2030. They also agreed to enhance their cooperation in the areas of technology, defense, and space.<sup>8</sup> The parties also agreed that an agreement on fair tariffs would be signed between them by the end of the year. Despite the apparent optimistic tone of February, tensions between Washington and New Delhi began to rise in the spring. On April 2, Trump imposed a 25 percent tariff on India.<sup>9</sup> In response to India's refusal to stop purchasing Russian oil, US has increased tariffs on goods exported from India to the US by another 25 percent. In total, the US tariff on Indian goods has increased to about 50 percent.

Amid the sharp tightening of tariffs, the Indian government undertook a number of notable diplomatic initiatives towards the "Northeast." From 19 to 21 August 2025, Minister

<sup>8</sup> The White House, "United States–India Joint Leaders' Statement," The White House, February 13, 2025, accessed November 27, 2025, <https://surl.li/rvycuo>, (Accessed 08.12.25)

<sup>9</sup> KPMG Assurance and Consulting Services LLP, U.S. Tariff Shifts: Tariff Revisions and Their Impact on India (September 2025), accessed November 27, 2025, <https://surl.li/abctkr>, (Accessed 08.12.25)

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of External Affairs Subrahmanyam Jaishankar paid an official visit to Moscow, where he chaired the meeting of the India-Russia Intergovernmental Commission. During the visit, he met with President Vladimir Putin and Foreign Minister Sergey Lavrov, emphasizing the necessity of expanding energy cooperation and trade relations between the two countries.<sup>10</sup>

India–Russia trade turnover experienced a sharp increase between 2022 and 2024. In the 2021–2022 fiscal year, bilateral trade amounted to approximately 12 billion USD,<sup>11</sup> whereas in the 2022–2023 fiscal year total trade volume reached 49.36 billion USD.<sup>12</sup> By the 2024–2025 fiscal year, trade turnover had exceeded 68 billion USD, marking a record level in the history of bilateral economic relations.<sup>13</sup> In 2024, the two sides agreed to raise their trade volume to 100 billion USD by 2030, reflecting their shared intention to institutionalize long-term economic cooperation and to deepen their partnership in key sectors such as energy, defense production, and transport logistics.<sup>14</sup>

All of this has taken place against the backdrop of the Russian Federation being under sanctions imposed by the United States and its allies, while the Trump administration continues its efforts to pressure Moscow to end the war in Ukraine.

A second notable diplomatic maneuver by India was Prime Minister Narendra Modi's participation in the Shanghai Cooperation Organization (SCO) Summit, held in China from late August to early September 2025. The political context of this event was directly linked to the tariff pressure imposed on India by the United States. The host country, China, was itself engaged in a trade and tariff dispute with Washington, which prompted questions in international policy circles as to whether India's active engagement in the SCO might signal

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<sup>10</sup> Reuters, “India, Russia Agree to Boost Trade Ties after Foreign Ministers Meet in Moscow,” Reuters, August 21, 2025, accessed November 27, 2025, <https://surl.li/kvrrga>, (Accessed 08.12.25)

<sup>11</sup> Yakov Sergienko et al., Upside Potential of India–Russia Cooperation Is up to USD 200 bn (Yakov and Partners, September 2023), accessed November 28, 2025, <https://surl.li/cluvrs>, (Accessed 08.12.25)

<sup>12</sup> Yesi Seli, “External Affairs Minister Jaishankar to Visit Russia from December 25–29,” The New Indian Express, December 24, 2023, accessed November 28, 2025, <https://surl.li/rhmxtj>, (Accessed 08.12.25)

<sup>13</sup> Embassy of India, Moscow. “Overview.” Embassy of India, Moscow. Last modified November 28, 2025. <https://surl.li/kfdmdy>, (Accessed 08.12.25)

<sup>14</sup> TradeImeX. “India and Russia Set Ambitious \$100 Billion Trade Goal by 2030: Exploring Strategic Economic Cooperation.” TradeImeX, July 11, 2024. accessed November 27, 2025, <https://surl.li/tgijpz>, (Accessed 08.12.25)

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a gradual rapprochement with the Russia-China geopolitical bloc in response to American economic coercion. Several analysts have observed a direct correlation between Prime Minister Modi's increased involvement within the SCO framework and the intensification of tariff measures introduced by the Trump administration, interpreting India's actions as part of a broader strategy to preserve strategic autonomy amid escalating great-power rivalries.<sup>15</sup> This should be a signal to Washington that India has alternative geopolitical and geoeconomic platforms.

Indian expert **Manoj Kumar Panigrahi**, Associate Professor at Jindal School of International Affairs, thinks that "India's purchase of oil from Russia was based on its domestic needs and rational. As one of the largest consumers of natural resources, it is natural for New Delhi to look for its cheapest sources. Both countries are strategic partners to each other and historically they have always come to each other aid."<sup>16</sup> To our question „Do you see India–Russia relations as a temporary “energy alliance,” or could they once again evolve into a broader strategic partnership? His answer was: “No it is not limited to energy alliance, it goes beyond that. I think, Russia’s policy is – Even if India do not align with us, it is better to keep it as friend rather than see it as outsider unlike United States.”<sup>17</sup>

Russia is not perceived by India as an adversary, nor does it pose a direct threat to India's national interests; consequently, cooperation between the two states remains both possible and pragmatic. The complex situation surrounding Russia following its aggressive war in Ukraine has, in fact, created new opportunities for India. The availability of discounted Russian energy resources serves the needs of India's rapidly growing economy, which requires stable and affordable energy supplies to sustain its development trajectory. At the same time, this trade has generated significant financial gains for segments of India's business elite, who are directly engaged in these transactions.

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<sup>15</sup>Amit Ranjan, “Trump Tariffs Prompt India to Rethink China Ties,” East Asia Forum, September 18, 2025, accessed November 27, 2025, <https://surl.cc/nzskgt>, (Accessed 08.12.25)

<sup>16</sup> Levan Gegeshidze's interview with Manoj Kumar Panigrahi, Associate Professor at Jindal School of International Affairs.

<sup>17</sup> Ibid.

India and Russia share a long-standing tradition of military cooperation, dating back several decades. For much of the post-independence period, Moscow has remained New Delhi's main supplier of defense equipment and technology. Although in recent years India has sought to diversify its defense imports—strengthening procurement ties with the United States, France, and Israel—Russian-origin systems still account for approximately 60 percent of India's total military arsenal. This enduring defense partnership reflects both the historical depth of bilateral relations and India's continued interest in maintaining a degree of strategic and technological continuity with Russia, even as it gradually expands cooperation with Western defense partners.<sup>18</sup>

### Relation between India and China

As for India's rapprochement with China, it is widely believed that this is more of a tactical maneuver than a long-term strategic partnership. India's second adversary in the region, after Pakistan, is China. Despite the Sino-Indian rapprochement, there is a lack of trust between them. This assumption is also shared by an Indian expert **Manoj Kumar Panigrahi**, namely „For India, China has broken trust in 1962, and in 2020. Additionally, its support to Pakistan in all means limits an enhanced cooperation between the two“.<sup>19</sup> Thus, the border dispute between the countries and especially cooperation with Pakistan hinders the long-term strategic partnership between China and India.

India's primary adversary is Pakistan, backed by China. China's competition with the US in the security sphere is growing stronger every day, so India is becoming an important asset for the United States. India has excellent relations with Russia, which is China's strategic partner and is increasingly dependent on Beijing. Of course, New Delhi understands very well that in the long term, America's most dangerous adversary is not Russia, due to its weak economy and its military, which is less qualified and poorly armed than America's. Perhaps that is why India shows some boldness in their relations with

<sup>18</sup> Kaushik, Krishn. "India Pivots Away from Russian Arms, but Will Retain Strong Ties." Reuters, January 29, 2024. <https://surl.li/qkquy5>, (Accessed 28. 11.2025.)

<sup>19</sup> Author interview- Manoj Kumar Panigrahi, Associate Professor at Jindal School of International Affairs.

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Russia. The strategic environment before Trump's tariffs still allowed India to cooperate with Russia in a way that did not harm its other national interests.

Scholar Keshor Mahbubani, in his hypothetical memorandum, advises Xi Jinping to prevent an alliance between the US and India. Preventing such a scenario should be a central task of China's long-term strategy. Otherwise, if India becomes closely associated with the US-led alliance, it will significantly prolong the period of Western global dominance.<sup>20</sup> However, for this, China must take real steps to resolve border disputes with India and convince New Delhi that its relations with Pakistan are not directed against India.

According to the logic of realism in international relations theory, China's rise and its actions should push India to enter alliances created to balance Beijing. True, India is a member of QUAD, which is considered an alliance created to contain China, but it is also a member of BRICS and SCO. For India, strategic autonomy in the modern context does not mean isolation or neutrality, but rather maintaining flexibility in the global system.<sup>21</sup> Jaishankar believes that strategic autonomy implies multiple partnerships, including with opposing powers.<sup>22</sup> This is precisely what India's membership in radically different organizations is all about.

In terms of economic relations, India's dependence on China is increasing day by day. China is currently India's second-largest trading partner.<sup>23</sup> In 2024, the trade turnover between them amounted to 138.48 billion US dollars. Of this, 120.48 billion was Chinese exports to India.<sup>24</sup> In 2025, direct frames were restored between the countries, and negotiations began to facilitate trade.

Beijing may also have its own motives for improving Sino-Indian relations, namely economic and demographic. Experts talk about China's internal problems; in particular,

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<sup>20</sup> Mahbubani, Kishore. *Has China Won? The Chinese Challenge to American Primacy*. New York: PublicAffairs, 2020.

<sup>21</sup> R. K. Singh, *India's Foreign Policy in the Indo-Pacific: Balancing Strategic Autonomy and Great Power Rivalry* (Supremo Amicus, 2025), <https://surl.li/vjuccj>, (Accessed 28. 11.2025.)

<sup>22</sup> S. Jaishankar, *The India Way: Strategies for an Uncertain World*. HarperCollins. (2020).

<sup>23</sup> Tekwani, Shyam. "The Cage of Equidistance." *Security Nexus*, Daniel K. Inouye Asia-Pacific Center for Security Studies, September 9, 2025. Accessed November 28, 2025. <https://surl.lu/mnxhsr>, (Accessed 28. 11.2025.)

<sup>24</sup> Zhou, Qian and Giulia Interesse. "China-India Economic Ties: Trade, Investment, and Opportunities." *China Briefing*, June 20, 2025. Accessed November 28, 2025. <https://surl.lt/unsgqa>, (Accessed 28. 11.2025.)

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China's population is aging rapidly, and therefore the labor force is shrinking.<sup>25</sup> There is also some stagnation in the real estate sector within the country.<sup>26</sup> After the Covid pandemic, the growth dynamics of its economy are on average lower than in the pre-pandemic period.<sup>27</sup> Therefore, India's growing economy and middle class may be a favorable target for Chinese export-oriented businesses.

## CONCLUSION

The US imposition of tariffs on India was soon followed by sanctions on Russian companies „Rosneft“ and „Lukoil“. This means that secondary sanctions can be imposed on any company that does business with these companies. According to Trump, Prime Minister Modi promised him to stop buying Russian oil. Otherwise, “massive sanctions” would be imposed against India.<sup>28</sup> Trump's rhetoric and actions create massive political pressure on New Delhi. Which makes us wonder whether India's importance is being exaggerated in the context of the US-China confrontation.

Amidst these tense political relations, a 10-year defense framework agreement was signed between India and the United States in Kuala Lumpur on October 31, 2025. The agreement was signed on the sidelines of the ASEAN Defense Ministers' meeting and covers issues such as intelligence sharing, technology cooperation, and shared security in the Indo-Pacific theater. The first deal for the purchase, maintenance, and service of military equipment, worth approximately \$894 million, was signed in November after the agreement was signed.<sup>29</sup>

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<sup>25</sup> Muir, Dirk, Natalija Novta, and Anne Oeking. China's Path to Sustainable and Balanced Growth. IMF Working Paper WP/24/238. Washington, DC: International Monetary Fund, 2024. Accessed november 16, 2025. <https://surl.li/quqmdb>, (Accessed 28. 11.2025.)

<sup>26</sup> World Bank. China Economic Update – December 2024. Washington, DC: World Bank, December 26, 2024. Accessed November 28, 2025. <https://surl.li/abispy>, (Accessed 28. 11.2025.)

<sup>27</sup> World Bank. “China Overview: Development News, Research, Data.” World Bank. Accessed November 28, 2025. <https://surl.li/izsmxa>, (Accessed 28. 11.2025.)

<sup>28</sup> Smith, Helena. “Trump Says Modi Has Assured Him India Will Not Buy Russian Oil.” Reuters, October 15, 2025. Accessed November 28, 2025. <https://surl.li/nzmhty>, (Accessed 28. 11.2025.)

<sup>29</sup> “ASEAN Defense Ministers Meet in Malaysia.” AP News, November 20, 2025. Accessed November 28, 2025. <https://surl.lt/qdjsstt>, (Accessed 28. 11.2025.)

Thus, on the one hand, we have Trump's high tariffs on goods imported from India, and on the other hand, cooperation in the military sphere. Moreover, Trump has imposed sanctions on Russian oil companies, a move that also presents a risk to Indian energy companies. On the other hand, we have a qualitative deepening of cooperation in the defense sector. It appears that the American political elite approaches relations with India with the same principle as New Delhi itself, and its main strategist, S. Jaishankar, views the world. "We will align with interests, not with alliances."<sup>30</sup>

India's energy cooperation with Russia has run counter to America's interest in forcing Russia to end the war and sign a peace agreement with Ukraine and, in a sense, with the West as a whole. As it turns out, strategic autonomy comes at a price, and a country's diplomacy must anticipate its ally's core strategic interests.

Thus, we can conclude that India's policy in a multipolar system is aimed at becoming a great power itself, and not part of any alliance. The main goal of its multi-vector policy is to obtain maximum benefits for India, to increase its economic and military power. To achieve this aim, India maneuvers between the USA, Russia and China as much as possible viewing these countries as a source for its development and modernization.

It cooperates with the United States in the field of security and high technologies, maintains an energy partnership with Russia. It perceives the Pakistan-China alliance as a threat, but it also realizes and strives for the benefits obtained as a result of economic cooperation with China.

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<sup>30</sup> S. Jaishankar, The India Way: Strategies for an Uncertain World. HarperCollins. (2020).

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## INFLUENCE OF MANAGER LEADER AND TOXIC LEADER CHARACTERISTICS ON THE SUCCESS OF ORGANIZATION

Tamar Vanishvili<sup>1</sup>

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### ABSTRACT

This study examines all stages that a “manager-leader” must navigate, along with the essential actions required for developing into an effective manager. It considers the manager’s role as both a leader of self and of the organization, and emphasizes changes as critical prerequisites for achieving success. Furthermore, the impact of the positive and negative traits of a “Level Five Manager” and a “Toxic Leader” on the performance and success of contemporary organizations is analyzed. Changes have been proposed, and their implementation has resulted in a model of modern, flexible organizations in which people enjoy working, as they are neither constrained nor stressed. The discussion further examines how conflictual and stressful situations within an organization can be minimized. A contemporary manager model is proposed, one that consistently strives to prevent stressful situations and, when they occur, to address them effectively.

The concept of the “art of dealing with people” is presented as a key factor for success, within organizations where individuals perceive themselves as members of a cohesive team. The manager, as a leader, stands out through their activity, practicality, persuasiveness, and the ability to consider and seriously evaluate ideas that may seem impossible to others. The discussion also covers fear and strategies for overcoming it, analyzing the fears encountered on the path to success and why focusing on them is not productive.

**Keywords:** manager, manager-leader, "fifth level manager", "toxic leader", organizational changes, communication. Effective communication, fear control, success, egotism, "balance in effective management"

<sup>1</sup> Administrator of Examinations and Academic Assessment of the Examination Center of LEPL David, Agmashenebeli National Defence Academy of Georgia, Academic Doctor of Business Administration

## INTRODUCTION

Despite accumulated knowledge and experience, there is still a lack of interaction and communication in modern organizations. Let's consider most basic and dense actions that lead to both harmony in the organization and imbalance during the relationship/communication.

Everyone knows that a good manager would not always be a leader, and the fact that he manages an enterprise/organization well does not necessarily mean leadership. However, a manager would have the personality traits of a leader that contribute him manage the organization effectively and give him the ability to deal with difficulties more effectively than another person. Becoming a leader is possible if we start studying and learning the characteristics of a leader. However, it is reasonable to assume that it is innate. Personal characteristics that highlight the strengths of an individual are either innate or can be developed. Traits that facilitate leadership can be acquired through consistent effort, which requires careful effort to ensure development is maintained. Leadership is a lifestyle, driven by circumstances and interests. So leadership would be learned. Studying leadership qualities and applying them in practice allows us to become authoritative, both in personal and professional activities.

A leader becomes a leader when he has followers. When we see employees of any company or organization working selflessly, we must remember that they are not doing so because of any particular person, but because of the values and ideas that the leader has created. Creating these values requires first of all understanding and then implementation, which a true leader makes “easy.” We know that in an organization where there is a diversity of employees, it is never “easy” to accept a new idea and, accordingly, spend time and effort on its implementation. Selflessly - you can only work for a brilliant idea, for an idea that you consider “real”. Only a true leader can be “convinced” of this.

## MAIN PART

What does a good manager do like a strong leader and how does it all work out? There is a common opinion that a manager should possess personal characteristics of a leader in

order to be able to "manage effectively". The manager, as a leader, creates a vision of the future and uses all means to make the organization such in the process of its management. He tries to ensure the high quality of the performed work and to inform everyone on the achieved results. He would really make the organization successful through revolutionary transformations, achieve exceptional rates of development in a short period of time, strive to create not just a good, but the best organization. He is distinguished by activity, practicality, analytical ability, logic, criticality, certainty, iconography, persuasiveness, prognostication, speed, mobility, gentleness (the ability to accept an opinion and seriously consider something that someone else imagines impossible), resistance to uncertainty. This type of manager is called "5th level manager". Therefore, when a person is oriented in such a way to present himself in front of an organization, a team, it is certainly impossible for him to have difficulties in communication/relationship with people, because his interest is not only to win the situation, which he achieves not alone, but with the help of a unified team, because he internally is a leader. A good manager should constantly take care of avoiding stressful situations, and if they exist, he eliminates them. People should perceive themselves as members of a whole team, because the "art of human relations" should be protected, which is the job of the manager to regulate.

It is widely acknowledged that a manager is both a manager and a leader. However, this concept is often applied solely in the context of organizations, enterprises, or companies, while it is frequently overlooked that, first and foremost, individuals are the managers of themselves. We must first master ourselves in order to be able to lead others. How would we talk on changing anything if we do not change ourselves and do not take care of changing our own visions (if, of course, it is necessary). When you change the perception and approaches, the results will change. This is undoubtedly true and also achievable. The desire to change oneself never means denying oneself. If we ourselves understand and analyze all this, it will definitely bring about a change in the result for the better.

Would a manager be a leader? Why should we care on developing the characteristics that emphasize the strong side of our personality? It is already clear from the question that

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it will be more beneficial for us, because we will be more efficient, confident in our current or future activities. When you believe in yourself, you will easily convince others of the correctness of your choice. Confidence does not mean deception. By your actions or approach, any person will have the opportunity to see the real picture, that your offered model is more profitable than the current one, and he will follow you, not because he is afraid, but because he clearly sees that this situation offers better results than the existing one.

Leaders and managers possess many common personal traits. The mode that is created by both the manager and the leader, seems to be built and formed on one common axis, whose motto is victory.

**Leadership** is the ability to overcome challenges and cope with change. Leaders set a direction by creating a vision for the future, then they transfer their vision to people and motivate them to overcome obstacles. A successful leader changes behavior, not goals. Leaders do what they love and enjoy. The result of their dedicated work is a realized goal. A person with the personal qualities of a leader is an outstanding, extraordinary worker in the professional field; he is, in a word, a “human success.”

In life we have to choose whether to follow the herd and be content with what we get from life or to have our own different opinion. Everyone has a choice between being a member of the crowd and a community. Believe me, leadership is better than being in line. Leadership requires the ability and courage to clearly state one's opinion. Share the opinion of others, but do not make it the content of life, but analyze it analytically and only after that apply it to your own “self”.<sup>2</sup>

A leader is simply a leader, he is "great" and a role model, such leaders can withstand all criticism, time and value breakdowns and remain leaders for a long time, but random leaders come and go.

Leaders are characterized by perspective. They have the ability to see events as a whole, to create a unified picture. They can see in what ways and means it is possible to achieve

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<sup>2</sup> L.Shamugia, *Way to Itaka*. Tbilisi, 2023, p. 79.

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the set goal and what effect it will have on them and the lives of those around them, then they return to the "here and now" and act accordingly.<sup>3</sup>

A common characteristic of leaders is realism. They are brave, fair to themselves and others, have a reputation as a decent person, are uncompromising and live in absolute reality. Internal harmony is the most desirable characteristic of a leader.

Leaders are characterized by a sense of responsibility. They take full responsibility for themselves and the people around them. "Being a leader is a character, not a status".<sup>4</sup>

However, things get complicated when we become familiar with **toxic forms of leadership**. It would be a good idea to first understand the phrase "toxic leadership" and why "toxic" is an accurate term to describe such leadership. As **John Lipman-Blumen** (American professor, sociologist) in his book "The Appeal of Toxic Leaders: Why We Follow Destructive Bosses and Corrupt Politicians and How to Get Rid of Them" conveys that toxic leaders bring "toxic effects that cause great harm to their organization and followers." Toxic leaders can be described as leaders who engage in destructive behavior and display dysfunctional personality traits. These leadership behaviors and traits are toxic when they have the potential to cause serious and lasting damage to their organizations and followers. The intention to harm others or advance oneself at the expense of others seriously distinguishes toxic leaders from careless and unintentionally toxic leaders. Such managers are usually characterized by an excessive tendency to control, which is undoubtedly caused by low self-esteem or insufficient qualifications. He exaggerates the importance of discipline to hide the lack of information he has in this field.

Toxic leaders, at the other extreme, see their success and glory in destructive actions toward others and thrive on the **psychological or physical harm** they cause to those around them. Either way, such toxic leadership will "undermine productivity and stunt organizational growth and stunt progress." Toxicity can be reflected in many negative

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<sup>3</sup> T.A. Vanishvili, T.L. Gegelia, „Implementation of management modern model in organizations with taking into account features of „, fifth level manager“ and „ new type leader“. National Defense Academy. Transactions № 1 (2), 2016. p.38

<sup>4</sup> Management and Business Administration, <https://surl.li/bjfbaz>, (Accessed 22.12.2025)

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personal characteristics, such as: incompetence, insatiable ambition, sense of inadequacy, irresponsibility, immorality, cowardice, egotism (focus on oneself), arrogance, dishonesty, lies, etc. This is detrimental to any organization, because in this case people leave their leaders, not their jobs. (US Army Field Manual)

Toxicity in general is damaging to both the organism and relationships. Whether it's destructive or not, it still has a devastating effect. Therefore, taking into account modern, civil approaches, it is promote to develop such a "managerial leader" that will not only harm the organization, but his every action or step will be a guarantee of the organization's progress. It is also significant that taking into account the positive and negative consequences of all the factors or approaches discussed above, both in personal and organizational relationships, will resolve, regulate the efficiency and flexibility of management, help the manager to establish effective communication with the team, which all modern organizations care about, because this is one of the benefits. There is one main factor.

How to reach this stage? The stage that involves the formation of a manager as a leader. A leader who is not a carrier of toxicity, who maintains balance and, as surprising as it may be, this does not necessarily mean only linear "good management" nor "threats with punishment". "Balance in effective management" - where all elements of effective management are adjusted and combined so that the "golden mean" is protected and not violated. How do we discover and develop this strength within ourselves? Strength, which means creating values and values first and then establishing them, which is not so easy.

One can obtain better results than is possible to have today by starting work on yourself. Here the first and inevitable stage is self-change. The need arises when you understand that modernity has already moved to completely different approaches or models. Currently, the only thing we need to do is keep up with these changes and not slow down. Development begins with changes, and the effective result is success. It is important to understand that there is no point in opposing progress - it is useless. We must accept it as a necessity and follow it, but not blindly. This includes the most difficult but surmountable stages that

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would be constantly accompanied by fear, which, if you do not work on eliminating it at the initial stage, will negate the desire to at least begin to change.

Striving for the goal and tireless work, that is what requires the synthesis of different approaches. Also, in many cases, we have to reject old, established rules and customs that often is inconvenient, since everything novel requires implementation, and this takes some time and adaptation. In many cases it requires us to change the paths to the goal, not the goal itself. In this case, this is what causes an increase in the likelihood of achieving the goal. Therefore, when we would proudly look at our own "self", look into the eyes and admit out loud that it's time to start changes and they should start with us first of all - after that everything becomes easier. Everything is brilliant, simple. Simplicity is simplicity, which is of course not easy to achieve. This is based on a lot of hard work. The main thing is not to get tired during this work. And the feeling of satisfaction received from achieving our goal will make us.

## CONCLUSION

Lack or absence of communication causes organizations to break down, modernity gives the possibility to us to take care of establishing and maintaining effective relationships between people. Observations and analysis have shown us that a good manager, as the head of an organization, will also carry the personal qualities of a leader or take care of their acquisition/formation.

In this case, the manager's tasks are:

- ✓ To become a "manager leader";
- ✓ To maintain balance on the way: person, manager, effective manager, manager, leader;
- ✓ To maintain a balance between "effective management" and "threat of punishment";
- ✓ To follow the "golden middle" that in effective management - implies the complete removal of the characteristics of the "toxic leader", because as we have seen, even the smallest deviation towards it gives a final destructive effect.
- ✓ Undoubtedly, this requires certain changes.

Changes are often associated with fear. Overcoming fear is possible: by releasing it from all accompanying emotions, placing it on an open and broad surface, and realizing that it

stems from past negative experiences that no longer exist, as well as anticipations of the future, which are equally nonexistent in the present. By analyzing all this, we will be able to reject such fears and it will be easier for us to start changes.

Always allow the probability that success is guaranteed, because in the universe, if there is a probability of failure, there is also a probability of success - in the same dose and at the same rate. Focus on success and it will surely come. Be here, now and in the present. Take the past as experience and work to create the best version of your future, because it doesn't matter when or where we start, it's where we end up that matters.

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## GEOPOLITICAL TRANSFORMATION AND NEW GENERATION WARFARE

Colonel Jambul Zaloshvili<sup>1</sup>

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### ABSTRACT

The study „Geopolitical Transformation and New-Generation Warfare“ examines the dynamics of the contemporary international system, where multipolarity, shifts in geostrategic axes, resource competition, and geoeconomic rivalry create a complex, multi-layered conflict environment. The research explores the concept of new-generation warfare (NGW), its hybrid forms, cyber and informational strategies, which pose significant challenges to modern states.

The main objective of this research is to analyze how the concepts of security and state sovereignty are being transformed in the 21st century, to understand the dilemmas faced by small and medium-sized states within a multipolar international system, and to examine the influence of geoeconomic instruments and resource competition on contemporary conflicts.

The study employs theoretical analysis, documentary research, comparative methods, and contemporary international practice examples. The findings reveal that NGW forms, multipolarity, and geoeconomic challenges require comprehensive, integrated approaches across military, economic, informational, and legal domains.

The conclusions emphasize the necessity for states to adopt strategic planning and resilient policies to secure sovereignty, maintain security, and ensure sustainable development in the evolving global environment.

**Keywords:** Geopolitical transformation, New-generation warfare, Hybrid warfare, Geoeconomics, Resource competition, Multipolar system, Small and medium-sized states, Security, Cyber and informational strategies.

<sup>1</sup> Head of State Resource Management Master Program, LEPL David Aghmashenebeli National Defence Academy of Georgia, Doctor of Military Sciences

## INTRODUCTION

Contemporary warfare has undergone a profound transformation, diverging significantly from the classical conflicts of the past. In recent years, the nature of military engagement has evolved due to rapid technological advancements, the proliferation of hybrid tactics, and shifts in global geopolitical dynamics. Emerging technologies - such as artificial intelligence, unmanned systems, commercial satellite networks, and advanced cybersecurity tools - have redefined the operational landscape, creating a strategic environment where control over information and electronic influence is as critical as conventional military power.

Moreover, both state and non-state actors increasingly employ hybrid strategies that extend beyond traditional battlefield confrontations. These include economic coercion, legal mechanisms, energy dependency, and the dissemination of disinformation. Such methods often prove more effective than direct military action, enabling actors to achieve strategic objectives while operating below the threshold of open conflict.

The global order is also undergoing significant transformation. Centers of power are increasingly multipolar, regional blocs are gaining strength, and international law struggles to keep pace with the rapid tempo of technological change. These developments contribute to a complex strategic environment in which the „nature“ of war - the fundamental essence of political violence - remains constant, while its „character“ - the forms, methods, and instruments through which it is conducted - is undergoing fundamental transformation.

These transformations have been accompanied by the erosion of the international order and a weakening of global stability. Conflicts have increasingly acquired a hybrid nature - wars are no longer fought solely with tanks and artillery but also through cyberattacks, economic sanctions, disinformation campaigns, and psychological pressure.<sup>2</sup> Consequently, the concept of the „new generation of war“ has gained prominence in academic and

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<sup>2</sup> Lawrence Freedman, *The Future of War: A History* (New York: Public Affairs, 2017), 214–220.

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strategic discourse, reflecting the changing forms of violence and influence, particularly within the context of great power competition.<sup>3</sup>

The primary aim of this study is to analyze the geopolitical transformation of the twenty-first century and to assess how it reshapes traditional understandings of war, power, and security. The research seeks to demonstrate that the contemporary global system is no longer defined merely by military might but is increasingly shaped by the interplay of geoeconomic, technological, and informational factors.<sup>4</sup>

The study is grounded in three major theoretical approaches to international relations, which together provide a multidimensional analytical lens:

- Realism - emphasizing the balance of power, national interest, and the security dilemma;
- Liberalism - focusing on cooperation, international institutions, and the mechanisms of globalization;
- Constructivism - highlighting the role of identities, cultural narratives, and ideational factors in shaping political behavior.<sup>5</sup>

This triadic framework enables a comprehensive understanding of modern geopolitical competition as a process driven not only by material and economic forces but also by ideological and normative contestation between liberal-democratic and authoritarian models.

The research employs a theoretical-analytical approach, combining the examination of existing academic literature, geopolitical theories, and comparative case studies. It utilizes a comparative method to explore the diversity of strategic models - American, Chinese, and Russian perspectives - and a systemic analysis to identify the structural causes of global transformation.<sup>6</sup>

The study seeks to answer the following core questions:

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<sup>3</sup> Mary Kaldor, *New and Old Wars: Organized Violence in a Global Era*, 3th ed. (Cambridge: Polity Press, 2012), 25–28

<sup>4</sup> Parag Khanna, *The Second World: Empires and Influence in the New Global Order* (New York: Random House, 2008), 41–43.

<sup>5</sup> John Baylis, Steve Smith, and Patricia Owens, *The Globalization of World Politics*, 9th ed. (Oxford: Oxford University Press, 2023), 33–37.

<sup>6</sup> Kenneth N. Waltz, *Theory of International Politics* (New York: McGraw-Hill, 1979), 88–92.

- How is the multipolar world order emerging in the twenty-first century, and what are the driving factors behind it?
- How are geoeconomic competition and technological transformation changing the nature of war?
- What challenges do small and medium-sized states face within the new global geopolitical environment?

Theoretically, this research contributes to the ongoing debate on the evolution of global power structures by integrating insights from geopolitics, security studies, and contemporary military strategy into a single analytical framework. Practically, it provides policymakers and scholars with a deeper understanding of how states can adapt to the realities of a changing world order. This analysis is particularly relevant for small and regional states, such as Georgia, which must navigate a delicate balance amid growing geopolitical competition.<sup>7</sup>

The research examines the process of forming a multipolar world order, new geostrategic axes, new forms of struggle for resources, manifestations of the crisis of globalization, and the dilemmas facing small and medium-sized states.

## MAIN PART

### I. Geopolitical Transformation in the Contemporary World, New Geostrategic Axes and the Dynamics of the Balance of Power

The end of the Cold War seemed to mark the conclusion of a long era of global confrontation and raised hopes for a new stage of peace and cooperation. During the 1990s, the United States emerged as the dominant power, establishing a unipolar world order shaped by its political, economic, and military influence. However, the twenty-first century revealed that this order was not a guarantee of stability - on the contrary, it produced new forms of tension and conflict.<sup>8</sup>

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<sup>7</sup> Charles Kupchan, *No One's World: The West, the Rising Rest, and the Coming Global Turn* (Oxford: Oxford University Press, 2012), 12–15.

<sup>8</sup> Henry Kissinger, *World Order* (New York: Penguin Press, 2014), 15–18.

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Gradually, the balance of power began to shift. China's economic rise in East Asia, Russia's military resurgence in Eurasia, and the growing regional ambitions of India, Turkey, and Iran - along with the European Union's aspirations to become an autonomous geopolitical actor - collectively define what scholars now describe as a „multipolar world order“.<sup>9</sup>

This transformation is not confined to military or political dimensions; it also encompasses economic and technological dynamics. The center of the global economy has been moving from the Atlantic toward the Asia-Pacific region; energy, land, and water resources have gained strategic importance; and information technologies have created entirely new domains of competition.<sup>10</sup>

The main characteristic of the contemporary multipolar system is the existence of several centers of power, each with its own sphere of regional or global influence. The United States, despite its military superiority, is no longer the sole cornerstone upon which the international order is built. China, with its economic power and „Belt and Road“ initiative, is creating an alternative geoeconomic architecture.<sup>11</sup>

Russia, despite its relatively limited economic base, maintains significant influence through control of energy resources, military technologies, and attempts at regional domination. The European Union, as an economic giant, attempts to establish its own strategic autonomy, though it confronts challenges of internal coordination and energy dependencies.

Additionally, regional powers - such as India, Turkey, Saudi Arabia, Brazil, and others - are increasingly actively participating in global processes and creating their own geopolitical agendas.<sup>12</sup> This creates not only a complex system of balance but also increases the possibility of international conflicts, as spheres of power often overlap.

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<sup>9</sup> Charles Kupchan, *No One's World: The West, the Rising Rest, and the Coming Global Turn* (Oxford: Oxford University Press, 2012), 22–25.

<sup>10</sup> Parag Khanna, *Connectography: Mapping the Future of Global Civilization* (New York: Random House, 2016), 47–51.

<sup>11</sup> Bruno Maçães, *Belt and Road: A Chinese World Order* (London: Hurst Publishers, 2018), 23–56.

<sup>12</sup> Kishore Mahbubani, *Has the West Lost It? A Provocation* (London: Penguin Books, 2018), 112–145.

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The formation of a multipolar system is also reflected in the crisis of international institutions. The United Nations Organization, International Monetary Fund, World Trade Organization, and other institutions created for a bipolar or unipolar system often fail to respond to the challenges of multipolar reality.<sup>13</sup> The paralysis of the Security Council, prolonged reform discussions, and the creation of alternative institutions (such as BRICS, Shanghai Cooperation Organization) indicate that the old institutional order requires significant transformation.

The central geopolitical dynamic of the 21st century is US-China strategic competition, which encompasses economic, technological, military, and ideological dimensions. This competition is not merely a traditional power struggle - it represents a contest between two different models for global governance.<sup>14</sup>

The United States views China as a strategic competitor requiring a strategy of „containment“ and „competition“. Washington is strengthening its alliances in the Indo-Pacific region (AUKUS, QUAD), imposing technological restrictions, and attempting to reduce economic dependence on China.

China, for its part, is implementing a „dual circulation“ economic strategy, building alternative infrastructure through the „Belt and Road Initiative“, and actively seeking to increase influence in developing countries. Beijing is also developing its own military capabilities, particularly its naval fleet and in cyberspace, to protect its interests and expand its sphere of influence.<sup>15</sup>

Russia's geostrategic position is based on several key factors: control of energy resources, military power, and attempts to maintain influence in the post-Soviet space. Moscow believes that Western expansion (NATO and EU) represents an existential threat to its security and therefore attempts to create „spheres of influence“ around itself.<sup>16</sup>

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<sup>13</sup> Stewart Patrick, *The Unruly World: The Case for Good Enough Global Governance*, Foreign Affairs, Vol. 93, No. 1 (January/February 2014): 58-73.

<sup>14</sup> Graham Allison, *Destined for War: Can America and China Escape Thucydides's Trap?* (Boston: Houghton Mifflin Harcourt, 2017), 89-134.

<sup>15</sup> Rush Doshi, *The Long Game: China's Grand Strategy to Displace American Order* (Oxford: Oxford University Press, 2021), 178-223.

<sup>16</sup> Angela Stent, *Putin's World: Russia Against the West and with the Rest* (New York: Twelve, 2019), 45-78.

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The 2022 invasion of Ukraine represents the culmination of this strategy, which radically changed the European security architecture. Russia's actions provoked an unprecedented package of Western sanctions, NATO expansion in Scandinavia, and a rethinking of Europe's energy dependence. However, Russia has also deepened cooperation with China, India, and Global South countries, demonstrating the reconfiguration of geopolitical coalitions.

The European Union, largely dependent on American security guarantees throughout the second half of the 20th century, now attempts to develop its own strategic autonomy. This includes increasing defense capabilities, achieving energy diversification, and developing technological sovereignty.

However, Europe faces difficult dilemmas: how to maintain the transatlantic connection while developing autonomy; how to balance economic interests with China and security needs; how to achieve consensus among 27 member countries on foreign and security policy. These challenges were further exacerbated by the energy crisis and the Russia-Ukraine war.

Beyond global power competition, we see the formation of regional axes. In the Middle East, the Iran-Saudi Arabia rivalry, Turkey's regional ambitions, and Israel's security dilemmas are increasingly relevant. In South Asia, India attempts to balance its relationships with both the West and with Russia and China.

In Africa and Latin America, competition among external powers for influence, resources, and geopolitical position is increasingly visible. These regional dynamics not only reflect global competition but create their own local geopolitical reality, which is often more complex than global confrontation.

## **II. The Role of Geoeconomic Competition and the Struggle for Resources: New Dimensions**

Energy resources have historically represented a central element of geopolitical competition, and this situation remains relevant in the 21st century, albeit with new

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dimensions. The geopolitics of oil and gas is supplemented by issues of renewable energy technologies, energy transition, and the geography of new energy resources.<sup>17</sup>

Russia's cessation of gas supplies to Europe in 2022 demonstrated the risks of energy dependence and accelerated Europe's energy diversification. Meanwhile, the globalization of the liquefied natural gas (LNG) market created new geopolitical dynamics, where the US, Qatar, and Australia play significant roles.

The Middle East remains a center of energy geopolitics, though its relative importance is gradually declining due to the growth of renewable energy and the emergence of new suppliers. Were it not for the coordinated actions of Saudi Arabia, Russia, and other OPEC+ member countries, influence on the oil market would be even weaker.

The energy transition and development of digital technologies create a new type of resource geopolitics - the geopolitics of critical minerals and rare earth elements. Lithium, cobalt, rare earth elements, graphite, and other minerals are essential for electric vehicle batteries, solar panels, wind turbines, and modern electronics.

China controls most of the supply chain for these critical minerals - from extraction (particularly in Africa and Latin America) to processing and manufacturing. This creates a new type of strategic dependence that may be more significant for the second half of the 21st century than oil dependence was for the 20th century.

Western countries and their allies attempt to create alternative supply chains, develop their own extraction capabilities, and reduce dependence on China. According to them, this is not only an economic but a national security issue.

Climate change and population growth make water resource geopolitics increasingly relevant. Control of transboundary rivers (such as the Nile, Indus, Mekong, Tigris and Euphrates) creates tension between different countries.<sup>18</sup>

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<sup>17</sup> Daniel Yergin, *The New Map: Energy, Climate, and the Clash of Nations* (New York: Penguin Press, 2020), 234-267.

<sup>18</sup> Peter Gleick, "Water, Drought, Climate Change, and Conflict in Syria," *Weather, Climate, and Society*, Vol. 6, No. 3 (2014): 331-340.

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Climate change also opens new geopolitical opportunities - melting Arctic ice creates new trade routes and resource extraction possibilities, making Arctic geopolitics relevant. We are dealing with a new space where international order is still unformed and over whose control Russia, the US, Canada, Norway, Denmark, and other players compete.

The vulnerability of global food supply chains became particularly evident during the Russia-Ukraine war, when Black Sea grain exports were restricted. This affects not only regional but global food security, particularly in the Middle East and Africa.

Food production depends on water, fertilizers (which in turn depend on natural gas and phosphates), energy, and stable climatic conditions. Climate change, resource scarcity, and geopolitical tension collectively threaten global food security, which may become a source of new conflicts and a driver of migration crises.

The hyperglobalization of the 1990s and 2000s, characterized by the removal of economic borders, global optimization of supply chains, and exponential growth of international trade, entered a crisis phase.<sup>19</sup> The reasons are diverse: the 2008 financial crisis, the rise of populist forces in the West, the COVID-19 pandemic, and the intensification of geopolitical confrontations.

The global optimization of supply chains, focused solely on cost reduction, proved vulnerable to shocks. The pandemic showed how production stoppage in one region could block global supply chains. The Russia-Ukraine war demonstrated how geopolitical conflict could use economic dependence as a weapon.

As a result, the process of economic fragmentation began - the partial separation of national economies considering geopolitical considerations. The term „decoupling“, originally used in the context of US-China economic relations, now describes a broader trend - reducing economic connections between geopolitically competing blocs.<sup>20</sup>

The US and its allies are implementing a „de-risking“ strategy, which includes reducing dependence on China in critical sectors, particularly semiconductors, pharmaceutical

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<sup>19</sup> Anthea Roberts, *Is International Law International?* (Oxford: Oxford University Press, 2017), 156-189.

<sup>20</sup> Henry Farrell and Abraham Newman, „*Weaponized Interdependence: How Global Economic Networks Shape State Coercion*“, *International Security*, Vol. 44, No. 1 (Summer 2019): 42-79.

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products, and critical technologies. China, for its part, attempts to develop a „dual circulation“ model, where the domestic market and Asian region will become the main engine of economic growth.

This process is not perfect separation - deep economic integration hinders rapid decoupling and both sides recognize that complete economic separation would be very expensive. However, the trend is toward selective reduction of economic connections in strategically important sectors.

Instead of hyperglobalization, we see the growth of regionalization - the concentration of economic activities at the regional level and the strengthening of connections between geographically or geopolitically close countries. American companies are increasing investments in Mexico, Central America, and Canada („nearshoring“), while Europeans focus on Eastern Europe and the Mediterranean region.<sup>21</sup>

In parallel, the concept of „friend-shoring“ is developing - transferring supply chains to geopolitically friendly or neutral countries. This means that economic decisions increasingly take geopolitical assessments, which increases economic costs but theoretically reduces strategic risks.

Geoeconomic fragmentation facilitates the formation of new blocs and coalitions. BRICS (Brazil, Russia, India, China, South Africa) expanded in 2024 with the inclusion of new members and attempts to present an alternative to Western-dominated institutions. The Shanghai Cooperation Organization (SCO) continues to expand in Central and South Asia.<sup>22</sup>

The Western world, for its part, attempts to strengthen its own alliances - G7, NATO, EU, and new formats such as AUKUS and QUAD in the Indo-Pacific region. Meanwhile, many countries attempt not to fall into a specific bloc and maintain „strategic autonomy“, creating a complex geopolitical mosaic.

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<sup>21</sup> Shannon K. O'Neil, *The Globalization Myth: Why Regions Matter* (New Haven: Yale University Press, 2022), 67-98.

<sup>22</sup> Oliver Stuenkel, *The BRICS and the Future of Global Order* (Lanham: Lexington Books, 2020), 123-156.

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These new blocs differ from Cold War period blocs - they are not rigidly ideological and are mostly focused on economic and security interests. However, the deeper the geopolitical confrontation becomes, the more bloc logic influences.

Geoeconomics describes the use of economic instruments to achieve geopolitical goals. In the contemporary international system, where direct military conflict between nuclear powers is very risky, geoeconomic instruments become the primary means of power projection.<sup>23</sup>

Geoeconomic tools include: economic sanctions, trade restrictions, investment policies, currency manipulation, infrastructure projects (such as the Belt and Road), development assistance, and control of technology transfer. These instruments can be both positive (incentive mechanisms) and negative (punishment mechanisms).

The 21st century is characterized by unprecedented use of sanctions as a foreign policy instrument. The West imposed extensive sanctions against Russia in 2014 following the annexation of Crimea, which significantly expanded in 2022 after the full-scale invasion of Ukraine. These sanctions cover the financial sector, energy, technologies, and individuals.<sup>24</sup>

The US also actively uses sanctions against Iran, North Korea, Venezuela, and other countries. Meanwhile, China is beginning to use its own geoeconomic tools - for example, restricting exports of rare earth elements during geopolitical disputes.

The effectiveness of sanctions is a subject of debate. Although sanctions cause significant economic damage, they often fail to achieve desired political changes. Moreover, sanctions facilitate the development of alternative economic systems and the formation of a „sanctions economy“ that attempts to avoid the Western financial system.

The dominant role of the US dollar in the global financial system represents a significant geoeconomic instrument for the US. The international payment system based on the SWIFT network and the dollar gives Washington unique opportunities to exert influence.<sup>25</sup>

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<sup>23</sup> Robert D. Blackwill and Jennifer M. Harris, *War by Other Means: Geoeconomics and Statecraft* (Cambridge: Harvard University Press, 2016), 34-67.

<sup>24</sup> Richard Nephew, *The Art of Sanctions: A View from the Field* (New York: Columbia University Press, 2018), 178-203.

<sup>25</sup> Eswar Prasad, *The Future of Money: How the Digital Revolution Is Transforming Currencies and Finance*

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However, financial sanctions used against Russia, particularly the freezing of Central Bank assets, strengthened interest in alternative financial systems. BRICS countries are actively discussing expanding the use of national currencies in trade, creating alternative payment systems, and potentially implementing a common BRICS currency.

The internationalization of the Chinese yuan is a long process that is gradually progressing. The development of the digital yuan (e-CNY) may in the future create an alternative payment system less dependent on Western financial infrastructure. However, a real challenge to dollar hegemony requires not only economic power but also deep and liquid capital markets, institutional credibility, and global network effects.

Infrastructure projects have become an important arena of geo-economic competition. China's „Belt and Road Initiative“ (BRI), which includes trillions of dollars in infrastructure investment in over 150 countries, represents the most ambitious geo-economic initiative.<sup>26</sup>

BRI aims not only to strengthen economic connections but also to expand geopolitical influence, create new markets for Chinese products, and establish an alternative global infrastructure network. However, the project faces criticism for „debt-trap diplomacy“ and use as an instrument of geopolitical influence.

The West responded with its own infrastructure initiatives - the G7's „Build Back Better World“ and subsequently "Partnership for Global Infrastructure and Investment" (PGII), which offers an alternative to BRI, emphasizing sustainability, transparency, and quality. The European Union has the "Global Gateway" initiative. This competition shows that infrastructure has become a significant dimension of geopolitical competition.

### **III. Technological Transformations and the New Generation of Warfare**

Technological leadership in the 21st century represents a critical element of geopolitical power. US-China competition in the technological sphere includes artificial intelligence, 5G networks, quantum computing, semiconductors, biotechnology, and space technologies.<sup>27</sup>

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(Cambridge: Harvard University Press, 2021), 234-267.

<sup>26</sup> Bruno Maçães, *Belt and Road: A Chinese World Order* (Oxford University Press, 2018), 145-189.

<sup>27</sup> Kai-Fu Lee, *AI Superpowers: China, Silicon Valley, and the New World Order* (Boston: Houghton Mifflin

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The US imposed significant restrictions on exports of advanced semiconductor manufacturing technologies to China, particularly EUV (extreme ultraviolet) lithography systems. China, for its part, is making massive investments in R&D and attempting to achieve „technological self-sufficiency“ in critical sectors.

The European Union attempts to develop „technological sovereignty“, which includes developing its own semiconductor industry (European Chips Act), establishing digital regulations (Digital Markets Act, Digital Services Act), and protecting critical technologies from foreign acquisitions.

Cyberspace has become a new domain of geopolitical competition, where countries engage in both defensive and offensive operations. Cyber attacks are used for espionage, destabilizing critical infrastructure, spreading disinformation, and economic sabotage.<sup>28</sup>

Russia, China, Iran, and North Korea have developed cyber capabilities and actively use them as foreign policy instruments. Western countries, for their part, develop both defensive and offensive cyber capabilities and attempt to create international norms for behavior in cyberspace.

Cyberspace also reflects the trend of fragmentation - China's „Great Firewall“ represents a model of a national version of the internet that is protected and controlled by the state. Russia also attempts to develop a „sovereign internet“. This creates the risk of global internet fragmentation and the formation of a „splinternet“.

Data in the 21st century is often referred to as „the new oil“. Control, processing, and use of data represents both an economic and strategic asset. Therefore, countries are increasingly actively regulating data storage, transfer, and processing.<sup>29</sup>

The EU's GDPR (General Data Protection Regulation) represents the most comprehensive data protection regulation, affecting not only Europe but globally. China's

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Harcourt, 2018), 89-134.

<sup>28</sup> David E. Sanger, *The Perfect Weapon: War, Sabotage, and Fear in the Cyber Age* (New York: Crown, 2018), 156-187.

<sup>29</sup> Anu Bradford, *The Brussels Effect: How the European Union Rules the World* (Oxford: Oxford University Press, 2020), 234-267.

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data protection legislation requires that critical data be stored within the country and subject to state control.

The US approach is more fragmented, but increases data localization requirements, particularly regarding Chinese applications (such as TikTok). These different approaches create the concept of „data nationality“ and complicate the global digital economy.

New Generation Warfare (NGW) represents the transformation of war in the 21st century: conflicts are no longer limited to conventional military operations but are multi-dimensional, interconnected, and often covert, aiming not only at the physical defeat of an adversary but also at the degradation of societal trust, economic stability, and political will.<sup>30</sup>

This concept responds to technological revolutions, globalization shifts, and a multipolar international system - factors that profoundly influence the nature, methods, and strategies of modern conflicts.<sup>31</sup>

Contemporary conflicts increasingly less resemble the traditional war model, where two states openly declare war and conduct military operations. Instead, we see the spread of „hybrid warfare“ - a combination of military and non-military means, often conducted in the „gray zone“ between war and peace.<sup>32</sup>

Hybrid warfare includes: conventional military operations on a limited scale, cyber attacks, disinformation campaigns, use of proxy forces, economic pressure, energy blackmail, and political interference. Russia's actions in Crimea in 2014 („little green men“), hybrid operations in eastern Ukraine, and cyber attacks in various countries represent examples of hybrid warfare.

New technologies are radically changing the nature of war. Unmanned combat vehicles (drones) have become a central element of conflicts, as clearly seen in the Russia-Ukraine

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<sup>30</sup> Mary Kaldor, *New and Old Wars: Organized Violence in a Global Era*, 4th ed. (Cambridge: Polity Press, 2019), 25–29.

<sup>31</sup> Lawrence Freedman, *The Future of War: A History* (New York: Public Affairs, 2017), 210–218.

<sup>32</sup> Frank G. Hoffman, *Hybrid Warfare and Challenges*, *Joint Force Quarterly*, No. 52 (1st Quarter 2009): 34–39.

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war and the Karabakh conflict. The use of artificial intelligence in intelligence, target identification, and autonomous systems creates new combat capabilities.<sup>33</sup>

Cyber warfare capabilities are growing - cyber attacks can paralyze critical infrastructure, disorganize military communications, and influence public opinion. Space technologies are also becoming an important element of conflicts - satellite intelligence, communications, and navigation are critically important for modern combat operations.

Hypersonic weapons, laser systems, electromagnetic weapons, and autonomous war robots represent future combat technologies that may further change the balance of power and the nature of war.

Information warfare is becoming an integral part of contemporary conflicts. Social media, digital platforms, and global information networks create new means for shaping public opinion, spreading disinformation, and influencing political processes.<sup>34</sup>

Disinformation campaigns, „deepfake“ technologies, coordinated bot networks, and strategic narrative formation represent information warfare instruments. These operations aim not only to spread specific information but to exert broad cognitive influence - weakening trust in institutions, strengthening societal polarization, and undermining the concept of „truth“.

Russia's information operations in Western democracies, China's „soft power“ campaigns, and Iranian or North Korean disinformation represent examples of this trend. Western countries attempt to develop counter-strategies and strengthen „cognitive security“, though this requires a difficult balance between freedom of expression and combating disinformation.

Economic warfare - trade wars, sanctions, investment restrictions, technological blockades - is becoming a central component of contemporary conflicts. The unprecedented package of Western sanctions against Russia, the US-China trade war, and

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<sup>33</sup> Paul Scharre, *Army of None: Autonomous Weapons and the Future of War* (New York: W.W. Norton, 2018), 145-189

<sup>34</sup> P.W. Singer and Emerson T. Brooking, *LikeWar: The Weaponization of Social Media* (Boston: Houghton Mifflin Harcourt, 2018), 234-267.

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technological decoupling show how economic instruments are used in the context of geopolitical conflicts.<sup>35</sup>

Contemporary forms of economic warfare are more sophisticated and targeted. „Smart sanctions“ target specific individuals, organizations, or sectors. Export controls are used to limit the spread of strategic technologies. Credit rating agencies, international payment systems, and global financial centers become arenas of geoeconomic conflict.

New generation warfare is multi-domain - it occurs simultaneously in different spheres: land, sea, air, space, and cyber domains, as well as in informational and cognitive space. Military doctrines increasingly emphasize coordination and synergy among these different domains.<sup>36</sup>

Contemporary conflicts also include the „gray zone“ - actions that do not reach the threshold of open war but are clearly aggressive or hostile. This may be cyber attacks that do not cause casualties, economic pressure that is not formal sanctions, or military activities that are formally „exercises“ or „patrols“ but are actually intimidation.

#### IV. The Dilemmas of Small and Medium-Sized States

Small and medium-sized states find themselves in a particularly difficult situation in the contemporary geopolitical environment. They must decide whether to follow a global power (and often fall into excessive dependence) or try to maintain strategic autonomy and hedge between different powers.<sup>37</sup>

This choice is determined by several factors: geographical location, economic dependencies, security threats, and domestic political dynamics. For example, small European countries near Russia actively seek NATO and EU protection. Meanwhile, Southeast Asian countries often attempt to balance relationships with both the US and China.

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<sup>35</sup> Nicholas Mulder, *The Economic Weapon: The Rise of Sanctions as a Tool of Modern War* (New Haven: Yale University Press, 2022), 312-345.

<sup>36</sup> Joint Chiefs of Staff, *Joint Concept for Integrated Campaigning* (Washington DC: Department of Defense, 2018).

<sup>37</sup> Evelyn Goh, "Southeast Asian Strategies toward the Great Powers: Still Hedging after All These Years?", The ASAN Forum, February 2016, <http://www.theasanforum.org>.

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Small economies are particularly vulnerable to global economic shocks, geopolitical tensions, and economic pressure from great powers. Disruptions in supply chains, rising energy prices, or financial crises may have more severe consequences in small countries because they have limited resources to absorb shocks.<sup>38</sup>

Moreover, small countries are often dependent on a limited number of markets or partners. If these partners are involved in geopolitical conflicts, small countries automatically feel the consequences. For example, African and Asian countries dependent on Ukrainian and Russian grain imports severely experienced a food security crisis.

Achieving technological sovereignty is nearly impossible for small countries that lack resources for R&D and technology industry development. This means they remain dependent on foreign technologies, which can become a source of strategic vulnerability.<sup>39</sup>

Development assistance and infrastructure investments often come with geopolitical strings. Loans under China's BRI, American development assistance, or Russian energy investments may include political expectations, limiting the foreign policy autonomy of small countries.

Despite challenges, small and medium-sized states have certain strategic options. Some countries manage to gain maximum benefits from competing powers through effective diplomatic maneuvering (such as Vietnam or Singapore). Others use regional organizations as a platform for strengthening collective voice (such as ASEAN).<sup>40</sup>

Some countries manage to use their geographical location, resources, or strategic position to increase their importance (such as small oil-rich states or strategically important transit countries). However, these strategies require great diplomatic skill and are often risky, as balancing the interests of great powers is difficult and unstable.

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<sup>38</sup> Dani Rodrik, *Straight Talk on Trade: Ideas for a Sane World Economy* (Princeton: Princeton University Press, 2017), 112-145.

<sup>39</sup> Chris Miller, *Chip War: The Fight for the World's Most Critical Technology* (New York: Scribner, 2022), 267-298.

<sup>40</sup> Amitav Acharya, *Constructing a Security Community in Southeast Asia: ASEAN and the Problem of Regional Order* (London: Routledge, 2014), 178-212.

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In a multipolar system, the collective voice of „Global South“ or „non-Western“ countries is becoming increasingly important. Organizations such as G77, the Non-Aligned Movement, the expanded BRICS format, and other platforms attempt to present an alternative perspective on the international order.<sup>41</sup>

These countries demand more equal representation in international institutions, reform of global financial architecture, and a fairer approach to climate change, debt, and development issues. However, this group of countries often lacks cohesion and unified vision, limiting the effectiveness of their collective action.

### CONCLUSION

The contemporary international system is undergoing a fundamental transformation whose final form is still in the process of formation. The end of the unipolar moment is clear, but the specific contours of the new multipolar order remain unclear. During this transitional period, the system is particularly unstable and unpredictable, as old rules and norms are undermined while new ones are not yet consolidated.

Geopolitical competition between the US and China, Russia's revisionist politics, Europe's search for strategic autonomy, increased activity of regional powers, and collective mobilization of Global South countries create a complex and dynamic geopolitical landscape where multiple scenarios are possible.

Globalization is not ending, but it is transforming. The hyperglobalization model that dominated 1990-2010 is being replaced by a more segmented and politicized global economy. Economic integration will continue, but it will be increasingly filtered through geopolitical, security, and values considerations.

Regionalization, friend-shoring, and selective decoupling will create a complex global economic architecture where different economic spheres and systems coexist in parallel. This will not be bipolar separation as during the Cold War, but a more complex and porous structure where countries and companies navigate between multiple overlapping networks and rules.

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<sup>41</sup> Kishore Mahbubani, *Has the West Lost It?*, ( Hardcover: Allen Lane,2018), 178-214.

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Traditional security concepts focused on military threats and territorial integrity are expanding to include economic security, technological security, energy security, cybersecurity, food security, and climate security. The threats facing contemporary states are multidimensional and interconnected.

Accordingly, security strategies must be comprehensive and integrated. Successful states will be those that can effectively balance and coordinate different dimensions of security policy - maintaining military capabilities, developing economic resilience, achieving technological sovereignty, and climate adaptation.

The future development of contemporary geopolitical transformation includes several possible scenarios:

- Stabilized Multipolarity: In this scenario, global powers reach a new modus vivendi - mutual recognition of spheres of influence, a system of negotiated rules, and a framework for stable competition. International institutions are reformed to better reflect the new distribution of power.
- Intense Conflict: In this more pessimistic scenario, geopolitical confrontation deepens and transitions to open confrontation in one or more regions (Taiwan, the Baltics, the Middle East). This causes significant destabilization of the international system and a deep economic crisis.
- Regional Hegemonies: In this scenario, global governance weakens and more power transfers to regional forces. The world is effectively divided into regional spheres where local hegemons have dominant influence.
- Technological Bifurcation: In this scenario, the global economy and technological systems divide into two or more parallel spheres with different standards, technologies, and governance models. A „digital silk curtain“ divides the world into technological blocs.
- Climate Catastrophe: In this scenario, accelerating climate change and insufficient global response cause cascading crises that fundamentally change geopolitical priorities and power distribution.

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In reality, development will likely be a combination of these scenarios in different regions and sectors. Geopolitical transformation will not be a linear process and will include both stabilization and crisis moments.

A multipolar system may provide more space for small and medium-sized states for diplomatic maneuvering and coalition building than a unipolar or bipolar system. However, this also means more uncertainty and security challenges. Successful countries will be those that can:

- Effectively diplomatically balance between major powers
- Build regional coalitions
- Economic diversification and increased resilience
- Technological adaptation and innovation
- Ensure internal political stability and effective governance

In these conditions, the strategic autonomy of small countries will depend not only on external factors but on internal resilience and adaptive capacity.

Effective global governance requires reform of international institutions to better reflect the new distribution of power and respond to 21st-century challenges. However, the reform process is slow and difficult because it requires consensus among powers with different interests.

In parallel, the development of alternative institutions - such as BRICS, SCO, AIIB (Asian Infrastructure Investment Bank) - creates a pluralistic institutional landscape. This can be both positive (more choice and competition) and negative (coordination difficulties and fragmentation).

Ideally, old and new institutions would find ways to coexist and cooperate to provide global public goods - combating climate change, pandemic prevention, economic stability, conflict prevention. However, this requires political will and ability to compromise, which is not guaranteed under conditions of high geopolitical tension.

The technological and conceptual evolution of warfare will continue. The development of artificial intelligence, autonomous systems, quantum computers, and biotechnologies

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may further change the nature of warfare. The role of information and cyber warfare is also growing.

Meanwhile, the development of international rules and norms for new combat technologies is becoming increasingly relevant. How should autonomous lethal systems be regulated? What are the „recognized rules“ in cyber warfare? How do we limit the militarization of space? These questions require international dialogue and possibly new international treaties, though achieving consensus is difficult under conditions of high confrontation.

Geopolitical transformation and new generation warfare represent interconnected processes that define the 21st-century international order. This transformation is not merely a change in the balance of power but a fundamental change in how power is exercised, how the global economy functions, and how international cooperation is managed.

Successful navigation in this complex environment requires strategic foresight, adaptive capacity, and development of a long-term vision for the future. Countries - large or small - must find ways to protect their interests while cooperating on global challenges.

The contemporary geopolitical landscape is unstable and uncertain, but it is also full of opportunities for creating new alliances, institutions, and forms of cooperation. How countries and societies use these opportunities will determine the security, well-being, and prosperity of future generations.

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## GEORGIA'S TAX SYSTEM: BETWEEN REFORM AND STABILITY

Geno Morchiladze<sup>1</sup>

Thea Bidzinashvili<sup>2</sup>

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### ABSTRACT

The tax system is one of the primary instruments of economic stability and fiscal sustainability in modern states. Georgia's Tax Code defines the types of taxes, taxpayer categories, and the rules of taxation, enabling the state to maintain a balanced budget and create a business-friendly environment. Taxes serve not only fiscal purposes but also strategic economic, social, and regulatory functions, promoting economic policy implementation, social equity, and the country's investment attractiveness.

The Georgian tax system is divided into two main categories: state taxes and local taxes. State taxes, which constitute the central budget, include personal income tax, corporate profit tax, value-added tax (VAT), excise duties, and import duties. Local taxes, administered by municipal authorities, primarily consist of property tax and other local levies, ensuring financial independence for municipalities and enabling the funding of infrastructure, education, and social projects.

Personal income tax in Georgia is progressive: annual income up to 40,000 GEL is exempt, while income above this threshold is taxed at a 20% rate, ensuring social fairness and international competitiveness. The corporate profit tax adopts an innovative model, taxing only distributed profits at 15%, while reinvested profits remain untaxed, stimulating investment attraction and business development. VAT, as an indirect tax, represents a major source of budget revenue, with a standard rate of 18% and a reduced rate of 5% for hotel services, supporting tourism promotion. Excise duties, applied to specific harmful products, both increase budget revenues and support public health policies.

Among local taxes, property tax plays the primary role, though it creates revenue disparities between regions. The Georgian Revenue Service is responsible for tax administration, and the introduction of electronic declaration has simplified bureaucracy and increased transparency.

Compared internationally, Georgia's tax system is competitive due to its low rates, simple administration, and predictable environment. However, challenges remain in maintaining fiscal stability, reducing regional disparities, and ensuring fair revenue distribution. Recommendations include improving administrative processes, maintaining business incentives, refining the progressive scale of personal income tax, strengthening local finances, and increasing taxpayer awareness.

Overall, Georgia's tax system represents a stable, competitive, and innovative fiscal mechanism, and its further refinement will significantly support economic growth and the promotion of social equity.

**Keywords:** Tax System, Fiscal Stability, Corporate and Personal Income Tax, Tax Administration, Digitalization.

<sup>1</sup> Associate Professor at GTU, Doctor of Public Administration

<sup>2</sup> Associate Professor at Georgian Technical University (GTU), Editor of the Scientific Center at ETA

## INTRODUCTION

The tax system is one of the key instruments for ensuring economic stability and financial sustainability in a modern state. Through taxation, the government secures budget revenues, finances public services, and regulates economic processes in a targeted manner. For this reason, tax policy forms the core of the state's fiscal mechanism, serving both as a source of budget revenue and as a tool for strategic economic functions.

The Tax Code in force in Georgia defines the types of taxes, categories of taxpayers, and the rules for their imposition. Its purpose is to balance the stability of budget revenues while creating a favorable environment for business. The tax system also represents a major factor in the country's investment attractiveness, as a solvent, predictable, and transparent taxation model enhances confidence in the state's economic policy.

The relevance of this topic stems from the fact that tax policy is not only a financial instrument but also an expression of the state's social responsibility. Proper planning and administration of taxes determine the pace of economic development, ensure fairness in income distribution, and contribute to the improvement of citizens' welfare.

## MAIN PART

### General Characteristics of the Tax System

The tax system of Georgia is based on a dual structure: state taxes and local taxes.

The primary objectives of state taxes are to generate budget revenues, ensure fiscal stability, and implement economic policy. The main state taxes include: personal income tax, corporate profit tax, value-added tax (VAT), excise duties, and customs duties.<sup>3,4</sup>

Local taxes are determined by municipal authorities and include property tax and other local levies. These taxes ensure the financial independence of local budgets and support the funding of infrastructure and social projects at the municipal level.<sup>5,6</sup>

<sup>3</sup> Ministry of Finance of Georgia. Tax Code of Georgia. Official Publication, Tbilisi. (2024).

<sup>4</sup> M. Kvartadze, Tax Law. Tbilisi: Ivane Javakhishvili Tbilisi State University. (2022).

<sup>5</sup> Ibid.

<sup>6</sup> OECD. Corporate Taxation in Estonia: Reforms and Outcomes. OECD Publishing, Paris. (2021).

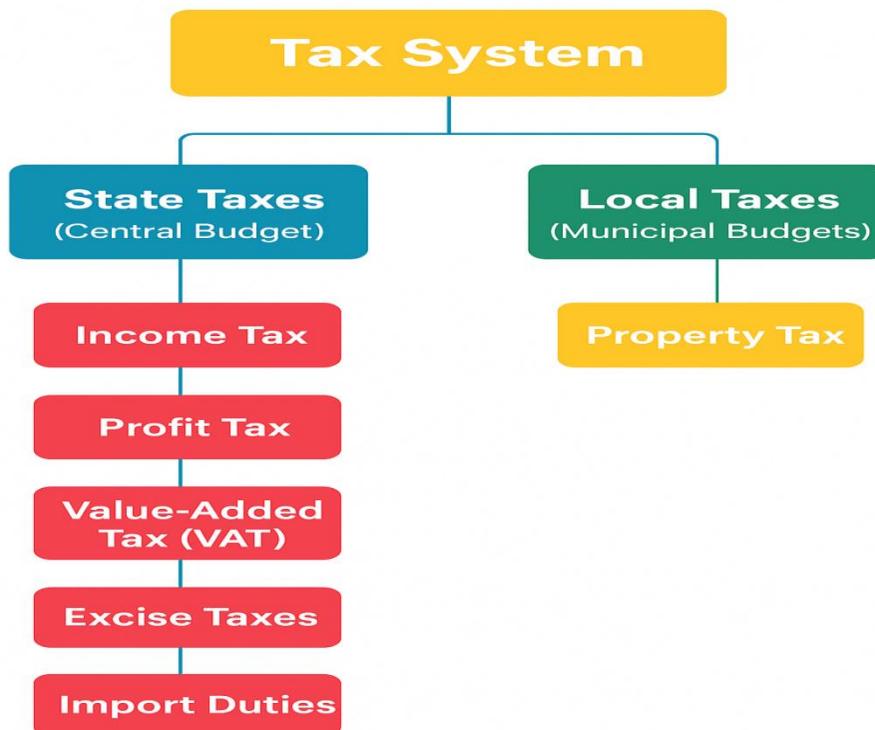


Diagram 1: Structure of the Tax System in Georgia

The main principles of tax policy are legality, fairness, neutrality, transparency, and the protection of taxpayers' rights. The Tax Code of Georgia provides for an electronic declaration system, which helps reduce bureaucratic barriers and creates a more predictable financial environment for businesses.<sup>7</sup>

## I. In-Depth Analysis of State Taxes

### Personal Income Tax

Personal income tax is a direct tax levied on the income of individuals. Under the current regulations in Georgia, the income tax is progressive: annual income up to 40,000 GEL falls within a safety threshold and is exempt, while income exceeding this threshold is taxed at a 20% rate. This ensures higher tax rates for high-income individuals and upholds the principle of social fairness.<sup>8</sup>

- Comparative Analysis: Georgia's maximum rate of 20% is among the lowest in Europe. For example, the progressive rate reaches up to 45% in France and Germany, Estonia applies a flat

<sup>7</sup> International Monetary Fund (IMF). Georgia: Fiscal Policy Review. IMF Country Report. (2023).

<sup>8</sup> Kvartadze, M. Tax Law. Tbilisi: Ivane Javakhishvili Tbilisi State University. (2022).

20% rate, and neighboring Bulgaria and Romania apply a flat 10% rate. Georgia's model combines a progressive element (40,000 GEL threshold) with a competitive maximum rate.

## 1. Corporate Profit Tax

Corporate profit tax applies to the financial results of legal entities. Georgia employs a so-called “distributed profit” model, similar to the Estonian system. The 15% tax on corporate profit is applied only when profits are distributed as dividends, while reinvested profits remain untaxed. This approach encourages business development and investment growth.<sup>9</sup> <sup>10</sup>

- **Comparative Analysis:** This model is considered a “trademark” of Georgia's tax system. The 15% rate on distributed profits is highly competitive. Estonia pioneered this model, and its success has served as an example for many countries, including Georgia. Compared to traditional systems (e.g., 21% federal rate in the USA, 30% in Germany), this approach significantly promotes capital accumulation and long-term business investments.

Structure of State Budget Revenues (2023)

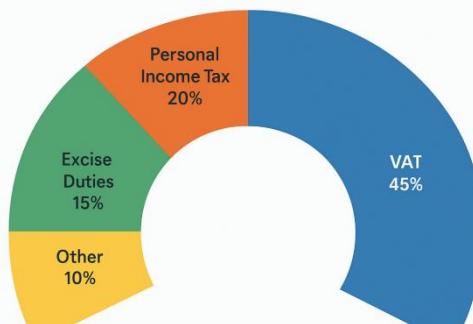


Diagram 2: Structure of State Budget Revenues (2023)

## 2. Value-Added Tax (VAT)

VAT is an indirect tax mechanism that applies to the value added at each stage of production and service provision. It ensures the stability of the tax system and represents a primary source of budget revenues. In Georgia, the standard VAT rate is 18%, while a reduced rate of 5% is applied to hotel services, which helps stimulate tourism.

- **Comparative Analysis:** The 18% VAT rate is relatively low compared to the European Union average (e.g., Germany 19%, France 20%, Poland 23%, Hungary 27%). This promotes price

<sup>9</sup> International Monetary Fund (IMF). Tax Policy Assessment in Georgia: Fiscal Reforms and Growth Strategy. IMF Country Report. (2023).

<sup>10</sup> Federal Ministry of Finance, Germany. German Tax Code. Berlin. (2022).

competitiveness and helps contain inflation. However, the high share of VAT in budget revenues (45%) indicates a strong dependence on consumption taxes, which can have a regressive effect, as lower-income citizens spend a larger proportion of their income on consumption.

### 3. Excise Duty

Excise duty is a targeted tax applied to specific products such as tobacco, alcohol, and fuel. Its objectives are twofold: to generate budget revenues and to support public health policies by discouraging the consumption of harmful products.<sup>11</sup>

- Comparative Analysis: Excise rates in Georgia, particularly for alcohol and tobacco, are often lower than those in Western European countries. While this provides a comparative advantage for tourism, it poses challenges from a public health policy perspective. As Georgia continues its European integration, aligning excise rates with European standards is expected, creating an additional source of budget revenue.

## II. Local Taxes

Local self-government bodies in Georgia are responsible for forming local budgets.

- Property Tax: This tax is based on the cadastral value of real estate. The rate varies from 0.05% to 1%, depending on property type and location.

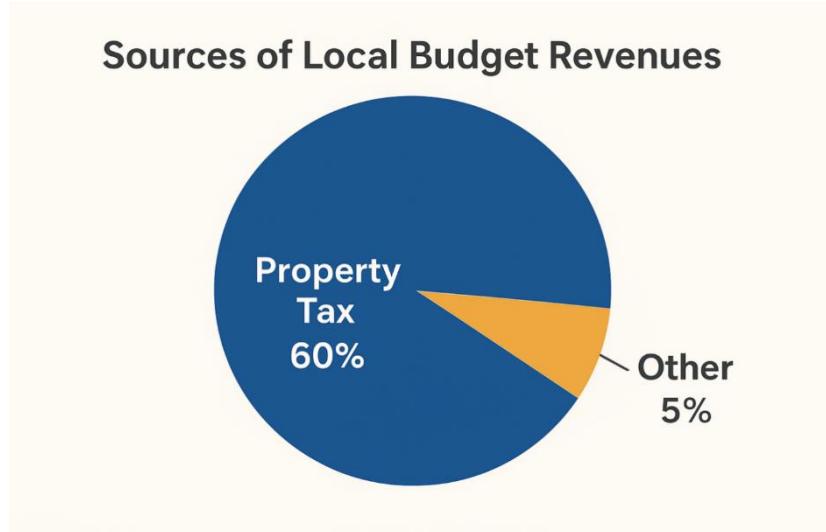


Diagram 3: Sources of Local Budget Revenues

<sup>11</sup> Z. Kobalia, Fiscal Policy and Economic Development in Georgia. Tbilisi: Economic Policy Institute. (2020).

These taxes ensure financial independence for municipalities, allowing local authorities to fund infrastructure, educational, and social projects.<sup>12</sup> <sup>13</sup> However, a strong reliance on property taxes creates disparities between regions, as urban areas (e.g., Tbilisi, Batumi) generate significantly higher revenues than rural municipalities.

### III. Features of Tax Administration

The Revenue Service of Georgia is the central authority for tax administration. Its functions include tax collection, declaration verification, tax control, and taxpayer services.<sup>14</sup>

The introduction of electronic declarations and digitalization has significantly improved administrative efficiency. The platform rs.ge enables rapid and convenient submission of declarations, reduces bureaucratic barriers, and increases transparency. This facilitates a business-friendly environment and enhances trust.<sup>15</sup> <sup>16</sup>

Taxpayer rights under the Georgian Tax Code include access to information, filing complaints, and using legal safeguards.

**VI. International Comparison and Competitiveness of Georgia's Tax System**  
Georgia's tax system is characterized by relatively low rates and simple administration, making it competitive in the region.

#### Comparison of Corporate Tax Rates

2024)



Diagram 4: Comparison of Corporate Tax Rates (2024) Georgia: 15% (on distributed profits only)

<sup>12</sup> M.Kvartadze, Tax Law. Tbilisi: Ivane Javakhishvili Tbilisi State University. (2022).

<sup>13</sup> ECD. Corporate Taxation in Estonia: Reforms and Outcomes. OECD Publishing, Paris. (2021).

<sup>14</sup> Ministry of Finance of Georgia. Tax Code of Georgia. Official Publication, Tbilisi. (2024).

<sup>15</sup> World Bank. Doing Business 2023: Georgia. Washington, D.C. (2023).

<sup>16</sup> International Monetary Fund (IMF). Georgia: Fiscal Policy Review. IMF Country Report. (2023).

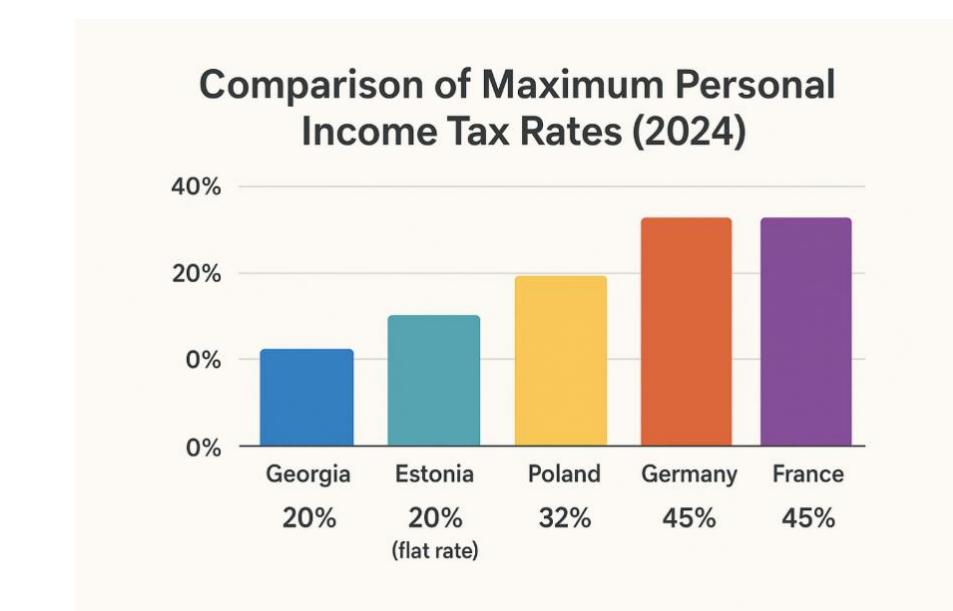


Diagram 5: Comparison of Maximum Personal Income Tax Rates (2024)

**Germany:** Features a complex system with high rates (up to 45% personal income tax), designed to maintain social balance and budget stability.<sup>17</sup> Tax administration is highly detailed and regulated.

**Estonia:** Known for its “Estonian model” of corporate taxation, partially adopted by Georgia. This approach stimulates investment and supports high economic growth rates. Estonia is also a leader in digitalization.

**Poland:** Uses a combined model with support for small businesses (reduced 9% corporate tax rate in some sectors) and various tax incentives.<sup>18</sup>

**Singapore:** Often referenced as a model for Georgia. Despite a progressive personal income tax (22%), it offers an effective corporate tax rate of 17% with broad investment incentives.

Georgia’s experience demonstrates that low tax rates, simple administration, and electronic filing support the creation of favorable conditions for business development. However, challenges remain in enhancing international competitiveness and maintaining fiscal stability.<sup>19,20</sup>

<sup>17</sup> Federal Ministry of Finance, Germany. German Tax Code. Berlin. (2022).

<sup>18</sup> International Monetary Fund (IMF). Georgia: Fiscal Policy Review. IMF Country Report. (2023).

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## CONCLUSION

- Competitiveness and Stability:** Georgia's tax system represents a competitive and relatively stable fiscal mechanism, built on low rates and innovative approaches, such as the distributed-profit corporate tax model.
- Investment and Business Development:** Low and pragmatic rates (personal income and corporate taxes) promote investments and business growth, as evidenced by the increasing volume of foreign direct investments.
- Digitalization and Transparency:** The implementation of the electronic declaration system has simplified tax administration and increased transparency, reflected in World Bank rankings.
- Local Taxes and Fiscal Autonomy:** Local taxes ensure the financial independence of municipalities, although significant disparities in revenues between regions persist.

### Challenges:

- Budget Dependence on VAT:** With over 45% of revenues coming from VAT, the budget is sensitive to economic cycles and the regressive nature of consumption taxes.
- Fiscal Stability:** Economic fluctuations and the predictability of tax revenues remain a challenge.
- Social Equity:** Progressive mechanisms need improvement to ensure fair income distribution, particularly to offset the regressive effects of VAT.
- Regional Disparities:** Strong reliance of local budgets on property taxes exacerbates development inequalities between regions.

### Recommendations

- Administrative Simplification:** Continue digitalization and simplify reporting procedures for small businesses, including introducing a simplified tax regime for micro-enterprises.
- Maintaining and Enhancing Business Incentives:** Preserve competitive rates and further develop the “Estonian model” of corporate taxation with sector-specific incentives (e.g., IT, green energy).
- Strengthening Fiscal Stability and Equity:** Consider refining the progressive scale of personal income tax and introducing an additional top tier for very high incomes to reduce VAT dependency. Enhance predictability of tax revenues for more effective budget planning.
- Strengthening Local Finances:** Develop a balanced formula for local budget transfers to reduce regional disparities and ensure access to essential services in all municipalities.

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**5. Increasing Taxpayer Awareness:** Strengthen advisory services and electronic platforms to improve taxpayer engagement and compliance.

Overall, Georgia's tax system provides the national economy with a stable and competitive fiscal instrument. Implementing these recommendations will further enhance its efficiency, fairness, and sustainability.

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## U.S. MILITARY “DETERRENCE” STRATEGY IN THE INDO-PACIFIC

Lieutenant Colonel Ioseb Turashvili<sup>1</sup>

<https://orcid.org/0009-0004-2891-7547>

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### ABSTRACT

This article examines the United States' military “deterrence” strategy in the Indo-Pacific region and its underlying geopolitical dynamics. The study highlights the 21st-century geopolitical context in which the region has become the primary arena of great-power competition between the United States and China. It emphasizes Washington's strategic objectives: containing China's expanding influence, maintaining military and air superiority, strengthening partnership alliances (ASEAN – Association of Southeast Asian Nations; AUKUS – Australia–United Kingdom–United States security partnership; QUAD – Quadrilateral Security Dialogue), and upholding the international order under the Free and Open Indo-Pacific (FOIP) strategy.

Special attention is given to the significance of AUKUS, which provides Australia with nuclear-powered submarines, cyber capabilities, hypersonic systems, and advanced AI technologies—constituting a direct response to China's military activities in the South China Sea and the broader region. The study also outlines the importance of economic engagement, support for innovation, and strengthening democratic governance as critical components of the U.S. global strategy, all of which reinforce the traditional military dimension of deterrence.

The research employs a qualitative social-science methodology. This approach enables a comprehensive and multidimensional analysis of the problem rather than focusing solely on isolated manifestations. The key advantage of the qualitative method lies in its capacity for in-depth, holistic examination of complex issues.

The paper discusses the role of U.S. geopolitical interests in shaping the global order of the 21st century. Strategically, Washington focuses on regions that directly or indirectly affect U.S. national security, economic power, and global leadership—with the Indo-Pacific being among the most vital. U.S. military policy for safeguarding these interests is grounded in three core principles: **Threat prevention and deterrence** through a robust military presence in strategic regions; **Strengthening global partnerships** via NATO, AUKUS, QUAD, and other regional blocs; **Integration of innovative technologies**, particularly in cybersecurity and artificial intelligence.

Geopolitically, the Indo-Pacific constitutes a crucial economic and strategic space in which the United States seeks to maintain vigilance and rapid response capabilities—militarily and economically. At the same time, regional partners such as India, Australia, Japan, and others form integral pillars of America's deterrence architecture, contributing to a strengthened regional coalition and an increasingly multipolar security structure. The strategy's effectiveness relies on mobile and flexible military forces, innovative technologies, and the active use of the information domain, all of which enhance the United States' capacity to respond to regional challenges.

**Keywords:** deterrence strategy, Indo-Pacific, AUCUS, regional security, global hegemony

<sup>1</sup> Head of the Baccalaureate Program in Management at LEPL - David Aghmashenebeli National Defence Academy of Georgia

## INTRODUCTION

In the geopolitical landscape of the 21st century, the Indo-Pacific has emerged as the primary arena of great-power rivalry. The strategic objective of the United States is to contain the expansion of China's influence and ensure the preservation of its own military and economic superiority in the region. To achieve this, Washington employs a strategy of **strategic deterrence**, which integrates military basing, security alliances, trade mechanisms, and technological dominance.

The Indo-Pacific encompasses the central sphere of competition between the world's two largest economies—the United States and China. China's *Belt and Road Initiative* (BRI), its assertive claims in the South China Sea, and the Taiwan issue—considered a potential flashpoint for military conflict—are identified in the **2022 U.S. National Security Strategy** as core strategic challenges. Within this framework, the U.S. deterrence strategy is designed to limit China's growing military and economic influence through a global network of military bases and strengthened alliances, including **AUKUS** (Australia, the United Kingdom, and the United States), **QUAD** (Quadrilateral Security Dialogue—United States, Japan, India, Australia), and **ASEAN** (Association of Southeast Asian Nations). These partnerships promote economic stability, maritime security, and cooperation on climate-related challenges.

Regarding U.S. military basing and force posture in the region, key installations are located in **Okinawa (Japan)**, **Guam**, **Diego Garcia**, **South Korea**, and **Australia**. In addition, the United States maintains a **rotational presence** in Australia (Darwin), the Philippines, and Japan as part of the **Free and Open Indo-Pacific (FOIP)** doctrine, ensuring sustained military access to critical strategic locations. Significant military assets oriented toward the region include new naval and air capabilities, such as **Ford-class aircraft carriers** and the **B-21 Raider** strategic bomber.<sup>2</sup>

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<sup>2</sup> U.S. Department of Defense. Fact Sheet: Department of Defense Marks Two-Year Anniversary of the U.S. Indo-Pacific Strategy. February 2024. <https://surl.lt/fobkw>, (Accessed 28. 11.2025.)

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## MAIN PART

The United States' Indo-Pacific strategy is officially defined in the **2022 Indo-Pacific Strategy** document. Its core components reflect Washington's long-term geopolitical vision for ensuring regional stability, maintaining a favorable balance of power, and countering China's expanding influence.

A central pillar of this framework is the **Free and Open Indo-Pacific (FOIP)** doctrine—a geostrategic concept in U.S. foreign policy aimed at promoting stability, security, respect for sovereignty, and economic openness across the Indo-Pacific region. FOIP is built upon four foundational principles:

1. **Freedom of Navigation and Overflight** – All states in the region must be able to move freely by sea and air in accordance with international law.
2. **Respect for Sovereignty** – No state should be coerced into accepting policies contrary to its national interests.
3. **Market-Based Economics and Inclusive Development** – Regional development should be based on open markets, transparency, infrastructure integrity, and the absence of corruption.
4. **A Predictable, Rules-Based Order** – Stability should rest on international norms and legal regimes, particularly the **United Nations Convention on the Law of the Sea (UNCLOS)**.

The FOIP doctrine emerged as a direct response to China's growing military, economic, and technological influence throughout the region, especially in the South China Sea. The United States places particular emphasis on a **deterrence-based strategy** to prevent unilateral Chinese dominance, strengthening both traditional and emerging multilateral security arrangements.

Among these, **AUKUS** and **QUAD** represent critical instruments of coordinated action. They enhance interoperability, increase joint military preparedness, and reinforce collective security commitments. Moreover, the United States continues to advance alternative infrastructure and investment initiatives—such as the **Blue Dot Network** and

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**Build Back Better World (B3W)**—which serve as counterweights to China’s expansive *Belt and Road Initiative* (BRI). These initiatives seek to provide transparent, sustainable, and rules-based infrastructure development as strategic alternatives to Chinese state-backed projects.

Through these combined approaches—military deterrence, alliance strengthening, technological cooperation, and geoeconomic counterbalancing—the United States aims to maintain regional stability while limiting China’s ability to reshape the Indo-Pacific order in ways that challenge U.S. national interests and the wider rules-based international system.

“Strengthening the Partnership Network” - China’s pressure on neighboring states in the South China Sea, its economic expansionism, and the construction of military bases have prompted an active U.S. response and deeper partnership engagement. The strengthening of the partnership network represents the United States’ geostrategic response to China’s assertive policies. This approach relies not only on military deterrence but also on long-term economic, technological, and political cooperation. Situational analysis demonstrates that the U.S. strategy is more inclusive and multilayered than the traditional, narrowly defined concept of “containment.”

“Regional Security and Deterrence” - The region holds immense geoeconomic and geopolitical significance, as it hosts 60 percent of global trade flows and some of the most critical energy routes. For the United States, the Indo-Pacific is strategically essential for maintaining global hegemony and balancing China’s growing military and political influence. U.S. military strategy in the Indo-Pacific is based on the principle of deterrence, which includes strengthening military capabilities in the region, supporting strategic allies, expanding the partnership network, and upholding a rules-based international order. This strategy aims to restrain China’s military expansion in the South China Sea, around the Taiwan Strait, and throughout East Asia.<sup>3</sup>

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<sup>3</sup> U.S. Department of Defense. Fact Sheet: Department of Defense Marks Two-Year Anniversary of the U.S. Indo-Pacific Strategy. February 2024. <https://surl.li/mnohuz>, (Accessed 28. 11.2025.)

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“Economic Engagement and Innovation” - The U.S. strategy in the Indo-Pacific is oriented not only toward military deterrence but also toward stabilizing the economic environment, developing digital infrastructure, and promoting innovation. Through this approach, the United States seeks to establish a partnership-based, rules-driven system that counters authoritarian economic models and ensures long-term stability in the region. Washington is launching multibillion-dollar infrastructure initiatives with its partners—for example, the G7-announced Partnership for Global Infrastructure and Investment (PGII)—which aims to provide an alternative to China’s Belt and Road Initiative. Priority areas include digital infrastructure, clean energy, and the health sector. Furthermore, the Indo-Pacific Economic Framework for Prosperity (IPEF), launched in 2022, brought together 14 countries (including Japan, South Korea, India, Australia, and Vietnam) to develop common standards in trade policy, supply-chain resilience, energy, and anti-corruption measures.<sup>4</sup> The United States also supports the development of startup ecosystems in the region, including assistance for digital enterprises, the empowerment of women in the technology sector, and the funding of regional innovation hubs.<sup>5</sup> In addition, Washington is advancing scientific cooperation with partners such as South Korea and Australia in areas related to the hydrogen economy, battery technologies, and green innovation—initiatives that also contribute to broader climate security objectives.<sup>6</sup>

“Support for Democratic Governance” - The United States promotes the development of democratic institutions, the strengthening of the rule of law, and the protection of human rights in the region. It supports non-governmental organizations, media freedom, and the empowerment of civil society. The U.S. considers democratic values to be directly linked to long-term security and stability.<sup>7</sup>

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<sup>4</sup> White House. “Fact Sheet: In Asia, President Biden and a Dozen Indo-Pacific Partners Launch the Indo-Pacific Economic Framework.” 2022. <https://surl.li/kelazn>, (Accessed 28. 11.2025.)

<sup>5</sup> U.S. Department of State. “U.S.-India Initiative on Critical and Emerging Technology (iCET).” 2023. <https://surl.li/brylfv>, (Accessed 28. 11.2025.)

<sup>6</sup> U.S. Department of Energy. “DOE Launches Clean Energy Partnerships in the Indo-Pacific.” 2022. <https://surl.li/zffhga>, (Accessed 28. 11.2025.)

<sup>7</sup> U.S. Department of State. *The United States’ Enduring Commitment to the Indo-Pacific*, February 2024. <https://surl.li/irykrz>, (Accessed 28. 11.2025.)

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The U.S. military deterrence strategy in the Indo-Pacific represents a comprehensive response to the evolving global balance of power. Partnership networks, economic engagement, the geographical distribution of military bases, and value-based principles together form a solid platform for maintaining U.S. global hegemony.

The AUKUS military-political bloc (Australia, the United Kingdom, and the United States) plays a crucial role in Washington's Indo-Pacific deterrence strategy, especially in countering China, and is widely regarded as a de facto NATO equivalent in the region. Analyzing this bloc and its objectives provides deeper insight into U.S. geopolitical interests in the Indo-Pacific. The U.S. National Security Strategy (2022) underscores the importance of AUKUS as a tool for strengthening the alliance network. The strategy aims to advance systems based on nuclear technologies, advanced weaponry, and cybersecurity.

The article “AUKUS: A Generational Opportunity,” published by the U.S. Department of State in 2023, is a key document that examines the goals, significance, and prospects of the newly established AUKUS military-political alliance among Australia, the United Kingdom, and the United States. The alliance represents a major indicator of shifting geopolitical dynamics in the Indo-Pacific region.<sup>8</sup>

The establishment of AUKUS was announced in 2021 as a trilateral partnership aimed at strengthening security in the Indo-Pacific region. AUKUS brings together three powerful democratic states that share common values and strategic interests. The formation of the alliance reinforces the unity of democratic forces in the region and reduces China's influence. Its creation was primarily driven by China's growing military capabilities and expanding regional influence, both of which pose challenges to the United States, its partners, and its allies. The objectives of AUKUS include: Development of Submarine Capabilities - The partnership envisions providing Australia with nuclear-powered submarines, which will enhance the maritime balance in the region. Under AUKUS, Australia will receive nuclear-powered submarines for the first time, enabling extended

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<sup>8</sup> U.S. Department of State. “AUKUS: A Generational Opportunity.” United States Department of State, April 5, 2023. <https://surl.li/lnwans>, (Accessed 28. 11.2025.)

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operational range and greater strategic flexibility. As part of the agreement, Australia will acquire at least three nuclear-powered submarines from the United States, significantly boosting its naval capabilities. This step is viewed as a means of strengthening deterrence and stability in the Indo-Pacific, although China perceives it as a threat and a factor contributing to regional destabilization.

This move substantially enhances Australia's maritime capabilities, serving as a direct instrument for countering China's military activities in the region. Nuclear-powered submarines possess the ability to operate undetected for long periods, making them ideal assets for maintaining the regional balance of power. The program contributes to the strengthening of U.S. allies in the Indo-Pacific and ultimately supports the overall security architecture of the region.<sup>9</sup>

**Cybersecurity and Advanced Technologies:** This includes partnership aimed at strengthening cybersecurity and developing cyber-defense strategies. One of the core priorities of AUKUS is the enhancement of cybersecurity, which is an integral part of modern military and economic strategies. This involves the development of innovative systems that ensure the protection of partners' critical infrastructure.

Regarding the research and development of artificial intelligence, hypersonic weapons, and counter-hypersonic systems, it encompasses the use of AI in military operations, which reduces human error and increases operational precision. Within the framework of the alliance, there is also close cooperation in the field of hypersonic technologies, which includes the development of both hypersonic weapons and anti-hypersonic defense systems, thereby strengthening defensive capabilities.

**Strategic Integration:** This refers to military and technological coordination that ensures the effectiveness of joint operations. Joint military exercises and technological experiments among AUKUS partners are aimed at improving operational coordination. This includes: *Integration of naval and air operations* – joint exercises that enable partners to operate as a

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<sup>9</sup> U.S. Space Forces Japan Celebrates First Year of Activation, <https://surl.li/jkacfk>, (Accessed 28. 11.2025.)

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unified force; Autonomous systems – the use of advanced technologies that increase efficiency and reduce the need for human involvement.<sup>10</sup>

AUKUS is clearly focused on containing China's growing military capabilities. The deployment of nuclear-powered submarines and the development of hypersonic weapons are a direct response to China's military expansion in the South China Sea and beyond.

China perceives AUKUS as a threat to its regional and global influence. As a result, China has strengthened its own military programs and is actively seeking diplomatic support in the region. It is also attempting to deepen its partnerships with Russia and other regional states.

AUKUS may also affect China's economic relations with partner countries, potentially slowing its economic growth rate. Additionally, the advanced technologies developed within the AUKUS framework may pose a direct challenge to China's military programs, such as:

*Hypersonic weapons:* China is actively working in this area, but AUKUS's technological progress threatens its military advantage;

*Cybersecurity capabilities:* the partnership creates a strong barrier against China's cyberattacks.

Despite AUKUS's strength, its implementation faces several challenges, including: *Regional reactions:* several regional countries (e.g., Indonesia and Malaysia) have expressed concern about AUKUS, which may complicate regional diplomacy; *Formation of new military alliances:* other states may begin forming new military blocs to balance AUKUS's influence; *Destabilization of the international order:* AUKUS may disrupt the global order and intensify great-power rivalry; *Chinese propaganda:* China actively uses criticism of AUKUS to advance its interests, strengthening anti-American sentiment; *Economic costs:* the expenses associated with nuclear submarine development and large-scale technological

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<sup>10</sup> U.S. Department of State. "AUKUS: A Generational Opportunity." United States Department of State, April 5, 2023. <https://surl.li/dffqrw>, (Accessed 28. 11.2025.)

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programs will be significant, which may lead to domestic criticism within partner countries.<sup>11</sup>

On January 10, 2025, U.S. Deputy Secretary of Defense Kathleen Hicks spoke at an event hosted by the School of Advanced International Studies at Johns Hopkins University and participated in a subsequent discussion, addressing issues related to strategic competition with China. Her remarks focused on the U.S. defense strategy aimed at containing China's growing influence and ensuring stability in the region. Hicks emphasized that China represents the U.S.'s primary strategic competitor, seeking to reshape the existing international order to its advantage.

In this context, the U.S. Department of Defense is making efforts to maintain military superiority and ensure a free and open Indo-Pacific region. Hicks highlighted that the AUKUS partnership, which brings together Australia, the United Kingdom, and the United States, represents a key initiative to strengthen security in the region. This partnership includes the provision of nuclear-powered submarines to Australia, as well as collaboration in cybersecurity, artificial intelligence, and other advanced technologies.

The Deputy Secretary of Defense stressed that technological innovations, such as artificial intelligence and hypersonic weapons, are critical for maintaining strategic advantage. She noted that AUKUS partners are actively working on the development and integration of these technologies, which will enhance the effectiveness of joint operations. Hicks also addressed the importance of cybersecurity, emphasizing that the AUKUS partnership facilitates information sharing and strengthens cyber defense. This cooperation aims to protect the critical infrastructure of partner countries and prevent cyberattacks.<sup>12</sup>

Kathleen Hicks' remarks and discussion underline the priorities of the U.S. defense strategy in the context of strategic competition with China. The AUKUS partnership and technological innovation are key components of this strategy, aimed at ensuring regional stability and security.

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<sup>11</sup> Ibid. U.S. Space Forces Japan Celebrates First Year of Activation

<sup>12</sup> Hicks Delivers Speech and Fireside Chat: "Outpacing the PRC: Lessons Learned for Strategic Competition", <https://surl.lu/jrzxlj>, (Accessed 28. 11.2025.)

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AUKUS is a significant geopolitical development with a major impact on the balance of power in the Indo-Pacific region. The full consequences of the alliance are not yet fully known, and its influence will depend on multiple factors, including China's policies, the responses of other regional powers, and the broader international environment. At this stage, however, AUKUS is an important part of the U.S. strategy of deterrence in the Indo-Pacific region against China. Its success depends not only on the development of military technologies but also on close cooperation among partners and the support of regional countries.

Despite existing challenges, the long-term impact of AUKUS will be decisive in maintaining regional security and stability. Preserving the balance of power in the Indo-Pacific remains a central goal of U.S. geopolitical strategy, and AUKUS remains an integral part of this strategy.

## CONCLUSION

In the 21st century, U.S. geopolitical interests and military policy are reflected in its efforts to ensure global security and stability. Despite challenges such as economic costs, geopolitical competitors, and domestic political polarization, the United States continues to act as a global leader. Its military and strategic decisions have a significant impact on the world order and international security. The U.S. military component plays a decisive role in shaping and implementing its geopolitical interests. From supporting allies in Europe amid the Russia-Ukraine war to countering China's rise in the Indo-Pacific through initiatives such as AUKUS and strategic force deployments, the U.S. continues to adapt to address new global challenges. The military remains a key instrument for realizing U.S. geopolitical objectives, integrating strategic and operational approaches to safeguard security, stability, and economic interests. However, in the face of emerging challenges such as technological progress and a multipolar world, the U.S. will need to develop more flexible and innovative strategies.

Using the situational analysis method, it is evident that the U.S. "deterrence" military strategy in the Indo-Pacific region is a key component for maintaining global hegemony.

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This strategy relies on a multifaceted approach that includes military presence, strategic partnerships, and economic diplomacy.

Primarily, the U.S. aims to contain China's growing influence in the region, which is directly linked to geopolitical tensions and new security challenges. By leveraging the size of its military forces and technological superiority, the United States strengthens stability, secures free maritime routes, and upholds the sovereignty of its allied countries in the region.

Ultimately, the U.S. “deterrence” military strategy in the Indo-Pacific is part of a broad and integrated policy. It not only demonstrates military power but also establishes partnership structures in a complex geopolitical environment and preserves the global order. Through this approach, the U.S. seeks to maintain prestige and influence in the region while remaining prepared to respond promptly and effectively to new geopolitical challenges.

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Hicks Delivers Speech and Fireside Chat: "Outpacing the PRC: Lessons Learned for Strategic Competition", <https://surl.lu/jrzxlj>, (Accessed 28. 11.2025.)

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## THE BIOLOGICAL AND POLITICAL FOUNDATIONS OF VIOLENCE

Daviti Khupenia<sup>1</sup>

Omari Lortkipanidze<sup>2</sup>

Mate Tchanturia<sup>3</sup>

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### ABSTRACT

The problem of violence has long occupied a central place in the study of human nature. From the philosophical reflections of Hobbes and Schmitt to the anthropological and neurobiological insights of Lorenz and Girard, violence emerges as a fundamental, multidimensional phenomenon that bridges the biological and the socio-political. The tendency toward aggression and conflict is not merely a product of external conditions or ideological confrontation, but rather an intrinsic feature of human existence - a mechanism that has historically served both survival and self-destruction. Understanding violence, therefore, requires a synthesis of perspectives: anthropology reveals its evolutionary origins, political theory explores its institutionalization, and psychology uncovers its neural and emotional roots. Within this framework, war appears not only as a political instrument but also as an expression of deeply embedded biological drives that shape human identity, social cohesion, and the very foundations of political order.

**Keywords:** Violence; Political Order; Human Nature; Sovereignty; Evolutionary Theory; Political Anthropology; Biopolitics; Power and Coercion.

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<sup>1</sup> Associate Professor, Department of Politic and International Relations, Georgian Technical University

<sup>2</sup> Doctoral Student, Department of Politic and International Relations, Georgian Technical University

<sup>3</sup> Doctoral Student, Department of Politic and International Relations, Georgian Technical University

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## INTRODUCTION

The phenomenon of violence serves as a fundamental bridge between our evolutionary past and our institutionalized present. While classical International Relations theories debate whether war is a result of human nature (Realism) or systemic instability (Liberalism), anthropological perspectives suggest it is a complex intersection of both biology and culture. From the instinctive drives identified by Konrad Lorenz to the "friend-enemy" distinctions of Carl Schmitt, violence emerges not just as destruction, but as a mechanism for social integration and political identity

## MAIN PART

### **The anthropological aspect of violence**

War, as the extreme form of violence aimed at achieving a desired outcome, has remained an object of study for humanity for centuries. What causes one person or group to violently attack another person or group? The debate about this continues to this day. For instance, Realism and Liberalism, from the classical theories of International Relations, offer different explanations for the origins of war: For Realists, war is inevitable due to human nature (Morgenthau) and the anarchical nature of the international system (Waltz), which compels states to fight for survival and to maintain power. For Liberals, war is the result of the instability of the political and institutional system. It arises between non-democratic actors who refuse economic integration and international cooperation based on common rules. In short, for Realists, "man is a wolf to man" (*Homo homini lupus*) by nature, while for Liberals, "man is an end in himself and not a means" (Kant).

The anthropological theory of the genesis of war, on the other hand, paints a different picture, suggesting that war is not merely a political-economic confrontation between states, but one of the most complex collective forms of human biological nature and culture.

For anthropology, war is a space where humans, as a biological species, were shaped over millions of years in a competitive ecological environment. This means that aggression and territorial defense became essential survival mechanisms from the beginning, since aggression is a natural behavior in humans and other animals, aimed at protecting resources

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and ensuring reproductive opportunities. For example, Konrad Lorenz wrote in his work (*Das sogenannte Böse. Zur Naturgeschichte der Aggression*, 1963): "Aggressive behavior belongs to the same class of instinctive drives as hunger and love; it has the same vital function of the preservation of the species<sup>4</sup>".

In Lorenz's view, aggression in the behavior of animals and humans is not merely destruction, but also a means of restoring homeostasis (internal balance). However, when this instinct is not culturally controlled, it transforms into collective violence - that is, war<sup>5</sup>. For instance, the Yanomamö tribe (an Amazonian tribe) studied by Napoleon Chagnon existed precisely on this principle: the status, prestige, and access to resources for men are directly linked to their participation in warfare. "Bloodshed for them is not simply a conflict, but a social mechanism that determines who will live and who will have children<sup>6</sup>."

Thus, evolutionarily, war can be perceived as a selective filter - groups that were better organized and more effectively utilized collective violence were better able to survive. Contemporary neuropsychology shows that aggressive behavior is closely linked to specific brain regions:

**Amygdala:** This brain structure is crucial for the perception of fear and threat, as well as the generation of defensive and aggressive reactions. Neuroimaging studies indicate that amygdala activation increases when an individual perceives hostile or dangerous stimuli<sup>7</sup>. In the context of war, the amygdala processes the "enemy" signal and prepares the organism for a defensive or offensive reaction.

**Hypothalamus:** This structure serves as the physiological generator of aggressive behavior. Experiments on animals have shown that electrical stimulation of the hypothalamus induces attacking behavior, indicating its role in instinctive aggression<sup>8</sup>.

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<sup>4</sup> Lorenz Konrad, *On Aggression*, New York: Harcourt, Brace & World, 1966, p. 40

<sup>5</sup> Ibid., pp. 247-250

<sup>6</sup> N. A. Yanomamö Chagnon,: *The Fierce People*. New York: Holt, Rinehart and Winston, 1968, pp. 29-35

<sup>7</sup> Davis, M., and P. J. Whalen. "The Amygdala: Vigilance and Emotion." *Molecular Psychiatry* 6, no. 1 (2001): 13-34

<sup>8</sup> W. R. Hess, "Über Diencephale Sympathicusaktionen." *Schweizer Archiv für Neurologie und Psychiatrie* 23 (1928): 33-52

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**Prefrontal Cortex:** This area is responsible for regulating impulse and emotional control<sup>9</sup>. Under conditions of intense stress or collective aggression (e.g., in war), the functioning of the prefrontal cortex decreases, resulting in reduced self-control and an increase in instinctive, emotionally-driven behavior<sup>10</sup>.

Consequently, an individual involved in war often no longer acts as an independent entity - their biological systems shift to a group mode, where emotional engagement and aggression are mobilized at an instinctive level.

Evolutionary psychology has shown that two seemingly opposite forms of human behavior - altruism and aggression - may stem from the same underlying biological and genetic mechanisms. The works of Edward O. Wilson and Richard Dawkins laid the foundation for an approach suggesting that social behaviors (including aggressive and defensive actions) can be explained by natural selection and strategies for gene survival.

Edward O. Wilson, in his work *Sociobiology: The New Synthesis* (1975), argued that aggression and altruism are evolutionarily shaped behavioral forms that serve the survival of the group or genetic kin<sup>11</sup>. Aggression is essential for securing resources and safety, while altruism is necessary for maintaining social coexistence and collective stability.

Richard Dawkins, in *The Selfish Gene*, proposed a theory that altruistic behavior is a manifestation of the gene's selfish interest - meaning an individual may sacrifice themselves if it increases the survival chance of the genes they share with their relatives<sup>12</sup>.

Consequently, evolutionary psychology views aggression and altruism not as a moral opposition, but as two sides of a genetic strategy that function within a unified system of biological survival<sup>13</sup>.

The biological mechanisms indicate that war did not emerge solely from political-economic motivations. It is deeply rooted in the human nervous, hormonal, and

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<sup>9</sup> R. J. R. Blair, "The Roles of Orbital Frontal Cortex in the Modulation of Antisocial Behavior." *Brain and Cognition* 55, no. 1 (2004): 198–208

<sup>10</sup> Adrian Raine, *The Anatomy of Violence: The Biological Roots of Crime*. New York: Vintage, 2018

<sup>11</sup> Edward O. Wilson, *Sociobiology: The New Synthesis*. Cambridge, MA: Harvard University Press, 1975

<sup>12</sup> Richard Dawkins, *The Selfish Gene*. Oxford: Oxford University Press, 1976

<sup>13</sup> Steven Pinker, *The Better Angels of Our Nature: Why Violence Has Declined*. New York: Viking, 2011

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evolutionary systems. War, from this perspective, is the social integration of instincts - an organized, culturally justified form of natural aggression. Thus, from the perspective of biological anthropology, war is a human evolutionary legacy that reflects instincts for group survival, domination, and the defense of resources. Its mechanisms are connected to the brain's aggressive and social cohesion zones, hormonal changes, and genetic survival strategies. However, the development of culture has given these instincts a new form - war has transformed into an organized political instrument. Therefore, overcoming war requires not only political but also biological consciousness transformation - shifting the instinct of aggression towards cooperation and empathy.

### **The Socio-Political Essence of Violence**

"Within identity theory, an identity is a **set of meanings defining who one is** in a role (e.g., father, plumber, student), in a group or social category (e.g., member of a church or voluntary association, an American, a female), or a unique individual... Our identities **tie us as individuals to the groups, the social categories, and the roles that make up society**. Identities are the **link between the individual and society or social structure**"<sup>14</sup>. Over time, the criteria for social identity have diversified, encompassing not only an individual's affiliation with a particular social group but also **negative criteria**<sup>15</sup>. This perspective posits that the establishment of an "alien" identity is requisite for political unity, which inherently stands in contrast to the group's own sense of self.

Both **Carl Schmitt**, with his "friend-enemy" distinction, and **Samuel Huntington**, in *The Clash of Civilizations*, argue for this inherent requirement. Huntington, for instance, views the existence of a "foreign culture" or "civilization" as a critical marker for the political cohesion of a people, serving as the basis upon which the first civilization defines its own political boundary<sup>16</sup>. In essence, "social identities are constructed as differential, that is, the

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<sup>14</sup> Peter J. Burke, "Identity," in \*The Cambridge Handbook of Social Theory\*, ed. Peter Kivisto. Cambridge: Cambridge University Press, 2021, 60

<sup>15</sup> Tajfel, Henri, and John C. Turner. "The Social Identity Theory of Intergroup Behaviour." *Psychology of Intergroup Relations*. Chicago: Nelson-Hall, 1986, 7-24

<sup>16</sup> Samuel P. Huntington, *The Clash of Civilizations and the Remaking of World Order*. New York: Simon & Schuster, 1996

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existence of externality, or of 'the Other' is fundamental to their establishment... The "Us" of equivalent social demands meets ... the "Their" naked power. Identity is here construed in mutual relation of two universalities ('our' equivalence against 'their' naked power)<sup>17</sup>." Such groups are commonly designated in political discourse using terms like **enemy**, **opponent**, **stranger**, or **competitor**.

Carl Schmitt introduced the concept of **the political** (German: *das Politische*), defining the **friend-enemy dichotomy** as "the fundamental principle to which all political actions and motives of people return"<sup>18</sup>. Observing modern political dynamics, particularly in the context of information warfare, the construction of an enemy image serves as a powerful mechanism to galvanize the masses against opposing states or social factions. Furthermore, in contemporary political reality, the image of the enemy functions as a tool for **group identity formation** that integrates and unifies society. As Umberto Eco aptly noted, "Having an enemy is important not only to define our identity but also to provide us with an obstacle against which to measure our system of values and, in seeking to overcome it, to demonstrate our own worth. So when there is no enemy, we have to invent one"<sup>19</sup>.

A significant conceptual challenge arises because, in modern political discourse, the term "**enemy**" often carries a **propagandistic connotation** and is frequently perceived as absolute evil. However, Schmitt carefully distinguished the **political enemy** (*hostis*) from the **personal enemy** (*inimicus*). A political enemy, according to Schmitt, "The political enemy need not be morally evil or aesthetically ugly; he need not appear as an economic competitor, and it may even be advantageous to engage with him in business transactions. But he is, nevertheless, the other, the stranger; and it is sufficient for his nature that he is, in a specially intense way, existentially something different and alien, so that in the extreme case conflicts with him are possible"<sup>20</sup>. Importantly, the "enemy" is not restricted

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<sup>17</sup> Jerzy Janiszewski, "Semiotics of Identity: Politics and Education," *Studies in Philosophy and Education* 30, no. 5 (2011): 510

<sup>18</sup> Carl Schmitt, *The Concept of the Political* (Chicago: University of Chicago Press, 1996), p. 26

<sup>19</sup> Umberto Eco, *Inventing the Enemy: And Other Occasional Writings*, trans. by Richard Dixon (Boston & New York: Mariner Books, 2013), 2

<sup>20</sup> Carl Schmitt, *The Concept of the Political*, in *Democracy: A Reader*, ed. Ricardo Blaug and John Schwarzmantel (New York: Columbia University Press, 2016), 245–46.

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to a specific person or collective entity such as a state, civilization, or organization; an "enemy" can also manifest as an abstract **idea**. The "**face of the enemy**" is the qualitative (evaluative) image formed in the public consciousness and interpreted by that society as an opponent to its own unity and identity.

Schmitt, much like **Thomas Hobbes**, grounds people's social reactions in the "**fear of the stranger**," which Schmitt ultimately designates as the "enemy". Consequently, for Schmitt, the fundamental *raison d'être* of the state and politics is encapsulated in the maxim: *protego ergo obligo* (Latin: "I defend, therefore I obey"), which he considers the *cogito* for the state<sup>21</sup>. This perspective establishes the existentially alien stranger/enemy as the sole phenomenon against which the use of **coercion** is deemed **legitimate** within a legal state. Intuitively, the concept of the "enemy" itself implies that the application of violence against them is permissible. Thus, the phenomenon of the enemy is foundational for introducing the definitions of "**violence**" into political discourse.

### Social Order, Anomie, and the Institutionalization of Violence

In *The Social Construction of Reality*, **Peter Berger** and Thomas Luckmann describe humans as world-creators and social beings, positing that human nature is fundamentally rooted in a desire for a **socially constructed order**<sup>22</sup>. The authors argue that the "I" is externalized by its very essence: "The totality of human externalizations creates society, which becomes an objective reality and, in turn, affects the individual"<sup>23</sup> . According to Berger and Luckmann, society and the individual are engaged in a **dialectical, self-perpetuating relationship** that serves as a collective defense against **anomie** (chaos)<sup>24</sup>. Nevertheless, these human-created social constructions are perpetually vulnerable, often due to the "self-interest and stupidity" of their creators. Therefore, this established order

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<sup>21</sup> Carl Schmitt, *The Leviathan in the State Theory of Thomas Hobbes: Meaning and Failure of a Political Symbol*, trans. by G.L. Ulmen (Westport, CT: Greenwood Press, 1996), 13

<sup>22</sup> Peter L. Berger and Thomas Luckmann, *The Social Construction of Reality: A Treatise in the Sociology of Knowledge* (Garden City, NY: Anchor Books, 1966), 61

<sup>23</sup> Ibid.

<sup>24</sup> Ibid., p. 72

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necessitates supporting **institutions** that can foster a **non-conflictual** (non-violent) environment in the relations between the individual and society<sup>25</sup>

Émile Durkheim's term *anomie* finds an equivalent in political science through Hobbes' definition of the "**state of nature**". The essential difference between the state of nature (anomie) and civil order, in Hobbes' view, lies in the problem of the **freedom to use violence**<sup>26</sup>. Hobbes argues that in the state of nature, the main rule is "**the war of all against all**", meaning a "free" person is driven by private interests, which are most effectively realized through war or the unrestrained use of violence<sup>27</sup>. He famously describes the life of individuals under the primacy of universally applicable and freely available violence as: " And the life of man, solitary, poor, nasty, brutish, and short"<sup>28</sup>. Consequently, Hobbes concludes that any human association, motivated by the **fear of violence**, "aspires to rise above the state of nature and create civil society (order)"<sup>29</sup>. This creation implies the surrender of individuals' freedom to use violence for personal gain, thereby establishing universal peace.

Violence is, of course, not entirely eliminated; as Schmitt noted, "The political is the most intense and extreme antagonism, and this antagonism is an inseparable feature of human existence"<sup>30</sup>. Therefore, the critical difference is that violence becomes **institutionalized** under the conditions of social order, with the ruling elite establishing a **monopoly on legitimate coercion**.

The problem of violence in social relations was deeply explored by the philosopher **René Girard**. The French thinker defined violence as: "Violence is generated by this process; or rather violence is the process itself when two or more partners try to prevent one another from appropriating the object of their desire."<sup>31</sup> Girard's starting premise is that human desires and the means to achieve them are **mimetic**. He shared **Gabriel Tarde's** insight that

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<sup>25</sup> Ibid., p. 61

<sup>26</sup> Thomas Hobbes, *Leviathan*, ed. Edwin Curley (Indianapolis: Hackett Publishing, 1994), Ch. XIII, 89–90

<sup>27</sup> Ibid.

<sup>28</sup> Ibid. Ch. XIII, 89

<sup>29</sup> Ibid. Ch. XVII, 116–17

<sup>30</sup> Carl Schmitt, *The Concept of the Political*, trans. George Schwab (Chicago: University of Chicago Press, 2007), 28

<sup>31</sup> René Girard, Interview: René Girard. Diacritics, 1978, 8.1

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the foundation of culture rests on the human capacity to imitate. However, Girard emphasized that this imitation yields both constructive results and negative manifestations, as mimesis also operates in the realm of violence<sup>32</sup>. The philosopher posited that **mimetism** applies primarily to the subject's desires: an individual, by imitating a peer, primarily learns to desire the objects that the other wants<sup>33</sup>. When desires converge on the same objects, which are often limited in quantity, **competition** for scarce resources ensues.

Girard suggested that the function of religion, particularly its rituals, is to avert this violent rivalry through **controlled violence** (coercion). In other words, society requires the prevention of chaotically spreading, uncontrollable, and mimetic violent disagreements among people for its own survival. According to Girard, religion recognized the phenomenon that "**ritualized**" (controlled and purposeful) coercion is a factor that **unifies society** and restrains violence within the group<sup>34</sup>.

While Girard's analysis of religion's role as a deterrent to violence is innovative, he is not the first to acknowledge the importance of coercion for social stability. In classical political theory, this tradition is associated with **Hobbes, Boulainville, and Clausewitz**—three figures whom **Michel Foucault** examined in *Society Must Be Defended* during his study of the problem of social order<sup>35</sup>. Foucault connected these thinkers in the discourse on violence and hypothesized that institutionalized (or, in Girard's terminology, "ritualized") coercion is a force that **produces and maintains order**. Accordingly, the political sphere and its central signifier, **political identity**, are inextricably intertwined with the phenomenon of violence. For example, as scholar Maxim Lipatov asserts: "Political violence is an ideologically defined and materially supported activity of classes, nations,

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<sup>32</sup> René Girard, *Violence and the Sacred* (Baltimore: Johns Hopkins University Press, 1977), 25

<sup>33</sup> René Girard, *Things Hidden Since the Foundation of the World*, trans. Stephen Bann and Michael Metteer (Stanford: Stanford University Press, 1987), 44

<sup>34</sup> René Girard, *Violence and the Sacred* (Baltimore: Johns Hopkins University Press, 1977), 28–29.

<sup>35</sup> Michel Foucault, Mauro Bertani, Alessandro Fontana, Francois Ewald and David Macey, *Society Must Be Defended: Lectures at the College De France, 1975–1976*. New York: Picador, 1st ed., 2003

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social groups, and social institutions aimed at using coercive means to gain or maintain state power, which, in turn,... governs internal social processes"<sup>36</sup>.

## CONCLUSION

Violence and war, when viewed through anthropological, biological, and political lenses, transcend mere political or economic explanation. They express humanity's dual nature-instinctively aggressive yet capable of empathy and moral reflection. From Hobbes's "war of all against all" to Kant's moral imperative that "man is an end in himself," the intellectual history of violence reveals an enduring tension between destructive instincts and ethical evolution. Modern neuroscience confirms that aggression is biologically embedded in the human brain, while cultural consciousness offers the potential to transform it.

Overcoming war and institutionalized violence, therefore, requires more than diplomatic reform; it demands an evolution of human awareness. Only by redirecting the biological instinct for aggression toward empathy, cooperation, and shared identity can humanity transcend its evolutionary legacy of conflict and realize the moral vision of peace.

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<sup>36</sup> Липатов М. Сущность и основные формы политического насилия в современных условиях (Философско-социологический анализ). Автореф. дис. канд. филос. наук. М.: 1989, стр. 5

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## SPECIFIC FEATURES OF INNOVATIVE TECHNOLOGICAL SUPPORT IN MODERN WARFARE

Kakha Phutkaradze<sup>1</sup>

<https://orcid.org/0000-0001-9222-0673>

Petre Gelashvili<sup>2</sup>

<https://orcid.org/0009-0005-1558-0321>

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### ABSTRACT

The article examines technological and informational innovations in modern warfare as factors exerting an increasingly significant influence on national security. It analyzes military and strategic concepts based on network integration, digital intelligence systems, and forms of information-psychological influence. The study compares the practical implementation of technological warfare models by the United States and NATO, as well as by Russia and China. Particular attention is devoted to the role of information-psychological operations (PSYOPS), which, together with next-generation technological tools, determine the structure and dynamics of the modern battlefield. In the context of Georgia, the significance of this topic lies in the fact that national security effectiveness depends not only on military potential but also on the protection of cyberspace, data management systems, and the strengthening of informational resilience. The conclusion emphasizes that the integration of technological innovations into the defense system requires strategic vision, digital transformation, and enhanced international cooperation.

**Keywords:** Innovative technologies, National security, Network-centric operations, Cybersecurity, Hybrid warfare, Information-psychological influence.

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<sup>1</sup> Associate Professor of Bachelor's Program in Defense and Security of LEPL David Aghmashenebeli National Defence Academy of Georgia, Doctor of Social Science,

<sup>2</sup> Assistant Professor of Bachelor's Program in Defense and Security of, LEPL David Aghmashenebeli National Defence Academy of Georgia, PhD in International Relations

## INTRODUCTION

Modern military conflicts are increasingly based on technological and informational innovations that are transforming the nature and structure of warfare. As the battlefield evolves, the role of physical force is diminishing, while the possession of information, speed, and precise analysis is becoming a decisive advantage.

In this reality, technological support for warfare has become the principal determinant of a national security system. Its purpose is not only the modernization of armaments, but also the strategic, operational, and tactical integration of all levels of combat into a unified digital system.

The “Network-Centric Warfare” (NCW) model, formulated by the U.S. Department of Defense in the 1990s, represents the foundation of this philosophy. It is based on the idea that the rapid and accurate exchange of information creates a shared picture of the battlefield, reduces decision-making time, and increases overall effectiveness.<sup>3</sup>

For Georgia, such an approach is critically important, as the country’s primary security challenges are directly linked to the protection of the informational domain, the prevention of cyberattacks, and the optimization of technological resources

In this context, it is relevant to analyze the historical-theoretical foundations and intellectual roots of the aforementioned direction, as well as to examine its economic-technological parallels, technological and operational aspects, international experience, philosophical-strategic interpretations, and the challenges and perspectives facing Georgia.

At the same time, attention must be paid to the strategies, tactics, and unique methods employed in recent years by various states in the field of military and information-psychological confrontation.

## MAIN PART

Given the current stage of human history and the existing architecture of global geopolitics, it is natural that the analysis of the key issues of this research should focus on

<sup>3</sup> Alberts, D. S., Garstka, J. J., & Stein, F. P. 1999. *Network Centric Warfare: Developing and Leveraging Information Superiority*. CCRP Publication Series

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three states—the United States, Russia, and China—along with the North Atlantic Alliance (NATO), as the actors possessing the greatest traditions and potential in Network-Centric Warfare (NCW), and on Georgia, which has been both one of the victims of confrontation conducted through this method (the final stage of the USSR, culminating in the August 2008 war and continuing to the present day) and a prospective target.

The Russian military theorist Yevgeny Messner wrote as early as 1959 that “modern war encompasses the entire society, where the boundary between soldiers and the population disappears.” This observation represents a kind of prediction of the contemporary network-centric model, in which the battlefield is no longer confined to the front line but extends into the social, economic, and informational domains.<sup>4</sup>

“In the 1980s, Marshal Nikolai Ogarkov developed the idea of a ‘military-technical revolution,’ which emphasized the role of information technologies in transforming the battlefield.”<sup>5</sup>

As for the American perspective, in U.S. military theory NCW was defined as a transition from “platform-based warfare” to “network-based warfare.” *Admiral Jay Johnson* called this “the most important military revolution in the last 200 years.” Experts and scholars of the field likewise note that informational superiority generates operational superiority, enabling the achievement of significant results with limited resources.<sup>6,7</sup>

The Chinese approach is well reflected in the 1999 publication *Unrestricted Warfare*, where Chinese military theorists *Qiao Liang* and *Wang Xiangsui* emphasize that war is no longer confined solely to the military arena. It also encompasses the economic, informational, technological, and psychological domains. This approach directly corresponds to the logic of NCW.<sup>8</sup>

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<sup>4</sup> B. Zelenko, "К вопросу о сетевоцентрических войне и мире (некоторые аспекты). Власть." *Власть*. 2022.

<sup>5</sup> Ibid

<sup>6</sup> avid S. Alberts, John J. Garstka, Frederick P. Stein. 1999. *Network Centric Warfare: Developing and Leveraging Information Superiority*. CCRP Publication Series.

<sup>7</sup> Vice Admiral Arthur K. Cebrowski, USN, and John H. Garstka. 1998. "Network-Centric Warfare - Its Origin and Future." *US Naval Institute*

<sup>8</sup> Xiangsui, by Qiao Liang and Wang. 1999. *Unrestricted Warfare*. Beijing: PLA Literature and Arts Publishing House, February.

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Through the theoretical and conceptual analysis of Network-Centric Warfare, it is based on the notion that the free and rapid exchange of information creates “**information superiority**.”

The main principles of NCW are:

- **Information sharing:** all combat units, sensors, and command posts are integrated into a unified network.
- **Common Operating Picture (COP):** all participants have a real-time updated view of the operational environment.
- **Decentralized decision-making:** subunits are granted greater autonomy, as they have precise and rapidly updated information.
- **High efficiency with limited resources:** through the use of so-called “**smart power**”, it is possible to achieve significant results with minimal force.

The foundation of this concept is the transition from “**platform-based warfare**” to “**network-based warfare**” — a shift that *Admiral Jay Johnson* described as the most significant stage of military revolution in the last 200 years.<sup>9</sup>

The implementation of Network-Centric Warfare is impossible without a technological foundation, and it is therefore natural that we must also examine its technological and operational aspects.

#### **Main components:**

- **Sensors and intelligence:** satellites, unmanned aerial vehicles, radars, electronic warfare (EW) systems, and other cybersecurity platforms;
- **Communication networks:** radio communication, satellite communication, navigation systems - GPS, GLONASS, Galileo, BeiDou, NavIC, QZSS, and fiber-optic systems;
- **Data analysis:** artificial intelligence and Big Data analytics;
- **Cyberspace:** defensive and offensive capabilities simultaneous.

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<sup>9</sup> Alberts, D. S., Garstka, J. J., & Stein, F. P. 1999. *Network Centric Warfare: Developing and Leveraging Information Superiority*. CCRP Publication Series.

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At the operational level, NCW (network-centric warfare) provides the capability to:

- to ensure rapid response;
- to synchronize different branches of the armed forces;
- to paralyze the adversary's informational infrastructure.

When discussing network-centric warfare, it is also impossible not to draw economic-technological parallels. For example, **Wal-Mart**<sup>10</sup>'s business model is based on the rapid collection and distribution of information, which gives the company a competitive advantage. The same principle operates in the military sphere: sensor networks, data processing, and battlefield synchronization create operational superiority. The example of the financial sector is also important, since here the instantaneous dissemination of information determines the circulation of trillions of dollars. Accordingly, in the military domain, the speed of information exchange may likewise become the defining factor between success and failure.

As for international experience, it can be presented as follows:

#### USA

- The NCW concept was officially formulated in the 1999 publication "Network-Centric Warfare: Developing and Leveraging Information Superiority" (Alberts 1999) (Network Centric Warfare: Developing and Leveraging Information Superiority). Its practical continuation is the **Joint All-Domain Command and Control (JADC2)**. The U.S. Department of Defense has conducted at least two major exercises using JADC2. The first took place in Florida in December 2019 and focused on repelling cruise-missile attacks. The exercise involved aircraft of the Air Force and Navy, including F-22 and F-35 fighter jets. The second exercise was held in July 2020. During the operation, the U.S. Air Force maintained communication with Navy vessels deployed in the Black

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<sup>10</sup> Founded in 1962 in the United States by brothers Sam and James "Bud" Walton, the transnational corporation that operates a network of hypermarkets across the U.S. and 23 other countries is a global leader in both revenue volume and employment.

Sea. In addition, special operations forces from eight NATO member states coordinated joint actions aimed at repelling a (JADC2)<sup>11, 12</sup>

### NATO

- NATO exercises demonstrate that a unified operational system based on the networked model significantly enhances the effectiveness of multinational operations.

### Russia

- In the 1990s, Russia adopted American experience and developed its own model. Since 2014, operations conducted in Ukraine have demonstrated that information-psychological influence has become a central element of military strategy. Gerasimov's doctrine reflects precisely this integrated approach.<sup>13 14 15</sup>

### China

- China is developing an “information-networked” model based on the comprehensive mobilization of national resources. Its central principle is the strategic paralysis of the adversary through informational dominance.

It is impossible to discuss NCW without focusing on information-psychological operations (PSYOPS), which today are as significant as traditional combat operations.

As the Russian example shows, these operations aim to:

- the demoralization of society;
- \*the dissemination of disinformation;
- the stimulation of fear and uncertainty;
- the discrediting of international support.

If we attempt a philosophical-strategic interpretation of NCW, we can assume that in the contemporary reality even “war through media” has become possible, where the

<sup>11</sup> A concept developed by the U.S. Department of Defense, the essence of which lies in integrating information flows coming from all branches of the armed forces into a unified network operating on the basis of artificial intelligence, and which connects all domains (land, air, sea, space, and cyberspace).

<sup>12</sup> R. Hoehn, John. 21 января 2022. *Joint All-Domain Command and Control (JADC2)*. . Congressional Research Service, Federation of American Scientists.

<sup>13</sup> Gerasimov, V. 2013. "The Value of Science is in the Foresight. ." *Military-Industrial Courier*.

<sup>14</sup> Thomas, T. 2015. "Russia's 21st Century Information War: Working to Undermine and Destabilize Populations." *The Journal of Slavic Military Studies*, 28(4).

<sup>15</sup> Darczewska, J. 2014. "The Anatomy of Russian Information Warfare: The Crimean Operation, A Case Study." OSW Report.

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informational domain itself has become the battlefield. According to *Boris Zelenko*, network-centric warfare is not merely a military-technical doctrine. It is part of a new global order, in which dominance in the informational space also determines political outcomes. In his view, “network-centric war and peace” creates a hybrid reality, where the boundaries between the military and civilian spheres dissolve.<sup>16</sup>

This interpretation shows that NCW requires not only military-strategic analysis but also philosophical and cultural understanding.

To summarize the research, let us address the challenges facing Georgia and the prospects associated with this direction, which are as follows:

**Main challenges:**

- Technological lag compared to advanced military countries;
- Weaknesses in cybersecurity systems;
- Insufficient control over the informational domain.

**Prospects::**

- Strengthening cooperation with international partners (NATO, the U.S., the European Union);
- Developing Georgia's own military cybersecurity and defensive capabilities;
- Integrating information security into the national education system.

## CONCLUSION

Network-centric warfare is a unity of technology, strategy, and psychological influence. It has already become one of the central challenges to national security including in Georgia. Confronting it requires a comprehensive approach that includes:

- **Strengthening informational resilience;**
- **Systemic development of cybersecurity;**
- **Strategic cooperation with international partners.**

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<sup>16</sup> Zelenko, B. 2022. "К вопросу о сетевоцентрических войне и мире (некоторые аспекты). Власть." *Власть*.

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Ultimately, it must be stated that a country's security today depends on its ability to manage military, informational, and cybersecurity challenges in an integrated manner.

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## CHALLENGES OF NATIONAL DEFENSE RESOURCE MANAGEMENT

Colonel Levan Usenashvili<sup>1</sup>

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### ABSTRACT

Effective National Defense Resource Management is indispensable for safeguarding a nation's security, stability, and strategic interests in an increasingly volatile global landscape. This paper undertakes a comprehensive analysis of the complex, multilayered challenges governments face in efficiently and effectively allocating, managing, and maintaining resources for their defense sectors. The research specifically examines five critical and interconnected dimensions: Budget Constraints and Fiscal Planning, Rapid Technological Advancements, Human Resource Management and Retention, Cybersecurity Vulnerabilities, and Supply Chain Resilience.

The inherent tension between limited resources and escalating defense needs is a core challenge. Defense spending, often influenced by political perceptions of threats and economic capacity (the 'defense burden'), must strategically cover operational costs, personnel (which can consume a significant portion of the defense budget), and critical procurement and R&D. The study emphasizes that geopolitical shifts and emerging threats, such as the dynamic nature of modern warfare highlighted by recent conflicts, necessitate constant renewal of capabilities, placing immense strain on national budgets.

Furthermore, the paper delves into the challenges posed by rapid technological evolution. Cutting-edge military technologies, while essential for maintaining a competitive edge in domains such as advanced weaponry and cybersecurity, are costly to develop, acquire, and maintain, requiring substantial investment in defense Research and Development. This rapid change also accelerates the obsolescence of once-advanced systems, creating a perpetual resource management challenge to keep pace.

Addressing these complexities requires meticulous strategic planning, focusing on transparent resource allocation, accountability, and adaptability. The paper highlights that resource management extends beyond materiel to include human capital. Recruiting, training, and retaining highly skilled personnel—particularly in specialized fields like cybersecurity and advanced engineering—is resource-intensive and crucial for maintaining military readiness. Finally, the analysis underscores the critical importance of mitigating both cybersecurity risks (given the increasing digitization of defense systems and infrastructure) and supply chain vulnerabilities, which are susceptible to geopolitical conflicts, single-source dependencies, and sophisticated cyber-attacks.

Ultimately, this paper argues that ensuring a robust defense posture in a world marked by geopolitical uncertainties and dynamic threats hinges on proactive, integrated, and flexible NDRM. Success requires balancing immediate operational needs with long-term strategic investment, continuous evaluation, and adaptation to secure national sovereignty and territorial integrity.

**Keywords:** complex challenges; budgeting; constraints; procurement; technological advancements; ever-evolving nature of threats; human resources; cybersecurity; supply chain; strategic planning; interoperability.

<sup>1</sup> Chief of G-5 Service Eastern Command, Georgian Defence Forces

## INTRODUCTION

**“The goal of defense resource management is to achieve a cost-effective allocation of resources among the nation’s national security objectives”.**

Since ancient times, defense has been the cornerstone of the country's security system. As times change, it requires the constant renewal of defense capabilities across all domains to adapt to the dynamic nature of modern warfare.

National Defense Resource Management is a critical aspect of national security, requiring a delicate balance of financial responsibility, strategic foresight, and adaptability. In an ever-changing world marked by geopolitical shifts, technological advancements, and emerging threats, the task of efficiently and effectively allocating resources to defend a country's sovereignty, its citizens, and its strategic objectives becomes increasingly complex.

This introductory section sets the stage for a comprehensive exploration of the multilayered challenges that governments and departments of defense face in defining the landscape of national defense resources to maintain readiness, secure their nations, adapt to the dynamic nature of modern warfare, and achieve national security objectives.

From budget constraints and evolving military technologies to human resources management and cybersecurity concerns, the complexity of resource allocation in the defense sector is at the forefront of national security discussions, which will be discussed in more detail below.

## MAIN PART

### 1. Budget Constraints:

Determining an adequate amount of money for defense depends on two major factors: the degree of vulnerability perceived by the government (or society) and the level of security that a government (or nation) can afford. Defense spending is therefore determined by a combination of economic and security policies that, on one hand, allocate social resources, and on the other, address threats to fundamental national interests.

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Allocation of a country's defense spending has always been a challenge for political decision-makers. The size of the armed forces, weapon platforms, equipment, and other defense capabilities inherently depend on military doctrine. These choices are often based on politicians' perceptions of current or expected threats or their desire to achieve intended goals by deploying their military and economic power.<sup>2</sup>

A potential adversary's military strength, country's geography, economic constraints, conflicts, major political changes, alliance membership, commitments, and other factors must also be taken into account.

The concept of defense burden lies in dividing a country's total defense budget by its GDP. The portion of the national budget that is allocated to defense covers salaries, training, health care, maintains and purchases arms, equipment, and facilities, funds military operations, and funds the research and development of new technologies.<sup>3</sup> However, personnel costs often take a significant portion of the defense budget, which meaningfully strains the budget.

## 2. Technological Advancements:

Technology has played an important role in the military capability to wage war in the modern age. This was especially characteristic of the Cold War era when the race of arms reached its peak. However, rapid technological advancement has made the demands of technological development more demanding. Defense R&D has maintained an essential feature of defense in the twenty-first century due to uncertainties surrounding international relations.<sup>4</sup>

Defense technology is a broad term that encompasses the use of technology in military operations, including research, development, acquisition, and deployment of systems and equipment used by armed forces to protect national interests. Defense technology covers

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<sup>2</sup> Peter G. Peterson Foundation, (2023, April 28). Budget Basics National Defense.

<sup>3</sup> Worlds Defense Budget Analysis Market by Allocation Type (Military Expense and Admin Expense) Departmental Allocation, Platform Allocation, System Allocation, Domain Allocation, Technology Allocation and Sales Allocation and Region-Global Forecast to 2028. (2023, July).

<sup>4</sup> Worlds Defense Budget Analysis Market by Allocation Type (Military Expense and Admin Expense) Departmental Allocation, Platform Allocation, System Allocation, Domain Allocation, Technology Allocation and Sales Allocation and Region-Global Forecast to 2028. (2023, July).

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various fields, from cybersecurity to advanced weaponry, and plays a critical role in modern warfare.<sup>5</sup>

The war in Ukraine has highlighted the critical importance of defense technology in modern warfare. Since the start of the conflict, several critical developments in defense technology have emerged.

Modern technologies play a significant role in all sectors, including defense. Developing military strength is difficult because technological advancement presents several challenges to national defense resource management: first of all, cutting-edge military technology is often expensive to develop, acquire, and maintain. This can strain defense budgets and require efficient resource allocation. Secondly, technology evolves quickly, making once-advanced systems obsolete. Managing resources to keep pace with technological changes is a constant challenge. Thirdly, maintaining a technologically advanced military requires well-trained personnel. Investing in training and retraining skilled personnel is resource-intensive. Last but not least, investment in research and development to stay ahead technologically requires a significant portion of defense resources.<sup>6</sup>

Indeed, technology plays a significant role in military expenditures, and developing military strength is difficult, especially while the government strives to satisfy the demands of economic growth to offer social protection and a higher quality of life for its citizens.

### **3. Strategic Planning:**

Strategic planning is a critical process in defense resource management that involves developing and implementing long-term plans to ensure the nation's military forces are well-prepared and maintain high combat readiness to address security threats and protect its interests based on Defense Policy and Strategy. "National defense policy and strategy identify defense priorities that should drive resource allocation within the defense sector and guide the management of the defense enterprise".<sup>7</sup> It encompasses various elements

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<sup>5</sup> Bernard. W.F Loo. (2019). *The Challenges Facing 21st Century Military Modernization*.

<sup>6</sup> Bernard. W.F Loo. *Military Modernization In The 21st Century Problems And Prospects For Small Military Organizations*.

<sup>7</sup> Martin Neill, Aaron C. Taliaferro, Mark E. Tillman, Gary D. Morgan, Wade P. Hinkle ( 2017, March 1). *Defense Policy and Strategy*.

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and requires a comprehensive approach to address associated challenges, such as allocation of resources, budget constraints, technology integration, human resources, etc.

The most important element in this regard is the allocation of resources since the defense sector generally operates under limited resources and experiences budget constraints. Thus, developing a strategic plan for the proper allocation of these limited resources is vital.<sup>8</sup> In addition, issues such as managing and retaining a highly skilled and motivated workforce are crucial, since attracting top talent in areas like cybersecurity, intelligence, and advanced engineering is very challenging, and should be taken into account during the planning.

Strategic planning in defense resource management must address these and many other challenges to ensure a country's military readiness, deter potential aggressors, and respond effectively to emerging threats. It is a complex and ongoing process that requires constant evaluation of geopolitical changes and threat assessment. Changes in the global political landscape can require a reassessment of strategic priorities and alliances. A strategic plan should be flexible enough to adapt to foreseen events or changes in circumstances. Being prepared for the unexpected is vital in defense planning.

#### **4. Human Resource and Recruitment:**

Human resources are the most critical resource that significantly determines the effectiveness of any organization. It is not easy to establish an effective organizational structure and consolidate the efforts of many people to carry out necessary activities to achieve the objectives. The main goal of the human resource management process in the armed forces is to create an organizational structure compatible with the security requirements of the country and maintain a balance between the supply and demand for military personnel. The main challenge of human resource management is to determine the number of personnel and the necessary skills.

Human resources play a pivotal role in defense resource management and are complex due to diverse roles, needs, and challenges within the sector. It involves the recruitment, training, deployment, and management of personnel within a nation's defense sector.

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<sup>8</sup> C. Vance Gordon, (2011). *Best Practices in Defense Resource Management*.

Addressing these challenges is essential to maintaining an effective and efficient armed forces. The primary challenge human resource management faces are the recruitment, training, and retention of personnel. Attracting and keeping the right talent is a continual challenge due to competition for top talent, both in the military and civilian sectors. Providing ongoing training and skill development is essential to keep defense personnel up-to-date with evolving technologies. Ensuring that personnel have the necessary knowledge and skills is resource-intensive.<sup>9</sup> Budget constraints are the main challenge in managing human resources. Balancing the allocation of resources for personnel, including health and well-being that directly impacts their overall performance and commitment, training, equipment, and infrastructure, is a constant juggling act since the biggest part of the allocated budget is used for the personnel's well-being. Coping with the challenges in human resources, considering the complexity of human resource management requires a comprehensive approach that combines strategic planning, effective policies, and ongoing adaptability, with a focus on balancing the needs of the defense forces, personnel, and the broader societal and legal obligations. Regularly reviewing and adjusting HR policies and practices is essential to meet these demands effectively.<sup>10</sup>

## 5. Cybersecurity:

In the realm of defense resource management, the challenges of cybersecurity are paramount. The increasing reliance on digital systems and technology within military operations brings a new level of vulnerability to potential cyber threats. Cybersecurity, like other aspects of defense resource management, is critical for safeguarding national defense resources management, as it helps protect critical infrastructure, preserve sensitive information, and maintain the effectiveness of military operations.<sup>11</sup>

The digitization of resources creates a real threat in terms of cybersecurity in all directions. One of the key challenges is the constant evolution of cyber threats, as hackers and malicious actors become sophisticated in their techniques. Attacks on critical

<sup>9</sup> Hari Bucur Marcu, *Defense Management: An Introduction*. (2009).

<sup>10</sup> Hari Bucur Marcu, *Defense Management: An Introduction*. (2009).

<sup>11</sup> US Department of Defense, *Summary, 2023 Cyber strategy*. (2023).

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infrastructure such as power grids and communications systems, cyber espionage and data theft, cyberattacks on financial facilities, and insider threats within the defense sector can compromise the security of resources and sensitive information. Cyber means are also widely used in attempts to disrupt military logistics, sabotage civilian infrastructure, erode political will, and deter civilian support. Cybersecurity measures are essential to mitigate these risks.

To comprehend and mitigate the risks from the cyber domain, defense organizations need to stay one step ahead by continuously updating their cybersecurity measures and implementing robust protocols. Another challenge is the sheer complexity of defense systems, which often consist of interconnected networks, databases, and devices. Securing this complicated web of resources requires not only effective firewalls and encryption, but also comprehensive training and awareness programs to educate personnel about potential risks.

Overcoming these challenges necessitates a multi-layered approach, involving collaboration between defense organizations, governments, and the private sector to develop and implement cutting-edge cybersecurity measures that can safeguard critical defense resources from potential cyber-attacks.

## **6. Supply Chain Vulnerabilities:**

The supply chain in the defense sector refers to a complex network of organizations, resources, and activities involved in the procurement, production, distribution, and maintenance of military equipment, technology, and supplies. It encompasses everything from the initial design and development of weapons to ongoing support in the field. The defense supply chain involves various stakeholders, including government agencies, defense contractors, subcontractors, logistics providers, and more. It plays a critical role in ensuring that armed forces have access to the necessary tools and resources to fulfill their missions effectively and maintain national security. The defense supply chain is often

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subject to stringent regulations and security measures due to the sensitive nature of the materials and technologies involved.<sup>12</sup>

Due to the complexity of the field, the interdependence of various actors, and existing regulations, vulnerabilities in the supply chain can arise from various sources and can have significant consequences that challenge defense resource management. Dependence on global suppliers can be considered the most important challenge since defense organizations often rely on a complex network of global suppliers for critical components and materials. Single-source dependence is also challenging, as reliance on a single supplier for critical components can create vulnerability. Disruptions in these supply chains, whether due to natural disasters, geopolitical conflicts, or other factors such as cyberattacks on the supply chain, can have a direct impact on defense readiness.<sup>13</sup>

As already mentioned above, cybersecurity threats have become a significant concern within the increasing digitalization of supply chains. Adversaries may attempt to infiltrate defense supply chains to gain access to sensitive information or compromise the integrity of critical components.

In addition to those challenges listed above, when planning defense resources, it is important to consider other issues such as lead time and inventory management, regulatory compliance, geopolitical risks, technological advancement, and human capital, since each of them has a significant impact on the development of defense capabilities.

- Maintaining the right level of inventory is a challenge. Stockpiling too much can be costly, while having too little can lead to shortages.
- Defense procurement is often subject to stringent regulations and export controls. Ensuring that suppliers are adherent to these regulations is a continuous challenge.
- Political instability in supplier countries can affect the reliability of the supply chain. Changing alliances and trade restrictions can also impact defense procurement.

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<sup>12</sup> Maiya Clark *Understanding and Protecting Vital U.S. Defense Supply Chains*. (2021, April 1).

<sup>13</sup> *Supply Chain Attacks: 7 Examples and 4 Defensive Strategies*

- Rapid technological changes can lead to obsolescence in defense systems, and it can be challenging to adapt the supply chain to incorporate new technologies quickly.
- The defense industry relies on skilled professionals for supply chain management. Recruiting and retaining the right talent is crucial.

To address these challenges, defense organizations need to adopt risk mitigation strategies, diversify suppliers, invest in technology for better visibility into supply chains, and continuously monitor and adapt to the evolving threat landscape.

## **7. Political Oversight and Public Support:**

Political oversight and public support play crucial roles in defense resource management, but they also present challenges to the process of management itself. One of the main challenges is striking a balance between national security and fiscal responsibility. The defense budget is often subject to intense scrutiny as politicians and taxpayers demand transparency and accountability for every dollar spent. This can create tension between the need to invest in advanced technologies and maintaining a strong military, and pressure to allocate resources to other public needs.

Additionally, the complex and ever-evolving nature of defense threats requires flexibility and adaptability in resource allocation, which can be challenging to achieve within the framework of political oversight and public support.

Moreover, public perception and support for defense spending can vary based on various factors such as the economic conditions of the state, public opinion on foreign conflicts, and the level of trust in government institutions. Therefore, defense resource managers face the ongoing challenge of effectively communicating the importance and value of defense spending to the public, while also ensuring that resources are allocated effectively and efficiently to meet national security objectives.

In conclusion, while political oversight and public support are essential in democratic defense resource management, they introduce complexities and challenges due to the dynamic nature of politics, shifting public opinions, and the need to balance national

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security within accountability and transparency. Striking the right balance is essential to ensure effective defense resource management.

## **8. International Alliances and Interoperability**

Alliances are usually bound together by mutual defense agreements, where member states pledge to come to each other's aid in the event of an attack. This can lead to the sharing of defense resources such as military personnel, equipment, and intelligence that can have a significant impact on national defense resource management in several ways: Firstly, shared resources can reduce the burden on individual nations and lead to a more efficient allocation of resources. Secondly, by pooling resources with allied nations, individual states can reduce the overall cost of defense. This can free up resources for other domestic needs and investments. Thirdly, alliances can encourage specialization among member countries. Some nations may focus on specific military capabilities, while others concentrate on different areas. This specialization can lead to more efficient use of resources within the alliance. Lastly, international alliances can help distribute the burden of defense more equitably among member nations. This can prevent a single state from shouldering an excessive financial or military load. In addition, diversification of threats. By working together in alliances, nations may deter potential aggressors, reducing the likelihood of conflict. This can lead to more stable defense planning and resource allocation. Overall, the impact of international alliances on national defense resource management depends on the specific nature of the alliance, the goals of the member countries, and the geopolitical context in which they operate. It requires careful coordination and negotiation to strike a balance that benefits all members.<sup>14</sup>

In summary, while international alliances can enhance security and resource pooling, they also introduce complexities and challenges in managing defense resources:

- Coordination and interoperability. Ensuring that different military forces within an alliance can work together efficiently requires significant investment in

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<sup>14</sup> Dr. James Derleth. *Enhancing interoperability: the foundation for effective NATO operations.* (2015, June 16).

interoperability. This includes standardizing equipment, communication systems, and training. Coordinating these efforts and resources is a logistical and financial challenge.<sup>15</sup>

- Resource allocation disputes: within an alliance, there can be disagreements over how to allocate resources, including personnel, budgets, and equipment. Nations may have different priorities or perceive threats differently, leading to resource allocation disputes.
- Budgetary pressures: Participating in an alliance often requires increased defense spending to meet alliance commitments. This can strain national budgets and lead to difficult choices between domestic needs and international obligations.
- Divergent interests: Member states may have varying foreign policy objectives and interests outside of the alliance. These differences can lead to challenges in resource management when the alliance's goals do not align with individual nations' priorities.
- Strategic Dependence: Overreliance on an alliance for defense can make a nation strategically dependent on its allies. This can limit a country's ability to pursue an independent defense strategy or diplomatic initiative.
- Political considerations: Defense resources management can be influenced by political factors, including the need to maintain public and political support for participation in an alliance. Decisions may be driven by political considerations rather than purely strategic ones.

Effective resource management in the context of alliances requires careful planning, coordination, and diplomacy to balance national interests with collective security objectives.

## CONCLUSION

Effective national defense resource management is essential for the successful operation and protection of a nation's defense capabilities. Navigating the complexities of this field can be challenging, but with the right strategies and approaches, these challenges can be

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<sup>15</sup> Ministry of National Defense Information and Public Relations Directorate *Defence Minister's message on the occasion of NATO Day celebration in Romania.* . (2022, April 2).

overcome. Comprehensive planning and coordination are essential. National defense resource management requires a holistic approach that considers various factors such as budget constraints, technological advancements, geopolitical shifts, and evolving threats. By developing a thorough understanding of these elements and aligning resources accordingly, defense organizations can optimize their capabilities and respond effectively to emerging challenges.

The crucial aspect of defense resource management is continuous evaluation and adaptation. Based on the dynamics of the defense landscape, what may have worked in the past might not be effective in the future. Regularly assessing resource allocation, identifying areas of improvement, and adjusting strategies accordingly is vital for maintaining agility and staying ahead of potential risks.

Lastly, investing in technologies and embracing digital technologies is key to effective national defense resource management. Advancements in areas such as artificial intelligence, cybersecurity, and data analysis can revolutionize resource allocation and enhance the decision-making process.

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# FROM BIPOLAR DETENTE TO ASYMMETRIC INTERDEPENDENCE: THEORETICAL LESSONS FOR MANAGING TWENTY-FIRST-CENTURY U.S.–CHINA RIVALRY

Maia Gamsakhurdia<sup>1</sup>

<https://orcid.org/0009-0008-3739-9226>  
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## ABSTRACT

This article provides a comprehensive comparative examination of great-power tension management by juxtaposing the Cold War-era détente between the United States and the Soviet Union with the contemporary strategic rivalry between the United States and China. While the Cold War détente emerged from a highly structured bipolar order characterized by nuclear parity, ideological confrontation, and relatively limited economic interdependence, today's U.S.–China relationship unfolds within a vastly more complex environment shaped by deep economic entanglement, technological interdependence, multipolar dynamics, and regionally distributed flashpoints. Against this backdrop, the article evaluates whether the conceptual logic, institutional mechanisms, and strategic lessons of détente retain analytical relevance for managing twenty-first-century great-power tensions.

The study argues that although historical analogies offer valuable insights, the structural conditions underpinning Cold War détente differ fundamentally from those shaping U.S.–China relations. Nevertheless, détente's foundational principles—strategic communication, mutual recognition of core interests, institutionalized crisis management, and rules-based competition—remain essential for preventing escalation in the current geopolitical landscape. Through a qualitative, theory-informed comparative analysis, the article demonstrates that a modernized form of détente may be possible but would require innovative frameworks that accommodate asymmetric interdependence, technological rivalry, cyber competition, and the evolving norms of global governance.

Ultimately, the findings contribute to broader scholarly debates about great-power politics, strategic stability, and the prospects for peaceful coexistence in an era defined by systemic rivalry. The article concludes that while Cold War détente cannot be replicated in its original form, its conceptual lessons can inform the development of new models of great-power management capable of reducing risks in an increasingly interconnected and contested global order.

**Keywords:** Detente, Detente U.S.–China relations, Cold War, great-power rivalry, geopolitical stability, technological competition, strategic management.

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<sup>1</sup>Chief Scientist of Scientific-Research Center of LEPL David Agmashenebeli National Defence Academy of Georgia, Ph.D. in International Relations;

## INTRODUCTION

The management of great-power tensions has long stood at the center of international relations, influencing the stability of the global system and shaping the trajectory of geopolitical competition. During the Cold War, the United States and the Soviet Union, despite profound ideological hostility and persistent military rivalry, entered a period of détente designed to stabilize the international environment, prevent nuclear confrontation, and impose predictability on bipolar competition. Détente did not eliminate conflict; instead, it institutionalized mechanisms of dialogue and arms control that constrained escalation and provided channels for crisis management during moments of heightened tension.

In the twenty-first century, the strategic rivalry between the United States and China has revived questions regarding the applicability of détente-like approaches in managing systemic competition. Although contemporary dynamics differ markedly from the Cold War, there is a growing scholarly interest in whether elements of détente—its emphasis on structured communication, recognition of red lines, and controlled competition—can inform strategies for maintaining stability in U.S.–China relations. As geopolitical tensions intensify across the Indo-Pacific, and as technological competition reshapes global order, the need for sustainable mechanisms to reduce the risk of accidental escalation and miscalculation has become increasingly urgent. The strategic rivalry between the United States and China, however, unfolds in a global environment fundamentally distinct from the mid-twentieth century bipolar system. Unlike the Soviet Union, China is deeply integrated into global economic networks, technologically interconnected with Western economies, and embedded in supply chains that sustain global production systems. U.S.–China competition therefore operates across multiple domains simultaneously—military, economic, technological, ideological, and institutional—creating a multidimensional landscape in which cooperation and rivalry coexist in complex, often contradictory forms.

Regionally, tensions surrounding Taiwan, the South China Sea, the Indo-Pacific alliance system, and advanced military capabilities contribute to a security dilemma that

increasingly resembles the competitive logic of the Cold War. Yet the presence of nuclear weapons, economic interdependence, cyber vulnerabilities, and global digital infrastructures introduces new forms of strategic fragility absent in earlier eras. The United States and China must therefore manage not only traditional geopolitical flashpoints but also interconnected technological ecosystems, information networks, and global supply chains whose disruption could have far-reaching consequences. Historically, détente emerged from mutual recognition of existential vulnerability and the realization that unrestrained hostility under nuclear parity threatened global survival. The Cuban Missile Crisis provided a dramatic illustration of how misperceptions could escalate into catastrophe, motivating both superpowers to institutionalize dialogue and establish mechanisms to prevent unintended escalation. Although the U.S.–China relationship has not yet reached a comparable nuclear brinkmanship crisis, warning signs—military encounters near Taiwan, cyber intrusions, economic coercion, and growing strategic mistrust—indicate that unmanaged competition carries serious risks.

The central question guiding this study is whether the logic of détente—its structural premises, institutional design, and strategic outcomes—can offer meaningful guidance for managing U.S.–China tensions. This inquiry is particularly salient as the global order transitions toward multi polarity, technological networks deepen systemic vulnerabilities, and geopolitical flashpoints multiply across interconnected domains. Détente’s historical legacy remains contested, yet its analytical value lies in its capacity to reveal how great powers can coexist under conditions of rivalry.<sup>2</sup> This article argues that while Cold War détente provides important structural insights, its traditional formula cannot be directly applied to contemporary U.S.–China relations. Instead, a modified and technologically informed variant of détente is required—one that acknowledges economic interdependence, digital rivalry, asymmetric power distributions, and the unique characteristics of twenty-first-century geopolitics. Through a rigorous comparative

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<sup>2</sup> Collective defence and article 5. 2023. Nato. <https://surli.cc/zjnbd0>, (Accessed 28. 11.2025.)

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analysis, the paper seeks to illuminate both the possibilities and the limitations of détente as a conceptual tool for managing systemic rivalry.

### Methodology

This study employs a qualitative, comparative–historical methodology to analyze how great-power tensions were managed during the Cold War and how similar dynamics might inform contemporary U.S.–China relations. Because great-power rivalry is shaped by material capabilities, ideological perceptions, and institutional arrangements, the research integrates historical analysis, structural comparison, and inquiry, cases highlights recurring patterns—such as the importance of crisis-management mechanisms—while revealing how twenty-first-century interdependence and technological rivalry alter the prospects for détente-like arrangements.<sup>3</sup>

Empirically, the study draws on declassified Cold War documents, official U.S. and Chinese strategy papers, speeches by political leaders, and scholarly works from major academic and policy institutions. Triangulating diverse primary and secondary sources ensures analytical robustness and mitigates bias. The study acknowledges limitations, including asymmetries between the Cold War and contemporary systems, opacity in Chinese decision-making, and the rapid evolution of U.S.–China competition. Nonetheless, the comparative–historical approach—supported by <sup>4</sup>theoretical triangulation—provides a rigorous foundation for assessing whether the principles of détente can inform strategies for managing twenty-first-century great-power rivalry.<sup>5</sup>

## MAIN PART

The management of great-power tensions during the Cold War and in today's U.S.–China rivalry unfolds across profoundly different strategic landscapes, yet both are governed by similar structural pressures that compel adversaries to balance competition

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<sup>3</sup> Al-auqaili. 2024. *How corporate-militant alliances are changing modern warfare*. Foreign policy in focus. <https://surl.li/sbgobg>, (Accessed 28. 11.2025.)

<sup>4</sup> Nxuan.. 2024. The dual role of military alliances in contemporary international relations. 3rd International Conference on International Law and Legal Policy. <https://surl.lu/rbwnms>, (Accessed 28. 11.2025.)

<sup>5</sup> Colective defence and article 5. 2023. NATO. <https://surl.li/yqkcy>, (Accessed 28. 11.2025.)

with restraint. Understanding these dynamics requires situating each relationship within its broader geopolitical, economic, and ideological context. While the logic of deterrence, the dangers of escalation, and the need for structured communication remain constant themes, the underlying conditions shaping U.S.–Soviet détente and contemporary U.S.–China relations diverge in fundamental ways that both enable and limit the applicability of historical analogies. Cold War détente emerged from a uniquely rigid bipolar environment defined by two superpowers who possessed near-equivalent nuclear arsenals and incompatible ideological visions of world order. By the late 1960s, Washington and Moscow recognized that unrestrained competition under nuclear parity had become unsustainable. The Cuban Missile Crisis served as a dramatic reminder of the catastrophic consequences inherent in miscalculation, pushing both sides toward negotiations designed to reduce the risk of accidental war. Détente was, in essence, the strategic institutionalization of coexistence: a tacit acknowledgment that rivalry could continue, but only within rules and structures that prevented escalation. It produced landmark agreements such as SALT I and the ABM Treaty, expanded diplomatic channels, and established regularized patterns of communication that helped stabilize the bipolar system.

However, détente was not a product of trust. Rather, it represented a pragmatic adaptation to structural constraints. The United States and the Soviet Union lacked meaningful economic interdependence; their relationship was primarily military and ideological. The absence of deep economic ties made détente a narrow form of stability management, confined largely to arms control and crisis communication. Even at its height, détente did not eliminate proxy conflicts or ideological hostility; instead, it imposed disciplined competition through predictable mechanisms and negotiated boundaries. Its eventual erosion in the late 1970s underscored both the fragility of trust and the endurance of systemic rivalry. By contrast, twenty-first-century U.S.–China relations operate within a vastly more interconnected and multifaceted global system. Unlike the Soviet Union, China is deeply embedded in international markets, global supply chains, and complex financial networks. Its rise was built not on isolation but on integration into the U.S.-led

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liberal economic order. This creates a paradox at the center of contemporary rivalry: the United States and China are simultaneously economic partners and strategic competitors. Their interdependence moderates, but does not eliminate, the risks of conflict. Instead, it produces a new form of systemic vulnerability in which competition unfolds across domains that were largely absent during the Cold War—particularly advanced technologies, cyberspace, digital infrastructures, and economic leverage.

Technological rivalry has become the defining axis of U.S.–China competition. While nuclear deterrence remains a stabilizing factor, the strategic landscape is now shaped by competition in artificial intelligence, quantum computing, semiconductors, space capabilities, and 5G/6G communications. These technologies influence not only military balance but also global economic power and governance models. The militarization of supply chains, export controls, and critical technology dependencies introduces novel forms of coercive leverage that differ dramatically from Cold War dynamics. In this environment, stability depends not only on military deterrence but also on the resilience of technological ecosystems and the management of economic vulnerabilities.<sup>6</sup> The regional context further complicates the U.S.–China rivalry. Whereas détente took place within a relatively stable set of spheres of influence, the Indo-Pacific is characterized by overlapping claims, alliance networks, and unresolved territorial disputes. Taiwan constitutes the most sensitive and dangerous flashpoint, where miscalculation or coercive escalation could trigger a major power conflict with global consequences. The South China Sea presents another arena in which territorial claims, naval modernization, and strategic signaling interact in unpredictable ways. Unlike Europe during the Cold War—where borders were effectively frozen—the Asia-Pacific remains fluid, contested, and vulnerable to rapid shifts in military posture. These dynamics limit the feasibility of a “clean détente” and suggest the need for more flexible crisis-management mechanisms tailored to regional complexity.

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<sup>6</sup>Walt. 1987. The origins of alliances. Cornell University Press. <https://surl.li/pnifan>, (Accessed 28. 11.2025.)

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Despite these differences, significant parallels exist between Cold War détente and today's U.S.–China tension management. In both eras, great powers face the dilemma of how to compete without triggering catastrophic escalation. The recognition of mutual vulnerability, whether through nuclear parity or economic interdependence, creates incentives for the establishment of red lines and guardrails. Recent efforts by Washington and Beijing to institutionalize military hotlines, expand diplomatic dialogue, and create working groups on issues such as artificial intelligence and climate change reflect an implicit understanding of détente's logic: the need to introduce predictability into a volatile relationship.

Yet the analogy has limits. Cold War détente was possible in part because bipolarity simplified the strategic environment. The United States and the Soviet Union occupied clearly defined geopolitical and ideological positions, and their rivalry was mediated through relatively stable alliance structures. Today's international system is more fragmented. Middle powers such as India, Japan, Australia, and the European Union exert significant influence, shaping the contours of U.S.–China interactions. Their choices—whether through alignment, hedging, or strategic ambiguity—complicate efforts to establish a bilateral détente, introducing new layers of uncertainty. In addition, the ideological dimension of U.S.–China rivalry does not mirror the stark, doctrinal confrontation of the Cold War. While the United States continues to champion liberal democratic norms, and China promotes authoritarian state-capitalism and governance models grounded in sovereignty and digital control, the ideological competition is less overtly global than during the Cold War. Instead, it manifests through competing development models, digital governance standards, and institutional preferences for international order. This softer, more diffuse ideological competition both expands the arenas of rivalry and blurs the boundaries of geopolitical influence.

Economic interdependence represents the most substantial departure from the Cold War framework. Whereas U.S.–Soviet détente operated in an environment of economic separation, U.S.–China relations are characterized by asymmetric interdependence in

which each side depends on the other in different ways. For the United States, China remains a critical manufacturing hub and the world's second-largest economy. For China, the United States remains central in terms of advanced technologies, financial markets, and global consumption. This interdependence both restrains escalation and becomes a tool of competition, as illustrated by tariffs, sanctions, supply-chain restrictions, and the geopolitical contest surrounding critical minerals and semiconductor fabrication. Managing these tensions requires a form of détente that encompasses not only military signaling but also economic coordination and technological safeguards.<sup>7</sup>

Finally, the digital domain introduces new escalation pathways unknown in the Cold War. Cyber intrusions, disinformation, AI-driven operations, and threats to critical infrastructure create a strategic environment in which ambiguity, speed, and deniability complicate traditional deterrence. A modern détente must therefore include norms governing cyber behavior, crisis-communication mechanisms for digital incidents, and mutual restraint in targeting critical civilian infrastructures. Taken together, these factors demonstrate that although the conceptual foundation of détente—structured competition, crisis management, and mutual restraint—remains relevant, the mechanisms required for stability must adapt to the realities of twenty-first-century geopolitics. The U.S.–China rivalry demands a more flexible, multidimensional approach to tension management, one that accounts for economic entanglement, technological vulnerabilities, regional instability, and global governance contestation. A simple replication of Cold War détente is neither feasible nor desirable; instead, modern great-power management must be a dynamic framework capable of evolving alongside the rapidly shifting contours of global power.

## CONCLUSION

The comparative analysis of Cold War détente and contemporary U.S.–China relations demonstrates that while the structural logic of great-power rivalry retains enduring

<sup>7</sup> Al-auqaili. 2024. *How corporate-militant alliances are changing modern warfare. Foreign policy in focus.* <https://surl.li/rapvyp>, (Accessed 28. 11.2025.)

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features, the conditions under which such rivalry unfolds have transformed in profound and unprecedented ways. The Cold War experience provides valuable insights into how adversaries can construct mechanisms that reduce escalation risks, clarify strategic intentions, and impose limits on destabilizing behavior. Yet these historical analogies must be employed with caution: the institutional designs, geopolitical circumstances, and technological constraints that shaped U.S.–Soviet détente cannot be simply transplanted into the twenty-first-century environment. In the Cold War, détente functioned as a response to the existential dangers posed by nuclear parity. It rested on a shared recognition by the United States and the Soviet Union that unregulated confrontation threatened not only the global system but their own survival<sup>2</sup>. This mutual vulnerability allowed both sides to institutionalize patterns of predictability through arms control, diplomatic engagement, and crisis-communication mechanisms. Although détente did not resolve ideological tensions or end geopolitical competition, it provided a framework through which rivalry could be managed without spiraling into direct conflict.

By contrast, U.S.–China relations operate within a far more complex and interconnected global landscape. Unlike the Soviet Union, China is deeply embedded in global markets, technological ecosystems, and transnational supply chains<sup>3</sup>. This economic and technological interdependence simultaneously moderates and complicates strategic competition, creating vulnerabilities that extend well beyond military domains. As a result, the challenge for modern great-power management is no longer limited to nuclear stability but encompasses cyber operations, AI-enabled conflict, economic coercion, supply-chain disruption, and contested governance over digital infrastructures<sup>4</sup>. These factors render contemporary rivalry multidimensional in ways that have no precise Cold War equivalent. The Indo-Pacific region further complicates the prospects for stability. Territorial disputes, shifting alliance dynamics, naval modernization, and the evolving military balance around Taiwan generate persistent uncertainties. Unlike the relatively static European frontiers of the Cold War, the Indo-Pacific is fluid, decentralized, and shaped by the independent strategic choices of numerous influential middle powers. These dynamics make it difficult

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to design bilateral mechanisms that can reliably constrain escalation.<sup>8</sup> Nevertheless, several core principles of détente remain relevant. Structured communication, recognition of red lines, mutual understanding of core interests, and the establishment of crisis-management protocols can help reduce misperceptions and prevent minor incidents from triggering broader confrontations. However, achieving these objectives today requires innovative adaptation rather than replication. A modern variant of détente would need to integrate technological governance, economic diplomacy, cyber norms, and transparency mechanisms tailored to digital-age risks<sup>6</sup>. It would also require institutional creativity to operate within a multipolar regional environment where the U.S.–China dyad no longer monopolizes strategic outcomes.<sup>9</sup>

Ultimately, the central insight of this study is that great-power rivalry can be managed, even if it cannot be eliminated. While the Cold War offers a conceptual template for stabilizing competition, its mechanisms must be reimagined in light of twenty-first-century realities. The United States and China face a choice: either allow unmanaged competition to intensify systemic vulnerability or construct new forms of strategic restraint capable of sustaining global stability. The stakes are immense. In a world defined by deep interdependence and rapid technological change, the absence of credible guardrails would not simply threaten bilateral relations—it would endanger the resilience of the international order itself<sup>7</sup>. A reconfigured, technologically informed, and institutionally flexible model of détente is therefore not merely desirable but necessary. Whether the United States and China can muster the political will, strategic imagination, and diplomatic commitment to pursue such a framework will shape the trajectory of global security for decades to come.

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<sup>8</sup> Mearsheimer. *The tragedy of great power politics*. 2001. <https://surl.li/ftxhoo>, (Accessed 28. 11.2025.)

<sup>9</sup> Gruszczak, kolascynski. *Understanding contemporary security: a prolegomenon to the interplay between technology, innovation and policy responses*. Politeja. 2022. <https://surl.li/klvpmd>, (Accessed 28. 11.2025.)

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## HYBRID WARFARE: THEORY, TACTICS AND STRATEGIC IMPLICATIONS

Zurab Samkharadze<sup>1</sup>

Ramaz Chichua<sup>2</sup>

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### ABSTRACT

This paper examines hybrid warfare as a distinct geopolitical phenomenon that cannot be fully addressed within conventional theories of war or security studies. Grounded in the framework of geopolitical realism, hybrid warfare is defined as a coordinated set of actions targeting an adversary's core geopolitical domains. Unlike traditional warfare, it unfolds simultaneously across political, economic, informational, cyber, and cultural spheres, aiming to erode societal resilience and weaken state sovereignty. The study highlights the key technologies of hybrid warfare, including cyber operations, disinformation, economic pressure, and the instrumentalization of energy resources, as well as its primary actors—states, non-state groups, and transnational networks. These actors exploit structural vulnerabilities to undermine legitimacy and stability without relying exclusively on military force. It is argued that hybrid warfare functions both as a strategic doctrine and as a flexible toolkit for achieving geopolitical dominance while avoiding large-scale kinetic confrontation. As such, it illustrates the transformation of contemporary power politics, where decisive struggles increasingly occur outside conventional battlefields.

**Keywords:** war; hybrid warfare; actors; technologies; methods

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<sup>1</sup> Chief Scientist in the Scientific Research Center of LEPL – David Aghmashenebeli National Defence Academy of Georgia, Doctor of Military Sciences

<sup>2</sup> Invited specialist of Bachelor's Program of LEPL-David Aghmashenebeli National Defence Academy of Georgia Academic Doctor of Social Sciences

## INTRODUCTION

Classical reference works offer varying definitions of “war.” V. I. Dal’s explanatory dictionary (first ed., 1863–1866) defines war as “a disagreement and military combat between states; an international affront,” whereas S. I. Ozhegov’s dictionary (first ed., 1949) broadens the concept to “armed struggle between states or populations, or between classes within a state.”<sup>3</sup> A political-science handbook (2008) further characterizes war as “an armed clash employed in conflict resolution—i.e., the use of force as a means of settling political disputes.”<sup>4</sup> Contemporary usage therefore increasingly regards war as the armed resolution of political conflicts of diverse kinds, a conceptual expansion from nineteenth- and twentieth-century formulations.

Over the past quarter century the noun “war” has acquired a rapidly changing set of adjectival qualifiers—“asymmetric,” “preventive,” “networked,” “non-linear,” “informational,” “psychological,” “chaotic,” and most recently “hybrid,” among others.<sup>5</sup> The proliferation of such modifiers, contrasted with the conceptual persistence of “war” itself, reflects an intensification and transformation of conflict across global, regional, and local levels.

## MAIN PART

Several structural drivers underlie the recent rise in interstate and societal conflict. First, the collapse of the global socialist system and the end of the Cold War produced unresolved problems of post-socialist and post-Soviet geopolitical redistribution, fostering instability in multiple regions (Eastern Europe, Central Asia, the Near East, Southeast Asia, and parts of Africa). Second, the United States’ effort to preserve a monopolistic global leadership has at times manifested in policies that hinder the emergence of regional great powers—whether through support for low-intensity conflicts, covert destabilization, or political interventions framed as regime change or humanitarian action. Third, the erosion of the

<sup>3</sup> Dahl's Online Explanatory Dictionary, <https://slovardalja.net/>, (Accessed 28.11.25)

<sup>4</sup>V. I. Dahl Explanatory Dictionary of the Living Great Russian Language. War [Electronic resource]. <https://surl.li/yuiivi>, (Accessed 28.11.25)

<sup>5</sup> D. E. Pogorely, K. V. Filippov, V. Yu. Fesenko Political Science Dictionary and Reference Book. War [Electronic resource]. <https://surl.li/mwshzw>, (Accessed 28.11.25)

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Western welfare model under competitive pressures has generated socio-economic grievances (among migrants and newly impoverished groups) that can be exploited to incite unrest.<sup>6</sup>

A more recent and decisive factor fueling the ascent of hybrid confrontation is the geopolitical revisionism exhibited by resurgent powers seeking to reclaim spheres of influence. Contemporary Russia's efforts to reassert control over territories formerly within its orbit exemplify such dynamics and constitute a major impetus for hybrid tactics.<sup>7</sup>

The term “hybrid warfare” entered anglophone security literature around 2001 and gained scholarly currency in the mid-2000s.<sup>8</sup> Authors such as Frank Hoffman, David Kilcullen, John McCuen, Nathan Freier, and others describe hybrid warfare as the co-deployment of regular and irregular methods, often incorporating terrorist-style operations; hence, both state and non-state actors are regarded as legitimate components of hybrid campaigns. Other analysts adopt still broader conceptions, arguing that hybrid confrontation permeates virtually every sphere of social life.

While many definitions catalog the manifestations of hybrid warfare across political, economic, informational, and cyber domains, this descriptive approach risks leaving the phenomenon analytically under-specified. Echoing Clausewitz's adage that war is “politics by other means,” we argue that hybrid warfare is first and foremost a geopolitical phenomenon that is not fully reducible to existing paradigms in allied disciplines.<sup>9</sup>

Accordingly, we define hybrid warfare as a coordinated ensemble of actions aimed at debilitating all principal geopolitical domains of an adversary society—effectively seeking its comprehensive neutralization—through simultaneous offensive activity across multiple types of geopolitical space. For analytical clarity, this study distinguishes four principal

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<sup>6</sup> J. Perkins, *The Secret History of American Empire: Economic Hit Men and the Truth About Global Corruption*. Moscow, 2008.

<sup>7</sup> J. Friedman, *The Next Hundred Years: Forecasting Events in the 21st Century* / translated from English by A. Kalinin, V. Naritsa, M. Matskovskaya. Moscow, 2010.

<sup>8</sup> McGregor Knox and Williamson Murray, Eds. *The dynamics of Military Revolution 1300 2050*. Cambridge, Cambridge University Press, 2001. 175

<sup>9</sup> Frank G. Hoffman. *Conflict in the 21-th Century: the Rise of Hybrid Wars*. Arlington, VA: Potomac Institute for Policy Studies, December 2007.

domains: the geographic, the economic, the informational-ideological, and the cyber-informational. The methods and instruments of hybrid operations differ according to the ontological character of each domain.

In the geographic domain, hybrid methods include localized conventional or low-intensity military engagements in resource regions, the fomentation of “color revolutions” and regime change, and the promotion of separatist movements. Such techniques have been observable in multiple late-twentieth and early-twenty-first century contexts. In the economic domain, hybrid instruments range from targeted sectoral sanctions and comprehensive economic blockades to asset freezes and personal sanctions against key political and economic actors. In the informational-ideological domain, hybrid operations seek to supplant indigenous value systems with alternative ideological constructs, falsify national narratives, desacralize symbolic leaders and institutions, and induce social decay through the promotion of criminal or morally corrosive practices. In the cyber-informational domain, methods include the removal of a target’s software and cyber products from global markets and direct hacker attacks on political and economic institutions.

Empirical studies suggest that contemporary hybrid campaigns favor non-kinetic measures over direct military force by a considerable margin—estimates indicate a ratio of roughly 4:1 in favor of non-military techniques. Actors in hybrid warfare encompass states, transnational corporations, supranational institutions, private military companies, organized criminal networks, terrorist groups, radical opposition elements, and subversive media or NGO entities. A salient characteristic of hybrid aggression is the relative absence of moral or legal restraints: outcome—namely, the destruction or neutralization of the adversary’s geopolitical space—takes precedence over normative constraints.

This willingness to eschew moral and legal limits is often driven by a perception of existential threat: actors that perceive a real danger of losing geopolitical status and associated capacities may resort to extreme measures. Contemporary strategic discourses—including some doctrinal treatments in major militaries and NATO analyses—recognize

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hybrid warfare as an integrated element of modern military strategy, combining conventional and unconventional methods across kinetic and non-kinetic spectrums.

To resist hybrid attacks effectively, states must pursue a comprehensive posture. Militarily, this entails balanced development across force types, mastery of precision weaponry, advanced communications, intelligence, automated command and control, and electronic warfare capabilities, together with force mobility to enable rapid, long-range redeployments.<sup>10</sup> Non-militarily, it requires the rapid concentration of critical resources on vulnerable fronts—today primarily information and economic domains—the cyber-protection of critical infrastructure, continuous intelligence and civil-military coordination, cultivation of expert personnel for counter-hybrid strategy development, legislative measures targeting hybrid technologies (notably operations aimed at regime overthrow), and sustained monitoring and disruption of malign information flows in media and social networks. Preemptive disruption of external financial and organizational channels that support radical opposition and expanded international cooperation with strategic partners in financial, economic, and informational fields are equally essential.<sup>11</sup>

The legal challenges of hybrid warfare are acute: conventional international law frameworks that define “aggression” and regulate the conduct of hostilities are ill-suited to contexts without clear front lines or conventional battlefields. Consequently, an international legal response requires (1) a precise legal definition of hybrid warfare and its principal modalities; (2) consistent application and enforcement of humanitarian law and cultural-heritage protections during hostilities; and (3) the development of new legal instruments tailored to counter the distinctive methods employed in each geopolitical domain targeted by hybrid campaigns.

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<sup>10</sup> Hybrid war — does it even exist? URL: NATO Review magazine [Electronic resource]. <https://surli.cc/xjmdxi>, (Accessed 28.11.25)

<sup>11</sup> The US Army Operating Concept (AOC): Win in a Complex World 2020-2040. 7 October 2014 [Electronic resource]. URL: <https://surli.cc/srstsf>, (Accessed 28.11.25).

## CONCLUSION

Effectively neutralizing systematic and deliberate hybrid-warfare operations directed against a state requires more than ad hoc defensive measures; it demands new institutional capacities, strategic foresight, and a comprehensive, multi-domain response. One practical requirement is the establishment of dedicated organizational structures—counter-hybrid bureaux or units—tasked with coordinating detection, prevention, response, and recovery across political, economic, informational, cyber, and military domains. (There are reports of such institutional experiments abroad, which suggests the model is both feasible and adaptable to differing national contexts.)

A reactive posture—limited to responding after an adversary’s move—will not suffice. Reactive strategies inevitably produce delay, strategic drift, and accumulated damage. States therefore must complement defensive readiness with proactive policies: anticipatory intelligence, resilience building, information hygiene, economic diversification, and preemptive legal and regulatory measures. In this respect Liddell Hart’s maxim is instructive: the purpose of war is to secure a preferable peace, and strategic action should therefore be governed by a clear conception of that desired outcome. Applied to hybrid threats, this means designing counter-hybrid strategies that are normatively coherent and oriented toward preserving societal stability and political legitimacy over the long term.

At a higher level, countering hybrid warfare calls for a “grand project”—a comprehensive conceptualization of institutional, legal, and technological foundations for a secure international order that reduces vulnerabilities exploited by hybrid methods. However, conception alone is insufficient. Implementation requires operational mechanisms: pooled resources, interoperable technologies, trained personnel, legislative instruments, and operational partnerships among states, international organizations, and private actors. In short, systemic threats demand systemic responses.

Finally, practical success hinges on sustained international cooperation. Because hybrid campaigns exploit transnational channels—information networks, financial flows, supply chains—a resilient defense must combine national measures with multinational

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coordination on intelligence-sharing, legal standards, crisis response, and norms for information integrity. Only by integrating institutional design, proactive strategy, resource commitment, and international collaboration can states hope to mitigate the multipronged dangers posed by hybrid warfare and safeguard the political and social foundations of stable order.

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## INNOVATIVE STRATEGIES FOR EMERGENCY HEALTHCARE IN RESOURCE-CONSTRAINED AND REMOTE REGIONS USING UAVS, AI, AND TELEMEDICINE

Master Sergeant Mirian Iakobashvili  
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### ABSTRACT

Georgia's mountainous and rugged terrain presents a critical challenge for the provision of timely and effective medical assistance during both armed conflicts and natural disasters. Limited ground accessibility, unpredictable weather, and dispersed population centers significantly delay casualty evacuation (CASEVAC) and the delivery of life-saving medical care within the "golden hour." Simultaneously, Georgia—like many other nations—faces a growing shortage of qualified military medical personnel, which further limits its capacity to respond efficiently in crisis situations.

This paper proposes an integrated solution that combines unmanned aerial vehicles (UAVs), artificial intelligence (AI), and telemedicine technologies under the principles of Tactical Combat Casualty Care (TCCC). Through this approach, UAVs equipped with advanced sensors can rapidly detect casualties; AI algorithms can analyze vital signs and injury data; and telemedicine systems, connected to a centralized Command and Control (C2) medical center, can guide first responders or even untrained individuals in providing effective life-saving care. Furthermore, AI-assisted triage and UAV-based medical logistics can optimize resource allocation, ensuring that medical personnel and supplies are deployed rationally and efficiently across complex terrains.

This study argues that the integration of UAVs, AI, and telemedicine—when structured in alignment with TCCC's core principles of immediate care, tactical field management, and evacuation—can provide Georgia with a strategic, innovative, and sustainable framework for modern military and humanitarian medicine. The model emphasizes the rational use of limited medical resources, the enhancement of casualty survival rates, and the expansion of tactical medical capabilities within the constraints imposed by Georgia's topography.

**Key Words:** Tactical Combat Casualty Care (TCCC); Unmanned Aerial Vehicles (UAV); Artificial Intelligence (AI); Telemedicine; Georgia; Mountainous Terrain; Military Medicine; CASEVAC; Golden Hour; Medical Logistics.

## INTRODUCTION

Georgia's geographic and geopolitical position has long placed it at the intersection of military, humanitarian, and environmental challenges. Its topography—characterized by steep mountainous regions, narrow valleys, and fragmented transportation networks—creates significant obstacles for the timely delivery of emergency medical assistance. During both wartime operations and peacetime disasters such as earthquakes, avalanches, and floods, terrain-induced isolation of affected areas often leads to critical delays in medical evacuation (MEDEVAC) and casualty stabilization. In such contexts, the concept of the “golden hour,”<sup>1</sup> a foundational principle of trauma medicine that underscores the need for life-saving interventions within sixty minutes of injury, becomes particularly difficult to achieve. The shortage of qualified military medical personnel further complicates this situation. According to global defense health assessments, many countries, including Georgia, face deficits in specialized combat medics, trauma surgeons, and emergency physicians. These shortages are intensified during large-scale emergencies or simultaneous crises. Consequently, traditional methods of casualty location, field triage, and evacuation are frequently insufficient, especially when communication lines are disrupted or when environmental hazards prevent direct access by ground or rotary-wing platforms. Given these challenges, the modernization of Georgia's military and disaster-response medical infrastructure requires the integration of advanced technological systems capable of operating autonomously and under adverse conditions. Among these technologies, unmanned aerial vehicles (UAVs), artificial intelligence (AI), and telemedicine stand out as transformative enablers of next-generation Tactical Combat Casualty Care (TCCC)<sup>2</sup>. When strategically combined, these tools can deliver crucial situational awareness, facilitate the early identification of casualties, support data-driven triage, and extend the reach of medical expertise beyond physical limitations.

Tactical Combat Casualty Care (TCCC) provides a doctrinal framework that aligns clinical decision-making with the realities of combat and austere environments. It divides

<sup>1</sup> Army University Press, <https://surl.lu/gtgwgh>, Accessed 04.11.2025

<sup>2</sup> TCCC collections for military, <https://tccc.org.ua/en>, Accessed 04.11.2025

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care into three progressive phases: Care Under Fire (CUF), where the focus is immediate life-saving actions such as hemorrhage control; Tactical Field Care (TFC), which allows for more comprehensive assessment and treatment once direct threats are mitigated; and Tactical Evacuation Care (TACEVAC), encompassing the stabilization and transfer of casualties to higher echelons of medical support. Integrating UAVs, AI, and telemedicine across these phases could enhance each component—improving the detection of injuries, expediting the relay of medical data, and optimizing resource deployment.

This paper aims to present a structured, innovative approach for Georgia’s operational environment—one that addresses the dual challenge of limited medical manpower and difficult terrain. Through the coordinated application of UAV-based reconnaissance, AI-driven analytics, and telemedical command support, it seeks to redefine how tactical and emergency medicine can be executed in the 21st century. The following sections detail four interrelated operational domains: casualty detection through UAV sensor systems; data collection and monitoring of vital signs; the use of AI and telemedicine for first aid guidance from centralized command (C2); AI-assisted triage and medical evacuation coordination; and finally, the planning and delivery of medical supplies through autonomous aerial logistics.

## MAIN PART

### **Detection of Casualties Using UAV Sensor Systems (Thermal and Multispectral Imaging)**

Rapid and accurate detection of casualties in mountainous or otherwise inaccessible terrain represents one of the most decisive factors in successful Tactical Combat Casualty Care (TCCC). In Georgia’s highland regions such as: Svaneti, Racha, and parts of Samtskhe–Javakheti the steep slopes, deep gorges, and variable microclimates frequently obstruct direct visual reconnaissance. In such environments, traditional ground-based search operations are both time-consuming and dangerous for rescue teams. Therefore, the integration of Unmanned Aerial Vehicles (UAVs) equipped with advanced sensor payloads has emerged as a critical innovation for modern battlefield and disaster medicine. Thermal imaging (infrared) sensors allow UAVs to identify human body heat signatures even in

complete darkness, dense fog, or forested areas. These sensors can detect subtle temperature variations between the casualty and the surrounding environment, producing visual maps that help pinpoint potential survivors. In Georgia's cold alpine zones, where nighttime temperatures often fall below freezing, the thermal contrast between a living body and the environment can exceed 15–20°C—making infrared detection highly reliable. Combined with multispectral and hyperspectral cameras, UAVs can differentiate between organic materials, clothing types, and movement patterns, enabling automatic casualty identification and classification. To enhance detection accuracy, AI-based algorithms can process real-time video streams from UAVs. Machine-learning models trained on datasets of human shapes, postures, and heat signatures can automatically distinguish casualties from terrain features such as rocks, vegetation, or animal movement. Once potential casualties are detected, the system can transmit their geospatial coordinates to the Command and Control (C2) medical center, where situational awareness is consolidated and mission prioritization begins.

The operational value of UAV-based detection extends directly to TCCC's Care Under Fire (CUF) phase. During active combat, manned reconnaissance may be impossible or lethal; UAVs, on the other hand, can safely assess the tactical situation, identify wounded personnel, and relay video feeds to commanders without exposing additional forces. Similarly, during civilian disasters such as avalanches or landslides, drones can cover up to ten times more search area than human rescuers within the same timeframe, dramatically improving the chances of locating survivors before hypothermia or exsanguination occurs.

For practical deployment, UAV systems should operate in coordinated swarms or grids, programmed to cover high-risk sectors using overlapping thermal and optical imagery. This redundancy compensates for environmental noise (e.g., solar reflection, snow glare) and provides robust situational data for the C2 medical network. Integration with Geographic Information Systems (GIS) further allows for the overlay of casualty positions on terrain models, predicting accessible landing or extraction points for medical evacuation (MEDEVAC).

By combining thermal, multispectral, and AI-assisted data processing, UAV-based casualty detection offers an unprecedented level of situational awareness and speed—transforming the first and most crucial step of tactical medical response. Within Georgia's mountainous operational environment, this technology effectively replaces hours of hazardous manual searching with precise, data-driven reconnaissance, fully aligned with the TCCC objective of minimizing preventable deaths within the „golden hour”.

### Collection and Transmission of Vital Signs Data

Once a casualty has been detected through UAV reconnaissance, the next critical step within the Tactical Combat Casualty Care (TCCC) continuum is the rapid acquisition and transmission of physiological data. Monitoring vital signs, such as heart rate, respiratory rate, and body temperature, is fundamental to assessing injury severity, prioritizing interventions, and planning evacuation in Georgia's mountainous terrain, where medical personnel may be hours away from casualties<sup>3</sup>.

Modern UAVs can be equipped with bio-sensor payloads, performing non-contact measurements via infrared spectroscopy and thermal imaging to detect shock, perfusion deficits, or blood loss. Small deployable pods or microdrones can place adhesive biosensors or wristbands that transmit physiological data to the Command and Control (C2) medical center.

At the C2 node, AI algorithms analyze incoming data to flag life-threatening conditions. Abnormal heart rate patterns and lowered body temperature can indicate internal bleeding or hypovolemic shock. AI-based decision support helps prioritize cases for Tactical Field Care (TFC), recommending interventions according to TCCC guidelines, such as hemorrhage control, airway management, or fluid resuscitation.

The AI system operates in a feedback loop, issuing instructions to field responders and updating C2 dashboards with geospatial coordinates, environmental conditions, and casualty trends. Hybrid communication networks combining 5G, satellite, and line-of-sight radio relays ensure reliability in complex terrains. Continuous monitoring during

<sup>3</sup>M. Gonzalez, et al., Remote physiological monitoring in austere environments, Critical Care, 2020 – demonstrates AI-assisted monitoring for faster detection of deterioration.

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evacuation supports the TACEVAC phase, allowing preemptive preparation of surgical teams, fluids, or ventilatory support.

### **AI - and Telemedicine-Based First Aid Recommendations from the C2 Medical Command Center**

Following data acquisition, the next critical step in TCCC is delivering first aid guidance. In mountainous regions, immediate access to trained personnel is limited. Integration of AI and telemedicine provides rapid, context-sensitive guidance aligned with TCCC protocols<sup>4</sup>. The C2 medical center receives UAV sensor feeds and analyzes them via AI. Algorithms assess injuries and environmental context to prioritize interventions. Telemedicine allows remote experts to review AI assessments and authorize field interventions, effectively bridging the gap between casualty and high-level clinical expertise<sup>5</sup>. Interactive AI systems allow responders to query procedures based on real-time casualty data, supporting TCCC's TFC phase, enabling advanced interventions such as airway management or intravenous therapy under remote supervision. Field trials demonstrate improved survival and faster stabilization when AI and telemedicine are combined with UAV-based data acquisition.

### **AI-Assisted Casualty Triage with Telemedicine Support**

Efficient triage is critical in scenarios with multiple casualties and limited medical personnel. AI-assisted triage systems can analyze real-time physiological and environmental data collected via UAVs or wearable sensors, assess injury severity, and categorize casualties according to urgency levels. This ensures that the most critical patients receive attention first, optimizing resource allocation and improving survival outcomes.

AI algorithms integrate inputs such as heart rate, respiratory rate, body temperature, visible trauma patterns, and environmental conditions to assign dynamic triage levels. These levels correspond to standard TCCC categories, enabling medics and responders to rapidly identify patients requiring immediate intervention, those who can wait, and those needing minimal care. Telemedicine integration enhances this process by allowing remote

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<sup>4</sup>R.Johnson, & Patel, K., AI-assisted triage and intervention recommendations, *Military Medicine*, 2021 – demonstrates AI guiding life-saving first aid in field scenarios.

<sup>5</sup>T.Williams, et al., Telemedicine-guided first aid in disaster and combat simulations, *J. of Telemedicine and Telecare*, 2020 – shows telemedicine improves accuracy and response time.

medical experts at a Command and Control (C2) center to review AI-generated triage decisions, confirm categorizations, and provide additional recommendations. This allows less-experienced responders in the field to execute triage and interventions accurately under expert guidance, maintaining adherence to TCCC protocols even in austere, mountainous, or disaster-affected regions<sup>6</sup>. Field simulations combining AI-assisted triage, UAV data acquisition, and telemedicine guidance have demonstrated reduced decision time, fewer errors, and improved casualty prioritization, particularly in remote or disaster-affected environments. This integrated system ensures that scarce medical personnel are utilized where most needed, enhancing situational awareness and patient outcomes.

### **UAV, AI, and Telemedicine for Medical Supply Delivery**

In addition to casualty triage and first aid guidance, the combination of UAVs, AI, and telemedicine can be applied to rapid medical supply delivery in remote or inaccessible regions. In mountainous areas, disaster zones, or isolated communities, timely delivery of medications, first aid kits, or medical equipment is critical for patient survival and continuity of care.

AI-assisted UAV logistics optimized the delivery route by analyzing real-time weather data, terrain conditions, and the family's location. The drone successfully navigated the challenging environment to reach the isolated household. Telemedicine integration enabled remote medical professionals to supervise the use of the delivered supplies, ensuring that the family received appropriate care despite the absence of on-site medical personnel. This case demonstrates the potential of combining UAVs, AI, and telemedicine to overcome geographical and logistical challenges in delivering medical supplies to isolated individuals during emergencies.

**Case Study: 2025 Guria Snowstorm Medical Supply Delivery** - In January 2025, during a severe snowstorm in the **Guria** region of Georgia, a family was isolated in their home due to heavy snowfall. Traditional ground transportation was impossible, and the family

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<sup>6</sup> Williams, T. et al., Telemedicine integration for remote triage guidance, *Journal of Telemedicine and Telecare*, 2020 – shows improved decision-making and accuracy through expert oversight.

required urgent medical supplies. Utilizing a drone, medical supplies were delivered directly to the family's location. Telemedicine support was provided remotely, allowing healthcare professionals to guide the family through the use of the delivered supplies.

## CONCLUSION

The integration of Unmanned Aerial Vehicles (UAVs), Artificial Intelligence (AI), and Telemedicine provides a robust framework for enhancing emergency medical response in austere, remote, and disaster-affected environments. These technologies enable rapid casualty detection, real-time physiological monitoring, AI-assisted prioritization, and timely medical supply delivery, overcoming limitations imposed by terrain, weather, and personnel shortages.

AI-driven analysis combined with telemedicine guidance ensures accurate triage and adherence to Tactical Combat Casualty Care (TCCC), Emergency Medical Technician (EMT), and Prehospital Trauma Life Support (PHTLS) protocols, while UAVs facilitate efficient logistical support. The practical application of these systems demonstrates measurable improvements in response times, patient prioritization, and operational efficiency, ultimately increasing survival and care quality.

In conclusion, the synergistic use of UAVs, AI, and telemedicine represents a scalable, evidence-based, and adaptable solution for modern emergency and tactical medical systems, providing effective and timely care in challenging operational contexts.

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