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Obsah

 KONCEPT MÄKKEJ SILY AKO NÁSTROJ NA ZAISTENIE BEZPEČNOSTI EURÓPSKEJ ÚNIE V RÁMCI BOJA PROTI ISLAMSKÉMU TERORIZMU A RADIKALIZMU PLK. GŠT. V. Z. ING. RADOSLAV IVANČÍK, PhD. ET PhD., MBA, MSc. _____	5
 JOSEPH SAMUEL NYE A KONCEPT MOCI V MEDZINÁRODNÝCH VZŤAHOCH: TEORETICKÝ RÁMEC A PRÍKLADY Z PRAXE PHDR. BARBORA KRIŠTOFOVÁ, MLITT. _____	18
 HISTORICKÝ VÝVOJ HLAVNÝCH MIGRAČNÝCH TOKOV PHDR. IRAH KUČEROVÁ, PhD. _____	34
 ŠPANIELSKY HOVORIACI MIGRANTI V SLOVENSKEJ REPUBLIKE MGR. ANDREJ KINER _____	58
 GOMBÁR, EDUARD, BAREŠ, LADISLAV, VESELÝ, RUDOLF: DĚJINY EGYPTA PROF. PHDR. KAROL R. SORBY, DRSc. _____	72
INFORMÁCIE O ČASOPISE MEDZINÁRODNÉ VZŤAHY	75
INŠTRUKCIE PRE AUTOROV	77

Content

 CONCEPT OF SOFT POWER AS A TOOL TO ENSURE THE SECURITY OF THE EUROPEAN UNION IN THE FIGHT AGAINST ISLAMIC TERRORISM AND RADICALISM RADOSLAV IVANCIK	5
 JOSEPH SAMUEL NYE AND THE CONCEPT OF POWER IN INTERNATIONAL RELATIONS: THEORETICAL FRAMEWORK AND PRACTICAL EXAMPLES BARBORA KRISTOFOVA	18
 THE HISTORICAL DEVELOPMENT OF MAIN MIGRATORY FLOWS IRAHA KUCEROVA	34
 SPANISH-SPEAKING MIGRANTS IN THE SLOVAK REPUBLIC ANDREJ KINER	58
 GOMBAR, EDUARD, BARES, LADISLAV, VESELY, RUDOLF: HISTORY OF EGYPT KAROL R. SORBY	72
ABOUT THE JOURNAL OF INTERNATIONAL RELATIONS	75
GUIDE FOR AUTHORS	77



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KONCEPT MÄKKEJ SILY AKO NÁSTROJ NA ZAISTENIE BEZPEČNOSTI EURÓPSKEJ ÚNIE V RÁMCI BOJA PROTI ISLAMSKÉMU TERORIZMU A RADIKALIZMU

CONCEPT OF SOFT POWER AS A TOOL TO ENSURE THE SECURITY OF THE EUROPEAN UNION IN THE FIGHT AGAINST ISLAMIC TERRORISM AND RADICALISM

Radoslav Ivančík¹

Európska bezpečnosť, najmä vnútorná, je v ostatných rokoch, okrem iného, ohrozovaná prejavmi islamského radikalizmu, ktoré sa zhmotnili v krvavých teroristických útokoch realizovaných vo viacerých európskych mestách predovšetkým po udalostiach tzv. Arabskej jari a konfliktoch a nepokojoch s ňou spojených. Na zaistenie európskej bezpečnosti je možné využiť viacero nástrojov vrátane tvrdej a mäkkej sily. Mäkká sila je tým prostriedkom, ktorý má Európska únia k dispozícii na posilnenie svojej bezpečnosti, na prepojenie medzi jej vonkajšou a vnútornou dimenziou a tiež na vybudovanie mostov medzi náboženstvami a komunitami s cieľom vytvoriť základ pre vzájomné porozumenie a vnútornú rovnováhu. Aj preto autor článku v rámci interdisciplinárneho vedeckého výskumu, s využitím relevantných vedeckých metód, skúma problematiku využitia mäkkej sily pri zaistovaní bezpečnosti Európskej únie v rámci boja proti islamskému radikalizmu a extrémizmu.

Kľúčové slová: bezpečnosť, mäkká sila, radikalizmus, terorizmus

European security, especially internal security, has been threatened in recent years, among other things, by manifestations of Islamic radicalism, which have materialized in bloody terrorist attacks in several European cities, especially after the events of the so-called Arab Spring and the conflicts and unrest associated with it. Several tools can be used to ensure European security, including hard and soft power. Soft power is the means at the

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Autor počas svojej profesionálnej kariéry pôsobil vo viacerých vedúcich funkciách na jednotlivých stupňoch velenia a riadenia Ozbrojených síl SR a Ministerstva obrany SR. Zároveň zastupoval SR v pracovných výboroch, skupinách a komisiách v rámci NATO, EÚ a V4. Je autorom a spoluautorom viacerých domácich i zahraničných vedeckých monografií, vysokoškolských učebníc, vedeckých i odborných štúdií, článkov a príspevkov najmä z oblasti vojenstva a národnej a medzinárodnej bezpečnosti.

European Union's disposal to strengthen its security, to link its external and internal dimensions, and also to build bridges between religions and communities in order to lay the foundations for mutual understanding and internal balance. That is why the author of the article in the framework of interdisciplinary scientific research, using relevant scientific methods, examines the issue of the use of soft power in ensuring the security of the European Union in the fight against Islamic radicalism and extremism.

Key words: security, soft power, radicalism, terrorism

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1 Úvod

Európska únia (ďalej len „EÚ“ alebo „Únia“) čelí na začiatku tretej dekády tretieho milénia zvýšenému počtu mnohostranných a viacvrstvových bezpečnostných výziev, čo si bezpodmienečne vyžaduje prehodnotenie dosiaľ prijatých stratégií, politik a organizačných štruktúr disponujúcich kapacitami a prostriedkami na riešenie existujúcich i novo vznikajúcich problémov. Viaceré konflikty, masové verejné protesty a nepokoje a z nich vyplývajúci chaos a nestabilita na periférii hraníc EÚ, predovšetkým po tzv. Arabskej jari², spôsobili v ostatnom desaťročí výrazné zmeny v bezpečnostnej oblasti a priniesli pre Úniu nové bezpečnostné výzvy. Jeden aspekt týchto výziev sa týka vonkajších hraníc EÚ a spôsobu, akým ovplyvňujú jej vnútornú bezpečnosť a zároveň aj celkovú úroveň európskej bezpečnosti. Druhý aspekt týchto výziev sa týka spôsobu, akým tieto zmeny ovplyvňujú vnútornú bezpečnosť Únie. Oba tieto aspekty sú pritom rovnako dôležité a vyžadujú si prijatie účinných a efektívnych opatrení, aby bola EÚ schopná zaistiť svoju bezpečnosť a čeliť novým bezpečnostným výzvam v podobe terorizmu, extrémizmu a radikalizmu.

EÚ sa totiž najmä v druhej polovici druhej dekády tohto storočia stala terčom útokov viacerých skupín teroristov alebo jednotlivcov, ktorí ohrozujú jej inštitucionálny poriadok, súdržnosť, stabilitu, hodnoty a vnútornú i vonkajšiu bezpečnosť. Arabská jar spustila dramatické zmeny v krajinách, v ktorých nestabilita vyvolaná občianskymi vojnami, nepokojmi a protestami ovplyvnila aj parametre európskej vnútornej bezpečnosti. Zhoršená bezpečnostná situácia, najmä po krvavých teroristických útokoch vo viacerých európskych mestách (napríklad v Paríži, Nice, Berlíne, Hamburgu, Madride, Barcelone, Londýne, Manchestri, Bruseli atď.), zmenila vnímanie moslimského sveta z pohľadu Európanov, posilnila islamofóbiu (Clay, 2017)

² Arabská jar je označenie pre vlnu rozsiahlych protestov, civilných nepokojov, povstaní až občianskych vojen, ktorá prebehla vo väčšine arabských štátov od decembra 2010 s primárnou aktivitou do roku 2012, pričom niektoré ozbrojené konflikty z Arabskej jari ako sýrska a druhá líbyjská občianska vojna pretrvávajú až do súčasnosti. Konkrétne motívy pre spustenie protestov, nepokojov a konfliktov boli v jednotlivých krajinách rôzne, v zásade ich však spájaj boj proti chudobe, nezamestnanosti a zlým životným podmienkam, ako aj s tým súvisiaci odpor voči autoritárskym a skorumpovaným režimom dlhodobo vládnuce v mnohých arabských krajinách. Niektorí analytici označujú následné a stále pretrvávajúce konflikty v regióne ako Arabskú zimu.

a viedla k politickej podpore pravicových strán (Mayer – Froio, 2017). Empirické dôkazy potvrdzujú, že narušená vonkajšia bezpečnosť funguje ako vstupný mechanizmus, ktorý znásobuje vnútorné hrozby, negatívne vplýva na vnútornú bezpečnosť a vytvára tlak na spoločnosti, jednotlivcov a politické systémy (Lutterbeck, 2005). V takomto prípade, keď je pomerne ťažké využiť tvrdú silu, sa ako oveľa vhodnejšie javí využitie mäkkej sily.

Aj preto autor článku v rámci interdisciplinárneho vedeckého výskumu, s využitím relevantných vedeckých metód, predovšetkým analyticko-syntetickej metódy, metódy štúdia a analýzy dokumentov, metódy deskripcie, ako aj obsahovej analýzy a ďalších analytických prístupov, skúma problematiku využitia mäkkej sily pri zaisťovaní bezpečnosti Európskej únie v rámci boja proti islamskému radikalizmu a extrémizmu.

2 KONCEPT MÄKKEJ SILY AKO NÁSTROJ NA ZAISTENIE BEZPEČNOSTI EÚ

Koncept mäkkej sily prvýkrát predstavil Joseph Nye vo svojej práci *Soft Power* (1990) a neskôr rozvinul v diele *Soft Power: The Means to Success in World Politics* (2005), v ktorom spochybnil tradičnú realistickú koncepciu moci spojenú s využitím vojenských prostriedkov, t. j. s využitím tvrdej sily. Mäkká sila predstavuje koncept, ktorý je na rozdiel od tvrdej sily, založený na užitočnosti a predpokladanej sile presvedčenia. Od takéhoto konceptu sa očakáva, že zmení medzinárodné správanie štátov takým spôsobom, ktorý podporí vzájomnú spoluprácu a porozumenie medzi štátmi a zabráni konfrontáciám, hrám s nulovým súčtom a problémom spojeným s bezpečnostnou dilemou. Pokiaľ ide o prostriedky, koncept mäkkej sily je postavený na silnej priestorovej a časovej dimenzii, reálne výsledky sa totiž neočakávajú v krátkodobom ani strednodobom, ale hlavne v dlhodobom horizonte (Heywood 2015).

Koncept mäkkej sily síce našiel úrodnú pôdu v spôsobe medzinárodnej interakcie EÚ, avšak jednotlivé koncepcie EÚ ako normatívnej moci sú pomerne často kritizované. Podľa viacerých autorov nereagujú úspešne na potrebu naliehavosti, pretože nedokážu uspokojiť časový rozmer protiteroristickej a protiextremistickej stratégie. Kultúrne a náboženské rozdiely totiž prispeli k neustále sa zväčšujúcej priepasti medzi súbormi kultúr v hodnotovo rozdelenom svete (Weitz, 2019). Podľa západných štandardov je akýkoľvek pokus pristupovať k problému prostredníctvom právnych prístupov a medzinárodného práva nedostatočný. Štatút EÚ ako civilnej veľmoci poskytuje alternatívy na použitie mäkkej sily, zároveň však odhaľuje limity tohto konceptu vo vzťahu k terorizmu a vnútornej bezpečnosti EÚ (Sjursen, 2016).

To má vplyv nielen na schopnosť diverzifikovanej EÚ plne implementovať a uplatňovať spoločnú bezpečnostnú a obrannú politiku, ale aj na jej schopnosť konceptualizovať komplexnú stratégiu mäkkej sily vo vzťahu k radikalizmu (Smith, 2017). Dôvodom nie je len chýbajúca kompaktná európska stratégia, ale aj fakt (problém), že EÚ je aktérom *sui generis*, čo ovplyvňuje jej schopnosť premeniť

spoločné pozície na spoločnú akciu. Navyše, intenzita hrozieb pochádzajúcich z radikalizmu sa líši v dôsledku rôzneho zaťaženia členských štátov a ich geografickej blízkosti k bodom jeho pôvodu (Dempsey, 2015).

3 MÄKKÁ SILA, MULTIKULTURALIZMUS A MEDZINÁBOŽENSKÝ DIALÓG

EÚ štandardne predstavuje multikultúrne prostredie uznané európskymi zmluvami, čo bolo nevyhnutné v snahe zjednotiť stále sa rozširujúce fórum štátov disponujúcich viac či menej sa líšiacimi organizačnými a kultúrnymi prvkami (Rožňák 2015, Brhlíková 2012, 2014). V tomto prostredí tvoria moslimovia menšinu, ktorá s kresťanskou väčšinou interaguje rôznymi spôsobmi. Výzvou pre EÚ je postupné diachrónne začlenenie týchto ľudí do európskej spoločnosti, aby nepôsobili ako hrozba pre ostatných. Vzhľadom na pomerne obmedzený rámec interakcie medzi islamom a kresťanstvom je však stratégia inklúzie pomerne náročnou úlohou. Najmä kultúrna a normatívna priepasť medzi islamom a zvyškom v prevažne kresťanskej EÚ predstavuje náročnú viacúrovňovú výzvu pre všetky strany. Základom jej riešenia by mohla byť postupná realizácia trojitého cieľa, a to v podobe vzájomného porozumenia, prijatia a politiky inklúzie (Taras, 2013).

V článku 2 Lisabonskej zmluvy (2007) sa zdôrazňuje, že EÚ: „*Rešpektuje svoju bohatú kultúrnu a jazykovú rozmanitosť a zabezpečí, aby sa kultúrne dedičstvo Európy chránilo a zveľaďovalo. Vo svojich vzťahoch s okolitým svetom Únia presadzuje a podporuje svoje hodnoty a záujmy a prispieva k ochrane svojich občanov. Prispieva k mieru, bezpečnosti, trvalo udržateľnému rozvoju Zeme, solidarite a vzájomnej úcte medzi národmi, odstráneniu chudoby a ochrane ľudských práv, ako aj k prísnemu dodržiavaniu a rozvoju medzinárodného práva vrátane rešpektovania zásad Charty Organizácie Spojených národov*“.

Otázka kultúrnej rozmanitosti pôsobila v EÚ v posledných rokoch ako deliaca, odstredivá sila. Z prieskumu verejnej mienky, ktorý pravidelne realizuje a vydáva Európska komisia (2021) je evidentné, že medzi Európanmi existuje skepticizmus voči ľuďom pochádzajúcim z mimoeurópskeho kultúrneho a hodnotového prostredia. Do roku 2011 bol multikulturalizmus ešte akceptovaný v určitej limitovanej miere, avšak po teroristických útokov v Európe sa zmenil náhľad naň a na spolužitie predovšetkým s moslimskou komunitou. Nové pohľady a názory boli formulované na základe ohrozenia vlastného života a spôsobu života. Imigrácia a terorizmus sú odvtedy pravidelne zaraďované medzi najväčšie hrozby v EÚ.

Ako je už uvedené vyššie, mäkká sila je založená na užitočnosti a predpokladanej sile presvedčania. To zahŕňa prevažne psychologické prvky presvedčania. V centre tohto procesu je schopnosť zmeniť, prehodnotiť postoje a ovplyvňovať poznanie, čo je proces prvoradého významu v snahe uplatniť politiku vnútornej rovnováhy voči terorizmu. Pokiaľ ide o výber prostriedkov, ktoré sa majú a dajú použiť, mäkká sila je jedným z nich, potrebuje ale silný priestorový a časový rozmer,

aby priniesla výsledky, pretože predstavuje dlhodobú stratégiu obohatenú o kultúrne prvky (Michalski, 2015).

EÚ v súčasnosti predstavuje nielen multikultúrne, ale aj multináboženské prostredie, ktoré sa snaží inštitucionálne vyhovieť rôznorodej verejnosti. Diverzifikácia nie je definovaná len z hľadiska národných identít, ale aj na základe náboženského presvedčenia. Viacvrstvé prispôbenie sa niekedy súperiacich entít nie je v žiadnom prípade ľahkým cieľom a je náročné ho dosiahnuť pod vplyvom viacúrovňovej heterogenity. Známe európske motto „*zjednotení rozmanitosťou*“ bolo v popredí európskej politiky voči inakosti s cieľom poskytnúť široký priestor náboženstvám a kultúram koexistujúcim v rámci európskeho priestoru. Ten bol vytvorený a založený na inkluzívnej stratégii zameranej na poskytovanie organizačných a hodnotových noriem koexistencie v rámci verejnej sféry spoločných európskych hodnôt (Poláčková – Brhlíková, 2017).

Táto voľba predstavuje zviditeľnenie európskej stratégie mäkkej sily a jej organizačného a normatívneho úsilia vytvoriť a poskytnúť prostredie pre pozitívnu medzikultúrnú a medzináboženskú interakciu s cieľom posilniť vnútornú bezpečnosť EÚ a prispôbiť, resp. vzájomne priblížiť súperiace hodnoty. Nanešťastie z dôvodu nedostatku konzistentnosti má zväčša roztrieštený účinok a dlhodobo sa neprijíma. Tomu výrazne pomohli aj krvavé teroristické útoky moslimských radikálov, ktoré pôsobili ako katalyzátor v spôsobe, akým sa kresťanské obyvateľstvo pozeralo na moslimov v EÚ (Tulmets, 2017).

4 MÄKKÁ SILA V RÁMCI INŠTITUCIONÁLNEHO PROSTREDIA EÚ

Mäkká sila je nevyhnutnou súčasťou inštitucionálneho a operačného nastavenia EÚ, jej organizačnej štruktúry a normatívneho charakteru. Vychádza a odráža sa na rozhodnutiach, ktoré urobili lídri Únie, a aj v režime fungovania Únie a uplatňovania mäkkej sily. Zmluvy EÚ odrážajú organizačnú štruktúru, normatívnu základňu a strategickú orientáciu Európy ako celku. Taktiež jasne popisujú obraz a úlohu EÚ podľa prostriedkov, ktoré má k dispozícii. V článku 2 Lisabonskej zmluvy (2007) sa uvádza, že: „*Únia je založená na hodnotách rešpektovania ľudskej dôstojnosti, slobody, demokracie, rovnosti, právneho štátu a rešpektovania ľudských práv vrátane práv osôb patriacich k menšinám. Tieto hodnoty sú spoločné pre členské štáty v spoločnosti, v ktorej prevláda pluralizmus, nediskriminácia, tolerancia, spravodlivosť, solidarita a rovnosť medzi ženami a mužmi*“.

Kľúčovými slovami vyššie uvedeného ustanovenia sú pojmy „pluralizmus“, „nediskriminácia“, „tolerancia“, „spravodlivosť“, „solidarita“ a „rovnosť“. Uplatňovanie takýchto politik jednoznačne spadá do operatívneho rámca mäkkej sily a nesie kultúrne prvky. Tieto ciele sa do značnej miery naplnili. Ďalšími kľúčovými slovami vyššie uvedeného sú „kultúrna rozmanitosť“ a „hodnoty“. Z hľadiska sémantiky sa text odvoláva na európske hodnoty, ktoré sa v istom zmysle dajú chápať ako kresťanské

hodnoty. Mohlo by to byť uľahčujúcim faktorom z hľadiska integrácie, keďže EÚ ako otvorený priestor umožnila rozmanitosť a otvorenosť posilniť jej multikultúrne a multináboženské prostredie. Toto inštitucionálne a prevádzkové usporiadanie však bolo formulované za iných okolností. Nástup terorizmu ako primárnej hrozby pre vnútornú bezpečnosť EÚ vytvoril nový tlak na Európu a jej schopnosť kognitívne sa prispôbiť inakosti.

5 MÄKKÁ SILA A ISLAMSKÝ RADIKALIZMUS

Podľa kognitívneho a operačného základu tejto analýzy je mäkká sila spojená najmä, ale nie výlučne, s vnútornou bezpečnosťou EÚ a špecifickými potrebami, ktoré je nutné pokryť pod vplyvom hrozby terorizmu. Ústredné prvky mäkkej sily EÚ v rámci jej rozšírenej územnej základne sú alebo by mali byť postavené na potrebe:

- presvedčiť rôznorodú európsku verejnosť, že radikalizmus je spoločnou hrozbou pre mierové spolužitie všetkých občanov v multikultúrnej Európe;
- vytvoriť viacúrovňové prepojenia medzi rôznymi kultúrami a náboženstvami s cieľom posilniť vzájomné porozumenie;
- podporiť umiernený islam a spustiť otvorený dialóg, pokiaľ ide o význam budovania umierneného islamu.
- poskytovať operačný doplnok k tvrdej sile potrebnej na riešenie viacerých závažných bezpečnostných problémov vyvolaných radikalizmom (Khan, 2017).

EÚ predstavuje multikultúrne prostredie uznané európskymi zmluvami v celej histórii európskej integrácie. Bola to nevyhnutná podmienka, doslova *conditio sine qua non*³, v snahe zjednotiť stále sa rozširujúce fórum štátov disponujúcich líšiacimi sa organizačnými a kultúrnymi prvkami, ako aj rozdielnymi kognitívnymi názormi na inakosť. V tomto prostredí moslimovia tvoria menšinu, ktorá s väčšinovou populáciou interaguje rôznymi spôsobmi, nie vždy v harmónii.

Výzvou pre EÚ bolo diachróne prijatie stratégie inklúzie pre moslimov, aby sa z nich nevyvinula hrozba pre ostatných, aby neboli otvorení radikalizmu. Podľa západných štandardov ide o herkulovskú úlohu, pretože medzi islamom a kresťanstvom existuje (aj na základe historických skúseností) obmedzený rámec interakcie, čo robí starosť všetkým zúčastneným stranám. Islamský radikalizmus predstavuje jednu z hlavných výziev pre Úniu a jej vnútornú bezpečnosť, čo je skutočnosť, ktorá ovplyvňuje celkový výkon EÚ z hľadiska demokratického spôsobu fungovania západných liberálnych demokracií (Lamy, 2019).

³ *Conditio sine qua non* (lat.) je nevyhnutná podmienka, bez ktorej nie je možná nejaká udalosť.

EÚ sa stala terčom malých skupín teroristov, ktorí ohrozujú súdržnosť a vnútornú stabilitu EÚ spôsobom, ktorý ovplyvňuje jej liberálny inštitucionálny poriadok, aspekty európskej slobody a aj jednotu schengenského priestoru. Viacúrovňové otázky vnútornej bezpečnosti EÚ sú vzájomne prepojené komplexným a mnohostranným spôsobom s vonkajšou bezpečnosťou EÚ, a teda aj celkovou bezpečnosťou vo svete, plnom nestabilných bezpečnostných systémov a subsystémov (napr. Blízky a Stredný východ alebo Stredozemie). Prepojenie bezpečnostných systémov a subsystémov je realitou medzinárodnej politiky a bezpečnosti, takže akékoľvek zmeny môžu mať spúšťacie účinky. Príkladom je fenomén už spomínanej Arabskej jari, ktorý spustil bezprecedentné procesy v krajinách, ktorých stabilita ovplyvnila aj parametre európskej vnútornej a vonkajšej bezpečnosti. Nová situácia prinútila európskych lídrov revidovať svoj pohľad na moslimský svet a výrazne sekuritizovala otázku migrácie a prijímania utečencov.

6 PRIESTOROVÝ ROZMER VYUŽITIA MÄKKEJ SILY

Stratégia využitia mäkkej sily súvisí s charakterom EÚ, s jej vnútornou bezpečnosťou a vnútorným nastavením, ako aj prostriedkami, ktoré má k dispozícii na riešenie definovaných bezpečnostných problémov. Práve tento fakt poskytuje priestorový rozmer pre využitie konceptu mäkkej sily. Ontologickou a organizačnou otázkou je, ako sa vysporiadať s uzavretými moslimskými komunitami v celej Európe. Ideálna stratégia by mala byť založená na uspokojení dvoch vzájomne prepojených potrieb: po prvé, posilnenia európskej bezpečnosti, a po druhé, zabezpečenia ústavného poriadku európskych liberálnych demokracií.

Rovnako dôležitá otázka, ktorá v tejto súvislosti vyvstáva, je, či použitie mäkkej sily stačí na riešenie problémov vnútornej bezpečnosti EÚ. Nominálne by sme mali mať obmedzené očakávania, aspoň pokiaľ ide o krátkodobé a strednodobé výsledky. Použitie mäkkej sily sa vzťahuje, ako už bolo uvedené vyššie, na dlhodobú stratégiu, ktorá sa by sa mala aplikovať na makrostrategický plánovací rámec. Nesie v sebe ústredné medzikultúrne prvky, ktoré sú potrebné na to, aby fungovala ako zjednocujúca sila v diverzifikovanom mnohonárodnom priestore.

Mäkká sila by sa mala v tomto zmysle považovať za prostriedok socializácie, cestu k inklúzii a pozitívnej interakcii. V tomto bode však vyvstáva ďalšia zásadná otázka. Existuje niečo také ako umiernený islam na uplatnenie mäkkej sily? Odpoveďou by mohla byť podpora tých moslimov, ktorí si osvojili otvorený prístup k inakosti. Ak ale niečo také ako umiernený islam neexistuje, potom existuje silná potreba pomôcť ho vytvoriť. Takáto stratégia však nemá žiadne záruky úspechu na základe empirických dôkazov odkazujúcich na hranice interakcie medzi islamom a zvyškom sveta (Voskopoulos, 2015).

Uplatňovanie stratégie mäkkej sily má zmysel v prípade očakávania dlhodobých výsledkov, keďže sa nezaobera otázkami vnútornej bezpečnosti naliehavo,

v krátkodobom horizonte, ani nestanovuje konkrétne otázky vonkajšej bezpečnosti ako vstupu pre vnútornú bezpečnosť a spôsob, akým vzájomne pôsobia. Ako už bolo naznačené, mäkká sila krajiny môže pochádzať z troch zdrojov:

- a) z jej kultúry (na miestach, kde je prítiažlivá pre ostatných),
- b) z jej politických hodnôt (keď vyhovuje doma aj v zahraničí),
- c) z jej zahraničnej politiky (keď je považovaná za legitímnu) (Nye, 2005).

Vyššie uvedené predstavuje epicentrum viacvrstvového problému EÚ pri uplatňovaní mäkkej sily v rámci Európy. Európska „kultúra“, rovnako ako európske identity, nie je jednotnou hodnotou, ale odráža rozmanitosť neustále sa rozširujúcej Únie štátov s rôznym kultúrnym a náboženským zázemím vybudovanom na národnom rámci. Vzhľadom na to, že kultúrne črty môžu spôsobiť a niekedy aj spôsobili kognitívne schizmy pri hodnotení inakosti, terorizmus výrazne prispel k zvýšenej podozrievavosti voči moslimom. Pri riešení vnútornej bezpečnosti vojenské alebo policajné opatrenia nestačia na riešenie potenciálnych alebo potenciálne vznikajúcich hrozieb, práve preto existuje jasná potreba vyrovňavacích mechanizmov hrozieb, pri implementácii ktorých môže mať mäkká sila význam a prinášať požadované výsledky.

7 MÄKKÁ SILA, RADIKALIZMUS A VNÚTORNÁ BEZPEČNOSŤ EÚ

Radikalizmus sa stal najmä v uplynulom desaťročí jedným z primárnych problémov európskej vnútornej bezpečnosti, a to zvlášť v turbulentnom a premenlivom medzinárodnom prostredí produkujúcom nové, asymetrické bezpečnostné hrozby (Jurčák 2013, Majchút 2018, Tomášek 2019). Je hrozbou pre európsku demokraciu a slobodu a vynucuje si prijímanie opatrení, ktoré ohrozujú základné ústavné slobody v západnom svete. Od EÚ sa preto naliehavo žiada, aby riešila nezrovnalosti v európskej stratégii boja proti terorizmu vo vzťahu k radikalizmu a nevojenským prostriedkom na jeho riešenie v rámci svojej teritoriálnej základne.

Mäkká sila je jedným z nástrojov, ktoré sa dajú využiť z hľadiska zaistovania európskej vnútornej bezpečnosti. Policajné opatrenia však nemôžu ponúknuť vysokú pridanú hodnotu k potrebe chrániť každodenný bežný život Európanov, preto ak je na operatívne ochromenie teroristických organizácií nevyhnutná tvrdá sila, treba ju použiť. Mäkká sila je v takomto prípade nástrojom využiteľným v spoločnostiach, v ktorých by mala štandardne koexistovať rozmanitosť a súlad so spoločnými pravidlami.

Ak je podľa Josepha Nyeho mäkká sila postavená na zdrojoch kultúry, hodnôt a politik krajiny, potom by ju EÚ mala využívať prepracovanejším a systematickejším spôsobom. Toto by malo byť jadrom stratégie kompaktnej „smart power“

(inteligentnej sily)⁴ (Gallarotti, 2015). Podľa Nyeho (2009) mäkká sila predstavuje schopnosť ovplyvňovať ostatných, aby dosiahli požadované výsledky prostredníctvom príťažlivosti predkladaných a prezentovaných ideí a nie nátlaku. Stratégia inteligentnej sily kombinuje tvrdé a mäkké nástroje. Súčasný boj proti nadnárodnému terorizmu (Ivančík – Nečas 2017, Trifunović – Kazanský – Nečas 2021) je totiž aj bojom o získanie srdca a mysli, z toho dôvodu prílišné spoliehanie sa len na tvrdú silu nie je cestou k úspechu.

Vyššie uvedené len podčiarkuje potrebu prepracovaného a konkrétneho prístupu ku všetkým parametrom vnútornej bezpečnosti a potrebe uplatňovať mäkkú silu diverzifikovaným spôsobom. Výhradné použitie tvrdej sily v rámci EÚ nie je možné, pretože neovplyvní „srdcia a mysle“ pozitívnym spôsobom. Naopak, skôr môže dať voľnejší priechod radikalizmu v dôsledku uplatňovania krátkodobých alebo strednodobých represívnych politík. Mäkká sila by sa preto mala vnímať ako pevná súčasť celkovej stratégie inteligentnej sily diferencovanej z hľadiska priestoru, intenzity a rozsahu. Mala by sa uplatňovať tak, aby navrhované riešenia pokrývali inštitucionálne, koncepcné a politické otázky. Deradikalizácia totiž nie je automatizovaný proces, ale proces, ktorý treba spustiť a pomôcť mu na rôznych úrovniach (vládnej, regionálnej i komunálnej) a v rôznej intenzite (Wilson, 2018).

8 ZÁVER

Na základe výsledkov analýzy konceptu mäkkej sily a jej využitia pri eliminácii radikalizmu, extrémizmu a terorizmu je možné na záver uviesť, že mäkká sila by sa mala používať spôsobom, ktorý nielen prispeje k zvýšeniu bezpečnosti v EÚ, ale zároveň bude dávať zmysel cieľovej skupine, ktorej kognitívne predsudky sú nezápadné, nekresťanské a neliberálne, a ktorá štandardne nie je vnímavá voči západným myšlienkam a európskemu hodnotovému systému. V rámci tohto spektra by sa možno mal klásť dôraz skôr na „tolerovanie“ ako na „akceptovanie“. To by však malo byť len jednou z parciálnych častí celkovej stratégie, ktorá musí vychádzať tak z procesov európskej integrácie, ako aj z vývoja v islamskom svete.

⁴ Pojem „smart power“ (inteligentná sila) použil vo svojich prácach Joseph Nye v snahe ilustrovať potrebu použitia kombinovaných nástrojov konania, konkrétne mäkkej a tvrdej sily. Termín inteligentná sila možno definovať ako prístup, ktorý podčiarkuje nevyhnutnosť silnej armády, ale tiež výrazne investuje do aliancií, partnerstiev a inštitúcií na všetkých úrovniach s cieľom rozšíriť svoj vplyv a vytvoriť legitímnosť svojho konania. Nye považuje za najefektívnejšie stratégie v súčasnosti tie, ktoré si vyžadujú kombináciu zdrojov tvrdej a mäkkej moci, pretože využívanie iba tvrdej sily alebo len mäkkej sily sa zvyčajne ukáže ako nedostatočné (Nye, 2009). Nye využíva príklad terorizmu a tvrdí, že boj proti terorizmu si vyžaduje inteligentnú stratégiu. Radí, že jednoduché využitie zdrojov mäkkej sily na zmenu srdca a mysli vlády Islamského štátu alebo Talibanu by bolo neúčinné a vyžaduje si zložku tvrdej sily. Pri rozvíjaní vzťahov s mainstreamovým moslimským svetom sú však potrebné zdroje mäkkej sily, pretože použitie tvrdej sily by malo škodlivé účinky.

Joseph Nye označil mäkkú silu aj ako „kultúrnu silu“, ktorá by sa mala používať ako nástroj vnútornej rovnováhy. Práve stratégia vnútornej rovnováhy štandardne zdôrazňuje význam využitia mäkkej sily a úlohu umiernených moslimských komunít v celej Európe a tiež spôsob, akým sa od nich očakáva, že prevezmú iniciatívu a pomôžu eliminovať islamský radikalizmus, extrémizmus a terorizmus a zvýšiť úroveň európskej bezpečnosti. Pri vytváraní protiteroristickej politiky, ktorá stavia na udalostiach z nedávnych rokov, je preto potrebné, s využitím prvkov mäkkej sily, vyriešiť nielen problém teroristov, ktorí využívajú slabiny systému, ale aj otázku zapojenia umiernených moslimov do riešenia bezpečnostných problémov.

Vnútorne vyrovňovanie, resp. hľadanie vnútornej rovnováhy súčasne musí aj s pomocou nástrojov využívajúcich prvky mäkkej sily prekonať kritický problém, konkrétne kultúrny základ organizačnej a hodnotovej štruktúry západných spoločností. Musí stanoviť skutočnú deliacu líniu toho, čo je a čo nie je prijateľné, keďže západná cesta života je pre moslimov štandardne cudzia a občas neprijateľná. To ich stavia do pozície, že môžu spochybňovať platnosť a hodnoty západného kultúrneho rámca. Na druhej strane tým, ktorí patria k tomu, čo sa označuje ako umiernený islam, sa podarilo nájsť rovnováhu medzi „nutnosťou“ a „potrebou“, čím sa stali „flexibilnejšími“ pri vytváraní základných hodnotiacich úsudkov. To je to, čo je potrebné aj s pomocou prvkov mäkkej sily využiť pri vytváraní bezpečnejšej Európy.

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JOSEPH SAMUEL NYE A KONCEPT MOCI V MEDZINÁRODNÝCH VZŤAHOCH: TEORETICKÝ RÁMEC A PRÍKLADY Z PRAXE

JOSEPH SAMUEL NYE AND THE CONCEPT OF POWER IN INTERNATIONAL RELATIONS: THEORETICAL FRAMEWORK AND PRACTICAL EXAMPLES

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Koncept moci je ústredným prvkom štúdia medzinárodných vzťahov. Hlavným cieľom príspevku je diskutovať o modernom chápaní moci. Článok mapuje prístup Josepha Nyea ku konceptualizácii moci, ktorý vysvetľuje povahu medzinárodných vzťahov. Dalo by sa tvrdiť, že Joseph Nye vytvoril teoretický rámec, ktorý podnecuje dôslednú pozornosť k moci v jej rôznych formách. Nyeho teoretický koncept moci je doplnený príkladmi z praxe medzinárodných vzťahov. V práci sú použité predovšetkým kvalitatívne metódy, ktoré sú založené na analýze a syntéze, aby poskytli kontextovú a subjektívnu presnosť. Aby sme pochopili, čo je moc v medzinárodných vzťahoch, Nye zdôrazňuje kontextovú inteligenciu, ktorá je kľúčovou zručnosťou i umožňuje politikom a diplomatom byť úspešnými.

Kľúčové slová: medzinárodné vzťahy, moc, prax, teória, Joseph Nye

The concept of power is central to studying of international relations. The main purpose of the paper is to discuss a modern understanding of power. The article surveys Joseph Nye's approach to the conceptualisation of power explaining the nature of international relations. It could be argued that Joseph Nye developed a theoretical framework that encourages rigorous attention to power in its different forms. Nye's theoretical concept of power is accompanied with examples from practice of international relations. Mainly, there are qualitative methods used in the paper, which are based on analysis and synthesis to provide contextual and subjective accuracy. To understand what power in international relations is, Nye underlines contextual intelligence, which is a crucial skill in enabling politicians and diplomats to be successful.

Key words: international relations, power, praxis, theory, Joseph Nye

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1 INTRODUCTION

“Power, like love, is easier to experience than to define or measure” (Nye 1990, p. 25). These words were said by Joseph Samuel Nye (Harvard Kennedy School, 2021). Perhaps, it is quite strange how he could compare something so beautifully fragile like love with something tough, such as power. It is perhaps difficult to understand at the first sign, but after deeper and careful deliberation makes sense. Nye notes that in a friendly relationship or a marriage, power does not necessarily reside with the larger partner, but, in the mysterious chemistry of attraction. However, he underlines that not all relationships are based on affection, attraction and love. Nye takes the example of the playground bully that commands other children and makes them jump at his commands, inducements and threats. Finally, he admits when someone desires to be successful in any relationship, the most important thing he or she has to do is to intelligently combine both types of influence.

If one wants to consider what power is, it is important to note that power is not accurately defined concept. In other words, power is one of the most problematic concepts to study of international relations (Gilpin, 1981). There is no universal definition of what power really is (Nye, 2011). Although, most people have an intuitive notion of what power means (Dahl, 1957). Simply put, “power is the longest-running social phenomenon, which has manifested itself since ancient times – from the first prehistoric inhabitants of the planet who fought for shelter and food – to the present day” (Negut and Neacășu 2012, p. 216). However, scholars have not yet formulated a single universal definition of the concept of power, which is rigorous enough to be used in the systematic study of this social phenomenon in the field of international relations (Dahl, 1957).

Historically, many thinkers considered the meaning of “power”. For example, a power, for Locke (2018, p. 138), is that which allows some entity to change or be changed by another. It means the active power is that which changes. The passive power is that which is changed. The sense of power that Locke explicated is that of a capacity or ability. All that it is to have a power to do something is to be able to do that thing. Locke argued that “nothing can operate, that is not able to operate; and that is not able to operate, that has no power to operate.”

Power is a crucial concept to the School of realism in international relations. Theory of realism perceives world politics as a field of conflict among actors pursuing power. The School of realism was quantitative and behavioural. Edward Hallet Carr, a member of School of realism, studied power and its significance for international politics. In his book *The Twenty Years' Crisis 1919–1939. In Introduction to the Study of International Relations* he claimed that power in the international sphere can be divided for the purposes of discussion into three categories: military power, economic

power and the power of ideas. These three categories are closely interdependent. Although, they are theoretically separable, it is impossible to imagine a country having one of these powers and using it separately from the other two components. According to Carr (2011), power is in its essence, an indivisible whole. Another theorist of School of realism, Hans Morgenthau, defined politics as an autonomous sphere based on power interest. He claimed that power is an attribute that characterizes the motivation of actors and whose maximization is one of the main goals of each state (Morgenthau, 1993).

Joseph Nye's attitude towards the study of international relations is unique, and quite distinct from the other prominent approaches such as classical realism, neorealism, liberal international relations theory, constructivism, feminist international relations theory, postcolonial theory, and other critical theories. The reason is that Nye has excelled as much in academia as in public service. In this article, power is defined as “the ability of an individual to influence others to do what they would otherwise not have done (and at a cost acceptable to that individual)” (Nye 2011, p.10). In this sense, power is understood as a control over the results. This relationship is also found in Nye's more precise and frequently quoted definition, where power means “the ability to influence others behaviour to achieve the required results” (Nye 2004, p. 2).

Joseph Samuel Nye (1937) is an American political scientist. He is University Distinguished Service Professor, and former Dean at Harvard's Kennedy School of Government. He is a fellow of the American Academy of Arts and Sciences, the British Academy, and the American Academy of Diplomacy (Harvard Kennedy School, 2021). Professor Nye is the co-founder, along with Robert Keohane, of the international relations theory of neoliberalism.² In 2011, *Foreign Policy* magazine named him to its list of top global thinkers (*Foreign Policy*, 2011). Equally, in 2014, *Foreign Policy* reported that the international relations scholars and policymakers both ranked Nye as one of the most influential scholars (*Foreign Policy*, 2014).

Unusually for a scholar, Professor Nye has excelled as much in public service as in academia. We could argue that his work in the Federal Government of the United States inspired him to focus on the concept of power in academia. From 1977 to 1979, Nye served as Deputy to the Under Secretary of State for Security Assistance, Science, and Technology and chaired the National Security Council Group on Non-proliferation of Nuclear Weapons. This was the era of the Cold War and the bipolar system. International policy was divided between the block of the United States of America and of the Soviet Union. In 1994 and 1995, Nye served as Assistant Secretary of Defence for International Security Affairs, where he used his political science expertise

² The international relations theory of neoliberalism was developed in their book. See: Nye, J. – Keohane, R. (1977): *Power and Interdependence: World Politics in Transition*.

to construct a new institutionalized relationship between the United States and Japan, which helped to defuse the trade conflict of that era (Nye, 2009).

2 POWER AS A CONCEPT EXPLAINING THE NATURE OF INTERNATIONAL RELATIONS

It is very important to note that context is a key aspect in terms of power in the study of international relations. In other words, power always depends on the context in which any relationship exists. Thus, all power in international relations depends on context – who relates to whom under what circumstances. The importance of context for power relations is clear in the following example, as Nye notes: “in the middle of the twentieth century, Josef Stalin scornfully asked how many divisions the Pope had, but in the context of ideas, five decades later, the Papacy was still intact while Stalin's empire had collapsed”(Nye 2013, p. 561). In this sense, Nye underlines the term “contextual intelligence,” (Nye 2013, p. 562) which he defines as a “crucial skill in enabling leaders to convert power resources into successful strategies.” Simply put, he perceives power as “the ability to achieve one's purposes or goals” (Nye 1990, pp. 25-26). In this sense, Nye introduces two definitions of power, that is to say, the behavioural definition and the definition based on the possession of power resources.

The first concept of power is associated with the behavioural definition, which is based on the observation of human's behaviour. Power, in this sense, is the ability to affect the outcomes one wants, and if necessary, to change the behaviour of others to make this happen (Nye, 2002). Power is, thus, the ability to control others and make them behave in a particular way. This behavioural perception of power is derived from Robert Dahl, a leading political scientist and professor at Yale University, who emphasised that power is a relationship between two actors (Dahl, 1961). In this sense, Dahl perceived power like a matter of actor A getting actor B to do what actor A wants, or even of actor A forcing actor B not to do what actor B wants to do. As Dahl noted “A has power over B to the extent that he can get B to do something that B would not otherwise do“ (Dahl 1957, p. 201).

To predict how one will act is very difficult because “when we measure power in terms of the changed behaviour of others, we have to know their preferences” (Nye 1990, p. 26). Furthermore, “knowing in advance how other people or nations would behave in the absence of our efforts is often difficult.” However, sometimes a country can get the outcomes it wants by affecting behaviour without commanding it (Nye, 2004).

The second definition of power is based on the possession of certain power resources that can influence outcomes. Power is the ability to influence the behaviour of others to get the outcome one wants (Nye, 2004). In this perception, power is defined as the possession of relatively large amount of power resources which “include population, territory, natural resources, economic size, military forces, and political stability among others” (Nye 1990, p. 26). When we look on power historically, it

could be argued that the nature of power is ever changing and the resources of power are never static. This explains why, for example, oil was not such impressive power resource before the industrial age and why uranium was not very significant before the nuclear age, or why, power resources, such as advanced science, technology and nuclear weapons had a powerful impact in the twentieth century.

To succeed in the international political scene, political leaders must have an excellent understanding of both definitions, and the ability to apply this understanding, because proof of power lies not only in resources but also in the changed behaviour of nations (Nye 1990, p. 26). However, policy-makers and diplomats often tend to turn only to the definition based on power resources because “it makes power appear more concrete, measurable, predictable than does the behavioural definition” (Nye 1990, p. 27). These political predictions and diplomatic strategies based on power resources alone can be misleading. It is true that possession of power resources provides at least a basic approximation of the possibilities of outcomes, but political leaders can risk a lot in this case. It could be argued, that it is easier to predict that a country that is well endowed with power resources is more likely to affect a weaker country and be less dependent upon an optimal strategy than vice versa. It is understandable that smaller countries may sometimes obtain preferred outcomes because they pick smaller fights or focus selectively on a few issues. “On average, and in direct conflicts, one would not expect Sweden or Georgia to prevail against Russia” (Nye 2013, p. 560). Nye underlines that “in my experience in government, policy-makers do tend to focus on resources”(Nye 2013, p. 572). Despite this practical experience in government, Nye notes that in practice, discussion of power and diplomacy must definitely involve the behavioural definition and also the definition based on power resources. He gives an example of why it is so important to combine both these definitions: when one wants to predicting the successful development of a rising powers, such as the BRICS group of countries, consisted of Brazil, Russia, India, China and South Africa. These countries have large population and increasing economic and military resources, but whether the capacity that these resources imply can actually be converted into preferred outcomes will depend upon the contexts and the countries' skills in converting resources into strategies that will produce preferred outcomes (Nye, 2013).

It is interesting that not just policy-makers but also many other people tend to define power as synonymous with the resources that produce it. They sometimes encounter the paradox that those best endowed with power do not always get the outcomes they want. Simply put, having power resources does not guarantee that a country will be successful in achieving its desired outcomes. This fact can be seen in several examples from recent history. For example, the United States was the largest power after the First World War, but it failed to prevent the rise of Germany or Japan, as demonstrated at Pearl Harbour (Nye, 2002). To take another example, in terms of

resources the United States was more powerful than Vietnam, yet the United States lost the Vietnam War (Nye, 2004). For this reason, it is clear that converting power resources into realized power in the sense of obtaining desired outcomes always requires well-designed policy and skilful leadership. This fact is connected with power conversion, which “is the capacity to convert potential power, as measured by resources, to realized power, as measured by the changed behaviour of others” (Nye 1990, p. 27). For example, “NATO's military power reversed Slobodan Milosevic's ethnic cleansing of Kosovo, and the promise of economic aid to Serbia's devastated economy reversed the Serbian government's initial disinclination to hand Milosevic over to the Hague tribunal” (Nye 2002, p. 4). Roughly speaking, NATO possessed sufficient military and economic resources with which they could affect and control the behaviour of the Serbian government in the way it wanted. In other words, NATO was able to convert its power resources into strong influence very effectively. It could be argued that NATO was skilled at power conversion and possessed sufficient power resources.

On the basis of the behavioural definition and the power resources definition, Nye introduces two types of power, that is to say, hard and soft power.³ Hard power can be defined as the ability to achieve one's purposes “by the use of force and payment and some agenda-setting based on them” (Nye 2013, p. 565). In contrast with hard power, soft power can be seen as the ability to affect others to obtain preferred outcomes by the use of “agenda-setting that is regarded as legitimate by the target, positive attraction, and persuasion” (Nye 2013, p. 565). In other words, hard power is push, soft power is pull.

As shown above, to exactly define power we have to be aware of whether we are speaking of the behavioural definition or the definition based of power resources. In behavioural terms, one can obtain preferred outcomes in three main ways such as threat of coercion, payment, or attraction and persuasion. In this sense, Nye writes about command and co-optive methods of exercising power. Command power (Nye 1990, p. 267) is the ability to change what others do. It is the ability to get others to do what one wants. This method can rest on coercion, inducement and threats. Thus, we can talk about the method of “carrots and sticks” (Nye 1990, p. 31). In this sense, a country gets other states to change according to its purposes. On the other hand, co-optive power (Nye 1990, p. 267) is the ability to get others to want what one wants. This method can rest on the attractiveness of one's ideas, culture, ideology or the ability to manipulate the agenda of political choices in a manner that makes actors fail to express some preferences because they seem to be too unrealistic. Simply put,

³ Nye introduced these definitions of power for the first time in his book *Bound to Lead* issued in 1990.

a country may achieve the outcomes it prefers in world politics because other countries want to follow it or have agreed to a system that produces this effect.

In terms of power resources, Joseph Nye writes about hard and soft power resources which “are aspects of the ability to achieve one's purposes by controlling the behaviour of others” (Nye 1990, p. 267). The distinction between these two types of power resources “is one of degree, both in the nature of the behaviour and in the tangibility of the resources” (Nye 1990, p. 267). Nye notes that “the types of resources that are associated with hard power include tangible factors like military and economic strength” (Nye 1990, p. 267). He explains that “the resources that are associated with soft power often include intangible factors like ideas, values, culture, institutions and perceived legitimacy of policies” (Nye 1990, p. 267).

During his political and academic career, Nye often focused on the relationship between the United States and Japan.⁴ As an example, he offered a short comparison of the United States with Japan at the end of the twentieth century. His claim was that in terms of command power, Japan's economic strength would be increasing in the future, but assumed that Japan would remain vulnerable in terms of raw materials and relatively weak in terms of military force. Furthermore, in regard to co-optive power, Japan's culture is generally highly insular, which let him to suppose that Japan's culture has yet to develop a major voice in international relations. In comparison with Japan, according to his opinion, the United States had always possessed an universalistic popular culture which also will allowed it a major role in international institutions (Nye, 1990). It could be argued that in today's twenty first century, the United States is recognised for its noticeable strength in command but also in co-optive power. However, Japan's culture still remains insular and relatively isolated while China's culture is more widely spread mainly in countries situated in the Western Hemisphere.

Nye notes that “soft power tends to be associated with co-optive power behaviour, whereas hard power resources are usually associated with command behaviour” (Nye 1990, p. 267). It is very important to note that this relationship is not perfect. Roughly speaking, in political practice, there are many cases when it is not possible to strictly categorise power in this way. In other words, soft power is not associated merely with intangible power resources and co-optive power behaviour, while hard power is not associated only with tangible power resources and command power behaviour. If one remembers the distinction between power resources and power behaviour, one realizes that resources often associated with hard power behaviour can produce soft power behaviour or vice versa, depending on the context and how they are used.

⁴ Joseph Nye offered this comparison in his book *Bound to Lead*.

It is clear that, for example, intangible resources like patriotism, morale, and legitimacy can strongly affect the capacity to fight and win a war. Similarly, threats to use force are intangible, however, they are a dimension of hard power. It is perhaps surprising, but many of the terms that are used daily such as military power and economic power are hybrids that combine both resources and behaviours.

With a deeper understanding of power, it is evident that command power can create resources that can create soft power at a later phase. For instance, the creation of institutions that will provide soft power resources in the future. Similarly, co-optive behaviour can be used to generate hard power resources in the form of military alliance or economic aid. In other words, a tangible hard power resources like a military unit can produce both command behaviour (by winning a battle) and co-optive behaviour (attraction) depending on how it is used. Therefore, since attraction depends upon the minds of the perceiver, the subject's perceptions play a significant role in whether given resources produce hard or soft power behaviour (Nye, 2013). For example, “naval forces can be used to win battles (hard power) or win hearts and minds (soft power) depending on who the target and what the issue is.” (Nye, 2013). Nye takes an example of the American navy's help in providing relief to Indonesia after the 2004 Indian Ocean tsunami had a strong effect on increasing their attraction towards the United States. “The Navy's 2007 Maritime Strategy refers not only to war-fighting but additionally maritime forces will be employed to build confidence and trust among nations.” (Nye 2013, p. 564). Similarly, as Nye adds, “successful economic performance such as that of the European Union or China can produce both the hard power sanctions and restricted market access as well as the soft power of attraction and emulation of success” (Nye 2013, p. 564).

Hard and soft power are interrelated: They can reinforce each other, but sometimes they can interfere with and undercut each other. Thus, it is very important to have very good “contextual intelligence” which is needed to distinguish how these two types of power can interact in different situations. As Angus Taverne puts it, “the military has to understand that soft power is more challenging to wield in terms of the application of military force—particularly if what the force is doing is not seen as attractive” (Taverne, 2013). Nye adds that “if the other levers of soft power are not pulling in the same direction, then the military cannot create favourable conditions on its own. Except at the tactical level, the military options for the use of soft power have to been [sic] seen in a larger policy context” (Nye, 2013).

As shown above, both hard and soft power reflect the ability to achieve one's purposes by affecting the behaviour of others. For this reason, sometimes the same power resources can affect the entire spectrum of behaviour from coercion to attraction. A country that suffers economic and military decline is likely to lose its hard-power resources but also its ability to shape the international agenda and its attractiveness. In contrast, some countries may be attracted to others with hard power

by the myth of invincibility or inevitability. For example, both Germany and the Soviet Union tried to develop such myths. Hard power can also be used to establish empires and institutions that set the agenda for smaller states—witness Soviet rule over the countries of Eastern Europe (Nye, 2002).

It is very important to note that soft power does not depend on hard power, and, in this sense, soft power is not simply the reflection of hard power. This could be demonstrated by the example of the Vatican and his persistent soft power. In fact, “the Vatican did not lose its soft power when it lost the Papal States in Italy in the nineteenth century” (Nye 2004, p. 9). “Conversely, the Soviet Union lost much of its soft power after it invaded Hungary and Czechoslovakia, even though its economic and military resources continued to grow” (Nye 2004, p. 9). Imperial policies that utilized Soviet hard power actually undercut its soft power (Nye 2004, p. 9). In contrast, the Soviet sphere of influence in Finland was reinforced by a degree of soft power. The United States' sphere of influence in Latin America in the 1930s was reinforced when Franklin Roosevelt applied soft power.

As demonstrated above, hard and soft power can sometimes reinforce, but can also sometimes interfere with each other. Roughly speaking, a country that courts popularity may be loath to exercise its hard power when it should. Similarly, a country that throws its weight around without regard to the effects on its soft power may find others placing obstacles in the way of its hard power. It could be argued that no country likes to be manipulated, even by soft power. As a good example of this, Nye takes a decision of President John F. Kennedy in 1961 to go ahead with nuclear testing in spite of negative polls. J. F. Kennedy took this decision because he was worried about global perception of Soviet gains and the Soviets' potential dominance in the arms race. J. F. Kennedy “was willing to sacrifice some of America's soft prestige in return for gains in the harder currency of military prestige” (Nye, 2004). On a lighter note, in 2003, just a few months after massive anti-war protests in London and Milan, fashion shows in those cities used models in US military commando gear exploding balloons. As one designer put it, American symbols “are still the strongest security blanket” (Horny 2003, p. 1).

In political practise, it is thus important to possess the ability to combine hard and soft power resources into effective strategies, which is called smart power. Nye introduced the term smart power in 2003 “to counter the misperception that soft power alone can produce effective foreign policy” (Nye 2012, p. 1). The first step towards smart power and effective power conversion strategies is an understanding of the full range of power resources and the problem of combining them effectively in various contexts. Smart power strategies could be compared to the proclamation of US President Theodore Roosevelt in 1901: “Speak softly and carry a big stick.” (Nye 2013, p. 58). Simply put, smart power addresses multilateralism and enhances foreign

policy. To take an example, the end of the Cold War was marked by the collapse of the Berlin Wall, which fell as a result of a combination of hard and soft power. Throughout the Cold War, hard power was used to deter Soviet aggression and soft power was used to erode faith in Communism. As Nye said: "When the Berlin Wall finally collapsed, it was destroyed not by artillery barrage but by hammers and bulldozers wielded by those who had lost faith in communism." (Nye 2013, p. 59). The former American Secretary of State Hillary Clinton described the diplomacy of the twenty-first century and importance of smart power in the following words: "America cannot solve the most pressing problems on our own, and the world cannot solve them without America. We must use what has been called smart power, the full range of tools at our disposal." (Nye 2013, p. 60). In practice, smart power strategies can be used not only by large states such as the United States, but also by small states. Some countries such as Canada, the Netherlands, and the Scandinavian states (Nye, 2004) have political clout that is greater than their military and economic weight, because of the incorporation of attractive causes such as economic aid or peacekeeping into their definitions of national interest. To take an example, Norway, a small state with five million people, has enhanced its attractiveness with legitimising policies in peace-making and development assistance that enhance its soft power (Nye, 2013). Norway has taken a hand in peace talks in the Philippines, the Middle East, Sri Lanka, Colombia, Guatemala and the Balkans (Nye, 2004). Similarly, but other end of the spectrum in terms of population size, China, a rising power in hard economic and military resources, has deliberately decided to invest massively in soft power resources so as to make its hard power look less threatening to its neighbours (Nye, 2013).

When we look at Nye's view on power from historical perspective, it could be argued the nature of power is ever changing. When we survey the distribution of power throughout history, it is clear that the five-century old modern state system⁵ shows that the sources of power are never static and different power resources played critical role in different periods. Nye explains this change gradually from the sixteenth century to the twenty-first century. It is not surprising that in earlier periods, power resources were easier to judge. As demonstrated above, the nature of power has changed and, therefore, we would like to describe four fundamental changes which contributed to the gradual transformation of power resources. In this sense, it is important to note

⁵ The Peace of Westphalia in 1648 inaugurated the modern international state system. This modern system established sovereignty as a right of the state. There are two dimensions of sovereignty, that is to say internal and external sovereignty. Internal sovereignty could be defined as the existence of an absolute authority over all individuals or associations of individuals within the state. External sovereignty could be defined in terms of state equality in international law. Simply put, all states are equal and each state is independent of any compulsion on the part of other states.

which power resources provided the best basis for power behaviour in any particular context.

The first important change related to a country's capability to prove its strength for war (Nye, 2002). Traditionally, the test of a great power was “the test of strength for war” (Teylor 1954, p. 29) and, in this sense, “war⁶ was the ultimate game in which relative power were proven” (Nye 2002, p. 5). In the sixteenth century, Spain was a leading country and managed a huge number of colonies overseas. In society, dynastic ties dominated. Spain, the so-called “the empire on which the sun never sets” had

a prosperous economy benefited mostly from colonial trade and it also possessed strong mercenary armies. Power resources in this period were mainly gold bullion and strong armies (Nye, 1990). In the agrarian economies of the seventeenth century, the Netherland's economy stood out because of its strong navy and flourishing trade overseas. The most important power resources were strong navies and capital markets (Nye, 1990). In the eighteenth-century Europe, population was a critical power resource, which provided a needed base for taxes, manpower in rural industry and public administration, and the recruitment of infantry who were mostly mercenaries. This combination of men and money gave the edge to France. In nineteenth - century Europe, power resources for war continued to change (Nye, 1990). These power resources were represented by the process of industrialisation reflected in the growing importance of industry and technological advance mainly in rail transport. As is well known, growing importance of industry benefited Britain, which ruled with a navy that had no peer (Nye, 2002). In the 1860s, Prussia under Bismarck's command was a pioneer in the use of railways to quickly transport armies where they were needed to quick victories. This Prussian rapid mobilization was in contrast with Russian difficulties to mobilize its army, although, Russia had greater population resources than the rest of Europe (Nye, 1990). Despite these initial difficulties, Russia built a modern rail system in its Western territory at the beginning of the twentieth century.

⁶ However, war is not always the ultimate arbiter in the contemporary age. There is not merely military, but also financial, political, (or diplomatic) and moral rebalancing underway in the world's power structure. Nye notes that none of this is to suggest that military force plays no role in international politics today. According to his opinion, military power remains crucial in certain situations, but it is a mistake to focus too narrowly on the military dimensions of power. The diplomat steps aside and the soldier takes over when the government concludes that the goals being pursued can be achieved through the use of military force - or when the diplomat has bungled. While the threat of use of force, whether explicit or implicit, is still part of the diplomat's arsenal, the actual use of force is required when diplomacy has failed and must be substituted by other instruments of statecraft. See COOPER, A. (2013): *Introduction: The Challenges of 21st Century Diplomacy*. In Cooper, A.: *The Oxford Handbook of Modern Diplomacy*.

This spread of rail systems throughout Continental Europe helped deprive Britain of as advantage, which related on naval power (Nye, 1990). In addition, Nye notes that “there are many situations where any use of force may be inappropriate or too costly. In 1853, for example, Commodore Perry could threaten to bombard Japan if it did not open its ports for supplies and trade, but it is hard to imagine that the United States could effectively threaten force to open Japanese markets today.” (Nye 1990, pp. 27-29). Equally, power resources, such as advanced science, technology and nuclear weapons had a powerful impact in the twentieth century. As we know from the history of the Cold War, the United States and the Soviet Union possessed not only industrial but also nuclear arsenals and intercontinental missiles (Nye, 2002).

The second important change was the rise of nationalism (Nye, 2002), which made it more difficult for empires to rule over “awakened” populations desiring for freedom. It could be argued that European world colonization commenced with military and commercial expansion in 1415 and completed in the nineteenth century. “In the nineteenth century, a few adventurers conquered most of Africa with a handful of soldiers, and Britain ruled India with a colonial force that was a tiny fraction of the indigenous population.” (Nye 2002, p. 5). However, as both Cold War superpowers discovered in the twentieth century in Vietnam and Afghanistan, colonial rule was not only widely condemned but far too costly. The emergence of large swathes of humanity from colonial rule to independence was, perhaps, one of the most important historical phenomena of the last century. The great wave of the retreat of European colonialism, from Asia and Africa in 1950s and 1960s and the South Pacific in 1970s, was followed by the collapse of the largest land-based empire, the USSR, in 1993. This led to a fresh burst of newly independent countries: Central and Eastern Europe and Central Asia in 1990s. The collapse of the Soviet empire followed the end of European empires by a matter of decades. To take another remarkable example of nationalism, at the end of the Napoleonic Wars, Prussia presented its fellow victors at the Congress of Vienna with a precise plan for its own reconstruction in order to maintain the balance of power. Its plan listed the territories and populations it had lost since 1805. In the prenationalist period, it did not much matter that many of the people in those provinces did not speak German or feel themselves to be German. However, within half a century, nationalist sentiments mattered very much (Nye, 1990). For example, after French defeat “in the Franco-Prussian War, the French government sought to repair the nation's shattered prestige by promoting its language and literature through the Alliance Française,⁷ created in 1883” (Nye 2002, p. 69). Italy, Germany, and others countries soon followed France in its idea to promote culture through diplomacy (Nye, 2002).

⁷ The projection of French culture abroad thus became a significant component of French diplomacy. See JINGJIE, L. (2000): *Pillars of the Sino-Russian Partnership*. p. 530.

The third important cause lies in societal change inside great powers (Nye, 2002). Roughly speaking, “there are three types of countries in the world today: poor, weak preindustrial states, which are often the chaotic remnants of collapsed empires, modernizing industrial states such as India or China, and the post-industrial societies that prevail in Europe, North America, and Japan” (Nye 2002, p. 6). Thus, it could be argued that most of the world does not consist of post-industrial societies. Much of Africa and the Middle East remains locked in preindustrial agricultural societies with weak institutions and authoritarian rulers. Other countries, such as China, India, and Brazil, are industrial economies analogous to parts of the West in the mid-twentieth century. In such a variegated world, all three sources of power—military, economic, and soft—remain relevant, although to different degrees in different relationships. Joseph Nye notes that, for example, “the use of force is common in the first type of country, still accepted in the second, but less tolerated in the third” (Nye 2002, p. 6).

In this sense, Nye argues that no country is better endowed than the United States in all three dimensions – military, economic, and soft power.

To take an example, whereas leaders in authoritarian countries can use coercion and issue commands, politicians in democracies have to rely more on a combination of inducement and attraction. Soft power is a staple of daily democratic politics. Soft power is also likely to be more important when power is dispersed in another country rather than concentrated. A dictator cannot be totally indifferent to the views of the people in his country, but he can often ignore whether another country is popular or not when he calculates whether it is in his interests to be helpful. In democracies where public opinion and parliaments matter, political leaders have less leeway to adopt tactics and strike deals than in autocracies. As Nye takes as a demonstrative example, “it was impossible for the Turkish government to permit the transport of American troops across the country in 2003 because American policies had greatly reduced its popularity in public opinion and in the parliament. In contrast, it was far easier for the United States to obtain the use of bases in authoritarian Uzbekistan for operations in Afghanistan” (Nye 2004, p. 16).

Finally, important changes can be found in the economic strength that states possessed (Nye, 2002). Economic power has become more important than in the past, because of the relative increase in the costliness of force and because economic objectives loom large in the values of post-industrial societies. In a world of economic globalization, all countries are to some extent dependent on market forces beyond their direct control, but markets constrain different countries to different degrees. For example, “Japan has certainly done far better with its strategy as a trading state after 1945 than it did with its military strategy to create a Greater East Asian Co-prosperity Sphere in the 1930s” (Nye 1990, p. 29). Clearly, Japan's role as a trading state after the

Second World War turned out to be more successful and lead it to be one of the largest national economies in the world.

It could be argued that the distribution of power resources in the contemporary age varies greatly on different issues. It is important to determine what power resources are the most important today. In international power today, factors such as technology, education, and economic growth are becoming more important and factors like geography, population, and raw materials are becoming less important. At least five trends have contributed to this diffusion of power: economic interdependence, transnational actors, nationalism in weak states, the spread of technology and changing political issues(Nye, 1990).

3 CONCLUSIONS

When we look at Nye's view on power historically, it is important to note that the nature of power is ever changing: transformation of power is never complete and power is not static. Politics is not a closed system and, thus, the agenda of world politics has become like a three-dimensional chess game in which one can win only by playing vertically and horizontally in an excellent way. On the top board players can find classic interstate military issues. Thus, it makes sense to speak in traditional terms of unipolarity or hegemony and the United States is viewed to be the only superpower with global military reach. However, on the middle board of interstate economic issues, the distribution of power is multipolar. In short, the United States is not able to obtain the outcomes it wants on trade and, therefore, the United States' financial regulation depends on the agreement of the European Union, Japan, China and others. Thus, it makes little sense to call this American hegemony. On the bottom board are placed transnational issues like international crime, climate change, and the spread of infectious diseases. Obviously, power is widely distributed and chaotically organised among state and non-state actors. Thus, it makes no sense at all to call this a unipolar world or an American hegemony. Nye calls this as "a set of issues that is now intruding into the world of grand strategy" (Nye 2004, p. 5).

By summarizing an extensive literature over Nye's understanding of power, we could argue that Nye developed a theoretical framework accompanied with examples from practice of international relations. The conceptual framework shown in this paper encourages rigorous attention to power in international relations. To understand what power in international relations is, Nye underlines the term of contextual intelligence, which is a fundamental skill in enabling politicians and diplomats to convert power resources into effective and successful strategies. Nye suggests that the most effective strategies in foreign policy today require a combination of hard and soft power into smart power strategies.

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HISTORICKÝ VÝVOJ HLAVNÝCH MIGRAČNÝCH TOKOV **THE HISTORICAL DEVELOPMENT OF MAIN MIGRATORY FLOWS**

Irah Kučerová¹

Migrácia je širokospektrálny, interdisciplinárny fenomén medzinárodných vzťahov s dôsledkami na mnohých úrovniach. Cieľom historického prehľadu migrácie je nájsť spoločné charakteristiky jednotlivých migračných vln, ich hlavné príčiny. Pri analýze príčin migrácie zvažujeme zámery push a pull faktorov. Dominantným teoretickým rámcom tohto kvalitatívneho výskumu je neoklasická teória. Minimálne od konca 19. storočia bola medzinárodná migrácia vnímaná ako páľčivý spoločenský či politický problém, preto treba migráciu regulovať. Výsledkom analýzy je, že vo väčšine prípadov sa motívy migrácie opakujú.²

Kľúčové slová: migrácia v historickom pohľade, push-pull faktory, neoklasická teória migrácie, utečenec, vyhnanstvo

Migration exists on a broad spectrum as an interdisciplinary phenomenon of international relations with its consequences permeating through many levels. The aim of this historical overview of migration is to identify the common characteristics of individual migratory waves, alongside their main causes. In the analysis of the causes of migration, we shall consider the consequences of push and pull factors. The dominant theoretical framework of this qualitative research is a neoclassical one. At least since the late 19th century, international migration has been perceived as a burning social or political problem and, therefore, migration must be regulated. As a result of the analysis, in most cases the motives for migration are repeated.

Key words: migration in historical view, push-pull factors, neo-classical theory of migration, refugee, exile

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1 INTRODUCTION

Migration is an immanent manifestation of human development, especially in the context of perpetual movement, including the search for new territories at distances that exceeded the lives of several generations (Shah 2020). Only in modern times do we hear of temporary migration, often of the work type. Migratory research must be interdisciplinary, considering the geographic, demographic, social, economic and political aspects (Jansen 1969, p. 60).

This remains despite the fact that the definition of migration is extremely straightforward, the temporary or permanent abandonment of home (Lee 1966, p. 49), which does not refer to the serious consequences of migration. But we also consider the intentions of both legal, illegal and irregular migration, especially that since the 1980s, when the notion of the necessity to regulate immigration came to the fore (King 2002, pp. 93-94).

In recent years, there has been talk of a migratory crisis, especially within Europe, which is, in some ways, misleading, as the US and Australia are facing a similar intensity of immigration. There are two developing trends, namely migration and refugees. We therefore have to outline the differences between the typical migrant and refugee.

While a traditional migrant is perceived as having voluntarily left their homeland in search of an improved way of life, a refugee is one who has fled involuntarily from traumatic circumstances and endangerment due to religious, racial, national or political factors (UN Refugee Status Convention, 1951). Of course, it is also impossible to abstract the causes associated with natural disasters, alongside the current, rapidly deteriorating natural environment which is severely limiting the livelihoods of many. The refugee is motivated by the fear of losing their freedom or even life in their home country, therefore complicating any return; they are often severely mentally scarred (Jelínková 2000, p. 2). The coordination of aid to refugees has been handled by the Office of the High Commissioner (UNHRA) at the UN since 1950. A year later, the Geneva Convention lay down minimum standards for the protection of refugees, further supplemented in 1967 by the New York Protocol.

An exile is a specific form of refugee, people involuntarily leaving their homeland, yet planning their departure, as compared to the refugee who often takes the first opportunity to escape. Both forms of leaving the home country are based around the idea of return once the situation calms down. This is perceived as "temporary" exile. "The exile, as opposed to the emigrant, cannot simply return home unless substantial changes take place in the homeland" (Pithart, 2003). Originally, migration was mainly for political reasons, when people sought protection from persecution abroad (Mráz 2019, p. 155). Exiles occur, not for economic or social reasons, but for political and religious ones, which is another differentiating element between refugees

and classic migrants. The fundamental difference between an exile and a refugee is the urgency of time.

Nor, may we omit the specific example of the exile, namely the one in the true sense of the word, a person deprived of citizenship of their home country. This violent migration is historically associated primarily with the slave caste in both antiquity and the early Middle Ages; yet the early modern transatlantic slave trade of African descent to serve the needs of the American continents, on a scale of approximately 10 million forced migrants (Cohen 2019, p. 42), corresponds to a huge wave of migration during 17th – 19th centuries. Constrained migration is also associated with the 20th century, for example, the expulsion of ethnic Germans after World War II from Central and Eastern Europe. Or in the exceptional circumstances of the emigration of political opponents abroad. This happened, for example, in connection with the struggle against the communist regime in Czechoslovakia in late 1970s, when, as part of the so-called, Personal Decontamination Action, some uncomfortable opponents of the regime were forcibly evicted and their Czechoslovak citizenship was revoked.

Unlike the definition of a refugee, there is no internationally legal definition of a migrant. Amnesty International defines a migrant as a person residing outside their home country for more than a year (AI, 2019), although this is not entirely accurate, as it does not address the issue of those sent on work secondments lasting more than a year. In any case, a migrant is a person who leaves their country in which they tend to be bound by family ties.

The theoretical framework for comparing the causes and consequences of migratory waves in history will be a neoclassical theory working on push-pull factors, despite there being a wide variety of other theories of migration.

Hypothesis: *Human migration always possesses general features common to the various causes of migration.*

Research question 1: Is it possible to detect the analogous causes among monitored historical cases of migratory push-pull factors?

Research question 2: Is it possible to identify the general consequences of the observed migratory waves?

It is said that history repeats itself. The aim of this reflection on the development of human migration is to find a common denominator within the individual historical waves. What are the main causes of migration?

2 THEORETICAL BACKGROUND AND LITERATURE REVIEW

Given the historical focus of research on migration waves, the use of neoclassical theory, resp. push-pull theory, proves the most appropriate as it offers a more general framework applicable to any historical period. However, it is also worth noting that this theory fails to answer all the questions of migration, so it is not a universal one. Although the neoclassical theory of migration is sometimes referred to

as being separate to the push-pull factor theory, both have a common basis. Both are founded on measuring the costs and benefits of migration (Kučerová 2020, p. 507).

The neoclassical theory of migration was developed mainly in the 1960s (Lee 1966, Jansen 1969), when the reverberations of the Second World War faded, yet the world was gripped by the Cold War so, on the one hand, the liberalization of people in peace and rising living standards was complemented by the migration of people from behind the Iron Curtain, or in connection with the decolonization process. However, Lee himself is based on his analysis of Ravenstein's migration and his postulated seven laws of migration caused by the industrial revolution (Ravenstein 1885). It seems that Ravenstein's patterns of migration can be verified in many historical cases, as each migratory flow creates its reverse counterpart; most movements are across shorter distances, so-called, gradual migratory steps where migrants prefer larger cities as destinations, which, after all, grow by immigration rather than by their own birth rate; the rural population is more prone to migration than the urban population; fewer families migrate, the majority tend to be single individuals and most are adults (Ravenstein 1885, 1889).

These theories focus on the reasons for leaving their homeland (push factors), as well as, on those that attract potential migrants to leave (pull factors). On the side of noticeably problematic causes of migration (push factors) there are up to sixteen reasons, including e.g. a low standard of living, lack of work, population boom (overpopulation), natural disasters, political repression, ethnic and religious instability, etc. In contrast, the attractiveness of reasons for leaving home is listed by nine factors such as land availability (especially in the past), employment, improved living conditions, liberty, simply put, these are incentives that multiply the life chances of the actors (Dahrendorf, 1990).

According to Lee and Jansen, migration occurs only at a certain level of perceived difficulty, yet there are always other pros and cons to be considered as migration always affects only a part of the population, so it is not a mass phenomenon. The decision about migration is always selective, migrants are not a random sample of the population (Lee 1966, p. 56). We can identify four basic categories relating to the causes of migration from a historical perspective, namely, economic, security, cultural incl. religious, and environmental. Although it is not part of the neoclassical theory, I consider it important to draw attention to two American authors who had already in 1918, highlighted the fact that migration changes people's life strategies and goals (Thomas and Znaniecki, 2018). In my opinion, neoclassical theory follows this finding, especially in the later period, when, in addition to macroeconomic analyses of migration, research focuses in detail on labour markets and extends to institutional aspects – see Massey (1993, 1998) e.g. Migration is examined mainly in terms of job opportunities or wage levels (Massey, 1993), decision-making on migration at the level of whole families or communities in connection with expected remittances, i.e. as

a strategic behaviour (Massey, 1998). Neo-classical theory, including the push-pull model, focuses predominantly, yet not only, on issues related to labour markets, wages and societal aspects (Nestorowicz and Anacka 2019, p. 295).

The original push-pull migration theory has branched out into a wider range of related concepts, but for the purposes of this article, the original causes of migration will be at the fore.

3 METHODOLOGY: SELECTED ANALYSIS CRITERIA

Migration research in the last century has been on the periphery of social or scientific disciplines (Zapata-Barrero and Yalaz 2018, p. 9), but is now gaining prominence as part of multidisciplinary research involving both international relations, political economy, geography, and social studies. The study of migration needs an interdisciplinary approach connecting demography, history, psychology, law, political science and urbanism (Drbohlav and Uherek, 2007), we can talk about the re-orientation of migration studies to multidisciplinary and diversity (Jansen 1969, Pisarevskaya et al. 2019).

This article will use a qualitative analysis of migration within historical developmental trends. Its advantage is that the phenomena or processes in question are examined, as far as possible, in their entirety. It allows us to capture many interrelationships and connections, which is essential for an interdisciplinary approach. The method used will be the interpretive method, searching for topics and regularity in narrative data (Hendl, 2016). The aim is to locate connecting elements in the monitoring of historical migratory waves, which qualitative research enables. The downside to qualitative research is that its results cannot be generalized or transferred to another environment, which in this case means strongly limiting possibilities to use historical experience (Strauss and Corbin, 1990). Nevertheless, a knowledge of history eases our ability to solve current problems.

It concerns the identification of shared features in individual migration waves, namely by an inductive method, i.e. by estimating, at the beginning of the research, the initial causes of the migration, such as territorial expansion enabled by military force, incl. settlement in new regions, or the opposite effect, namely an escape from an enslaved country or homeland. It proves to be two sides of the same coin.

The criterion of this analysis is to identify the general features of migration in relation to its various causes.

4 DEFINITION OF INTERNAL AND EXTERNAL (INTERNATIONAL) MIGRATION

Population migration should not be perceived as solely a geographical relocation of people, but instead, in a broader context as a complex process of economic, social, demographic, political, and security factors in a geographical context (Jansen 1969, Castles and Miller 1998).

We tend to distinguish migration, in accordance with geographical contours, as internal and external i.e. international migration. Most often, however, internal migration is associated with the search for improved livelihoods in more favourable places of settlement (Drbohlav 2001, King 2002, Kučerová 2015), which tend to be cities in general, the larger ones having a greater guarantee of securing employment. This indicates that, along with migration, urbanization is intensifying, with the amount of people living in conglomerations that have been increasing in recent centuries, compared to within the traditional countryside. Urbanization is not only a logical consequence of the concentration of resources such as labour forces, but may also possibly occur due to failed economic policies, which might then lead to a diversity between urban and rural areas. This correlates with worsening social, economic, transport, energy and environmental difficulties (Kučerová 2011, p. 56). While in 1800, there were only 45 cities in the world with a population of over 100,000, by 1950, this had increased to 880 cities with 50 possessing over 1 million inhabitants. Yet, by 1990, the number of cities reaching the million marks had increased to 250 (Maryas, 2004), and, by 2015, the figure was 550 (Robbins 2014, p. 162). We refer to such a concentrated growth rate as metropolitanization. While in developed countries, this is accompanied by a deconcentration, suburbanization or migration from centres, alongside an emergence of satellite cities, in developing countries this is not the case and, conversely, their urban centres are expanding to the expense of the quality of life their inhabitants. To take, for example, Turkey which highlights a noticeable development, in 1950 20% of the population lived in urban settlements, thirty years later, in 1980, this had more than doubled (44%), in 2000 it had reached 65%, and in 2010, they reported that 75% of Turkish citizens live in an urban environment! (World Bank, 2018). By analogy, in Cairo alone, where 18 million out of a total population of 97.5 million live today (World Bank, 2018).

Although urbanization is a natural accompanying phenomenon of civilization development, there are both positive and negative effects. The relocation of an impoverished population to cities offers many the opportunity for an improved lifestyle, but, on the other hand, problems tend to concentrate in cities (see below), so a so-called urbanization of poverty occurs. There is a lack of technical infrastructure (drinking water, sewerage, road and energy network), institutional (educational, health, social services, legal networks).

As the pressure on the labour market increases, so unemployment rises, and the original benefits of city life disappear. After all, the static standard of living, alongside a growing population, leads to so-called demographic overpressure, which increases tensions within societies, as, for example, the events that led to the Arab Spring Uprising in December 2010, resp. then 2011. An inability to provide for one's family, to find employment, combined with the effects of the authoritarian regimes of the Middle East countries created an explosive powder keg for revolts.

In general, urbanization increases the concentration of the population, and alongside it, a concentration of negative accompanying phenomena of civilization development. Especially in built-up areas, there is a higher pressure on the intake of resources, access to work, public services and demands for educational needs, health care, etc.

In regards to the development of urbanization, a UN forecast in 2002 predicted that more than half of the world's population would live in cities, actual developments support this: 56 per cent of people in the world since 2015 are estimated to live in urban settlements (UN, 2003). This had already occurred roughly three years before in 2012. The metropolitan population, i.e., from half a million to 10 million, had more than tripled between 1990 and 2008, with a further forecast that the share of rural settlements would fall by a further 11 million by 2030 (WUP 2018, p. 56).

International migration can be defined as the movement of persons who leave their country of origin or country of residence to settle permanently or temporarily in another country so, therefore, borders are crossed (IOM 2019, p. 41).

From the point of view of research on international migration, an important methodological criterion is the geographical determination of the source countries (Zapata-Barrero and Yalaz 2018, p. 11), as well as the destinations of migrants.

5 HISTORY OF MAJOR MIGRATORY WAVES

Probably the first real wave of migration, according to archaeological findings, was the *flow of Africans* heading through the Middle East to Europe and Asia 10,000-20,000 years ago. As part of this migratory flow, the first humans crossed today's Bering Strait into North America (Robbins 2014, p. 156) to reach the southern tip of South America (Cohen 2019, p. 12). This is a classic example of the natural search for new livelihoods.

One of the most historically, respectively religious and culturally significant cases of migration is mentioned in the *biblical exodus of the 13th century BC*, specifically in 1220 (Dorazil 1997, p. 27). The biblical portrayal of "bringing Jews out of Egyptian captivity" by Moses became a symbol of escaping poor living conditions to seek a better future for the nation (see the essence of emigration). The reality was probably far different. By no means were the Jews captive in Egypt, on the contrary, they enjoyed a relatively decent social and economic status, but later narration adjusted this. An interesting explanation is how the Red Sea parted so that Moses could guide his people to the other side and the Promised Land. The catalyst for change were natural causes, the results of a storm led to a rise in mud which allowed passage across the waters. This narrative corresponds to the classical theory of migration for reasons of improved living conditions.

A significant, historically demonstrable wave of migration was the so-called *movement of nations during the 4th to 6th centuries AD*, specifically in period of 375-

568 in the area of Eurasia and North Africa. The weakening Roman Empire as displayed by an inability to control the entire territory militarily, the dysfunction of its state structures, and a growing economic crisis with rising inflation made it easier for new tribes to enter its territory (Hora 1985, pp. 87-88). Then the total collapse of the Roman Empire in 395, respectively its division into Western and Eastern parts and its subsequent development was another sufficient reason for increased migration. The main causes of the “movement of nations” were climate change and a booming population resulting in the need to seek livelihoods elsewhere and in new manners. Therefore, the result was the settlement of many hitherto nomadic tribes, a fundamental change in their lifestyle. The main direction of the migratory wave was from East to West or South, from Asia to Europe, led in 375 mainly by nomadic Huns from the Central Asian steppes. However, the migration of Germanic and Slavic tribes between the 4th and 7th centuries, a period referred to as the first wave of the movement of nations, is often considered to be the core of migration (Bednaříková, 2017). In the middle of the 5th century, tribes of Angles and Saxons arrived to the British Isles and gradually displaced the native Celts. The billiard ball effect is referred to here as it indicates the interaction of migrating tribes. The second phase of the movement of nations is connected with migratory trends during the 6th to 8th centuries, when the Slavs came to Central Europe and the Balkans and settled there. In the early Middle Ages, Central Europe thus became a crossroads of migration within the movement of nations, as there was plenty of vacant space with abundant forests and highly fertile land (Kučerová 2015, p. 20). The early medieval wave of this migration of people corresponds to the motive of searching for new living grounds for a growing population. The classic reason for migration.

The *Arab expansion in the 7th-8th centuries* was provoked after the Prophet's death by contradictions in the conception of Islam, which still retains a fundamental schism between the Sunnis and the Shiites, leading to bloody clashes even to this day. While the Sunnis profess, in addition to the Qur'an, to the so-called path (sunna) of the development of Islam, which was indicated by the Prophet, and later by any religious authority who has been able to convince others of their importance; Shiites, on the other hand, recognize authority derived only from the descendants of the Prophet himself, and the only canon remains the Qur'an (Dorazil 1997, p. 190). This wave of migration spread the influence of Islam east, through Asia, and on to the Chinese border, as well as, West to North Africa and the Pyrenees, where Arab tribes (known as the Moors) ruled part of the mainland for seven centuries. The cause of this migration was therefore primarily religious reasons accompanied by logical economic interests, too.

A significant migratory impulse was the so-called *Ostsiedlung (Eastern Settlement)* process, i.e., the settlement of the Eastern regions in a long-stretching period between the 10th and 19th centuries. It was the colonization of Eastern Europe

by Germanic tribes, even in the Middle Ages, supported by Slavic rulers, as the arrival of new tribes was perceived as a factor of economic development within an area which, until then, consisted of large uninhabited territories. But it is also true that the medieval Ostsiedlung has transformed since the 18th century into the so-called Drang nach Osten, meaning the invasion of the East, or the policy of expansion and forcible Germanization. The predominant cause was demographic overpressure by the Germans, accompanied by the idea of civilizational superiority over the Slavic nations (Kučerová 2015, p. 38). In any case, the Ostsiedlung was a nine-century supported migratory flow, relatively huge in scale, which came to the end by the waters of the Black Sea. The original natural expansion into free territory turned into a violent process of colonization and Germanization which logically met with resistance, so it was necessary to strengthen military support of these movements. Ostsiedlung is an often-cited example of the quest to find new lands and territories in a bid to improve livelihoods. It is also recognised as the period when the influence of the German monarchs began.

A further undeniably significant wave of in the 13th century was the *Mongol expansion*, during which the Mongol Empire spread from the East Asian steppes into Middle Europe. With the unification of numerous tribes by Genghis Khan in 1206, a powerful, and generally successful campaign by the Mongols to the west was initiated, which also headed south and east (Japan proved unsuccessful). The advance of the Mongol warriors created an empire spanning about 22 per cent of the Earth's surface and controlling about a third of the world's population: 27.7 per cent, or 100 million of the then 360 million total. The success probably lay in a combination of three factors – an accomplished military, effective trade and agricultural support (Cohen 2019, p. 31) i.e. offensive power, the ability to interact and use comparative advantages and ensure basic products, and self-sufficiency. In any case, the Mongolian expansion led to the largest waves of migration overall during the 13th century. The motive was obviously a desire to expand influence under any circumstances, so it was a violent expansive migration across half of Eurasia.

Another milestone in the development of international migration was the *fall of the Byzantine Empire in 1453*, and the conquest of Constantinople by the Ottomans. Constantinople was the seat of Orthodox Christians, the Eastern branch of Christianity which was laid out to prevent any further penetration of Islam into Europe. This proved successful for quite some time, but the Ottoman Turks were Muslims, and, with the downfall of this bastion, the spread of Islam accelerated rapidly, partly because the victorious Sultan of Constantinople converted it into the seat of the Ottoman Empire (Dorazil 1997, p. 177). On the other hand, the Ottomans did not expel the Christians, they only strategically taxed them higher, so, while many families remained, others left for economic and security reasons. The conquest of Constantinople was a powerful impetus for the wave of migration, with further Ottoman Sultanate tribes coming from

parts of Asia, while an exodus of mainly scholars and Christian craftsmen left Byzantium to seek asylum in the heart of Christianity, in Rome or other such city-states along the Apennine Peninsula. This allegedly contributed to the onset of the Renaissance (Vojáček, 2015) as an artistic movement, although hardly to the Renaissance lifestyle. The effect was rising migration due to the fear of further persecution, although in fact the Ottomans did not, on the whole, pursue this course of action with their ideological opponents. There is a combination of ideological, religious and economic reasons responsible for this migratory wave.

Forty years after the fall of Byzantium, a counterflow of migration began, when, according to the *Edict of the Alhambra of March 1492*, the Moorish kingdom and the last Islamic state in the Iberian Peninsula was overcome after the conquest of Granada. The Spanish couple, Isabella of Castile and Ferdinand of Aragon expelled all "heretics", especially the Jews who conservative Catholicism treated far more radically, and the Muslims, who had lived there for generations spanning seven hundred years. They all then left for North Africa, often to the east, under the protective wing of the Sultan of the Ottoman Empire. The ***"reconquest of the Iberian Empire"*** completed by Ferdinand and Isabella, amplified by the Inquisition, led to a large migration of 700,000-900,000 people and forced the religious conversion of the remaining Sephardic Jews or Muslim Moors. Unequivocally, an example of religious migration.

However, the year 1492 is a major turning point in world history for another reason, namely the *arrival of Christopher Columbus in the Western Hemisphere*. Discovery, resp. the rediscovery (the Western Hemisphere was first discovered by the Vikings in the 10th century - another wave of migration not to be deemed negligible in human history) of America initiated a massive wave of European migration which lasted the next 450 years. The settlement of the New World as a continuous process lasted from the beginning of the 16th century until the middle of the 20th. The colonization of new territories discovered by European sailors changed the nature of migration (Castel, Haas and Miller 2014, p. 23). The reasons for going overseas were numerous, both economic, consisting mainly of land grabbing, gold mining, and religious, with many Protestants emigrating, especially during the Catholic Counter-Reformation. Furthermore, there were political, as well as, natural factors (Europe went through a minor ice age when temperatures in the humid climate dropped significantly causing crop failure, followed by famine, and this became a recurring phenomenon). Very soon after Columbus's arrival in the Bahamas, waves of migration from Europe spread into South America, which was dominated by the Spanish - during the 16th century alone, 250,000 Spaniards had settled there (King, 2008), with an overall population consisting of over 8% Spanish, the Portuguese, while the French and English began colonising North America. Thus a continuous emigration to America took place, when, from approximately 1495 to 1950, hundreds of millions of

people emigrated from Europe. An especially large migratory flow occurred in the 19th century, caused by the availability of agricultural land along with repeated famine in Ireland during 1822-1844. As a result, half of the Irish population died, and a further quarter chose to emigrate, mainly to the United States. Another motive for leaving to the USA during the 19th century was the supply of work in industrialized regions. Between 1870 and 1920, 28 million Europeans arrived in the United States. It should be added that this was aided by the development of transport, steam ocean liners and railways, which both facilitated and reduced the cost of travel (Robbins 2014, p. 156). The search for improved living conditions, land acquisition, and the opportunity to seek one's fortune proved the main motives for migration to America.

Forwarding to a time after the European colonization of America, another influx of millions of people into America concerns the involuntary, respectively *forced, malevolent migration of early modern slavery*, when, as early as 1619, the first slave ships from Africa landed on American shores, and when, even after 1808 and the banning of the import of slaves, up to 10 million Africans were illegally transported to the USA for slave labour. However, estimates refer to almost double the number of victims of this transatlantic trade, as many Africans did not survive the passage and died on route (about 25%), the majority of these had not been properly registered. However, the import of slaves continued illegally involving 300,000 people after the ban, which posed an even higher risk for Africans, as shipowners preferred to throw them offboard alive when facing inspections at sea, with a further loss of life of around 20 per cent (King, 2008). Captives were taken mainly from West Africa to both North and South America (Robbins 2014, p. 156). Upon arrival, the colonizers immediately began to cultivate the land and opened mines, mainly for gold. But they needed manpower to manage this, and, as the native tribes turned out to be too physically weak and less resilient to diseases introduced by Europeans (smallpox, tuberculosis, etc.), the solution was to import slaves from elsewhere. This is the dark side of migratory history, when the goal is solely financial enrichment, but in no way harmonious to the new lands, but at the expense of others, the slaves. The clear motive for this violent wave of migration was labour shortages, the desire for wealth at the expense of others, including maximizing profits while minimizing costs. It existed purely of economic calculations while completely ignoring the human cost and suffering.

Every war leads to increased migration, so even the *Thirty Years' War in Europe* from 1618-1648 proved no exception. In this case, it was not only the extraordinary length of a conflict that involved numerous European nations in oft-times bilateral clashes, but, even more importantly were the nature of the disputes. Predominately, it was a rivalry of various European ruling families for power, therefore it was a quest for territorial and forceful gain. At the same time, the primary motive was a re-Catholicization promoted especially by the Habsburgs after the

recognition of the Peace of Augsburg in 1555 on the basis of the principle of *cuius regio, eius religio* i. e. whose territory, that religion. Due to the strength of the Habsburgs, who ruled the Spanish, Dutch and Austrian thrones (as well as, the Czech and Hungarian), Protestant states from Germany and Scandinavia opposed them. The end of the war, with the signing of the Peace of Westphalia, only entrenched this principle of choosing the religion according to the sovereign authority, and this in turn led to the establishment of absolutism. From the point of view of analysing migration as a movement of people, this era of war, which lasted for three decades, led to significant population movements across Europe. However, in addition to the high mortality rate (the population of Europeans fell by at least 30 %) both as a result of the war itself and the recurring plagues, malnutrition became another reason for migration. Protestants in particular, whether Evangelicals, Lutherans or Calvinists, went into exile. Due to the result of the Peace of Westphalia, when conditions in the field of religion tightened, these exiles became permanent. The power struggle is shrouded in religious differences, i. e. clear ideological reasons for migrants, supplemented by existential ones.

The driving force and impetus of migration became economic development in general, the expansion of trade, to which the developments in arts and crafts were tied. All this is connected with the *process of urbanization* that took place from the Late Middle Ages; however, the major instigation came with colonial expansion from the beginning of the 16th century and the growing might and prosperity of metropolises. However, the world experienced a complete and significant about-turn in labour migration in the 19th century following industrialization, with approximately 50 million people becoming migrants between 1870 and 1914 within Europe alone (King, 2008). Timewise, it was mostly a permanent migration. The effects were mostly assessed as positive for both sides. For migrant workers it was an improvement in their standard of living, including for the families they had left at home, because remittances were already being paid in the 19th century (as a transfer of part of earnings sent from abroad to the family). Even then, these contributions made it possible to support the family's needs and enable the children to attend school, e.g. On the part of the recipient country, the influx of workers stimulated the economic development of that particular sector and of the economy as a whole. It worked in the 19th century for Europeans or Chinese in America, it also still functions for those from the developing world heading to wealthier regions, whether in Europe, the US, Canada or Australia. Or also in other countries officially classified as developing but highly prosperous economically, such as the countries of the Middle East, Saudi Arabia, Qatar, Kuwait, etc. These prove examples of natural, economically motivated migration, as a result of the growing demand for labour and a corresponding supply.

The modern age, along with the 20th century, was to be a time of reason and prosperity. Unfortunately, the words uttered by the Roman playwright Titus Plautus

around 200 BC, so famously replicated by Thomas Hobbes in *Leviathan* in 1651, were confirmed, *homo homini lupus*, man to man by a wolf. Two world wars in the course of thirty years led to a migration unprecedented in history.

The *First World War* marked a major breakthrough in migration policy, from a hitherto completely liberal approach in Europe (compared to the USA, where they began to control immigration after 1850) individual states approached the regulation of migration and actively supported the repatriation of people from other regions. As a result of the First World War, which changed the political map of Europe, numerous population movements occurred. These newly formed states gave rise to the departure of some habitants, in the least due to political, civic, linguistic or property changes. The most damaging reasons for migration were the political ones, perhaps the most horrific example took place in newly formed Turkey rising from the ruins of the Ottoman Empire as migration caused by the Armenian genocide of 1915-1918, when the Ottomans slaughtered 1.5 million Armenians on ethnic, non-religious grounds, while a further 600,000 fled and, therefore, migrated. Or after 1919, when 1.3 million Greeks were displaced from the Turkish Republic, even though they had lived there for centuries (Mazower 1998, Řoutil, Košťálová and Novák 2017). The Treaty of Lausanne in 1923, which ended the war between Greece and Turkey, also addressed the exchange of population on the basis of religious affiliation, forcing approximately half a million Turks to leave Greek territory. However, not only did mass migration occur, as in the Pontic Greeks, but further genocide continued when 1.2 million Greeks were massacred on May 19, 1919 by the new regime of Mustafa Kemal Atatürk, (Řoutil et al. 2017). This provides an example of the composite reasons for migration namely, political, ethnic, religious, economic. All mainly occurring at an unprecedented extent.

Another dark case of emigration for political reasons is Russia after the revolution of 1917. In the *interwar period*, the international system did not return to a completely liberal immigration policy, which meant significant complications for refugees from the new dictatorships of Soviet Russia or later from Germany as the main source countries of migration. In connection with the revolutions in Russia since 1905, and centring around 1917, up to 3,000,000 Russians emigrated or were directly expelled from Russia in the first wave alone. These consisted mostly of members of the economic, scientific, cultural and, for logical reasons, noble classes (Racyn, 2017). The vast majority went to France, Switzerland, Germany, but also Czechoslovakia.

In the *case of Germany*, migration was linguistically or culturally more straightforward, thanks to tightknit German minorities in Central Europe, German acting as a unifying language and a shared institutional environment that had existed for centuries (Kučerová 2015, pp. 57-59, 80). The flow of migration from Germany intensified after Hitler took office as chancellor, when mainly Jews, liberal intellectuals and communists fled. From the second half of the 1930s, however, the

regime of their adopted countries gradually became more problematic. The milestone and tightening of conditions for refugees culminated in the Anschluss of Austria on March 12, 1938, then the Munich Agreement of September 30, 1938 and the Crystal Night on November 9, 1938. Emigration, an escape from Nazi Germany concerned mainly Jews, only about 425,000 of them went into exile outside Europe, and about 117,000 others found asylum within the continent (Cohen 2019, pp. 78-79). More than 170,000 exiles had to leave the Sudetenland occupied by the Empire. In Europe, as a whole, we are talking about a refugee wave of up to a million people just before the war broke out. The reasons for migration were purely ideological, political, racial, but later became matters of security.

Second World War brought about population movements of many forms, mainly though they were violent and forceful. During the actual years of conflict 1939-1945, about 60 million people relocated. The last year of the war 1945, recorded perhaps the largest population shift in history (Applebaum 2014, p. 19). During the post-war turmoil, another significant wave of migration took place, when ethnic Germans had to "return" from Eastern and Central Europe to Germany as part of displacement policies. In total, 9.4 million ethnic Germans, many from the third or fourth generations of the original colonizers of the Eastern European were forced to return (Kučerová 2015, pp. 143-144). Second World War contained all the possible reasons for migration, it was comprehensive in this respect.

The tragic fate of many Palestinians, who were displaced or left in connection with the *influx of Jews into Palestine* before and after Second World War, cannot be overlooked. As a result of the proclamation of the state of Israel in 1948, about 750,000 Palestinians emigrated to surrounding Arabic countries. Unfortunately, recurring Arab-Israeli conflicts have left 5 million descendants of these original refugees in displacement camps themselves. The events of May 2021, with rocket attacks, prove the insolvability of this conflict. There are both national and religious reasons for Palestinian emigration.

While Second World War was over, others, especially civil wars which quickly flared up, were unfortunately not. *The Cold War*, the bipolar break up of international relations, led to many further conflicts, many being internal. The Chinese conflict between Mao Zedong and the Communist Party on the one hand and Chiang Kai-shek of the Kuomintang on the other in 1946-1949; the Yugoslav conflict at the same time as the Greek Civil War, where the Communists fought on one side, though failing to win in Greece alone. In the case of Greece, the result was forced emigration for political reasons: 80,000 Greeks had to leave their homes and their property fell to the state; originally temporary, later permanent asylum was found in the states of the Eastern bloc, in Czechoslovakia alone it was around 20,000 occurring in several waves (Víšek, 2016). Although no civil war broke out in Czechoslovakia, the Communists took firm control and, as a result of their dictatorship and terror, up to 200,000 people

emigrated (1948-1989). After February 1948, about 40,000 fled, immediately after the occupation of 1968, this then doubled, and later a further total of another 150,000 people in 1969-1989 emigrated (Kurillová, 2013). As in other states belonging to the Soviet camp, 300,000 people emigrated from Hungary alone after the revolution in the autumn of 1956. Emigration from Poland developed similarly, with waves of migration from behind the Iron Curtain, especially after the strikes in Poznan in 1956, but also after events in 1970 and 1981 (Walczak 2010, p. 4). In these cases, political, ideological, but also economic reasons for migration prevailed.

A major breakthrough in the development of international relations is the period *after Second World War*, when, in terms of migration, it became a source region in Asia, later Africa and Latin America. In the case of the latter, a fundamental change took place when, until the 1960s, it was a destination for many emigrants for a variety of reasons. Among other things, including criminals who were granted asylum by several South American countries after World War II, amongst them many who were part of the Nazi regime in Europe. The main difference was in the orientation of the migrants, while 1.8 million immigrants came to South America in the 1960s, by the 1980s that same number were looking for other places to live. Therefore, in two decades, immigration balanced out with emigration (Robbins 2014, p. 158). The difference was in the economic circumstances of the migrants, people who arrived financially solvent, while the poor left and politicians were persecuted. Migration, emigration and exile were clearly dominated by political and ideological reasons, then later, economic ones. But these economic ones were never the predominant factors.

By contrast, during the second half of the 20th century, Europe gradually became a continent for targeted immigration, a destination for migration. In the 1980s, there was a significant *wave coming from Africa* and estimated at 10 million people. This partly involves the departure of those from the Maghreb (the northern coast of Africa, originally the western extent of the Arab Empire) to Europe, to the countries of the former metropolises, France, Italy, or Spain. It should be added that a significant share of migration was also from the south to North Africa, fuelled mainly by transitions from a nomadic to a sedentary existence, and intensified by crop failures and armed conflicts (Krejčí, 2016). Economic, resp. demographic reasons dominated here.

The *Collapse of the Soviet Union*, otherwise known as, the *Fall of the Iron Curtain* opened the borders, and thus the floodgates, to migration. Already, during Perestroika 1985-89, the figure reached around a quarter of a million on average, culminating at 1.2 million Soviet citizens a year before the fall of the Iron Curtain (Robbins 2014, p. 158). After the collapse of the USSR in 1991, there were significant relocations of ethnic groups in post-Soviet regions, often returning to their ancestral lands, as at least a third of Russians lived and worked under Stalin's national policy in every USSR state, in order to keep violently annexed territories, and any potential

development, under control. And it was not only people ethnically belonging to an area, as, for example, ethnic Germans held by force in Kazakhstan or Ukraine left for Germany, between the years 1992-2007 causing more than 1.7 million emigrants (Cohen 2019, p. 98). This also applied to the numerous Russian military garrisons expelled from the periphery of the socialist camp back to Russia (Cohen, 1991). Migration processes can become so entrenched and resistant to government control that new political forms emerge (Castles and Miller 1998, p. 1). The fall of the Iron Curtain was a fundamental systemic change in international relations after the end of the Cold War. Freedom of movement became a major demonstration against the previous regime. However, more than 80 % were tourists, not long-term migrants.

By opening the borders, which proved, let it be noted, the main message of the democratization of the system and the freedom actually gained, it is not only impossible to place an exact figure on the number of migrants this involved, it is in fact difficult to even estimate the total. Accordingly, the vast majority, in addition to the tourist stream, migrated for personal reasons, and soon after also for employment. This democratization of life led to a natural development of migration that former Soviet Bloc citizens had been waiting so long for. However, due to improved conditions, human rights guarantees and the desire to return home, the re-emigration of many exiles prevailed in some Central European countries. On the other hand, the number of people traveling for medium- or longer-term periods was constantly growing (students, guest workers, posted workers by companies operating abroad etc.).

An undeniable impetus for increased migration was the so-called *Eastern enlargement of the EU in 2004*, when three existing EU member states opened their borders to labour migration from ten new member states. E. g. the British labour market opened to migrants from the new member states without restriction, causing opponents of British EU membership to claim that the process has been abused and that migrants are taking the jobs of UK workers. Although Britain's agricultural sector or services cannot do without migrant workers, because the British consider these jobs to be inferior. And it's not just unskilled work, Britain doesn't have enough of its own doctors, so a significant proportion of professionally qualified hospital staff are immigrants from the new member states. Nevertheless, paradoxically, migrants from Commonwealth countries are generally better accepted in Britain (Kučerová 2018, pp. 871-874), Pakistanis are not perceived as a problem, Poles or Romanians are. It should be added that a language barrier may have contributed to this as European migrant working in lower-paid jobs in Britain, especially those from the new EU member states, generally possessed poorer English language skills, unlike Indians or Pakistanis. The inability of "Eastern European" migrants to communicate sufficiently in English is said to have contributed to the rejection of many Britons in the previously referred to Brexit referendum. So, also a cultural barrier formed. Therefore, increased migration conditioned by economics.

Following the Allied *invasion into Iraq in 2003*, this is one of the largest migratory movements in the whole of the Middle Eastern region, even when compared to Israel's 1948 enactment, the 1967 Six-Day War or Lebanon's long-running war in "former Middle East Switzerland" unfortunately continues to these days. It has actually been perceived by the international community as a purely regional problem. Surprisingly, migration was not caused directly by the military intervention itself, but by the failure of the security forces to protect lives, when sectarianism, insurgents and criminal groups began to terrorize the population. An estimated 5 million Iraqis fled their homeland, despite a re-emigration in 2005 of about 350,000 people (Murad 2010, pp. 119-123). Security aspects in migration have clearly dominated this situation.

The *Arab Spring* was ignited in December 2010 by the unfortunate self-immolation of a bullied vegetable seller in Tunis, who was not authorized to do business, an astounding victory for bureaucracy over the interests of livelihoods. This revolutionary movement engulfed most of the MENA countries and became so violent and vast that Europe is now perhaps facing the largest wave of migrants and refugees in its history. But not only Europe, but also countries in the west of Asia have become destinations. The so-called, European migration crisis of 2014-2016, culminating in 2015, when 1.5-1.8 million refugees arrived in Europe (FRONTEX, 2019), led to disputes between EU member states over potential resolutions. The ethnicity (that is, the original source) of the refugees was as follows: over 362,000 Syrians (9%), 178,000 Pakistanis (14%), 121,000 Iraqis (10%). One third of all asylum seekers or refugees came from these three countries of MENAP region, countries of politically unstable or experiencing armed conflict, respectively (Eurostat 2016). To this we must add economic migrants from other countries in Africa or Asia, often disguised as war refugees. On the other hand, it must be emphasized that Turkey has received more than 2 million Syrian refugees in recent years. So it is Turkey, in fact, which carries the largest burden for sheltering and caring for war refugees in Europe.

In the case of African migration, we associate its causes with demographic development, when the number of Africans has multiplied since the middle of the 20th century. We are talking about overpopulation leading, among other things, to the predominance of young people in society (60% of Africans are under the age of 25) and the so-called youthquake, which will trigger further waves of thousands upon thousands of migrants to Europe (Paice, 2021).

The refugee crisis has more or less passed since 2017, should we take into account that, while there were 1.5 million refugees in 2015, this figure had fallen to "only" 205 thousand in 2017, and by the following year to 150 thousand (Eurostat, 2019) It is interesting to note that 60% of these refugees are sheltered in only 10 countries, the vast majority of them being in Europe. Although migration from the MENAP region has weakened, it will continue to be a source. The causes of migration

in connection with the Arab Spring are mostly demographic, economic, but political and security motives have come to the fore.

Another recent migration crisis is the exodus of the *Rohingya from Burma*, which began in 2012, but intensified particularly in 2017 and continues to this day (2022). The Rohingya are a predominantly Muslim ethnic group in a predominantly Buddhist Burma, they hold no civil rights there and have been a classic case of apatrites for generations. These are indigenous refugees from predominantly Muslim Bangladesh. The exodus has affected about 700,000 Rohingya, or about 50-70% of their total population in Burma (Shah 2020). The unfortunate role of the leader of the Burmese opposition, Aung San Suu Kyi, the Nobel Peace Prize winner for fighting to democratize her country which spent more than 20 years under persecution, seems reluctant to come to the aid of the Rohingya, or perhaps is she in fact unable to help? The reasons for this migration are therefore obvious, being both religious and openly racist, even in the 21st century, unfortunately.

However, after two years of partial economic lockdown due to the SARS-COVID-19 pandemic, immigration to Europe across the Mediterranean intensified in May 2021, with two Spanish enclaves in West Africa coming under attack by more than 5,000 refugees in just one day. Migration reduced significantly during 2020, but is now once again on the rise. The causes of this remain the same, in addition to the effects of conflicts, i.e. security, they are demographic and economic.

6 EVALUATION OF HISTORICAL ANALYSIS OF MIGRATORY WAVES

Based on qualitative analyses of selected historical waves of population migration, the appropriate theoretical framework was chosen, namely a neoclassical theory connected with the push-pull factors of migration. A hypothesis was formulated from the chosen theoretical concept, namely *(H1) The migration of the population always possesses general features common to various causes*.

Two research questions were set for its verification or falsification:

Research question 1 (*RQ 1*): Is it possible to detect the analogous causes among monitored historical cases of migratory push-pull factors?

Research question 2 (*RQ 2*): Is it possible to identify the general consequences of the observed migratory waves?

The historical analysis of individual migratory waves has obviously confirmed this hypothesis, as there are still recurring causes of migration. Their purpose hinges mainly around finding new habitation, securing new sources of livelihood, but also fleeing from politically or religiously unstable communities. On the side of the causes of migration, there are various push factors that lead to rational decisions to abandon home and seek better lives elsewhere. There is a total of up to sixteen push factors, of which we have repeatedly identified several. In practicality, in all such cases of migration, the main push factors can be identified, namely, a lack of land for

cultivation, low standards of living, a shortage of employment, population booms (and overpopulation), natural disasters, climate change, political oppression, ethnic and religious instability, and armed conflicts. Regarding pull factors (i.e. those that drag migrants to specific destinations), it is true that in the analysis of migratory waves, on which I do not explicitly focus much attention, the implicit pull factors of the target territories are mainly as follows, economic benefits, social stability, political, and geographical accessibility. And not only in the past, but also now, religious tolerance plays an important role on the pull side, which may be seen, among other cases, in the so-called European migratory crisis. RQ 1 was thus answered.

Regarding the answer to RQ 2, it is appropriate to admit that such waves of migration were selected, having been caused by historical events and which, to a large extent, have shaped international relations and current events. Therefore, I estimate that the general consequences of each of the migratory waves can be identified. While in the past, the migration of the population was associated with the discovery of new territories, often very distant indeed, it contributed to the expansion of the Earth's population, to a higher utilization of natural resources and eventually to population growth due to improved living conditions. However, human migration also has a reverse face, the devastation of the environment, increased pressure on selected destinations and the severance of social ties. In the case of forced emigration, there are also economic losses. Yes, even in the case of RQ 2 we can talk about its verification.

Although the topic of migration is a multi-layered phenomenon, common causes, their accompanying developmental features and possibly the consequences of migration can be found.

7 CONCLUSION

Migration is a natural part of human life, as people move from place to place due to the result of both demographic and climate change, alongside the development of production and trade, all of which have always been part of human history, as has the formation of nations and the rise of states and empires, political conflicts and war (Castles - Miller 1998, pp. 48, 283). However, migration is eternal, it has accompanied humanity throughout its existence. "The decision to migrate, therefore, is never completely rational, and for some persons the rational component is far less than the irrational." (Lee 1966, p. 51).

According to the General Declaration of Human Rights, No. 13, UN General Assembly 1948, everyone has the right to move without boundaries, choose their place freely, or leave and return to their own country. The right to leave one's country and to seek refuge in another, is certainly a natural human right, but not the duty of states to accept anyone, anywhere, anytime. Therefore, seeking more favourable circumstances for living and relocation is acceptable and should not involve people forcing themselves on a specifically targeted destination without urgent need. This has been

somewhat forgotten recently in connection with the refugee crisis in Europe 2014-2017. What can be described as an industry of migration (Castle and Miller 1998, p. 284) is actually an abuse of the international system for refugee protection, as the activities of smuggling gangs, especially from the MENAP area, but also from other areas such as the Mexican-American border, flood recipient countries with overwhelming numbers of migrants. Therefore, in some cases it is also necessary to regulate immigration.

Another subject of research will be, among other things, the economics of immigration and the effects of migration, economically, socially and culturally. Theoretical research models will be a further area of research.

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ŠPANIELSKY HOVORIACI MIGRANTI V SLOVENSKEJ REPUBLIKE **SPANISH-SPEAKING MIGRANTS IN THE SLOVAK REPUBLIC**

Andrej Kiner¹

V súčasnosti na Slovensku pracuje okolo tisíc cudzincov, ktorí pochádzajú z krajín, v ktorých je španielčina úradným jazykom. Vzhľadom na to, že ich absolútny počet je v porovnaní s ostatnými národnosťami relatívne malý a nepriťahuje pozornosť odborníkov, primárnym cieľom tohto článku je analýza práve tejto skupiny. Konkrétne ide o migrantov zo Španielska, Kolumbie, Kuby, Ekvádoru a Mexika, pri ktorých sme skúmali vzdelanostnú úroveň, druh pracovnej činnosti a dĺžku pracovného pomeru. Deskriptívnymi štatistickými metódami a analýzou sme zistili, že väčšina imigrantov má vzdelanie tretieho stupňa (s výnimkou Kuby) a vykonávajú adekvátnu pracovnú činnosť k svojmu vzdelaniu. Spomedzi nich sú to cudzinci ekvádorskej národnosti, ktorých trvanie pracovnej zmluvy je najdlhšie.

Kľúčové slová: migrácia, vzdelanie, pracovná činnosť, analýza rozptylu, Slovensko

There are currently around a thousand foreigners working in Slovakia who come from countries where Spanish is the official language. Due to the fact that their absolute number is relatively small in comparison with other nationalities, the objective of this article is to analyse this group. Specifically, these are migrants from Spain, Colombia, Cuba, Ecuador and Mexico, for whom we examined the level of education, work activity and length of employment. Using descriptive statistical methods and analysis, we have found that most immigrants have a tertiary education (excluding Cuba) and are adequately employed for their education. Among them, foreigners of Ecuadorian nationality remain working the longest.

Key words: migration, education, work activity, analysis of variance, Slovakia

JEL: F22, N30

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1 INTRODUCTION

The object of the presented article is international migration. At present, migration is one of the most important phenomena shaping the current, but also the future economic, political, social, demographic, but also cultural development in the world (Ossman 2004, Wee and Yeoh 2020). The problem of migration and subsequent integration of migrants (or foreigners, as this group of people is perceived by the Slovak legislation) is a highly topical issue both in the world and in the territory of the Slovak Republic. It is the geographical location of Slovakia, the rising standard of living of the Slovak population, and deepening poverty in some regions of the world that are extremely important factors that predetermine the Slovak Republic to become not only a transit state of migration but also a final destination of migrants.

Despite the slower influx of migrants to Slovakia, there are still those whose native language is Spanish. Spanish is the most widely used language in the Romance language family, both in terms of the number of speakers and countries where Spanish has a dominant position. In a total of 21 countries around the world, Spanish is the official language and, in addition to English and Mandarin Chinese, is one of the most widely used languages in the world, with 325 million native speakers² (Green, 2018). The Spanish culture is present on a large part of our planet, as evidenced by the findings of Spišiaková and Kittová (2020), according to which the Spanish language is in demand in the global and Slovak labour market. But as far as foreigners are concerned, Spaniards remain the largest group of Spanish-speaking immigrants living in the Slovak Republic, accounting for 1,279 of the total 152,902 foreign-born residents (Jun 2021). In December 2020, there were 1,300 foreigners from Spain living in Slovakia, meaning that to date, this population declined by 21 people, or 1.62 percentual points. However, between 2011 and 2020, their number increased by 141%.³ The second most numerous ethnic group, whose native language is Spanish, is Mexicans. Their number in the same period of 10 years, ie. from 2011 to 2020, rose from 105 to 228, thus an increase of 117% (UHCP, 2021). Despite rising immigration trends, Slovakia is not one of the most frequent destinations for the Spanish-speaking population.

This article aims to present data on the Spanish-speaking workforce in Slovakia, highlighting the similarities and differences among Hispanics of different ethnic subgroups. It means that the paper does not focus on the whole Spanish-speaking diaspora living in Slovakia, yet the focus is placed on the employed ones. It should be noted that the Spanish-speaking population does not only consist of the Spanish ethnic group as a homogeneous group, but in reality, as Bucknor (2016)

² This figure must be taken with caution, as it is relatively difficult to estimate the exact number of natives.

³ The number of registered and authorized stays granted to Spanish nationals was 539 in 2011. The figure was calculated from December 31, 2010 to December 31, 2020.

claims, they come from a variety of backgrounds and face a multitude of challenges in the current labour market.

To February 2020, there were about a thousand workers of Hispanic origin in the Slovak Republic, who differ from each other in terms of gender, educational attainment, and occupation. We will use the data of the Central Office of Labour, Social Affairs and Family (COLSAF) for the analysis and subsequent derivation of the results. The Spanish-speaking population is one of the fastest growing diasporas in the world, creating a community that shares products, services and culture. In our case, we will focus on 5 ethnic groups which have the most numerous representation on the Slovak labour market among all Hispanics. This study examines the occupational attainment of long-term and short-term Spanish-speaking immigrants from Spain, Mexico, Colombia, Cuba and Ecuador in Slovakia. The research question we set ourselves is: What is the difference between these ethnic groups in the Slovak labour market if we take into account education, occupation, and the length of the employment contract?

2 LITERATURE REVIEW

As migration is a relatively complex phenomenon involving a number of actors and processes, it can be understood and described by combining and using multiple approaches, which implies that several important theories address the causes of migration. Perhaps the most common concept is the theory of push and pull factors (Lee, 1966). However, the theory of migration is also studied from different perspectives, including neoclassical economic theory or the theory of the new economy of migration (Constant and Massey, 2002). Relevant theories include dual labour market theory and the world system theory (Massey et al., 1993). As the research question also concerns the level of education, there are theories based on the assumption that individuals will significantly apply their education in labour markets, where they will obtain the highest economic return (Taylor and Martin, 2001). Concerning educational attainment, a lot of attention is placed on educational mismatch, primarily overqualification of immigrants. In this regard, according to Eurostat (2011), foreign-born persons in 2008 experienced significantly higher overqualification rates than nationals (34% compared to 19%) in the EU27. Possible educational mismatch and overqualification have drawn our attention as well.

Overall, little focus is paid to the issue of the Spanish-speaking population as one heterogeneous group in the region of Central and Eastern Europe, so it is necessary to focus on individual ethnic groups. Spain is primarily a country of immigration, which in the short term period has gone from being a country which had practically no immigrants to having one of the greatest proportions of foreigners across all EU member countries (Rodríguez-Planas and Nollenberger 2016, Urriza 2008), whilst recently emigration of highly qualified Spaniards has drawn considerable attention

(Alaminos et al., 2010). For instance, Romero-Valiente (2016) accentuates that since 2011, the emigration of Spaniards abroad has experienced a notable rebound that had not been recorded for almost four decades. According to Izquierdo, Jimeno and Lacuesta (2016), the possible reason for the outflow is the Great Recession and the subsequent European debt crisis. According to the official statistics, between 2008 and 2013 there were about 300,000 emigrations of Spaniards abroad. Half of them were heading for European countries, in particular, the vast majority remained within the European Union (47%) and the European Free Trade Association, primarily the United Kingdom, France and Germany. Not all Spanish migrants are determined to settle down and acquire citizenship. Bygnes and Bivand Erdal (2016) studied Spanish migrants settled in Norway as a consequence of liquid migration⁴, which is characterised by „its temporary, flexible and unpredictable character, with workers ‘trying their luck’ in different European labour markets before settling or moving on or moving home“ (Engbersen 2018, pp. 63-64).

It is understandable that so far other Spanish-speaking ethnic groups in the CEECs are not the focus of academics, as their percentage among indigenous societies is negligible compared to other immigrants. However, much more attention – whether from an economic, demographic or social point of view – is given to the Latino community emigrating to the United States of America. Bohon (2005) contributed to the researched topic with his findings that occupational attainment among selected Hispanic communities⁵ varies significantly by country of origin, although important human and social capital factors are also significant variables. Thus, for immigrants, place of origin and destination are important prerequisites in job-queue position. Equivalent research was conducted by Bucknor (2016) who found out that in 2014, the unemployment rate for Hispanics residing in the USA was about 8.5%, out of which Puerto Ricans had the highest unemployment rate (11.2%). In terms of education, 15.4% of Hispanic workers have a college degree or more. Women make up 43.3% of the overall Hispanic workforce, and the most common industry for Hispanic women is restaurants (10.3%), while the most common for men is construction (17.5%). Previous findings are also supported by Catanzarite and Trimble (2008), according to which Latinos experience a number of significant labour market disadvantages, such as high unemployment rates, low wages, overrepresentation in low-level occupations, and limited mobility.

⁴ The article dealt with the Spanish and Polish diasporas based in Norway. However, according to the findings, most of the Spaniards interviewed ruled out a possible return to their country of origin due to the unsatisfactory political and financial climate in the labour market. These reasons, namely easier integration into the labour market and the political situation, can be interpreted as one of the causes of emigration.

⁵ Bohon (2005) examined the occupational attainment of long-term Latin American immigrants from Mexico, El Salvador, Guatemala, Cuba, Ecuador, and Colombia in four metropolitan areas with large Latino populations.

As we will be interested in analysing the length of employment in this article, we also dealt with return migration. According to Bocker and Gehring (2015), Spanish migrants living in the EU, in this case the Netherlands, generally show a lower propensity to naturalize, as they are EU residents and have the right to free movement across Member States. Spanish-born migrants prefer to maintain a flexible migratory pattern, however, according to findings, female migrants are much more likely to settle down in the country of destination than males. Overall, however, return migration depends on the social system of country of destination. As stated by Yahirun (2012), older Spaniards who were previously employed in Switzerland were likely to return back to Spain after retirement. If we look at Hispanic nations, Mexicans migrating to the United States are a frequent subject of research. In general, the net migration rate is negative, ie. the number of emigrants is higher than the number of immigrants. However, we are currently noticing that this ratio has reversed and Mexican-born migrants are increasingly returning. According to Gonzales-Barrera (2015), among the most common reasons they decided to return to Mexico was family reunification – specifically 61% of interviewed respondents. Cachón and Aysa-Lastra (2015), who found out that Latinos working in the EU, in particular, in Spain, recorded a significant return rate compared to the ones employed in the USA, who resisted better to the implications of the 2008 Great Recession. It therefore might be concluded that return migration of Spaniards is virtually related to the social system. They have longer employment contracts and decide to return mostly for retirement. On the other hand, Hispanics mostly hinge on the working conditions and labour market, as they emigrate due to economic purposes. Consequently, we can expect that they will act similarly in the Slovak labour market, meaning they will have shorter contracts with employers before they return for any reason.

3 METHODS AND DATA

Drawing on data mapping the employment of foreigners in Slovakia during the past period 2016 – 2020, we have set two goals. The primary aim of the paper is to find out the structure of employment across a selected sample of Spanish-speaking immigrants. In the first place, we will be interested in what professions immigrants practice, and by comparison we want to compare the educational level of the researched sample. Official statistical data of the Slovak Republic recognize 10 levels of education:

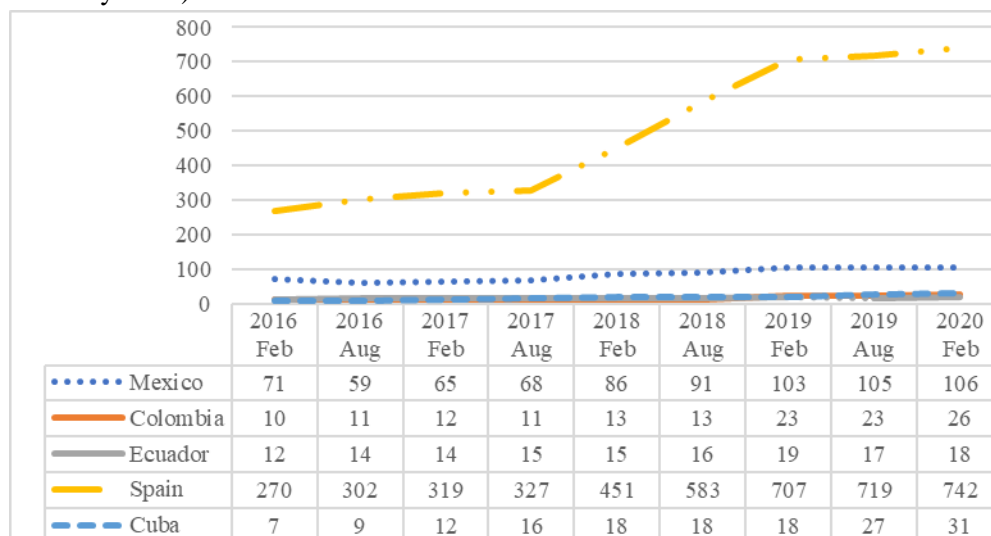
1. No schooling (NS)
2. Primary education (PE)
3. Lower secondary education (LSE)
4. Secondary education (SE)
5. Upper secondary education (USE)

6. General upper secondary education (GUSE)
7. Post-secondary non-tertiary education (PNE)
8. First stage of tertiary education (FTE)
9. Second stage of tertiary education (STE)
10. Third stage of tertiary education (TTE)

In order to find the answer to the research question, we will focus on foreigners working in Slovakia who come from the following countries: Spain, Mexico, Colombia, Cuba and Ecuador. As the employment mapping statistics are published by COLSAF on a monthly basis, we decided to process these data on a semi-annual basis by averaging the number of foreigners over a period of six months starting in February (February 2016 – February 2020), which will be expressed by the coefficient of the share in the range from 0 to 1. Thereby, our methods comprise a quantitative research in order to gain relevant insights of specific issues. Last but not least, we will find out the average length of the employment contract across the examined spectrum. Based on the data and facts discussed in the previous section – Cachón and Aysa-Lastra (2015), Bocker and Gehring (2015), we believe that Spaniards working in Slovakia will work longer than the Latino community. Therefore, we establish the hypothesis that *Immigrants from South American countries (Mexico, Colombia, Ecuador and Cuba) generally have shorter employment contracts than immigrants from Spain*. As in the previous case, we will proceed from the COLSAF data, which we will be processed and evaluated over the period of time. In order to verify whether a different culture and thus nationality have an impact on the length of the employment contract, we use a parametric statistical method created to compare groups to determine if there is a difference in sample populations – analysis of variance (ANOVA). One-way ANOVA is a technique that generalizes the two-sample t-test to three or more samples (Heiberger and Neuwirth, 2009). In our case, the independent variable is the nationality of the foreign employees, while the variable is the average length of contract in months. Using ANOVA is a common practice among many researchers dealing with migration (Cimporeu et al. 2020, Sonderegger and Barrett 2004), thus we also opted for this descriptive statistical method.

The following section presents the results we have obtained according to the mentioned methodology. The following graph shows the number of employees from selected Latin American countries and Spain. We observe that Spaniards constitute a sizable share of the current Spanish-speaking workforce in Slovakia, followed by Mexicans and the remaining ones. Overall, the number of Spanish-speaking immigrants has been constantly growing, however, the ones from Spain significantly outnumbered the rest.

Graph 1: Evolution of the examined immigrants in Slovakia (February 2016 – February 2020)



Source: processed by author.

4 EDUCATIONAL ATTAINMENT

The purpose of this research is to address a range of questions about immigrants employed in any sector in Slovakia. Specifically, this part seeks to provide information on the profile of the already mentioned group of employees, comprising their country of origin and level of education attained.⁶ Among Hispanic workers, there are notable differences by the country of origin. Overall, Latino workers seem to have an equal level of educational attainment than the workers of which Spain is the country of origin, although that is not the case of Cubans and Colombians. Through the whole examined period, there is zero percentage of Latino workers with no schooling, yet we register some Spaniards without any education (0.16%).

To examine the given figures in detail, we can conclude that immigrants from Ecuador are highly educated, possessing any form of university education (85.7%). The Mexican immigrant employees lag behind, with 76.4% of the tertiary educated ones. The share of Spaniards who have a university degree is lower, but still slightly more than 67%. On the other hand, the lowest number of workers with a university degree is registered with Cubans (26.3%), while we observe approximately twice the number of Mexican immigrants (53.5%). If we focus exclusively on any form of secondary education, Cuban (55.1%), followed by Colombians (46.5%), Mexicans

⁶ Educational levels used in the paper are subjected to International Standard Classification of Education-97 (ISCED-97) – an international classification for organising education programmes and related qualifications by levels and fields.

(19.8%), Spaniards (16%) and lastly Ecuadorians (8.6%) predominate in this category. As in the case of secondary school, Cubans have the first place in primary education.

Table 1: Share of the examined immigrants based on their education

	<i>NS</i>	<i>PE</i>	<i>LSE</i>	<i>SE</i>	<i>USE</i>	<i>GUS</i>	<i>PNE</i>	<i>FTE</i>	<i>STE</i>	<i>TTE</i>	<i>N/A</i>
	Less than Secondary Education		Any form of Secondary Education					Any form of Tertiary Education			
<i>Colombia</i>	0,0000	0,0000	0,0000	0,0000	0,3310	0,0845	0,0493	0,0563	0,4789	0,0000	0,0000
<i>Cuba</i>	0,0000	0,1282	0,0128	0,0769	0,3462	0,1154	0,0000	0,0128	0,2500	0,0000	0,0577
<i>Ecuador</i>	0,0000	0,0571	0,0000	0,0000	0,0214	0,0643	0,0000	0,2714	0,5857	0,0000	0,0000
<i>Mexico</i>	0,0000	0,0013	0,0013	0,0358	0,0716	0,0782	0,0106	0,1273	0,6114	0,0252	0,0371
<i>Spain</i>	0,0016	0,0568	0,0095	0,0391	0,0529	0,0554	0,0029	0,1486	0,5210	0,0041	0,1079

Note: Education level by official statistical data of the Slovak Republic.

Source: processed by author.

5 OCCUPATIONAL ATTAINMENT

Hispanic workers work in a variety of occupations. One frustration that we share in data analysis to compare immigrant occupational attainment is that they do not provide information on particular professions but are contained in categorical groups.⁷ In the result part, we excluded two categorical groups as there were no employees (armed forces occupations; skilled agricultural, forestry and fishery workers). Managers, Professionals, Technicians and associate professionals are considered most demanding jobs, requiring high skill levels. Clerical support workers, Service and sales workers, Skilled agricultural, forestry and fishery workers, Craft and related trades workers, Plant and machine operators and assemblers require medium skill, while Elementary occupations are conditioned by low skills (ILO, 2021).

According to our findings, the highest percentage of employees in a profession requiring higher level of education comes from Mexico (80%). The rest of Mexican workers work in a sector that requires intermediate knowledge (16.6%) and only a negligible number hold positions in which employees can perform their tasks with the minimum qualifications (0.5%). Foreigners from Colombia and Ecuador are in a similar situation. Approximately 71% and 67% respectively perform a profession requiring a higher level of education, but only 21% of Colombians and 33% of Ecuadorians perform administrative work, work in services, or are employed as production operators. Using the example of Cubans, we can demonstrate how the level of education is reflected in the type of employment. We recorded 26.3% of immigrants who had completed a third-degree education, with a similar percentage pursuing

⁷ We opted for the International Classification of Occupations (ISCO) system, which is commonly used in national contexts for the collection and dissemination of statistics

a profession requiring the same education (22.4%). Employees who perform a job requiring a medium (37.2%) or low (34.6%) level of qualification have the largest representation. In the case of Spanish foreigners, we observe that almost 60% are employed in positions requiring higher education, which to some extent also reflects the number of university-educated workers (67%). 33.7% of Spaniards work in services, trade, administration and related jobs, while only 0.5% perform elementary jobs.

Table 2: Share of the examined immigrants based on their occupation

	<i>Managers</i>	<i>Professionals</i>	<i>Technicians and associate professionals</i>	<i>Clerical support workers</i>	<i>Service and sales workers</i>	<i>Craft and related trades workers</i>	<i>Plant and machine operators and assemblers</i>	<i>Elementary occupations</i>	<i>N/A</i>
<i>Colombia</i>	0,0986	0,4789	0,1338	0,2113	0,0000	0,0000	0,0000	0,0775	0,0000
<i>Cuba</i>	0,0064	0,2115	0,0064	0,0385	0,1154	0,0833	0,1346	0,3462	0,0577
<i>Ecuador</i>	0,1500	0,3714	0,1500	0,2714	0,0500	0,0000	0,0071	0,0000	0,0000
<i>Mexico</i>	0,1114	0,5133	0,1790	0,0862	0,0186	0,0345	0,0265	0,0053	0,0252
<i>Spain</i>	0,0824	0,3391	0,1738	0,1923	0,0186	0,0575	0,0688	0,0213	0,0464

Source: processed by author.

6 LENGTH OF EMPLOYMENT

This part provides evidence on the length of employment of the examined sample of Spanish-speaking immigrants. Our findings suggest that there are subtle differences in the average length of the contract, either accepting or rejecting the hypothesis stated. In this regard, we want to justify whether there is a substantial difference between groups. For this reason, as stated in methodology, we used a one-way analysis of variance (ANOVA) with the following null hypothesis: *There is no difference in means between groups of the selected samples of Spanish-speaking immigrants employed in Slovakia.* The level of significance was set at $\alpha = 0.05$.

Table 3: The average length of employment

	<i>Count</i>	<i>Sum</i>	<i>Average</i>	<i>Variance</i>
<i>Colombia</i>	9	268,8953	29,87725	12,43256
<i>Cuba</i>	9	270,0657	30,0073	14,93083
<i>Ecuador</i>	9	395,8405	43,98228	14,6438
<i>Mexico</i>	9	232,6466	25,84962	9,102132
<i>Spain</i>	9	261,238	29,02644	6,426688

Source: processed by author.

Based on the data we have calculated, migrants from Ecuador tend to make a contract of employment for the longest period, in particular, for almost 44 months on average. On the other hand, the shortest employment contracts are made by Mexicans, who remained employed approximately for 30 months before they quit or change employment. Colombians, Cubans, and Spaniards are relatively similar when it comes to the period of employment (from 29 to 30 months).

Table 4: ANOVA test

<i>Source of Variation</i>	<i>SS</i>	<i>df</i>	<i>MS</i>	<i>F</i>	<i>P-value</i>	<i>F crit</i>
<i>Between Groups</i>	1785,646	4	446,4114	38,79408	2,89E-13	2,605975
<i>Within Groups</i>	460,2881	40	11,5072			
<i>Total</i>	2245,934	44				

Source: processed by author.

We do not reject the null hypothesis because the critical value $F_{crit} 2.605975 < 37.79408$. We do not have statistically significant evidence at $\alpha = 0.05$ to show that there is a difference in mean length of employment contracts among the five groups of immigrants as the p-value is greater than the significance level.

7 DISCUSSION AND CONCLUSION

The influx of migrant workers who came to Slovakia after Slovakia's accession to the EU was characterized by a high number of those who achieved a higher form of education and more than 50% of migrant workers had a university degree (Přívarová and Přivara, 2015). With the exception of Cubans, we observe a similar phenomenon in our researched sample. When examining the highest educational attainment of the group of immigrants surveyed, we found that the largest proportion of people with a university degree came from Ecuador and Mexico and not from Spain, as we initially thought. The common currency and the free movement of nationals of the Member States do not put as much pressure on education as there are third-country immigrants who may be discriminated on the labour market. On the contrary, among the surveyed group of foreigners working in Slovakia, the lowest educational attainment concerns the population of Cuba, where the highest proportion of people possess secondary education, followed by university graduates, but surprisingly also workers who have completed only the first stage of education. Workers with primary education and no education were practically non-existent in other group or rather their number was less than 6%. The limit of this part was data processing, as we do not have information about education about 11% of Spaniards and 6% of Cubans.

Previously, we have stressed the role of educational mismatch, which has been at the very centre of attention of many authors in the past (Chiswick and Miller 2009, Piracha and Vadean 2012). In our case we observe a certain concord between educational and occupational attainment. Thus, the fact and willingness of taking up lower paid jobs while being over-educated, as illustrated by other academics in their research (Qureshi 2011, Chiswick 1978, Belot and Ederveen 2011), have not been confirmed.

Examining the average length of the employment contract, we found that Ecuadorians tend to have the same job for the longest time, averaging 44 months, which is the longest compared to other Latinos. Spaniards, on average, remain employed for 29 months. It will be extremely interesting to examine the reasons and differences between the different ethnic groups and to determine what is behind the different lengths of the employment contract. According to Bivand Erdal and Ezzati (2015), the causes and length of stay are influenced by several factors. Whether it is a matter of successful integration, age, reunification with the family, or culture plays a role in the whole process, this topic will be the subject of our further qualitative research.

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GOMBÁR, EDUARD, BAREŠ, LADISLAV, VESELÝ, RUDOLF: DĚJINY EGYPTA

GOMBAR, EDUARD, BARES, LADISLAV, VESELY, RUDOLF: HISTORY OF EGYPT

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Nakladatel'stvo Lidové noviny v Praze zaradilo do plánu svojho dlhoročného úspešného edičného projektu „dějiny států“ aj vydanie historického diela týkajúceho sa dejín Egypta. Býva pravidlom, že diela, ktorých napísanie – na rozdiel od prekladov kníh zo zahraničia – bolo zverené popredným domácim špecialistom, lepšie vystihujú predstavy a potreby českého (aj slovenského) čitateľa. Ako uvádzajú autori Egypt patrí ku krajinám, ktorých životnú os tvorili rieky, podobne ako iné civilizácie (Čína, India, Mezopotámia), má jednu z najdlhších súvislých histórií na svete, siahajúcu až k samotnému prahu ľudskej civilizácie. Na brehoch rieky Níl vzniklo písmo, ktoré bolo vizuálnym zachytením hovoreného slova, písmo hieroglyfické. Prírodné podmienky Egypta – pravidelné níl'ske záplavy prinášajúce z oblastí horného toku rieky úrodnú pôdu – umožnili rast obyvateľ'stva, rozvoj poľnohospodár'stva a položili základy hospodár'sko-spoločenskej organizácie štátu. Rubom tejto úspešnosti bola skutočnosť, že Egypt sa často stával objektom nájazdov cudzích vládcov z bližšieho i vzdialenejšieho okolia, medzi ktorých môžeme zaradiť aj Grékov, Rimanov, ale hlavne Arabov. Tí v 7. storočí n. l. vtisli Egyptu arabsko-muslimskú podobu, trvajúcu až do dnešných dní.

Autormi tohto monumentálneho historického diela sú traja vynikajúci českí orientalisti, egyptológ, prof. PhDr. Ladislav Bareš, CSc., riaditeľ Egyptologického ústavu Karlovej univerzity, arabista, prof. PhDr. Rudolf Veselý, CSc., nedávno

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Popredný slovenský arabista, historik, vysokoškolský učiteľ a diplomat. V rokoch 2008-2018 pôsobil ako učiteľ aj vedúci katedry medzinárodných politických vzťahov FMV EU v Bratislave.

zosnulý emeritný profesor Ústavu Blízkeho východu a Afriky Karlovej univerzity a arabista prof. PhDr. Eduard Gombár, CSc., bývalý riaditeľ Ústavu Blízkeho východu a Afriky Karlovej univerzity. Prvé vydanie tejto knihy vyšlo v roku 2009 a bolo v priebehu niekoľkých rokov bežne vypredané, takže vydavateľstvo sa rozhodlo vydať dielo znova a prácu na ňom zverilo prof. Gombárovi. Ten časti o najstarších dejinách Egypta z pera prof. Bareša a o Egypte v stredoveku od prof. Veselého a svoju časť „Moderný Egypt“ ponechal v nezmenenej podobe. Svoju poslednú časť „Súčasný Egypt“ upravil a doplnil fundovanou informáciou o vývoji Egypta v poslednom desaťročí.

Prof. Bareš spracoval na 150 stranách prvú časť práce, nazvanú „Najstaršie dejiny Egypta“. Ide o obdobie začínajúce sa počiatkami ľudskej aktivity na území Egypta. Autor následne približuje dejiny Starej, Strednej a Novej ríše a končí opisom pomerov v Egypte pod nadvládou Grékov a Rimanov. Ako sa ukazuje, vzhľadom na obrovský časový záber, najväčším problémom prof. Bareša bolo vtesnať sa do vymedzeného rozsahu strán. Čo sa týka druhej časti práce, nazvanej „Egypt v stredoveku“, táto sa začína vznikom islámu a dobytím Egypta muslimskými Arabmi. Prof. Veselý na 220 stranách približuje čitateľovi dejiny Egypta za arabského kalifátu, v období šíitského fátimovského kalifátu a v období krížových výprav. Potom pokračuje vo výklade egyptských dejín počas mamlúckeho sultanátu a svoju časť uzatvára opisom udalostí 16. – 18. storočia, keď bol Egypt súčasťou Osmanskej ríše. V tejto časti sa autor venuje úsiliu porazenej mamlúckej vrstvy znovu si vydobýť rozhodujúce postavenie v krajine napriek osmanskej nadvláde.

Najväčší podiel na celom diele má prof. Gombár, autor tretej a štvrtej časti práce. Tretia časť nazvaná „Moderný Egypt“ sa začína vojenskou výpravou Napoleona Bonaparta do Egypta (1798 – 1801). Na 160-tich stranách autor približuje Egypt za vlády Muhammada Alího a jeho nástupcov. V celej časti sa pravidelne stretávame s osvetľovaním problémov týkajúcich sa tzv. „východnej otázky“ od jej vzniku na konci 18. storočia až do jej zániku v rámci usporiadania sveta po prvej svetovej vojne. Autor nezaujate hodnotí udalosti, pričom ostro odhaľuje zjavné i skryté záujmy veľmocí, o ktorých vlastná historiografia (britská, francúzska, ruská atď.) často taktne mlčí alebo ich skresľuje resp. prikrášľuje. Autor sa ďalej venuje situácii v Egypte po britskej okupácii v roku 1882, keď krajina formálne zostávala provinciou Osmanskej ríše, cez obdobie britského protektorátu (1914 – 1922) a pokračuje v zasvätenom výklade politického, hospodárskeho, spoločenského a kultúrneho vývoja Egypta počas formálnej nezávislosti, ale pod priamou britskou kontrolou.

Posledná štvrtá časť práce, ktorej autorom je tiež prof. Gombár, má názov „Súčasný Egypt“ a venuje sa historickému výkladu od egyptskej revolúcie Slobodných dôstojníkov v roku 1952 do konca 20. storočia. Najväčšiu pozornosť autor venuje obdobiu egyptských dejín keď bol na čele krajiny Džamál Abdannásir (1952 – 1970).

Potom nasleduje približne desaťročné obdobie prezidenta Anwara as-Sádáta (1971 – 1981), ktorý zásadne zmenil smerovanie revolučného Egypta. Jeho politická línia nebola konzistentná a skutočnosť, že na počiatku svojej vlády využil Muslimske bratstvo v politickom boji proti silám ľavice, uvoľnila dlho potláčaný prúd islámskych síl, ktoré nakoniec krvavo odstránili jeho samého. Egypt za vlády prezidenta Husního Mubáraka už definitívne stratil postavenie regionálnej arabskej mocnosti akou bol v 50. a 60. rokoch. Zaujímavým doplnkom tejto časti je aj kapitola nazvaná „Česko-egyptské vzťahy“. Prof. Gombár vo svojom podaní skĺbil problémy súvisiace s vnútorným vývojom (o. i. modernizácia, sekularizácia a nacionalizmus, islamizmus) v skúmaných obdobiach so zahraničnopolitickými otázkami ovplyvňujúcimi vývoj (politika európskych mocností a neskôr supervelmocí USA a ZSSR) do plynulého a vyváženého textu.

Práca napriek svojmu veľkému rozsahu – veď ide o prehľadný výklad dejín Egypta v období vyše päťtisíc rokov vývoja – je rozčlenená premyslene a logicky do 35 kapitol. Je to nepochybne výsledok mnohoročnej úspešnej symbiózy pedagogickej a vedeckej činnosti všetkých troch autorov. Zreteľne sa u nich prejavuje aj dôverná znalosť reálií skúmanej oblasti, vďaka ich častým kratším i dlhším pobytom v Egypte. Bibliografia, hoci je označená ako výberová, poskytuje rozsiahly zoznam prameňov a literatúry, čo svedčí o mimoriadne širokom zábere autorov a je pre prípadného záujemcu spoľahlivým vodidlom v relevantných dostupných i ťažšie dostupných dielach. Dobrou pomôckou sú aj „Dodatky“, ktoré obsahujú chronologický prehľad významných udalostí, genealógiu vládcov Egypta, slovníček neznámych pojmov, mapy a register. Aj keď syntetické dielo tohto druhu nemôže dať odpoveď na každú otázku, ktorú môže vnuknúť, dáva jasné východiská pre ďalšie štúdium.

Vo svojej dobre vyargumentovanej a erudovanej práci založenej na neobyčajne širokej pramennej báze, všetci traja autori majstrovsky vedú svojho čitateľa spleťou množstva zložitých historických udalostí k získaniu spoľahlivého prehľadu o historickom vývoji Egypta, ktorý napriek svojej geografickej blízkosti nie je pre nášho čitateľa príliš známy. Práca svojou úrovňou a spracovaním sa určite zaradí medzi fundamentálne diela českej historiografie.

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