RE-CONCEPTUALIZING A GLOBAL CHALLENGER:

RUSSIA IN THE INTERNATIONAL SYSTEM

By

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I, Jacqueline Dufalla, declare that the present thesis is exclusively my own work, based on independently conducted research and only external information as properly cited in the references. I further declare that no part of the thesis has been submitted in this form to any other institution of higher education for an academic degree.

Jacqueline Dufalla

Prague, 30 April 2023

Dedicated to

Michael H. Dufalla

sitting in silence up Ten Mile Creek, fish pacing
through muddy waters. Sometimes the boys came,

waiting for tugging lines. Doh-matz, they called
it. When your thoughts get lost in the trees

- Excerpt from “Pennsylvania,” by Nicole Dufalla

Abstract

What kind of challenger is contemporary Russia, if one at all? This dissertation aims to explore this question by, first, focusing on the concept of a challenger (and therefore, also a challenger to what), and then by constructing a usable framework to analyze contemporary Russia. In International Relations literature, the concept of a global challenger has evolved and been explored further in discussions of hegemony and counter-hegemonic movements. However, with this breadth of literature, confusion has grown in one specific area, which is the implicit difference between a challenger who challenges its position versus a challenger who challenges the global order. For instance, if a challenger simply wants a different role in an existing institution, this indicates that the challenger still respects the basic tenants of the system. However, if a challenger views the system as illegitimate, this is an altogether different threat, one which would involve greater upheaval. Following a neo-Gramscian approach, I highlight the importance of common-sense to the international hegemonic system and focus, but not limit, my analysis based on this feature.

To better comprehend the nuances of these two trends, I construct two Weberian ideal types through analyzing two historical cases (Petrine Russia and early Bolshevik Russia) to form a usable framework. I analyze Peter I as an example of a challenger wanting to change its place in the existing system and the Bolsheviks as an example of wanting to change and replace the international system. By using this framework, I then analyze top-level foreign policy discourse coming from the Russian Federation, starting from the Annexation of Crimea to the recent full-scale invasion of Ukraine.

As a result, I find that the dichotomy presented initially is too static; challengers are dialectical, changing with the system in unexpected ways, and at times, they exhibit multiple kinds

of challenges at once. Rather than attempting to pin down what type of challenger one actor might be, it is more productive to consider at which moments an actor presents challenges, the signposts they exhibit, and to what they are responding. In this case, Russia from 2015-2021 was neither a challenger aiming to change its position nor one that wanted to change the system, although it exhibited both elements at times in response to its external and internal environments. This means challengers and challenges are dynamic, situational, and even opportunistic at times.

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Chapter 1: Introducing a Challenger

When this research began in 2016, Russia was in a different place domestically and internationally. The research question then was on Russia as a global challenger, emerging from two, at that time, surprising and striking events: the Annexation of Crimea, and partially, the Russo-Georgian War. It appeared that these actions, plus new discourse in Russian foreign policy, indicated that Russia was positioning itself in a different way in the global order. Rather than being a country with its head down and claiming it had no ideology, more nuanced discussions started happening about Russia's right to be involved in its "neighborhood" and a rewriting, or more importantly perhaps, a refocusing, of Russia and Ukraine's history.

However, in February 2022, the Russian Federation launched a full-scale invasion of Ukraine. Since then, Russia and Ukraine have been locked in a war that has resulted in war crimes and threats of using nuclear weapons. The consequences of this war have permeated not only Russia's foreign and domestic policy but its actions and possibilities to act in the global order. Contemporary Russia, in the current international system, does not exist as a stable concept. Despite the uncertainty this creates, it also presents an opportunity to approach this research question from a different perspective.

More concretely, this dissertation is focused on challenges and challengers to the international system. In the case of this research, I am focused on if Russia is a challenger to the contemporary international system. On the surface, given the events of the past year, it does appear this way. Yet, *what kind* of challenger Russia is, and was, are important questions. Is it a challenger to the current system, and if so, what does this entail? What type of challenger is it? And: was it always the same kind of challenger? From this, more questions arise, such as: how can we define our current international order? What kind of challengers exist? Are all challengers the same?

While Russia is the focus of this dissertation, the questions here extend well beyond this case and indeed, nation states.[1] While it is doubtful this research can provide solid answers to all these questions, the exercise of exploring these questions can illustrate different ways of approaching this topic and introduce a framework to further engage this topic. Through this research, we can gain a deeper understanding of the challenges facing the international system, and the ways in which different actors, including nation-states like Russia, are shaping its present and future.

1.1 Challengers and challenges

To begin, it is necessary to explore the confusion around the word "challenger". The word "challenge," for instance, is used in everyday language: Russia *challenges* international law when it discusses US actions in Kosovo; China *challenges* the global economy; and Brazil *challenges* the US' influence in Latin America. These everyday usages show us that, conceptually speaking, 'challenger' is a rich term, and when approaching the subject of Russia as a challenger, it is important to solidify what is meant here by a challenger. The issue with misunderstanding what type of challenge an actor is presenting is that each challenge presents a different threat and/or opportunity. While challenges can present certain threats to parts or wholes of an actor or object, they also provide an opportunity for the actor/object being challenged to reflect on vulnerabilities, inadequacies, and make more informed decisions from this.

There often appears to be a divide between a challenger that aims to change its position within the system and a challenger that wants to change the system itself. Andrew Hurrell shows this dichotomy when he describes how challengers typically need to be strong enough "to demand a revision of the established order and of its dominant norms in ways that reflect their own interests,

[1] This dissertation is focused on nation state challengers in particular because it aims to fill a gap in hegemonic literature concerning nation states. It does not claim that there cannot be other challengers to a hegemon.

concerns and values".[2] Here, one interpretation of this can be that the system has not taken your interests into consideration but if you are strong enough, you can change this. On the other hand, it can be read that the system can be 'revised' to accept some other values but not radically change.

Neil MacFarlane defines a challenger as "a state whose rising power causes it to question its established place in the system and to assert itself more ambitiously in international politics".[3] In this, he implies that the state is not looking to change the system but its place in the system. Or as Michael Mazaar more explicitly writes, "Many major countries, including China and Russia, are groping toward roles appropriate to their growing power".[4] MacFarlane and Mazaar highlight characteristics of what might be called the first type of challenger, wherein the challenger aims to change its position within the system.

The second challenger aims to challenge the system itself. According to Alexander Cooley and Daniel Nexon, for instance, this can mean leaving the system altogether after delegitimizing it and replacing it with a parallel system.[5] Can these two vaguely outlined types of challengers be separated, or is there something fundamentally similar between the two? For example, can a state change its place in the system without then changing the system itself? Can the system remain the same, especially if there is discord on the fundamental values making up the base of the system?

Seemingly, these two challengers constitute a neat dichotomy. The first challenger examines the external system and understands the rules of the game; second, it has accumulated some power, in whichever way it is understood at the time, *and* realizes it must change its position in the system to achieve some objective; and third, it then challenges the main actor of the system

[2] Andrew Hurrell "Hegemony, liberalism and global order: what space for would-be great powers?" *International Affairs* 82, No. 1 (2006), 2
[3] S. Neil MacFarlane, "The 'R' in BRICs: Is Russia an Emerging Power?" International Affairs 82, No. 1 (2006), 43
[4] Michael J. Mazarr "The Once and Future Order: What Comes After Hegemony?" *Foreign Affairs* January/February 2017, 28
[5] Alexander Cooley & Daniel Nexon, *Exit from Hegemony: The Unraveling of the American Global*, (Oxford: Oxford University Press, 2020)

to get a better position for itself. The challenging state, however, does not attempt to overthrow the existing order as it has a basic level of respect for the order.

This basic respect for the external system is one of the main differences between the two types. The second challenger, at its most fundamental conceptualization, no longer believes in the legitimacy of the international system. The second challenger will present critiques of the current system that question the legitimacy of its external system. This challenger will have concrete strategies for affecting change – usually, it is either revolution or transformation. The final addition is that this challenger must have a vision for an alternative order and a legitimizing base. While this may seem logical, some challengers and challenges may have the first two elements, but they fall short when it comes to the last and most difficult aspect – an idea for a new system. Yet having all three characteristics is what constitutes the second challenger.

And how do we conceptualize *change*? There is also a breadth of literature on change, and more specifically, mechanisms for causing change. This typically devolves into conversations over revolution and transformation, but both approaches highlight the importance of leadership. In this research, there is not as much a focus on how to make change, but rather, the effects of wanting change and having change take place. It is therefore more the mutable aspirations of an actor and that actor's agency that are under scrutiny here.

Therefore, we return to the main point: how can we classify different challengers, how can we identify them, and what type of challenge does each challenger present? On the one hand, discussions on states, particularly Russia, as a challenger do not often go into depth about what exactly is being challenged and what this means to the international order itself. Moreover, Russia often acts as an opportunist, responding to situations, leading to a very dynamic foreign policy. It is difficult then to pigeonhole it as one kind of challenger. In this case, this dissertation aims to

make an empirical contribution to the discussion of Russia as a challenger, and how this affects the international system.

Within this contribution, this research finds that these basic types of challengers can provide insight but are not static labels when it comes to contemporary Russia. Alexander Cooley, Daniel Nexon, and Steven Ward do attempt to provide a typology of challengers, outlining four types (reformist, revolutionary, status quo, and positionalist), yet their focus is on military power and does not delve into the nebulous area concerning normative debates.[6] Therefore, despite the research conducted on challengers, there should be more attention paid to the dynamism of this spectrum, the contextuality of challenges, and the interstitial nature of challengers, who are both outside and inside the system that they are changing. Moreover, these challenges do not happen in a vacuum – the external system itself plays a role in the development of a challenger, and the challenger, despite its motivations and interests, may change the system in an unintended way. Therefore, what kind of challenger Russia is can only be a relevant question when we understand what is meant by challenger and what is being challenged.

1.2 What is being challenged?

When discussing challengers, one question has been left dangling – what is a challenger challenging? While there is a myriad of ways to understand what is being challenged, this project takes the approach that there is an external system that is the object of the challenge. In this research, a hegemonic external system is being challenged, and in the case of contemporary Russia as a challenger, it is a US-led hegemonic system. The role of the US, however, is less important than acknowledging it built the system that is currently operating.

[6] Alexander Cooley, Daniel Nexon, & Steven Ward, "Revising order or challenging the balance of military power? An alternative typology of revisionist and status-quo states," *Review of International Studies,* 45, No. 4 (2019): 689-708

Hegemony also acts as a theoretical base to explore this question. As Andreas Antoniades argues, hegemony allows us to "focus on the 'movement of power' within a hegemonic order, i.e., where does power come from, where is it targeted to and how does it operate?"[7] Hegemony, therefore, allows us to see how power moves to and from actors, starting with the dominant actor and examining those attempting to challenge that actor. This exchange leads to potential changes in power dynamics. In short, with hegemony, we can observe what is being challenged as well as the dynamism of challenges.

The concept of hegemony has a rich history. The multitude of conceptualizations makes it difficult, like with challengers, to have only one definition or understanding of the term. The word itself originates from the Greek *hegemonia,* and there it takes on meaning of temporary leadership over a league of actors. From this origin, the word expanded over the centuries, and with this, so did the conceptualization of challengers to hegemony. However, in this research, what is being challenged is a hegemonic international system, with an understanding of hegemony coming from post-Marxist theory and particularly building on the works of Antonio Gramsci. This approach is particularly chosen because of post-Marxism's emphasis on the importance of a hegemonic system's underlying principle, or common-sense. The common-sense then acts as main battleground for hegemonic contestations and where we can see attempts by challengers to change the hegemonic system and how.

Chapter 2 goes more in-depth as to why this research takes a neo-Gramscian approach to hegemony, yet ultimately, what this project does is bring the concept of hegemony closer to international relations. What this means is that hegemony, as understood here, gives space for the development and better understanding of contemporary challengers in the US-led hegemonic

[7] Andreas Antoniades, "Hegemony and International Relations," *International Politics*, 55 (2018), 605

system. By better understanding the concept of hegemony regarding the question of challengers, we are better able to see more complex clashes over normative debates and the potential shifting of an established hegemonic common-sense, which would present an altogether different challenge to the system.

1.3 Building concepts of challengers

Now that we can better understand what is meant by a challenger here, I will turn to how we will be able to see what kind of a challenge an actor is presenting, if one at all. To do so, in Chapters 3, 4, and 5, I build a conceptual framework aimed at applying to the case of Russia and potentially other empirical examples. Chapter 3 discusses the theoretical and methodological approaches taken toward this endeavor. First, I rely on Max Weber and his Ideal Types, which will allow us to typify a challenger aiming to change its place in the system (Ideal Type I) and a challenger aiming to change the system (Ideal Type II).

To construct ideal types, I rely on the work of Patrick Jackson specifically, as he outlines steps researchers can take to first construct ideal types and then turn them into useable concepts for conducting research. Part of this work relies on positioning the researcher within their own research. Positionality in this sense is value-based, meaning that the researcher must reflect on their values and beliefs going into the research and how this can affect or was affected by the research itself. However, these values are not on the individual level but rather the common world-view that the researcher is a part of and being aware of this environment. Approaching this topic, I also had to reflect on the fact that I am a member of a neoliberal common-sense, with prejudices stemming from this environment. Neoliberalism and its characteristics will be further explained in Chapter 2.

After understanding my value-position in relation to the research, according to Jackson, the researcher can move on to construct the ideal types. In the case of constructing ideal types, the researcher must conceptualize what these certain types might look like. Based on the apparent dichotomy between the first and second challenger, I was able to bring together certain signposts that might align with one or the other. These signposts are then applied to empirical cases, which allows me as the researcher to adjust and reflect on some of the signposts I had identified. Only after the empirical application are we left with two ideal types.

In Chapter 4, I use signposts from Ideal Type I to analyze Russia under Peter I (1682-1725). On the surface, Peter I's reign fits the first type of challenger, wherein Peter I seemingly wanted to change the position of Russia in the existing external European system. However, while not aiming to change the system, Peter I did change the external system he was working toward joining in some ways, primarily by defeating Sweden in the Great Northern War. Chapter 4, therefore, completes the first ideal type. However, the chapter importantly adds that while Peter I did not aim to change the external system, his reign ultimately did change his external European system, which had to adjust to Russia's inclusion. His example begins to show the conversational nature of challengers; regardless of their intentions, other outcomes may occur depending on how the challenger and its external system have conversed.

Similarly, in Chapter 5, I explore the second ideal type, wherein the challenger wants to change the system. Here, I analyze the period the Bolsheviks gained and held power in Russia from 1917-1924. Using the signposts formulated before completing the ideal type by applying it to an empirical case, I analyze the discourse primarily coming from main Bolshevik leaders, Lev Trotsky and Vladimir Lenin, as well as documents from the Communist International. Like with Challenger I, the final concept of Challenger II ends up being more complicated than the ideal

type. The Bolsheviks set out to change the international system, and they expressed critiques undermining the legitimacy of the system, they saw it as changeable, and they presented an alternative. Yet, as their government progresses, they must, despite themselves, somehow engage more with the external system to ensure their own survival. Similar to Peter I's reign, the intentions of the challenger were not reflected ultimately in how they interacted with the external system.

In this way, constructing the ideal types then leads to associated discursive formations. These formations and how they are constructed will be further explicated and explored in Chapter 3, but they provide a way to move forward in analyzing contemporary challengers. This dissertation does not aim to generalize the conditions or types of global challengers. Rather, it aims to create a framework that can explore the question of a global challenger in the context specifically of a nation state. Moreover, the ideal types present exactly that – an ideal. Both empirical cases were chosen since they seemed to align the most with the theoretical concepts. However, it is unlikely that all empirical cases will fit so neatly into a box, as even these well-suited historical periods were not perfect fits. The ideal types still provide a framework for investigating whether a Foucauldian discursive formation exists that can fall under one of these ideal types.

1.4 Russia as a challenger

While in principle the two concepts can be applied to any challenger, even including non-state actors, this research is specifically examining if Russia is a challenger, and if so, what kind of challenger is it? I explore this question in further detail in Chapters 6 and 7. To conduct the analysis framework of contemporary Russia, I rely on the conceptual framework constructed in Chapters 3 through 5. By using this framework, we should be able to see what Russia is and is not doing. Chapter 6 and 7, therefore, proceed to examine contemporary Russia in moments when it is particularly active and visible on the international arena. This means these chapters specifically

focus on Russia's relationship with Ukraine and Syria. Chapter 6 begins in 2015, after the intensity of the Annexation of Crimea in 2014.

Russia between 2015 and 2021 provides a rich empirical case for better understanding the nuances and complexities of potential international challengers. Since Putin's famous 2007 speech at the Munich Security Conference to Russia's ongoing involvement in Syria, there have been changes to how Russia views and engages with the international order.[8] We can see the Russian Federation making complaints and criticisms against the international system, but what these are often varies, even within the same speech. For instance, in the 2014 speech Putin gave to Duma and Federal Council members concerning annexing Crimea, there are moments it seems Russia is not opposed to the system itself but wants to be treated differently within the existing system, like Challenger I. Putin illustrates this with the US' actions in Kosovo. He states:

> the Crimean authorities referred to the well-known Kosovo precedent – a precedent our western colleagues created with their own hands in a very similar situation, when they agreed that the unilateral separation of Kosovo from Serbia, exactly what Crimea is doing now, was legitimate and did not require any permission from the country's central authorities.[9]

Following this quote, Putin cites a section from the UN Charter in support of this. From this quote, it appears as though Russia is searching for the same recognition that the US received when it intervened with NATO in the Yugoslav Wars, particularly, in the creation of Kosovo. While in other speeches, he has said this action was incorrect, here he seems to accept this precedent and use it as part of international law. This example alone shows that Russia, while positioned as a challenger, may not be one, but multiple challengers simultaneously, moving along the spectrum of what challengers can be.

[8] Vladimir Putin, "Putin's Prepared Remarks at 43rd Munich Conference on Security Policy," *The Washington Post*, 12 February 2007, https://www.washingtonpost.com/wp-dyn/content/article/2007/02/12/AR2007021200555_pf.html

[9] Vladimir Putin, "Address by President of the Russian Federation." 18 March 2014. http://en.kremlin.ru/events/president/news/20603

Moreover, this dissertation examines Russian foreign policy in the current international system because the end of the Cold War not only triggered the rise of an unchallenged United States but also the birth of a new kind of hostility between the West and Russia, which has garnered much attention. From the Foreign Agent Law in 2012, to granting asylum to Edward Snowden, annexing Crimea, and asserting itself into the Syrian Civil War, Russia was noticeably more active internationally. Russia further experienced a notable shift in its foreign policy after the Annexation of Crimea.[10]

The problem, however, goes deeper than this fraught relationship. Rather than merely regard each other with suspicion and clash sometimes over the interpretations of international law, Russia and the US seem to view "the internal nature of each other as the root and cause of the problem".[11] This is different, then, because Russia and the US view each other's transgressions as something fundamental to each other's character. To change each other's behavior, therefore, each other would have to challenge the foundational legitimacy of each other's state, which would make it seem like it is the second type of challenger.

Relatedly, Russia began to use more moral rhetoric when justifying its actions than legal rhetoric, as it had done previously. Although scholars have noted this shift and explored why it has occurred, it needs further exploration, given the increase of this type of discourse since the Annexation and, now, the full-scale invasion of Ukraine.[12] The resurgence of this more

[10] Peter Rutland, "A Paradigm Shift in Russia's Foreign Policy," *The Moscow Times*, 18 May 2014, accessed 5 May 2015, http://www.themoscowtimes.com/opinion/article/a-paradigm-shift-in-russia-s-foreign-policy/500352.html
[11] Dmitry Suslov, "US-Russia Confrontation and a New Global Balance" *Strategic Analysis* 40, No. 6 (2016), 549
[12] For examples, see Regina Heller, "Russia's Quest for Respect in the International Conflict Management in Kosovo" *Communist and Post-Communist Studies* 47 (2014): 333-343; Xymena Kurowska, "Multipolarity as Resistance to Liberal Norms: Russia's Position on Responsibility to Protect," *Conflict, Security, & Development* 14, No. 4 (2014): 489-508; Charles E. Ziegler, "Russia on the Rebound: Using and Misusing the Responsibility to Protect," *International Relations* 30, No. 3 (2016): 346-361

normatively charged ideological rhetoric in Russian foreign policy thus requires a more serious examination.

And therein lies one difficulty with understanding Russia as a challenger. Russia, on the surface, both seemingly gives legitimacy to the international order, as in referring to actions done by the UN, even if they disagree with them, but simultaneously, criticizes the international system, views the order as collapsing, and makes proposals for how it should be ordered. Thus, it is rarely clear, from even the same speech, what kind of challenge Russia is making. Another difficulty lies in the tendency to think of Russia as *a* challenger, i.e., a fixed, static actor that has several foreign policy objectives umbrellaed under one clear motivation for years. In this case, this dissertation will aim to examine Russian foreign policy over a period, from 2015-2021, in an attempt to understand what kind of challenges Russia presented during this time and what this tells us about both challengers theoretically and in terms of the current international system. Yet already we can see that Russia during this period is not an ideal type.

Chapter 6 goes through each year from 2015 until 2020. Primarily, this was done because, as the research progressed, it seemed there was a discursive and conceptual change. With the Covid-19 Pandemic, Russia's discursive approach to the international order changed. There was also a development in how it perceived its own domestic strength. Owing to this, Chapter 7 begins with 2020 and ends with 2021, purposefully not discussing the full-scale invasion of Ukraine. The attention here is on what kind of challenger Russia was, and with events moving so quickly in the current war, an analysis done in the same way from February 2022 would be too chaotic and incomplete.

Yet, the type of challenge Russia presents and at which time matters to both Russia's domestic politics and the international system. Replacing a pre-existing system, for instance,

would require serious effort and provocation from Russia, which could destabilize the international system. Russia simply criticizing the existing system, however, potentially presents much less danger to the overall stability of the system. Russia's relationship to the current United States-led hegemonic system is filled with ambiguity, and while this ambiguity may always exist, at least there can be some understanding of how we can see changes in Russia's international position and what these may mean. Chapter 8, therefore, concludes and offers an analysis of Russia as a challenger of the contemporary international system, suggesting ways that the war has impacted and will continue to impact Russia in the international system.

Ultimately, however, this dissertation aims to demonstrate that if we begin with an incomplete understanding of a challenger theoretically, we will be left with an incomplete picture of what a challenger might and might not be. Arbitrarily calling Russia a challenger without exploring the spectrum, avenues, and possibilities of what this might mean can lead to a superficial understanding of Russia's past and present actions, which could result in future missteps. Most of all, however, attempting to pin Russia down as *a challenger*, static in this concept, driven by one ambition, is also a misrepresentation of what a challenger can be, which is dynamic, situational, and opportunistic at times. Therefore, the proceeding chapters offer a counter-narrative to understanding a static Russia, or a static challenger in general, and instead provides a base for observing more complicated oppositional landscapes in the international system.

Chapter 2: Challengers to the Current Hegemonic System

To avoid misunderstanding what kind of challenges certain actors can present, it is important to understand the concept of a challenger better. There are generally two types of challengers that have been highlighted in IR literature. One is a challenger that aims to change its position in the existing system, while the other aims to change the system itself. However, it seems as though there must be more to this simplistic formulation, and this chapter endeavors to uncover the theoretical depths of this distinction. This will involve examining the existing literature to better understand *what* is being challenged.

For this question, the dissertation relies on the concept of hegemony, which permits us to explore hegemony on the international level and with attention to complex power dynamics. This leads us to explore the concept of counter-hegemony, and the role of discourse, articulation, disarticulation, and rearticulation in a counter-hegemonic challenger's pursuit of challenging hegemony. Finally, the chapter will end with defining what the current common-sense is of the operating international hegemonic system as to better understand if Russia is a challenger to this system, and if so, what kind.

2.1 Types of Challengers

When looking at types of challengers in International Relations, two clusters appear in the existing literature. One set of characteristics tends to see challengers as those who want to change their current position in the existing system, while the other indicates that the challenger sees the system as the problem and aims to change it. In terms of the challenger that wants to change its position, there are many ways to perceive how this challenge is put forward. For instance, MacFarlane defines a challenger as a state that questions its place in the existing system because of its growing

power, and it starts being more assertive.[13] His statement indicates that power growth comes first and then a reconsideration of an actor's position within the system.

Hurrell similarly follows this line of thinking when discussing how great powers can operate in the current international climate. He writes:

> The goals of seeking greater influence and a more prominent role in the world or in the region remain; liberal economic integration provides a means of achieving those goals. Hence a willingness to challenge comes from the renewed confidence that economic success brings.[14]

Here, Hurrell is arguing that a state is a challenger when it aims to change its role in the current system, but to do so, the state decides to use the tools provided by the system itself. Indeed, succeeding at hitting certain goalposts set by the system, in this case, succeeding economically, might encourage an actor to attempt to change its position. To illustrate, G. John Ikenberry would see Russia and China as challengers to hegemony because "unlike the old authoritarian states of the last century, they are adaptive to global capitalism, and capable of sustained growth and development".[15] For Ikenberry, this means that Russia and China can engage the US equally in its own playing field, and they can even benefit from the current system. In his view, a challenger then does not have to create a new system but instead must have a powerful voice in the current one. There is still respect for the legitimacy of the system. A challenger along these lines also sees the benefit of the existing system, and therefore, in this way, the challenge is not necessarily to the system but to its position in it.

Therefore, in this understanding of a challenger, nation states that a challenge the order seem to follow four steps. First, a state examines the order and understands the rules of the game.

[13] MacFarlane, "The 'R' in BRICs," 43
[14] Hurrell, "Hegemony, liberalism and global", 18
[15] G. John Ikenberry, "The Liberal International Order and its Discontents," *Millennium - Journal of International Studies* 38, No. 3 (2010), 51

Second, the state has accumulated some power, in whichever way it is understood at the time, usually by using the tools of the system itself. Third, it may then realize that it must change its position in the system. Finally, the state then attempts to secure a better position for itself within the system. Challenging the system is not an objective of the challenger, but the system may be challenged as a side effect of the challenger attempting to gain a different role in the system. The challenging state has no incentive to overthrow the existing order as it has a basic level of respect for the order and can possibly even benefit from it.

The second set of characteristics implies a different kind of challenger. This challenger actively aims to challenge the system itself. In this case, it seems that the system is changeable and that it needs to be changed. For instance, Erik Olin Wright describes different anti-capitalist strategies, thus shifting the focus from actors to an economic structure instead.[16] Opening the discussion to systems also then opens the discussion to what kind of challenge it is and the threats it can/does present. As Robert Legvold writes:

> These are times when the normal fare of politics – the struggle for power over policy – fades, and the stakes become political life itself… No longer is the issue… who gets what, when, and how, but the very structure of the political and economic system within these questions are answered.[17]

Understanding a challenger this way begins to raise the question of what is at the base of these structures and systems, and what a challenge to this might be.

So far, therefore, we can see there are broadly two types of challengers to the international order. Both challengers engage with their external system, but while one challenger attempts to navigate the system and change its status within it, the other is critical of the system to the point

[16] Erik Olin Wright, *How to be an Anti-Capitalist for the 21st Century*, (New York: Verso, 2018), 17
[17] Robert Legvold, "Russian Foreign Policy During Periods of Great State Transformation," in *Russian Foreign Policy in the 21st century & the Shadow of the Past.* Ed. Legvold, Robert (New York: Columbia University Press, 2007), 77

where it poses a systemic challenge. The question then is: how can we understand a social system that is being opposed?

2.2 Hegemonic System

To better understand challengers to a system, it is necessary to explore what is being opposed. In International Relations, scholars have turned to the concept of hegemony to better understand the international system. Hegemony is one concept that is a part of understanding the wider, international system. While there is a diverse spectrum of approaches to take toward hegemony in the study of international relations, from Robert Keohane's dismissal of the concept to Hans Morgenthau's equating hegemony with political domination and leadership, these approaches are not enough to understand the challenges that are to the system itself as these approaches do not focus on systemic challenges. Therefore, I focus more concretely on certain authors and pieces that have formed the basis for both neo-Gramscian and post-Marxist understandings of hegemony and neoliberal hegemony. Post-Marxist hegemony provides a theoretical approach to hegemony that allows us to better explore the topic of contemporary challengers.

Aside from being focused on systemic challenges, post-Marxist hegemony provides a flexible approach for better understanding power dynamics. What this means is that post-Marxism hegemony considers material conditions, leadership, culture, and language. It provides more contact points for recognizing hegemony and its mechanisms of control. By looking at these points, it is possible to see how the dominant group and the subordinate one, the system and the challenge, engage with hegemony.

One of these points is legitimacy and its relationship with power through the system's emphasis on common-sense, which is a basic, taken-for-granted logic woven into a system. This post-Marxian conceptualization of hegemonic common-sense is one of the main reasons for

choosing this approach. Hegemonic common-sense highlights the importance and nuance of normative posturing and debates in politics. This targets the system's legitimacy and provides a space where we can see changes and challenges. A fight over common-sense, or criticisms of it, can signal challenges and give a space for the rationale behind those challenges. Finally, there is a distinction that Chantal Mouffe makes between a hegemon and a hegemonic system, which will be explored more in detail later, and this gives space for understanding both an existing system and ongoing changes to this system. Grounding the concept of challengers within this approach also provides a starting point for exploring the potentialities and limitations of challenger identification itself.

a. Gramsci's concept of hegemony

While there are several theorists who contributed early on to a Marxist concept of hegemony, one foundational scholar was Antonio Gramsci and his book, *The Prison Notebooks*, written in the early 1930s.[18] This section will primarily focus on Gramsci before delving into neo-Gramscian traditions. Gramsci is the starting point for our discussion on hegemony as Gramsci laid the foundation for several important concepts relevant to this research, particularly the notion of common-sense. His basic framework for how change is achieved and the motivations behind seeking change are also taken up and continued by later post-Marxists, and therefore, this framework is useful for understanding his early discussions on affecting change.

[18] Other theorists, such as Giovanni Arrighi and Immanuel Wallerstein, continued this trend in their own ways. However, Wallerstein was rather focused on either a world-system as a "world-empire" or one as a "world-economy" (Wallerstein, Immanuel, *The Modern World-System I: Capitalist Agriculture and the Origins of the European World-Economy in the Sixteenth Century* (San Diego: Academic Press, 1974), 348). Coming from a material understanding of the world, it would make sense that Wallerstein would structure his argument on this basis; yet this structuring fails to grasp both the intricacies of ideology and adheres to the idea of a cyclical inevitability to this system.

Gramsci theorized about hegemony mostly by exploring the question of how to transform "the subordinate group into a dominant one".[19] Hegemony was the space where this transformation took place, and it allowed him to explore the political channels whereby intellectual and moral reform occurs and a "national-popular collective will" begins to form.[20] For Gramsci, this space was located in the nation-state, as he wanted to understand how communists could take power from the state. Yet, hegemony, conceptually, was also separate from the state, i.e., the words "state" and "hegemon" are not interchangeable. Gramsci understood the state as maintaining control through legitimate violence and hegemony through civil society, which was the space for ideological production and diffusion, and included everything from newspapers to voluntary associations to schools.[21] The interweaving of these two aspects is what gave the ruling class control.

By looking at the cases of Italy, France, and Russia, Gramsci already saw how consent and coercion worked together to provide the ruling class with instruments of control. He then developed these observations into a theoretical account of how hegemony operates generally.[22] These cases also led Gramsci to try to understand why hegemony operated differently in Russia versus the West, which resulted in him looking at different agents of power.[23] There were the "culturally well-equipped and long-established" intellectuals, who were "enablers of hegemony," as they reproduced and "diffused" the ruling order's ideas to the suppressed group(s).[24] Second, there was civil society. Both, however, reproduced the existing power structure, and this is why

[19] Antonio Gramsci, *Selections from the Prison Notebooks*, eds. Quintin Hoare and Geoffrey N. Smith (London: Lawrence and Wishart, 2010), 160
[20] Alexandros Kioupkiolis, *The Common and Counter-Hegemonic Politics Re-thinking social change* (Edinburgh: University of Edinburgh, 2019), 128
[21] Chantal Mouffe, *Gramsci and Marxist Theory*, ed. Chantal Mouffe (Boston: Routledge S& Kegan Paul, 1979), 187
[22] Perry Anderson, *The H-Word: Peripeteia of Hegemony. (*London, New York: Verso, 2017), 21
[23] Ibid., 22
[24] Ibid., 22

conquering the state only in terms of the state's material resources, in Gramsci's view, is not enough to secure hegemony, and it is necessary to secure hegemony for the subordinate group to become the dominant one.[25]

Therefore, in his Notebooks, Gramsci explored both theoretical and practical aspects of how to wrest hegemony from the ruling class. Consent for Gramsci is of particular concern.[26] Consent is what allows a hegemon to more easily rule and not depend on force alone. Moreover, consent can also lead to those in society helping the ruling classes, even if it goes against their own interest. In other words, consent is an important part of hegemony by making it more palatable. Consent "maintains and justifies" the dominance of the hegemon, however, the hegemon does not rely on consent alone.[27] When consent wavers in subordinate groups, then the hegemon's legitimacy is "legally" enforced.[28]

Consent is also supported by the hegemonic world-view, or common-sense. Gramsci builds this concept by first discussing culture and ideology, which "must propose a set of descriptions of the world, and the values that preside over it, that become in large measure internalised by those under its sway".[29] The more philosophical and abstract understandings of how the world works and values within this world are what Gramsci refers to as a world-view.[30] A world-view does not come from an individual but from "communal life," which is why it is also referred to as an "organic ideology" or "organic ideologies".[31]

[25] Kioupkiolis, *The Common and Counter*, 130
[26] Anderson, *The H-Word: Peripeteia,* 23
[27] Gramsci, *Selections from the Prison,* 160
[28] Ibid., 12-13; Kioupkiolis, *The Common and Counter,* 128-9
[29] Anderson, *The H-Word: Peripeteia,* 22
[30] Mouffe, *Gramsci and Marxist Theory*, 186
[31] Ibid., p. 186; Alexandros Kioupkiolis, "Heteropolitics: Refiguring the Common and the Political*," European Research Council,* July 2020, 151

"Common sense" is the simpler form of this, expressed as "the spontaneous philosophy of the man in the street".[32] The reason world-view plays such an important role in hegemony originates from Marx's inversion of Hegel's dialectic; Gramsci follows the Marxist tradition that consciousness is formed "as the effect of the system" rather than, as Hegel argued, formed internally.[33] In this way, a collective world-view can "serve as a unifying principle" and translate to a "collective will" which is how a ruling class creates its hegemony.[34] Once again, this notion of a "will" or an "act" is important when it comes to Gramsci's concept of hegemony.[35] As Alexandros Kioupkiolis summarizes, "The proper function of hegemonic politics is permanent action, political organization and the making of new identities".[36] It is not enough to be critical of a hegemon nor is it enough to have state power. Hegemonic control comes from a blend of coercion and consent, built on a *created* world-view that ultimately produces tangible steps for the creation and maintenance of itself.

Gramsci, therefore, not only provided an answer for how one ruling class becomes hegemonic, but he also made a framework for what a hegemon *should do* to maintain and reproduce its control. The cornerstone of this endeavor is rooted in the construction and maintenance of a common-sense, which provides guidelines for how an individual can and *should* live in society.[37] Gramsci has therefore produced a theory of hegemony that gives conceptual space to changes in ideology and challenges to a system itself. The question remains how this structure might look on the international level.

[32] Mouffe, *Gramsci and Marxist Theory*, 186
[33] Ibid., 186-7
[34] Ibid., 191; Anderson, *The H-Word: Peripeteia*, 74; Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 141
[35] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 144
[36] Ibid., 144, 151
[37] Common-sense, with a hyphen, will be used throughout the rest of the dissertation to explicitly reference Gramsci's conceptualization.

b. International hegemony

To first start discussing hegemony on the international level, there are several obstacles to overcome. To begin with, sovereignty, a common legal framework, and certain shared political and cultural values exist within a nation state. While it is possible to make more room for commonalities on the political and cultural dimensions, how law works in a nation state versus on an international level is different, and this also ties closely into the concept of sovereignty.

What begins to help us unpack hegemony on the international level is Robert Cox's definition of world hegemony, which "is expressed in universal norms, institutions and mechanisms which lay down general rules of behaviour for states and for those forces of civil society that act across national boundaries – rules which support the dominant mode of production".[38] In short, we can begin to understand hegemony on the international level through the expansion of Gramsci's concept of a shared "world-view" and how this world-view can become institutionalized internationally to provide a framework for the 'general rules of behavior for states'.

This can become especially visible when a state or group of states look beyond, what might be called, pure economic or military gains, to a greater ideological goal.[39] This can be seen when a hegemon makes certain rules and creates institutions as they make the ideology more explicit and concrete.[40] Ultimately, a successful and visible hegemonic international order comes from "the successful formation of an international historic bloc of social forces, which in turn is premised

[38] Robert W. Cox, "Gramsci, Hegemony and International Relations: An Essay in Method" *Millennium: Journal of International Studies* 12, No.2 (1981), 172
[39] Mark Rupert, "Producing Hegemony: State/Society Relations and the Politics of Productivity in the United States," *International Studies Quarterly* 34, No. 2 (1990), 29
[40] Christian Reus-Smit, *The Moral Purpose of the State: Culture, Social Identity, and Institutional Rationality in International Relations* (Princeton: Princeton University Press, 1999), 34

upon the articulation of a dominant ideology accepted by subordinate classes".[41] In this case, the institutionalization, acceptance, and visibility of an ideology in international spaces indicates the presence of international hegemony.[42]

What this means is that Gramscian hegemony can be understood on the international level, not because sovereignty is an irrelevant concept, but because the desire for this world-view to be accepted and adhered to exists on the international level. Additionally, as this is a consent-based concept, national sovereignty, in principle, should not be violated. However, despite the strong emphasis on consent, domestic hegemony still expands beyond its borders in a particular way; the thinness of the line between consent and coercion presents difficulties in understanding the nature of the international hegemon. Thus, although some distinction between the elements of the hegemonic common-sense and hegemony in theory was previously discussed, the division is not so strict, and some characteristics intertwine.

By moving past the constraints of sovereignty and national borders and focusing on the ideological and political discussions in the contemporary international order, we can imagine hegemony both on the international level and beyond the nation state. To illustrate, as the Roman Empire expanded, it did not merely dominate but created a new identity for itself and an order to suit it. There was coercion, but the goal of the empire was not simply to dominate; the goal was also to build and create. This expansionism leads to a more international system not based on a shared space but on a shared identity imposed on the space which states occupy.

[41] Peter Burnham, "Neo-Gramscian Hegemony and the International Order." In *Global Restructuring, State, Capital and Labour*, eds. Andreas Bieler, Werner Bonefeld, Peter Burnham, and Adam David Morton. (New York: Palgrave, 2006), 31

[42] Andreas Bieler and Adam David Morton, "A critical theory route to hegemony, world order and historical change: neo-Gramscian perspectives in International Relations" *Capital & Class* 82 (2004), 87

The concept of a *shared identity* in a space theoretically aids the concept of international hegemony. In some ways, nation states have the capacity to decide how, when, and in which form they will interact with actors outside their national boundaries. More importantly, nation states make choices that impact how those actors will view them – painting a narrative that explains to others who this nation state is *(an identity).* Here, we can build on Richard Saull, who explained how international hegemony is not only about material capabilities but "the *social* order… [which] rests on *a consensual acceptance of socioeconomic and political hierarchy* through a network of social, ideational, cultural, and institutional means".[43] If we then imagine international hegemony as a *social* order, with a consensual hierarchy, created and maintained through multiple mechanisms, we can begin to see how international hegemony differs from domestic hegemony and is context and period specific as well as the conditions for how international hegemony is even possible.

c. International hegemonic system

However, hegemony conceptually working on the international level is not enough to explain what a systemic challenger is to hegemony; we need to understand what a hegemonic system is. Here, Ernesto Laclau and Mouffe have conceptually expanded hegemony to the systemic level. First, Mouffe developed the concept of a hegemonic system. In her unpacking of Gramsci, Mouffe makes the distinction between a hegemon ("exercising a political, intellectual and moral role of leadership") and a hegemonic system ("cemented by a common world-view").[44] This distinction gives intellectual space for focusing on the role of common-sense, or 'a common world-view'. Therefore, understanding the system as a hegemonic one means that we can observe the existing

[43] Richard Saull, "Rethinking Hegemony: Uneven Development, Historical Blocs, and the World Economic Crisis," *International Studies Quarterly,* 56 (2012), 328, italics in original
[44] Mouffe, *Gramsci and Marxist Theory*, 193

hegemonic system while it is challenged but still is reproducing and maintaining itself through its common-sense.

Aside from moving on from traditional Marxist interpretations, including economic determinism and the importance of a central party/apparatus, Laclau and Mouffe also moved past the notion that hegemonic change could only happen through a "historical rupture – Revolution with a capital 'r'".[45] While this built on Gramsci, this also allowed them to reject the focus on state power and the fight over state power and instead look at an overall transformation that involved more actors and a longer-term strategy.[46] Rather than a subject, like a social class or state, Laclau and Mouffe consider hegemonic subjects based on their positionality within discursive formations, and discursive formations, therefore, compose an important part of understanding hegemony.[47]

Laclau and Mouffe then attempt to unpack and reassemble this already cemented system, thus developing Gramscian mechanisms for altering a hegemon's common-sense. One of the ways hegemonies are created and maintained is through language, or rather articulation and discourse. To better understand this, Laclau and Mouffe first start with their concept of nodal points – wherein meaning is affixed to certain words for the sake of intelligibility in a society, but this attachment is alterable.[48] Because of multiplicity in societ(ies), it is not possible to have a single nodal point, and instead, "there can be various hegemonic nodal points, although some of them may be highly overdetermined and decisive for a broad range of social relations".[49]

The battle for nodal points is the process where hegemony is located; hegemony "endeavors to limit and control the flow of differences… [and] to configure an organized system

[45] Ernesto Laclau & Chantal Mouffe, *Hegemony and Socialist Strategy*, (London & New York: Verso, 1985), 152; Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 153
[46] Ibid., 153
[47] Ibid., 156-7; Kioupkiolis, *The Common and Counter*, 127
[48] Laclau & Mouffe, *Hegemony and Socialist Strategy*, 113
[49] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 112

out of disaggregated elements by instituting nodal points".[50] Hegemonic politics takes place where different communities fight to give nodal points meaning, or through this antagonism, they settle on a compromised meaning.[51] Articulation of nodal points occurs only when there is "the presence of antagonistic forces and the instability of the frontiers that separate them".[52] To see change occur in a hegemonic system, therefore, it is necessary to look at fights over nodal points and the outcomes of these antagonistic moments. The disarticulation of certain nodal points then also provides a space for their rearticulation and further development. Hegemony is the coming together of conflicting positions until there is one dominant world-view with secured and articulated nodal points.

International hegemony does exist and has existed, and it can provide order, but here, hegemony is understood through the, as Mouffe called it, 'cemented common world-view'. In the case of Russia as a global challenger, we now have a better concept of *what* is being challenged – a hegemonic common-sense. When a hegemonic system is challenged, we now understand *that* challenger is a counter-hegemonic challenger. While Laclau and Mouffe outlined how a hegemonic system exists, maintains, and reproduces itself, we must further conceptually explore the actions a counter-hegemonic challenger would take to pose a systemic challenge.

2.3 Counter-hegemonic challenger

What has been missing so far from this discussion is a further exploration of what a counter-hegemonic challenger does and how. One aspect of being a counter-hegemonic challenger is to first challenge the existing nodal points that the current hegemonic system has articulated. The challenger then should re-articulate the nodal points according to its own common-sense, but it

[50] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 108
[51] Ibid., 155
[52] Laclau & Mouffe, *Hegemony and Socialist Strategy*, 136

must construct this common-sense. Therefore, how does a counter-hegemonic challenger engage in the process of articulation and antagonism? What does it mean to *construct* a new common-sense and how does the counter-hegemonic challenger achieve this?

Rather than pushing its beliefs onto a group, a hegemon, and therefore also a counter-hegemonic actor, should disseminate popular ideas to better flesh out the corresponding ethics and politics, all the while uprooting the existing common-sense.[53] While this is beneficial in terms of maintaining and/or building a popular religion, it is also a deeper ontological act that involves a larger group in moral questions regarding what it means to live in society and what it should mean. Various actors, including the hegemon itself, will explore ideas that have gained traction to continue to maintain the status quo or to move in another direction, depending on the actor's perspective.

Typically, a counter-hegemonic actor "picks out potentially antagonistic and emancipatory strands" in the existing commonsense that sometimes "may be the first stirrings of a new common sense… occasionally manifest[ing] themselves in action, in momentary flashes".[54] A counter-hegemonic challenger, therefore, does not nor cannot have a premeditated approach to its challenge; rather, it has a back-and-forth with the hegemon, in which it acts, reflects, acts again, changes, and in short, has a dynamic process that eventually can lead to it *becoming* a counter-hegemonic challenger. This in itself begins to unravel the narrative that there is a dichotomous understanding of challengers – that they can be *either/or*. We instead begin to see that challengers are in conversation with their external system, which affects both them and the system in unpredictable ways.

[53] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 146; See also Gramsci, *Selections from the Prison*, 334-335, 339-341
[54] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 145

For Gramsci, the moral discussions involved in building a popular religion, or "organic politics," is "key to a successful counter-hegemonic project".[55] Why this matters is because participation in building a collective common-sense also forms a collective identity, and a collective identity and the unification of multiple social forces are essential to forming a successful counter-hegemonic movement.[56] The moment the new common-sense broadens and exists on a "universal plane," "the hegemony of a fundamental social group over a series of subordinate groups" is also created.[57] After all, a counter-hegemonic movement is not an anti-hegemonic movement. Forming a new collective identity, new hierarchies, and new power structures are part of a counter-hegemonic challenger's work.

In that sense, it is important for a counter-hegemonic challenger to both show they have a concrete vision for the future and take steps that move this vision forward. Critiquing the existing common-sense is only one example of a counter-hegemonic challenger; the counter-hegemonic challenger should also be proposing a new order. Suggesting certain policies or advocating for a different position within an existing power structure *is not* explicitly proposing a new order. As a side effect of such changes, a new system can appear, but such proposals rarely carry with them the idea that there will be a new system. Rather, these types of proposals indicate that an actor knows this system well already and is rather jostling for a better position or a louder voice; the system then can suit them well if they know how to take advantage of the rules of the game. We have seen this already with a challenger that aims to change its position within the existing system.

Rather, the counter-hegemonic challenger must unify on both cultural and social levels, bringing together different visions and aims around one common view of the world, supported by

[55] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 147
[56] Ibid., 141
[57] Kioupkiolis, *The Common and Counter*, 131; Gramsci, *Selections from the Prison*, 182

material improvements.[58] Material resources are important here, as a successful counter-hegemonic movement must be able to understand "existing structural limitations" as well as balance between these limits and its "utopian ambition to fully transcend the current state of affairs".[59] When the counter-hegemonic challenge grows, i.e., gains more support and greater universal acceptance, then the actor "must both set up new parallel or alternative institutions, counterpowers, 'prefigurative' spaces and engage, as well, with established institutions and relations".[60] Therefore, not only does using pre-existing spaces aid the construction of a new common-sense, it also means the counter-hegemonic challenger does not, and should not, have to start from scratch when it comes to material resources.

However, as stated before, a counter-hegemonic challenger is contextual, and this means that even if an actor seems to fit the definition of a counter-hegemonic challenger, there may not be space in the system for such a challenge. From this it follows that we should be looking for moments and periods of weakness in the international hegemonic system that allow for counter-hegemonic sentiments to erupt or leak. Focusing on these moments gives us an opportunity then to further explore potential alternatives being promulgated, while noting the state of the material conditions, which both make a counter-hegemonic challenge even more likely to exist and perhaps succeed.

This brings us to the final point of how to recognize a counter-hegemonic challenger, and yet first a note should be made. Even if we can theoretically define and delineate a counter-hegemonic challenger, these aspects do not always appear in empirics nor are they so neatly displayed by challengers. Indeed, this delineation serves to create a distinction which can later

[58] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 143
[59] Ibid., 158, 172; See also Laclau & Mouffe, *Hegemony and Socialist Strategy*
[60] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 178

form an analytical tool, and this can only illustrate the messiness of attempting to understand challengers to a system.

To conclude, however, with defining a counter-hegemonic theoretically, first, as discussed previously, there must be a convalescence of diverse social forces, unified by material conditions as well as, and more importantly, a newly accepted and far-reaching common-sense. Second, the counter-hegemonic challenger will build on old ground but in a decidedly new way, which is also how it becomes successful. The new idea should indeed challenge the existing order, "undermin[ing] its effectiveness and legitimacy".[61] Here, then, we see the role of critiques, as they should undermine the existing order, but as a counter-hegemonic critique, they should also leave space for a proposed solution.

A challenger that only critiques without proposing a new order (with elements of the old order plus moral and intellectual revisions) cannot be conceptualized as a counter-hegemonic challenger. As Alan Hunt writes: "The most significant stage in the construction of counter-hegemony comes about with the putting into place of discourses, which whilst still building on the elements of the hegemonic discourses, introduce elements which transcend that discourse".[62] These revisions, plus actions and strategies to implement them, define a counter-hegemonic challenger.

a. Counter-hegemonic critiques

A challenge to a hegemonic common-sense triggers a crisis in a hegemonic system through "disarticulation," i.e., the struggle over signifiers and the "counter-hegemonic battle".[63] There is a danger in criticizing the order, delegitimizing it, and untethering it – disarticulation – without a

[61] Antoniades, "Hegemony and International Relations," 608
[62] Alan Hunt, "Rights and Social Movements: Counter-Hegemonic Strategies," *Journal of Law and Society* 17, No. 3 (Autumn 1990), 314
[63] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 168

firm battle for its re-articulation. One danger from a counter-hegemonic challenger lies in its critiques or questions that challenge legitimacy of the hegemonic common-sense.

1. Dismantle

Part of a counter-hegemonic critique involves dismantling the existing common-sense. More specifically, and as Wang Hui argues, a counter-hegemonic critique dismantles "the totalizing quality" and finds "new spaces for political struggle".[64] It recognizes there is nothing that is a totality, i.e., there is always, or there always *should* be, space for criticism. This implicitly also means that even the hegemonic common-sense *should* be criticized, meaning that the first step of recognizing it as something constructed has already occurred. A counter-hegemonic challenge, therefore, should refute "the sense of impossibility".[65]

What Gramsci would call "a philosophy of praxis" is the idea that common-sense must be critiqued, "selecting among its components and throwing off its regressive elements".[66] Critique, then, is an important component to a counter-hegemonic challenger, although, as the quote indicates, it is not the sole indicator that a counter-hegemonic challenge exists. Dismantling is a critiquing by breaking down elements of the common-sense and does not limit itself to the boundaries of a hegemonic common-sense.

2. Articulation (dis-, re-)

A counter-hegemonic critique not only dismantles the hegemonic common-sense, but it also interacts with how the common-sense has been articulated, specifically to disarticulate it and then rearticulate elements of the common-sense. How a critique has itself been articulated should

[64] Wang Hui, "Depoliticized Politics, From East to West," *New Left Review*, 41, Sept/Oct 2006, 44
[65] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 103
[66] Kioupkiolis, *The Common and Counter*, 133

also interact with the in-place common-sense, which gives an "organic relation" to the counter-hegemonic actor's critiques and other actors and movements.[67]

Dis-, re-articulation are not the only ways that the counter-hegemonic critique can be presented, and more knottily, it can be shown by the hegemon itself as a part of a conversation with its challenger. In some ways, this then can be rearticulation, but the counter-hegemonic challenger is agentless in the execution of this process. As Saull describes, this can be seen through the transition from the Fordist model of accumulation in the US; the hegemon "[*responded]* to the structural changes in the 'mode of production' as well as *[redirected]* the structure of capitalist development… to ensure the maintenance of the leadership…".[68] The danger of doing this for the hegemon is that the hegemon itself is introducing new ideas and reforms into the existing common-sense that may lead to changes the hegemon does not have the capacity to govern. It may lead to a new "collective will" or even a "novel social order", and/or may undermine the existing common-sense by showing it is indeed changeable.[69]

A counter-hegemonic critique, therefore, is an important part to the overall counter-hegemonic challenge. Through critiques that dismantle, then disarticulate and rearticulate the existing common-sense, the counter-hegemonic challenger can begin, first, to show the populace that the common-sense is constructed and changeable, and second, that the common-sense may be the reason for some injustices they have experienced. However, a critique is an important part of a challenge, but the rearticulation and the presentation of an alternative and *how* this is done are also a part of a counter-hegemonic challenge.

b. Counter-hegemonic strategies

[67] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 144
[68] Saull, "Rethinking Hegemony: Uneven Development," 330, italics in original
[69] Kioupkiolis, *The Common and Counter*, 132

Usually when challenges are discussed, following a Marxist tradition, there is a focus on *how* this can be accomplished, i.e., the *how* of the revolution. Often Marxist theorists have paid attention to this, because, following Gramsci, it is necessary for both hegemony and a counter-hegemonic movement to construct "a collective identity, a 'moral' and 'intellectual' unity pivoting around a common will and a shared political project."[70] To begin the process, an aggregate group must be organized and motivated to affect change.[71] These social forces will form a counter-hegemonic coalition that then ultimately can "topple the status quo" with united social forces.[72] This is also where Gramsci's concept of "organic leadership" comes into play. Leadership in this case should be able to organically "[bond] with ordinary people and social movements," and do so on a moral and intellectual level.[73]

Once social forces are rallied, then change occurs through either revolution/rupture or transformation. A revolution reflects more the Gramscian idea of the War of Movement/Maneuver. For Gramsci, a War of Movement in terms of creating political change meant "winning positions that are not decisive, so that all the resources of the State's hegemony cannot be mobilized".[74] One interpretation of this, and it is important to highlight, is that a revolution does not mean a counter-hegemonic challenger is the one causing the revolution; it is entirely possible another actor is behind a revolution. This means that advocating for revolution, or even revolting, is not a sign of a counter-hegemonic challenge alone. Usually after a War of Movement, a War of Position, or transformation, takes place because the easy battles have been won, and now "only the decisive

[70] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 147
[71] Ibid., 147
[72] Ibid., 142
[73] Gramsci, *Selections from the Prison,* 335; Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 149
[74] Gramsci, *Selections from the Prison,* 239

positions are at stake".[75] The War of Position is still a strategy with the same goal as the War of Movement.

However, to state that one strategy is better than the other, or that only one can be used by a counter-hegemonic challenger, paints a clear picture that does not capture the messiness, conceptually and empirically, of a counter-hegemonic actor. Often, the logics and strategies of revolution and transformation tend to work together. As Kioupkiolis has argued, these are "not the only two manifestations of constituent power[76] and the human ability to start something new. They are, and they should be intertwined in practice".[77] Indeed, in practice, these methods of creating radical political change tend to merge or be used in tandem. A challenge is counter-hegemonic does not rely solely on the type of strategy employed.

Therefore, there are two elements commonly found in discussions of counter-hegemonic challengers and/or movements. One of which is that the counter-hegemonic challenger will present critiques of the current system that criticize the legitimacy of a hegemonic system. The second is that the challenger will have concrete strategies for affecting change – usually, it is either revolution or transformation. The final addition is that a counter-hegemonic challenger must have a vision for an alternative order and a new common-sense. While this may seem logical, some challengers and challenges may have the first two elements, but they fall short when it comes to the last and most difficult aspect; to be a counter-hegemonic challenger, an actor must exhibit all three qualities.

2.4 The current hegemonic system and its common-sense

[75] Gramsci, *Selections from the Prison,* 239
[76] Constituent power is "the power to institute and to amend the basic coordinates of social life". (Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 111)
[77] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 112

While we now have a better idea of what a hegemonic system is and a challenger to that system, we must define the current system to understand what kind of challenger Russia is. While this project has historical detours, e.g., Peter I's reign and the Bolsheviks, it is primarily focused on the present. However, stating that this dissertation is focused on the "present" is also vague and misleading at the same time. While events in Russia and the world are changing rapidly, this dissertation particularly focuses on the period after the Annexation of Crimea until the 2022 Russian invasion of Ukraine. This section, therefore, focuses on the international system of this period. Grounding the concept of the hegemonic system into this period will allow us to then see if Russia is challenging the hegemonic system and, if so, *how*. Therefore, this section will briefly outline what is the current hegemonic system and its common-sense.

One of the important qualities in hegemony according to Gramsci was moral and intellectual leadership that can combine social forces into collective political will. In this sense, hegemony is not agentless, nor is there some kind of inevitability about it. However, hegemonic leadership plays less of an important role when analyzing hegemonic systems. Arguably, the United States at one time led the international order, but while the US can be said to be responsible for many principles that technically underpin the international order, this does not necessarily translate to its current role in the international order. There is now a common trend to discuss the decline of US leadership.[78] However, moving from hegemon to hegemonic system means that leadership is not the only important element of hegemony. We can also look at the persistent structure of hegemony, which is its common-sense. This common-sense remains even when there are moments of insecurity in hegemony.

[78] For examples, see Charles A. Kupchan & Peter L. Trubowitz. "Dead Center: The Demise of Liberal Internationalism in the United States," *International Security* 32, No. 2 (2007): 7-44; Ikenberry, "The Liberal Discontents"; John Kasich, "Reclaiming Global Leadership: The Right Way to Put America First," *Foreign Affairs* 97 (2018): 102-112

In this case, the focus is less on the US and more on the common-sense of the existing system. A hegemonic system is still in place no matter the state of the leadership. Yet, to narrow down the common-sense of the contemporary hegemonic system, I will first look toward the historical roots of the existing system. To do so, I will begin with the end of World War II, when liberalism gained a foothold in global politics, and the historical role of the US as one main proponent of the liberal international order. From the historical perspective of the scholar, Joseph Nye, the US learned its lesson after WWII to not turn inward, and it drew up ideas on how to achieve this: "The resulting system of security alliances, multilateral institutions and relatively open economic policies has been called the American international order or the 'liberal international order'".[79]

However, it should be noted that the US was not the only global power during this time. Since WWII, the US was one of several important global players, including the Soviet Union and the Non-Aligned Movement. The collapse of the Soviet Union and readjustment of the world order allowed for neoliberalism to become dominant where before it had only been one of several competing ideologies and in a different form.[80] As Barry Posen has argued, this led to its expansion since the US was unable to "moderate its ambitions" and "has pursued a grand strategy that can be called "Liberal Hegemony".[81] In this sense, the current hegemonic system's common-sense seems to have been constructed by the US through its attempt to expand the liberal international order after the Cold War, but the hegemonic system has moved beyond this initial scaffolding. Therefore, I examine the offshoot- neoliberalism - as the current hegemonic system's common-sense.

[79] Joseph S. Nye, "The Rise and Fall of American Hegemony from Wilson to Trump," *International Affairs*, 95, No. 1 (2019), 63-64

[80] Daniel Deudney & G. John Ikenberry, "The Unravelling of the Cold War Settlement" *Survival*, 51, No. 6 (2009): 39-62

[81] Anderson, *The H-Word: Peripeteia*, 139

a. The hegemonic common-sense

The ongoing changes in economics and in politics after the collapse of the previous world order in the 1990s led to a shift in what can be understood as the (neo)liberal international order. However, this does not mean that there have not been events that have opened the order to criticisms. For instance, the US has had several military conflicts that were heavily criticized since the end of WWII (e.g., the Vietnam War, the War in Afghanistan). In addition, the 2008 Financial Crisis further pushed criticisms, as economics is one of the tenants of the contemporary order. According to Saull, what the crisis uncovered was an "uneven (and iniquitous) growth pattern [that] highlighted the structural weaknesses in the longterm sustainability of the neoliberal mode of accumulation and, in consequence, the material base of the neoliberal historical bloc".[82] The crisis, in short, "undermined the neoliberal historical bloc".[83]

To better understand the nuances of the common-sense of neoliberalism, I will first explore its origins. It grew from the capitalist logic that came from the factory and Fordist model started during the wars, which mixed mass production in the US with rising wages and consumption of the working class.[84] However, already by the 1950s, this model was beginning to decline.[85] Two changes to the world economic structure in the 1970s had led to this deterioration: the shift of manufacturing to the global South, East Asia in particular, and the changing character of money, which led to increased global financialization.[86] By the 1980s, through this mix of new financing, technological decline in Western manufacturing, and the breaking of unions in the US, much of

[82] Saull, "Rethinking Hegemony: Uneven Development," 334
[83] Ibid., 335
[84] Anderson, *The H-Word: Peripeteia*, 115
[85] Lee E. Ohanian, "Competition and the Decline of the Rust Belt," *Federal Reserve Bank of Minneapolis*, 20 December 2014, https://www.minneapolisfed.org/article/2014/competition-and-the-decline-of-the-rust-belt
[86] Saull, "Rethinking Hegemony: Uneven Development," 331

global manufacturing moved to East Asia.[87] The importance of this shift is that it led to what many, and in this case, Saull, have called, "the neoliberal historical bloc," which brought with it, "an intensification of uneven growth in the world economy, and with it, a source of tension in the maintenance of the bloc and thus American hegemony".[88] While the US did not invent this system, the structure of the international system after the Cold War allowed for the US to support and reproduce this common-sense.

To understand the facets of neoliberal common-sense, I will first refer to Hui and how he has understood the financial backbone of this system:

> The era of finance capital has involved a further institutionalization and legalization of the concept of the spontaneously self-ordering market—the central nostrum of neoclassical economics, under which all non-capitalist institutions and forms of labour allocation are disparaged as 'political interference'. The unlimited expansion of the market economy into the political, cultural, domestic and other spheres is seen as an apolitical, 'natural' process.[89]

Hui's statement is packed with important qualifiers of the term neoliberalism. First, he centers his understanding of neoliberalism on finance capital, and then understands finance capital as being structurally in place, i.e., systematic. What is important to note here, however, is when we talk about capitalist logic in neoliberalism, despite its presentation in various scholarly works, it is more "a complex of 'diverse economies,' a zone of cohabitation and contention among different economic forms of transaction, labor, production and enterprise".[90] What this means is that despite an underpinning logic, alternatives and variations exist in parallel.

Hui also claims that the institutionalized idea, ironically, is the 'spontaneously self-ordering market'. This paradox is heightened by the notion that this is process is 'apolitical',

[87] Anderson, *The H-Word: Peripeteia*, 115; Saull, "Rethinking Hegemony: Uneven Development," 331
[88] Saull, "Rethinking Hegemony: Uneven Development," 331
[89] Hui, "Depoliticized Politics, From East," 38
[90] Kioupkiolis, "Heteropolitics: Reconfiguring the Common", 113; J. K. Gibson-Graham, *A Postcapitalist Politics*, (London & Minneapolis: University of Minnesota Press, 2006), p. xxi-xxii, 60, 65, 73, 87

meaning that process is understood in economic terms despite the fact it infiltrates other spheres. As Kioupkiolis supports, "since market values have become the overriding values, there remain thin normative grounds in the public sphere on which to question market inequalities and capitalist modes of domination in the name of other, democratic principles".[91] In other words, it is fair to say that currently capitalism is a dominating logic in several spheres.

Hui contributes to this idea, commentating that the existing capitalist logic is seen as a '*natural*' process. The idea that neoliberalism, finance capital, a self-regulating market, or any of these terms indicate a 'natural' process illustrates that this logic has become a hegemonic common-sense. However, what this dissertation concentrates on here is when there are processes that have become understood as 'natural,' thus forming an existing hegemonic common-sense.

b. The current hegemonic system

What perhaps remains important in terms of the US' position in the hegemonic system is the US' continued role in the financial sector. This role grants it "relative immunity from financial conditions in other economies, [yet] means that it disproportionately affects the stability of the international economy… the ability of families in other countries to purchase a home are all affected by the dynamic supply and demand for credit and debt on the part of Americans".[92] In short, the dollar's dominance and the financial capital from the US gives it an ingrained disproportionate advantage in the global market. This means that for all purported discussion of a US-decline, the picture is more complicated, as it retains power within a core part of neoliberalism's common-sense.

[91] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 102; Wendy Brown, *Undoing the Demos. Neoliberalism's Stealth Revolution*, (New York: Zone Books, 2015), 208

[92] Heather Ba, "Hegemonic Instability: Complex interdependence and the dynamics of financial crisis in the contemporary international system," *European Journal of International Relations*, 27, No. 2 (2021), 396-7

It would be incorrect, however, to stop the discussion here, and make it seem like only what top-level elites and world economic and financial systems do matter. The neoliberal hegemonic system is matched with a certain type of civic disengagement. In other words, in terms of political engagement, we also see that neoliberalism has a particular character. Starting arguably from Thatcherism, Reaganism, and political and economic policies of the 1980s in general, we can see "the removal policies and domains from the arena of political contest and decision-making".[93] These policy changes have hollowed out certain spaces, where in principle, discussions of policies, i.e., the acts that complement collective decisions on what is right and wrong for a society, would be held.

In other words, there is also a side that deals more in the politics and policies of the contemporary hegemonic system that additionally plays an important part of this underlying principle. Saull notes that after WWII, the globalization of capitalism was developed in parallel with the growth of nation states and international organizations; while they are interrelated, they are also separate.[94] The separation of these two created and continues to create a contradiction – wherein "hegemony is organized at a national and international level—and the uneven logic of capitalist development, which tends to develop new forms of production, new logics of accumulation, and social relations that, ultimately, undermine the existing historical bloc, becoming manifest in moments of crisis".[95]

This is complemented by "the *systematicity* of neoliberal hegemony," which makes it feel like "'There is no alternative' to the neoliberal way of the world".[96] Kioupkiolis argues that:

> As [financialized market economies] grow hyper-complex and opaque, they congeal into a global market *system* that appears as a given and impersonal interplay of global forces,

[93] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 101
[94] Saull, "Rethinking Hegemony: Uneven Development," 329
[95] Saull, "Rethinking Hegemony: Uneven Development," 329
[96] Kioupkiolis, "Heteropolitics: Reconfiguring the Common," 101, italics in original

> which is not commanded by any single locus of decision. All these phenomena serve to ingrain in everyday experience the sense of an objective order, which lies beyond the pale of collective control and political recalibration.[97]

In other words, there is also an element now of political disengagement that is heightened by the seeming incomprehensibility of the system that surrounds ordinary citizens. If it is too big and too complex to understand, and if policymaking is less present in a more traditional political sphere, then what motivation do citizens have for engaging? This leads to an important aspect of how contemporality is understood here – inevitability. The idea that there is no alternative is present in the neoliberal era, although as we have seen, there have been events that have begun to challenge and question this order. For Hui, in the contemporary era, it is politics itself that is being challenged.[98] Overall, depoliticization is challenging society's ability to challenge the status quo.[99]

These crises and belief in a US decline show cracks in the consent and belief in the common-sense, and it is in these cracks that we can see spaces for challengers. This means that when we look for counter-hegemonic criticisms, we must acknowledge that some are more counter-hegemonic, and we must look for specific signposts relevant to this common-sense. The question that remains to be seen is how this system is being challenged and if all challenges are alike.

With an established understanding of what the current hegemonic system and its common-sense are, we can now proceed with constructing a conceptual framework that will highlight the signposts of both challengers – one who aims to change their position within the existing system, and the other who counters the system. Specifically, the framework can better distinguish the differences in criticisms and actions taken between the two, which is significant in terms of

[97] Ibid., 101, italics in original
[98] Hui, "Depoliticized Politics, From East"
[99] Anderson, *The H-Word: Peripeteia*, 139, 116

understanding what exactly is the threat the challenger will present. By knowing what it is that a challenger will challenge, it is now possible to conduct research on what kind of challengers exist and what they might look like in empirical cases, with its eventual application to contemporary Russia.

Chapter 3: Constructing Challengers

At this point, it has been established that there are two types of challenges and challengers in IR literature. The second type of challenger targets the system in a more direct way. These challengers form a theoretical delineation, but it remains to be seen how they can work analytically and what they can show us about Russia. An international system can be understood through the prism of hegemony, leaving us with the concept of a hegemonic system. While IR literature perhaps gave concepts that can aid research into types of challengers, these concepts need to be further developed to specifically understand the case of Russia from 2015-2021. This chapter then aims to finetune these concepts to answer what kind of challenger Russia was during this period. To this end, Chapter 3 constructs Weberian Ideal Types, which will allow for there to be more nuances and details in the original concepts of these challengers.

3.1 Ideal Types

What is an ideal type, and how is it constructed? Here, it is best to quote Richard Ned Lebow's summary at length:

> [Ideal types are] an analytical accentuation of aspects of one or more attributes of a phenomenon to create a mental construct that will never be encountered in practice but against which real-world approximations can be measured. Such ideal types were not intended as a basis for comparison, but a schema for understanding a specific culture or situation and by these means singular events.[100]

Ideal types are guideposts with which a researcher can follow along. They "establish benchmarks at best. Researchers must do careful empirical research to see how and why actors depart from economic man or any other ideal type model".[101] The researcher constructs ideal types to construct a framework to identify particularities, singularities, and other oddities that might appear in the

[100] Richard Ned Lebow, "Weber's Search for Knowledge," In *Max Weber and International Relations*. Ed. Richard Ned Lebow. (Cambridge: Cambridge University Press, 2017), 55
[101] Ibid., 62

case they are analyzing. These oddities could not come from earlier abstractions and previous knowledge. In this case, ideal types can help to finesse the existing concepts of challengers in a way that these concepts can be applied to contemporary Russia.

Ideal types allow for subjectivity to exist without treating it negatively; instead, it is logical that the research process cannot be fully objective, given the fact that research is conducted by a researcher influenced, subconsciously or consciously, by their own background. Ideal types bring some kind of logical ordering to an often-subjective process. As Patrick Jackson supports "an ideal-type is always a way of *mediating* between ourselves and the objects of our analysis, and is in a sense more like a formalized intuition than it is like a well-supported conclusion or a hypothetical conjecture".[102]

In some ways, ideal types were a forerunner to the growing interest in cultural relativism in the 19th century when scholars were wondering how researchers could understand others' cultures and at the same time acknowledge the position from where the researchers themselves were coming. Therefore, Max Weber "devised the concept initially to replace intuition as a means of understanding behavior of societies with different values and worldviews".[103] This, in part, accounts for the contradiction present in ideal types; ideal types are tools that attempt to analyze something objectively, but it is acknowledged that analysis itself has multiple subjective perspectives. However, given that the subject under analysis is culture, then it follows that there will be limitations to an objective approach. Thus, the contradiction in Weber's ideal types exists but is necessary due to the tension in the subject material itself.

[102] Patrick Thaddeus Jackson, "The Production of Facts: Ideal-Typification and the Preservation of Politics," In *Max Weber and International Relations*. Ed. Richard Ned Lebow. (Cambridge: Cambridge University Press, 2017), 83
[103] Lebow, "Weber's Search for Knowledge," 55

Then, of course, why make any aim at analyzing this apparent subjective culture objectively? Much like Gramsci, Weber saw culture as subjectively objective; culture was created by people, but it was and is treated as though it comes from an external, suprahuman source. Therefore, culture here is treated in the same way as hegemonic common-sense; it is something that is treated as objective, but it has been constructed by people, and thus, is not objective. Weber's ideal types, then, are particularly useful to this project. As has been discussed in the previous chapter, a hegemonic system constructs a common-sense that is understood as unchangeable and an objective natural law. Weber's ideal types construct a conceptual framework that will not disregard this objective subjectivity and instead allow this juxtaposition to exist analytically while the common-sense is being analyzed.

While the surrounding space and object of study itself is subjective, the process can still follow some structure or semblance of objectivity. This is because ideal types "[serve] to 'clarify… the actual meaning of expressions commonly found in empirical sociology… rending these terms more appropriate and precise'".[104] As one of the aims of this research is to clarify and more precisely define the meaning of a global challenger, ideal types can help in this process.

As aforementioned, ideal types are influenced by the researcher, and the analysis is then affected by the researcher. Weber believes this is commonsensical, and it still should not prevent researchers from organizing their analyses. Weber's creation of ideal types aims to provide a framework for researchers that "seeks to render the scholar's judgment concerning causal imputation more acute: it *is not* a *depiction* of reality, but it seeks to provide [the scientific] account

[104] Michael M. Rosenberg, "The conceptual articulation of the reality of life: Max Weber's theoretical constitution of sociological ideal types," *Journal of Classical Sociology.* 16, No. 1 (2016), 97

with unambiguous means of expression".[105] In other words, ideal types should not attempt to reflect reality. Instead, they should show the ideal of a concept, and the researcher must use the ideal image to judge their external world.

How, then, are ideal types constructed? Jackson recently wrote an in-depth guide as to how to formulate ideal types. I will provide a brief overview of his approach and include the chart he provided. First, the research locates themselves in a "concrete sphere of values and purposes" (A).[106] Second, the researcher then acknowledges their personal values and ethics "with respect to the values and norms in circulation in her or his social context" (I).[107] These value commitment(s) (B) are combined with "empirical observations in order to create limiting-case representations," (II) which ultimately produces analytical depictions (C) with one or more ideal types.[108] The depiction(s) are then applied (III) to empirical cases to finally produce facts (D).[109]

A	I	B	II	C	III	D
Spheres of values	Stand-taking	Value commitment(s)	Formalization	Analytical depiction	Application	Facts

Chart 1. The Weberian Procedure of Ideal-Typification

In short, there are seven stages, although they interact with each other differently. Values A, B, C, and D rely on the researcher to reflect and solidify certain aspects of the process and are more on an implicit level, while values I, II, and III are action-oriented. They are when the researcher must act on their decisions from A-C. D is the final stage, wherein the researcher produces what are called 'facts.' Moreover, the stages acknowledge both the subjective (A, I) and

[105] Max Weber, "The 'Objectivity' of Knowledge in Social Science and Social Policy," in *Max Weber: Collected Methodological Writings*, Eds. Hans Henrik Bruun and Sam Whimster, trans. Hans Henrik Bruun (New York: Routledge, 2012), 125
[106] Jackson, "The production of Facts," 82
[107] Ibid., 82
[108] Ibid., 82
[109] Ibid., 82

objective (II, C, III, D) parts of research, with B acting as a bridge between the two. In this chapter, steps A-C are taken, while the following two chapters will be steps III-D.

Yet, as Jackson writes, these facts are not objective still because the whole process began with an acknowledgement of the subjectivity of the research. The empirical addition to the process is what allows for the facts to emerge, since they are no longer coming solely from the researcher's musings or intuition. Indeed, despite that ideal types are primarily abstractions and a guideline for the researcher to follow, "An ideal-typical concept, or more correctly, the theoretical scheme of which it is a part, must be *applied* to some empirical context for an explanation to be possible".[110] Thus, empirics are a part of constructing a proper ideal type to then be used to evaluate a separate case. Once the ideal types are constructed in this chapter, they are then applied to two seemingly well-matched case studies in Chapters 4 and 5, and then this framework is used to examine the more complicated case of contemporary Russia in Chapters 6 and 7.

Hillard Aronovitch, however, argues that there is a final stage for constructing ideal types that must show "whether and how the agents' understanding of the situation has to be altered or amended to provide the needed explanation of it".[111] An ideal type is not complete until then. In some ways, this is similar to Jackson's facts. The ideal type should produce some new information or perspective that the researcher did not have going into the research process. Aronovitch's addition, however, enriched Jackson's facts. The researcher should ask themselves one question about their facts, potentially followed by two additional ones: 1) has the initial understanding of the concept changed? 2) If so, how? 3) How should the concept now change to accept this new information? These questions are important to include for the final stage of developing the ideal

[110] Rosenberg, "The Conceptual Articulation," 91
[111] Hillard Aronovitch, "Interpreting Weber's Ideal-Types," *Philosophy of the Social Sciences* 42, No. 3 (2012), 361

types, which is to reflect on the process of building the concepts and alter them to include the new information.

Because of this subjective objectivity, however, it is difficult to evaluate ideal types – how is it possible to tell if the ideal type you have produced is useful and properly constructed? As Jackson argues, it is only after ideal types are constructed and used can they be evaluated. Specifically, he suggests that you can evaluate this if it reveals "intriguing and useful things about the objects to which it is applied".[112] From this, it seems to be the case that the usefulness of ideal types can only be evaluated after they are created and used. However, as Aronovitch claims, ideal types can be useful even if the original concept the researcher had before the process did not change. The reflection and empirics added to the process, as Jackson himself illustrated, are the benefits of using ideal types, regardless of the final product.

Thus, to give more nuance to understanding what a global challenger is, this dissertation constructs Weberian ideal types. Ideal types allow for the epistemological flexibility necessary to analyze a hegemonic system and common-sense. Furthermore, ideal types provide some structure to the research process that allow for the researcher to explore and reflect on an ideal and how, and in which ways, the empirics vary from the ideal.

3.2 Analyzing ideal types

With the construction of the ideal types, it is necessary to explain how they will be produced, and how the empirics will be analyzed. Moreover, contemporary Russia will most likely not fall perfectly into one of the constructed ideal types. Instead, it will be better to understand the larger narratives surrounding specific complaints as these narratives can illustrate more general attitudes and motivations during the examined period rather than specific instances. It can also help to show

[112] Jackson, "The Production of Facts," 84

how these two challengers might interweave, surface, submerge, and react to changes in their external systems. This work is interested in these fluctuations and the in-between spaces that also exist in the challenger literature.

Discourse provides a space to see unfixed structures and the play between them. As it was discussed in the previous chapter, Laclau and Mouffe showed how a hegemonic system is based on the articulation of nodal points by the dominant group. The question becomes: how can we see this articulation and dis/re-articulation, i.e., the antagonistic battle for the hegemonic common-sense? Here, Michel Foucault provides a way through his understanding of discourse, discursive formations, and rules of formation.

Discourse is not only an imprint of an object or an idea, but it is "a totality, in which the dispersion of the subject and his discontinuity with himself may be determined".[113] It is a flexible, changing arena consisting of multiple, contradicting voices. It is both a set of rules and a space for the creation of new rules. Foucault's understanding of discourse matches how post-Marxist understand the expression of the common-sense prevalent in the hegemonic system. The focus on articulation, rearticulation, and de-articulation all indicates a hegemon's interest in discourse and the importance of the group that *assigns value*.

Specifically, to find moments of antagonism, articulation, disarticulation, and rearticulation, we can turn to discursive formations and rules of formation. Discursive formations take shape "Whenever one can describe, between a number of statements, such a system of dispersion, whenever, between objects, types of statement, concepts, or thematic choices, one can define a regularity (an order, correlations, positions and functionings, transformations)".[114] The associated rules of formation are "The conditions to which the elements of this division (objects,

[113] Michal Foucault, *The Archaeology of Knowledge*, (New York: Pantheon Books, 1972), 55
[114] Ibid., 38

mode of statement, concepts, thematic choices) are subjected... The rules of formation are conditions of existence (but also of coexistence, maintenance, modification, and disappearance) in a given discursive division".[115]

Given that this research aims to conceptualize government discourse, discursive formations can help in analyzing a certain period since, while they are composed of regularity, they do not discount irregularities. Irregularities instead can appear later to become dominant in a discourse and acknowledging them at an earlier period can help better understand the development of an idea. Moreover, rules of formation also help show agency in changing discourse, as it looks for the rules that set what is allowed to be communicated and how. As Foucault states, "The description of the events of discourse poses a quite different question: how is it that one particular statement appeared rather than another?"[116] As the question here concerns the appearance of different signposts over others, it is beneficial to follow this approach.

Discursive formations are also useful in understanding ideology, which can be understood here as a hegemonic world-view. Narrative construction allows the hegemon and challengers to it to conceptualize the present and suggest the potential. Narratives also dictate how an actor views the world and its place within it.[117] How an actor narrates the system it creates also matters because that actor becomes a part of this system as well and its actions are then tied to its chosen narrative.[118] As Erik Ringmar writes, "The narratives we construct about our state will specify who we are and what role we play in the world; how our 'national interests' are to be defined, or which foreign policy to pursue".[119] Narratives, however, allow for various sub-themes and contradictions

[115] Foucault, *The Archaeology of Knowledge,* 38
[116] Ibid., 27
[117] Erik Ringmar, "On the Ontological Status of the State," *European Journal of International Relations* 2, No. 4 (1996), 454
[118] Ibid., 454
[119] Ibid., 455

to come to light, as discourse is taken as an arena for identity formation and narrative storytelling.[120] Thus, a hegemon, through maintaining its system, defines its identity and possibilities for action.

More concretely, I will first use the guideposts that I created and analyze discourse alongside these guideposts, seeing how the ideal-typical guideposts align with the empirics. After this, I will build on the guideposts and add, alter, or delete guideposts which have failed to match up with the empirical analysis. After the case of Peter I in Chapter 4 and the Bolsheviks in Chapter 5, the ideal types will have been created and usable for the analytical work conducted in Chapters 6 and 7. There, I will similarly use the updated guideposts to examine the discourse from contemporary Russia. I will then be able to better understand how contemporary Russia was positioned between the two challenger ideal types.

3.3 Building Ideal Types

In the remainder of the chapter, I will begin to construct the ideal types and explain their application in the following chapters. Only in the following chapters, with the empirical cases, will the ideal types be completed. The following two chapters will go through two of Jackson's steps (III-D) to produce facts, while the remainder of this chapter will cover steps A-C, to build ideal types. As a reminder, in step A-I, the researcher must first locate themselves in the 'sphere of values and purposes' (A) and take a clear stance about the values that, in this case, she is bringing to the research (I).

In terms of the positionality of my values, I have already discussed this in the introduction regarding my position within the existing common-sense. Moving past my position within my own

[120] Henrik Larsen, *Discourse Analysis and Foreign Policy: France, Britain and Europe*. (London, New York: Routledge, 1997); Richard Ned Lebow, "Thucydides the Constructivist," *American Political Science Review* 95, No. 3 (September 2001): 547-559; Jaime Gaskarth, "Discourses and Ethics: The Social Construction of British Foreign Policy," *Foreign Policy Analysis* 2, (2006): 325-341

research, and in accordance with Jackson's steps B-C, I will now attempt to construct the two ideal types that have come out of both my personal background and the academic research conducted in the previous two chapters (B). This rough depiction is then matched with the justification of the case studies (II) to finally produce an analytical depiction (C) which can then be used to create facts (III-D) in Chapters 4 and 5.

a. Ideal Type I: A challenge located within the system

The first hypothetical ideal type can be considered a challenger who generally accepts the system, but it would like to change its place or position in the system. In brief, it will be referred to as a state whose challenge is located within the system, or Ideal Type I. It builds on the theoretical work done in the previous chapter, and to recap, if a state dissents about its position or about the privileged position of the hegemon, this means it is not challenging the base legitimacy of the system. The state might also strive to gain recognition as an equal or important player within the system. Again, this shows respect for the system, but it still will change the structure of the system, since it will change the value of an actor.

From the previous explorations of this type of challenger, certain trends have seemingly emerged that can act as guideposts for constructing an ideal type from an example. These include discussions of inferiority/superiority regarding the external system, praise of the system and optimism for joining it, arguments concerning why the actor should be seen as an equal, and the actor's ability to act with a long-term strategy to build long-lasting connections with the existing system.

Empirically, Ideal Type I will be explored through analyzing the Russian empire under the rule of Peter I in Chapter 4.[121] On the surface, this period matches Ideal Type I because Peter I managed to enter the European system during his reign. This period covered approximately forty years from 1682-1725, and the analysis will focus on key events from his reign, particularly the building of Russian diplomatic infrastructure, in combination with Russia's dealings with the Ottomans, and the Great Northern War. These events highlight moments when Peter I's desire to make Russia a European power was especially visible. Peter I fits the first ideal type as his reign did not set out to change the current international system, but it aimed to change Russia's position within that existing system. Specific markers that I will look for in the discourse will consist primarily of direct discussions of Russia's place in the external hegemonic system, how the system operated, Russia's view of the system, and any indicators of inferiority or superiority. For example, what were the effects of the Great Northern War on Peter I's foreign policy afterward? How did Peter I attempt to build a diplomatic relationship with Europe?

b. Ideal Type II: A challenge to the system itself

The second type, referred to as Ideal Type II, is a different, more extreme type of challenger, as it challenges the system itself because it believes the system is changeable and is currently wrong. This relates to the same theoretical discussion conducted in Chapter 2. Ideal Type II will challenge the system because it cannot fit into the hegemonic system in the way that it wants to (this can be for moral reasons as well). This is due to the hegemonic common-sense losing legitimacy in the eyes of the challenger. A state challenging the hegemonic common-sense challenges the entire system. This is a seemingly altogether different challenge than vying for a different position or

[121] Peter I is also known as Peter the Great. Peter I will rather be used in this dissertation to avoid passing judgment on the achievements of his reign.

verdict within the existing system. Part of this challenge includes creating an alternative idea for a system.

Key signifiers that will function as guideposts are first, articulations that aim to disarticulate certain nodal points and rearticulate others, which are not like complaints and criticisms in Ideal Type I. These instead are focused on the hegemonic system itself (as it is understood during the period in question) and therefore are counter-hegemonic critiques. As was discussed in the previous chapter, these critiques aim to disarticulate existing nodal points that are the cornerstone of the existing hegemonic system. There additionally should be discursive moments that indicate that the actor sees the system as changeable. In this sense, there are not just criticisms and complaints but the hope that something can change. In principle, there should also be specific suggestions as to how the system should look and why. This is when the challenger begins engaging with morality, e.g., how *should* states and other global actors occupy and interact in their shared space? Questions concerning the motivation of the current hegemon and the legitimacy of its actions are typical. The challenger then should also provide answers to these questions, thus providing a rearticulation of nodal points.

Empirically, this will be explored by analyzing the Russian polity from 1917-1924. This encompasses the Bolsheviks' relationship with the international order from 1917, when the Bolsheviks took control, until 1924, when Vladimir Lenin died. During this time, significant events happened that allowed for the Bolsheviks' perspectives on the international order and the new socialist state's place within it to surface. Specifically, two significant events were the Bolsheviks' negotiation to end Russia's involvement in World War I, and the Russian Civil War, which, despite being a domestic war, was heavily influenced by external actors and states. On the surface, this period seems to feature Ideal Type II. The Bolsheviks were adamant about changing the global

order, not just their position within it. Furthermore, their desire to change the global order was based on a clear ideology that strictly countered the one being espoused at the time. The Bolsheviks wrote extensively on their view of the external order as well as relied heavily on propaganda to spread their message. Many Comintern documents will be used for discourse analysis to first compare them to the ideal type and then see in which way they differ. Some specific markers with the Bolsheviks that I will look for are when the Bolsheviks call for the end of the international system as it was then, propose a new international system, and indicate superiority of the Bolsheviks and the inferiority of the West and old system.

The dissertation will proceed with the understanding that these ideal types are useful tools for looking for and understanding certain patterns, but the empirics will not and do not have to perfectly fit the type. Instead, they will help to show how counter-hegemonic sentiments are articulated and with what effects. Moreover, they will highlight the overlapping of these concepts, and how difficult it is to understand the ways in which, in this case, a state can be a challenger and what precisely the challenger is challenging. Exploring these complexities will ultimately tighten the ideal types that can help in analyzing contemporary Russia.

Chapter 4: Ideal Type I – Petrine Russia (1682-1725)

Before analyzing contemporary Russia, however, it is important to solidify the conceptual framework. To reiterate, the first ideal type of challenger does not impose a different idea for governing or ruling the affairs between actors. Instead, the ideal typical challenger aims to change its position in the existing system, not the system itself. The actor is satisfied with the rules of the game, but it cannot achieve what it wants to in its current position within the order. At some point, the actor must accept different features to gain acceptance into the external community, allowing it then to pursue its interests, or, to gain independence in the system.

This chapter is not a historical analysis of Peter I's regime; it is an exploration of a historical case to develop a concept analytically. Therefore, this chapter does not aim to make a historical contribution nor engage with historical debates over certain particularities of Peter I's regime. Rather, it aims to look at one specific historical trend in the analysis of Peter I's regime and explore what this period in Russian history can show us about challengers to international systems. The historical information used here was based on a choice; I chose to follow historical explorations of his regime in which he interacted the most with the West. However, I acknowledge that there are still contested aspects of his regime, which, in this chapter, are explored as though they are not contested. This treatment of the historical case comes again from the goal of this chapter, which is not a historical contribution but an analytical one.

To better understand the common-sense of the period, both inside Russia and in the European system Russia was interacting with, it is necessary to examine discussions of values and legitimacy at the time while seeing also how this translates into action.[122] These moments are traces

[122] Here the term "European system" refers to one of the external systems acknowledged by Peter I's reign. It is referred here as the European system to encompass, first, that it was not the only system at the time that Peter I's reign interacted with, but second, that, when referenced, I am primarily referring to Petrine Russia's perception of the

of what might be regularities signifying a discursive formation, which then can indicate what type of challenge the Russian Empire under Peter I presented to the European system and create a workable concept.

Peter I's reign was chosen as an example that seemingly fit Ideal Type I and would be able to fully develop it into a workable ideal type. On the surface, it seems as though Petrine Russia wished to change its position within the existing system, rather than the system itself. Yet to change its external position, Petrine Russia had to be reformed domestically. Therefore, a complex interaction emerged between the two challenges – domestic reform and the challenge to the external system. Both challenges led to outcomes that were not intended either domestically or internationally. As we will see, this means that the European system was also affected by Russia at the time, even if not in the way the regime intended. Therefore, like discussed in Chapter 2, Petrine Russia shows that this ideal type is not static; in other words, the challenger is not pushing forward one idea constantly that does not change. Rather, the challenger enters a conversation with the international system and adjusts its expectations, its own policies, and its own goals as the relationship develops. The relationship between the system and agent is dialogical and inter-subjective.

Therefore, this chapter will explore several of these key concepts that permeated the reign of Peter I to solidify the original Ideal Type into an analytical tool (a Weberian Fact). First, a basic outline of pre-Petrine Russia will be provided in order to understand two important features: what was the common-sense of the Russian polity before Peter I and what was its relationship with the external European system. From this, Peter I's reign will then be explored, particularly highlighting the domestic reforms that were undertaken as well as certain military campaigns to

European system based, mostly, on great Western powers. This system, however, will be further explored and defined in the next section.

better understand how the Russian Empire interacted internationally while simultaneously securing its domestic hegemony and common-sense. Finally, the chapter will reflect on Peter I's reign first to understand how, and if, Petrine Russia was a challenge to the European system, and second, to create and solidify the first ideal type.

The chapter will rely on certain signposts that were made in the previous chapter to help solidify the first ideal type. These signposts are not confirmed, but they act as a base upon which to build; the signposts can also be altered, depending on what appears from the empirics. These include discussions of inferiority/superiority with the external system itself, arguments about that actor's right or value in the system, i.e., why the actor should be seen as an equal, and the actor's ability to act with a long-term strategy to build long-lasting connections with the existing system. The form these characteristics take is what is explored in this chapter and gives shape to a conceptual tool, the first ideal type. This is matched by empirical additions, which will help form a system of dispersion. Ultimately, this should lead to a discursive formation for Ideal Type I that can help us in analyzing contemporary Russia later.

4.1 Pre-Petrine Russia

While some reforms had begun to occur in pre-Petrine Russia, the polity had remained relatively protective of its domestic structure and traditions from outside influences. One element that had influenced its relative isolation to foreign influence was the strength of Orthodoxy in governing matters. Orthodoxy at this time found other religions to be heretical.[123] Therefore, accompanying theories and practices coming from societies based on another religion were seen with an equally suspicious and close-minded eye. However, by the middle of the seventeenth century, interactions with other countries, mainly European ones, were beginning to points of relative weakness in

[123] Robert K. Massie, *Peter the Great: His Life and World*, (New York: Alfred A. Knopf, Inc., 1980), 54-55

Russia.[124] Slowly the country opened slightly, and invitations to foreigners were issued, giving some precedence for Peter I's later reforms.[125] This section will first go over the international position of pre-Petrine Russia before outlining the domestic common-sense of the system that existed before Peter I.[126]

a. Pre-Petrine Russia's international position

Pre-Petrine Russia's international position helps us to better understand the view of the international order Peter I inherited. As this chapter focuses on Peter I's reign, which focused more on its European border, this section focuses more on pre-Petrine's relations with Europe. On a superficial level, Russia was different from Western Europe in some visible ways as well as from the differences in religion. Europeans who would come to Russia at the time would notice the different dress, including long robes and heavy boots, as well as long beards, traditional in Orthodoxy. Women were also kept in seclusion often, while contemporary Western European countries included women in, at least, social life.[127]

There were also differences in terms of governance and in waging war. For instance, pre-Petrine Russia was mainly preoccupied by disturbances to its southern border, waged by the Ottoman Empire, and specifically, the Tartars, who would raid what is now Ukraine and other parts of Eastern Europe periodically to capture slaves for the lucrative markets in the Ottoman Empire.[128] The vast borders of Russia meant that it was both secure and insecure in its internal safety – there was distance to Moscow, but there was then distance from Moscow to its borders.

[124] Massie, *Peter the Great,* 55
[125] Ibid., 54-55
[126] Throughout this chapter, I will use the term "common-sense" and "hegemonic system," terms developed from the previous chapter. While it is debatable whether or not we can apply Gramsci's concepts to the Russian polity and later Empire at this time, this dissertation proceeds with these terms because they are being used analytically, as previously discussed, rather than to comment on the historical political structure at the time.
[127] Ian Gray, *Peter the Great, Emperor of all Russia,* (Philadelphia: J.B. Lippincott Co., 1960), 206
[128] Victor Ostapchuk, "The Human Landscape of the Ottoman Black Sea in the Face of the Cossack Naval Raids," *Oriente Moderno,* Nuova serie, Anno 20 (81), No. 1, The Ottomans and the Sea (2001), 31

The differences in threats to Russia also then accounted for its limited interaction with certain European powers at the time, like France and Great Britain. If there were threats from the West, they usually came from the Polish-Lithuanian Commonwealth or the Kingdom of Sweden, creating a buffer between the Western European states and Russia.[129] Pre-Petrine Russia therefore had limited political interactions with some of the larger powers in Europe at the time.

Therefore, in pre-Petrine Russia, there was little interaction with parts of Europe, both domestically, e.g., the number of foreign specialists present in the country, and internationally, as protecting Russia's southern border was its primary focus at the time. Furthermore, there were aspects of Russian governance that were alien to the West and contributed to its reputation abroad, such as basic customs but also in terms of most West European polities' interests and threats at the time, which came more from each other than Russia. In general, the view of the external order Peter I inherited was rather closed to parts of Europe, out of religious suspicion and less military engagement, and more focused on its Southern and immediate Western border. The main motivator for foreign interaction was primarily for security reasons.[130]

b. Pre-Petrine common-sense

When discussing hegemony, now on the domestic level, it is important to look for the hegemon's common-sense. In this case, Orthodoxy is an important component of understanding the hegemonic common-sense Peter I inherited, as religion, like in many polities of the time, provided space for discussing morality, and in this context, what it meant to be a good leader, subject, and

[129] Robert I. Frost, *After the Deluge: Poland-Lithuania and the Second Northern War, 1655-1660,* (Cambridge: Cambridge University Press, 1993), 3

[130] For instance, most of the few foreign specialist in pre-Petrine Russia were military experts.

polity.[131] Orthodoxy diverges from Roman Catholicism and other forms of Christianity in only a few yet distinct ways when it comes to discussing the idea of a ruler, or broadly speaking, authority.

One of the most distinguishing features of Orthodoxy is the focus on apophaticism, or when a person must recognize the limits of what s/he can know about God through reason, and that there are things we can never know about God.[132] While apophaticism is also common in Catholicism, it is particularly emphasized in Orthodoxy.[133] This emphasis also increased the reliance on the Church and church leaders as *the* interpreters of scripture. Thus, while the relationship between Christianity and the ruler was beginning to develop, the separation of authority between the ruler and religious leader was accentuated. There was also the idea that there was a limit to what could be understood by reason, which is not how other Christian philosophizing proceeded, exemplified by the works of Thomas Aquinas.[134]

Basil I, Byzantine emperor from 867-886, outlined extensively what he believed was the role of the emperor and how this was different from the role of patriarch. While the patriarch oversaw monitoring and leading the interpretation of the scripture, the emperor:

> is a legal authority… who neither punishes in antipathy nor rewards in partiality, but behaves like an umpire making awards in a game. The emperor is presumed to enforce and maintain, first and foremost, all that is set out in the divine scriptures; then the doctrines laid down by the seven holy councils; and further, and in addition, the received Romaic laws… In his interpretation of the laws he must pay attention to the custom of the state. What is proposed contrary to the canons [of the church] is not admitted as a pattern [to be followed].[135]

[131] While there are many sects of orthodoxy, this dissertation refers to some broadly shared concepts across the sect, especially in its theological development, and when it is necessary to distinguish certain features of Russian Orthodoxy, will refer to it as such.
[132] Bryn Geffert, & Theofanis G. Stavrou. *Eastern Orthodox Christianity: The Essential Texts*. (New Haven: Yale University Press, 2016), 130
[133] Ibid., 206
[134] Ibid., 206
[135] Ibid., 116-117, brackets in original

The tradition of the emperor was to uphold the law, which was, first, the morality coming from scripture and second, the laws that were inherited from the Roman Empire. On the surface, it then appears like there is a clear division between the Church and State, with the Church taking on a stronger role as the writer of laws coming from scripture. However, Basil I's interpretation of his job is interesting as he still includes Roman law as part of the law which he executes. Seemingly then already in the late 800s, there is the idea that scripture is not the only base to the law, and while the emperor must be religious, he must also maintain order. Moreover, when interpreting the laws, he must also consider what is already natural for the state. This gives leeway in the emperor's job, as he is then able to balance between scripture and policy with deference to custom as long as it is not too 'contrary to the canons'.

Therefore, there are two important features coming from Orthodoxy that impacted Petrine Russia's inherited common-sense. One is the idea that there is a limit to reason, and thus, the Patriarch and ruler had a more prominent role in interpreting and executing what was *beyond* reason. The average citizen could not be responsible for this. The second feature is that the emperor had to combine both scripture, interpreted by the Patriarch, and the laws coming from Rome. Indeed, after the fall of Constantinople in 1453, the most powerful Russian principality, Muscovy, believed that it had inherited the legacy of the Roman Empire as the last true holder of the faith. In this way, to some in Russia, Constantinople "had forfeited its right to lead the Eastern Church, as this right now fell to Moscow".[136] With the combination of the two traditions (Roman law and Orthodox scripture), the common-sense of pre-Petrine Russia balanced these two guiding principles, and this tradition remained strong during Peter's time as well. What is notable is that

[136] Geffert & Stavrou, *Eastern Orthodox Christianity*, 279

pre-Petrine Russia had also inherited a moral directive – the preservation of Orthodoxy after the fall of Constantinople.

The Tsar was responsible, as Basil I wrote, for maintaining power and the security of the possessions already in the ruler's hand, and because of this, there were limits to the authority of the church that both the church and subjects could acknowledge, especially when it came 'Roman law'. There were also limits to the Tsar, however, wherein the Tsar could not be solely responsible for interpreting Orthodox scripture. This tenuous system of checks-and-balances is one reasons Orthodoxy kept a prominent position then, and it was part of the operating common-sense of pre-Petrine hegemony.

Already before Peter I's reign, however, there were cracks in the authority of the Church, mainly coming from two sources: the need for foreign experts and the growing curiosity of the Russian elite.[137] As Massie explains, twenty years before even the birth of Peter:

> foreigners were coming to Russia, bringing new techniques and ideas in war, commerce, engineering and science. Inevitably, other principles and concepts crept in with them. The Russian church, suspicious and frightened, reacted with such extreme hostility that wary foreigners were forced to seek the protection of the tsar. Yet, the intellectual ferment continued to bubble. It was not long before Russians themselves, including some within the church, began to look with doubtful eyes on their orthodoxy. Questions were raised: The church challenged the church, and the church challenged the tsar.[138]

This was followed shortly by the Schism (*Raskol)* in 1666 wherein Peter I's father, Tsar Alexis I, deposed of the then Patriarch, Nikon, as well as revised several rituals in the Russian Orthodox Church. What this did in particular was hurt Church authority and begin as well to subsume it under the Tsar's. It also divided the peasantry. Some were worried that by abandoning the old

[137] Up to Peter I's reign, Russia had much lower levels of education than in the rest of Europe, due in part to apophaticism, but there also had not been a Renaissance or Reformation. Pre-Petrine Russia had been suspicious of the outside world, which was strongly reinforced by the Church. The investment into education and creating specialists, which was one of the key benefits emerging from the Reformation, therefore had not occurred on a large scale.

[138] Massie, *Peter the Great,* 54-55

rituals, they would not be granted salvation, and they saw this as the work of foreigners, who had brought in sinful objects, like tobacco and representational art.[139]

For some, these changes were too dramatic, and a new group formed, the Old Believers, who kept to the former traditions and escaped to the forests of Russia to preserve their way of life. For others, the changes were accepted, but the authority of the Church suffered, and the idea of foreigners as a subversive element was bolstered. For the elite, however, this allowed an opening for them to explore other ways of thinking, and the Tsar's protection of foreign specialists, especially in the German Suburb of Moscow, gave Russians access to a different way of life. One of these Russians would be Peter I about two decades later. In the meantime, however, there was a crack in the common-sense that had been rooted in Orthodoxy. A precedent was set for challenging the authority of the Church and learning from, as well as protecting, foreign specialists, but the Church still retained an important role in pre-Petrine Russia.

4.1 Peter I's Reign (1682-1725)

Peter I's reign lasted from 1682-1725, and during these 43 years, the country went through several domestic reforms and won the Great Northern War, which drastically altered Russia's relationship with the European continent. While it is important to remember that Russia was already beginning to reform before Peter I, and that while it is not always the personality of the leader who can affect change alone nor explain certain changes to a country, Peter I did have a specific and strong impact on Russia. The Russian Empire was formed and engaged militarily and politically with most European powers. Moreover, the internal changes to Russia altered the relationship between the

[139] Massie, *Peter the Great*, 61; And indeed, in some ways, there is an outside element to the *Raskol*. As Anatoly Reshetnikov explains, "Nikon aspired to expose [the Russian Church] to external recognition – to the judgment of those outsiders, who could accept it as the new spiritual leader of the Christian world." (Anatoly Reshetnikov, *Chasing Greatness: On Russia's Discursive Interaction with the West over the Past Millenium,* (Ann Arbor: University of Michigan Press, Forthcoming))

peasantry, Church, and government to a point where the religious absolutism of the Tsar would never be as strong as it once was during the 17th century.

To understand how Peter I's government managed to challenge the European system at the time, it is necessary to go into detail about the changes to his domestic hegemony and how they were implemented. This also includes how Peter I understood his external and internal system, and how he understood the common-sense of each. This section therefore will go through the life of Peter I while concurrently detailing the changes that were occurring on the external and domestic levels and why changes occurred. It will specifically go into details about the reforms that were introduced to see their lasting effect after Peter I's death as well as lessons he learned from several military engagements, beginning with the Azov Campaigns and ending with the Great Northern War. Ultimately, it will be shown how Peter I's reign managed to navigate the practices of its external system to the point where Russia was perceived as being *European enough* and could be an equal. Throughout this historical retelling, different signposts from Ideal Type I will be explored to see if regularities between statements, concepts, acts, and others emerge that can illustrate a discursive formation for Ideal Type I.

a. Azov Campaigns (1695-96)

Peter I understood from the beginning of his reign that he needed to bolster Russia's military and trade. While this was already a process pre-Petrine Russia had initiated, Peter I himself saw the value of a seaport for both trade and military. Commerce would support the military, which would ensure Russia's security, particularly at its borders, and this would allow for prosperity. When considering his options for gaining access to the sea, Peter had mainly two choices: the Baltics or the Sea of Azov, which would also give him access to the Black Sea. The Baltics were manned by

Sweden, which had a reputation at the time for its formidable army. Peter I therefore turned toward the south.

Peter I's early campaigns against the Ottomans were rather successful, in that Peter I did manage to conquer the seaport of Azov after, first, an unsuccessful campaign. Peter I also established Taganrog in 1698 as a more secure seaport and developed a navy there. However, Peter I was restricted by the Ottomans. They also controlled the Strait of Kerch, which would have given Peter access to the Black Sea. As it was, Peter I did have success in the south, but his new navy was limited to the Sea of Azov, meaning his new navy could not do much. Peter I "knew that Muscovy alone could not conquer the Ottoman Empire. He proposed, therefore, to form a great alliance of Russia, England, Denmark, Prussia, Holland, Austria, and Venice against Turkey".[140] In short, Peter understood that to make use of any gains in the south, European powers would have to be involved.

The Azov Campaigns were not military successes, but Peter I, as a military and navy commander, did learn several important lessons. First, this was Peter I's first exposure to live warfare, and in particular, naval warfare. Peter's first glimpse into warfare stressed to him the importance of diplomacy, which was the official reason for him to take his Grand Embassy to Europe; he aimed to gain allies for a war against the Ottomans. Relatedly, Peter I understood to fight the Ottomans, he needed other European powers, and to get help from them, he had to be part of that system. At this point, Peter I did not understand fully how Russia was not a part of the European system, thus leading to his diplomatic mission – The Grand Embassy.

b. The Grand Embassy (1697-8)

[140] Gray, *Peter the Great*, 96

Due to Peter I's upbringing, he already had an interest in traveling to Europe. Peter I was exposed at an early age to more European customs and ways of life, and this was mainly due to his ability to go to the German Suburb.[141] Primarily as a teenager, Peter I would visit the Suburb and, as the foreigners drank, they would give Peter I advice based on their experience in the West, mostly regarding military affairs and trade.[142] From this influence, Peter I set out to visit to Europe, primarily to study shipbuilding, which had become one of his biggest interests, and officially, to gain support for an alliance against the Ottomans. The Grand Embassy, as it was known as, lasted 18 months, and Peter I visited the Netherlands, England, the Holy Roman Empire, and the German states, such as Saxony.

1. Lasting impressions from the Embassy

Peter I experienced several shocks as he moved through Europe. As Peter I proceeded with his travels, he had difficulty reconciling the comparatively small size of Amsterdam to Russia, yet it was economically more successful.[143] The two reasons that he could find had to do with the success of mercantilism, and the inferiority of Russian trade to the Dutch was visible to Peter I.[144] The second reason he identified, connected to trade, was religious toleration. As previously discussed, part of the Russian common-sense Peter I inherited came from the Orthodox Church's suspicion of the outside world. However, "international trade could not flourish in an atmosphere of narrow religious doctrine or prejudice, [and so] Protestant Holland practiced the widest religious toleration in Europe of that day".[145] Peter I could then identify these two factors that Russia lacked as

[141] The German Suburb was a district in Moscow where foreigners were allowed to live. Under Tsar Alexis I, all foreigners in Moscow were relocated to their district by the suggestion of the clergy. It was understood as a compromise, wherein foreigners and their heretic ways could be allowed in Russia as long as they were kept away from the general population. Some of the Russian elite were able to access this suburb, which also had many elements of their former lives in Europe, as the foreigners there were allowed to practice their own religion.
[142] Massie, *Peter the Great*, 113
[143] Ibid., 189
[144] Ibid., 189
[145] Ibid., 189

contributing positively to trade, forming a perception that Russia was inferior to these commercial powers.

As the trip came to an end, Peter I had realized also that Russia was extremely technologically backward for realizing his ambitions. While shipbuilding had brought him to the West, delving into the subject showed Peter I how far behind Russia was in terms of mathematics, natural sciences, engineering, and other fields that supported and built strong navies and sea trade routes.[146] This then also constructed a perception of Russia's education system as being inferior, as it focused more on scripture and lacked these subjects, and that the government was inefficient.[147] In essence, Peter I realized Russians could not simply learn how to build good ships, they had to learn and perfect several fields, and the fields that needed to be reformed quickly snowballed. Moreover, he was beginning to build perceptions of the right and wrong rules of the game to follow, which stemmed from a growing sense of Russia's inferiority, which is a key feature of Ideal Type I.

One other aspect of Russian inferiority that upset Peter was his inability to recruit many European specialists to work in Russia because of Russia's poor reputation abroad. As Ian Gray explains:

> the descriptions of Russia, current in Western Europe, dwelt with such lurid detail on the primitive conditions there and the xenophobia of the people, that only the adventurous and the desperate were prepared to serve the Tsar… This disturbed Peter, not only because it discouraged the foreign experts he needed, but for the more basic reason that it prevented the acceptance of Russia as a civilized nation and an equal among Western powers.[148]

Based on Peter I's experiences visiting these economic powerhouses and comparing it with his own understanding of Russia, he accepted a view that Russia was inferior, and these powers were

[146] Massie, *Peter the Great*, 232
[147] Gray, *Peter the Great*, 136
[148] Ibid., 205

superior. Moreover, he had foreign policy objectives, mainly, to secure his southern border and have a maritime trade route. To secure his border and do well in trade, he needed allies, and for this, he needed to be accepted as an equal European power. This, in part, meant changing how Peter I believed Russia was viewed by European powers at the time.

The Grand Embassy, while failing to muster support for a war against the Ottomans, had a lasting effect on Peter I and inspired some of his reforms that would continue throughout his reign. During this period, we can see the beginning of a conversation between Russia and part of the external European system. The pre-Petrine common-sense was brought up short when Peter I was confronted with the wealth of European powers, the seemingly positive effect of religious tolerance, the different focus on the content and scope of education, and his inability to make allies.

The resulting conversation left a new perceived inferiority and new knowledge about what it would take for Russia to be able to achieve its foreign policy objectives that would also ensure its domestic stability. In essence, Peter I understood that Russia was on the periphery of Europe, which meant be excluded from certain important activities, such as waging war with allies and having trading partners. Most of all, Peter I understood trade was the common-sense of the European system, or the European system with which he had interacted. The importance of trade re-doubled Peter I's belief that gaining access to a seaport, especially to Europe, was essential for Russia; it was the way Russia could engage in commerce and prosper. Peter I also left the European states with the impression he had to make reforms domestically to achieve these goals for Russia.

c. The Great Northern War (1700-1721)

Owing to Peter I's studies of the West, he aimed to follow mercantilism, and therefore, he desired to have strong trade to build strong reserves with which to fund a strong army. He did so because he respected the common-sense at the time, which was commerce. This also stressed to Peter I the

importance of having a seaport for Russia.[149] To attain a certain level of trade, however, Peter I had to engage in warfare to have access to a seaport. Additionally, since Peter I had to start both trade and his military outside of European standards, he intervened in Russia's industries. Rather than the idea of mercantilism coming naturally from Enlightenment ideals or from homegrown intellectual thinking, he imported it like any other mechanism from Europe.

After the failure in the south, Peter I set out to reform his army, build a navy, secure his borders, and show his strength as a ruler to the other European powers at the time. Therefore, after his failed attempted to secure the southern border of Russia against the Ottomans, Russia turned to face Sweden, which stood in the way of the only other accessible seaport to Europe, and initiated the Great Northern War. While driven by practicality, this turn toward Sweden marks an important step in Peter I's attempt to make Russia a European power. After worsening Russia's reputation even further with his failures against the Ottomans, there was little faith in Europe that Russia could take on Sweden, which was a strong European power at the time.[150] It is not an exaggeration to say that this was a "push toward the West into Europe".[151] This shift changed Peter's potential for Russia and opened the way for Russia to get a chance at becoming a European power.

1. Early Russian failures

The first few years of the Great Northern War were essentially a series of Russian failures, most notable of which was the Battle of Narva in 1700. In the Battle, Peter I lost to Sweden, despite a force nearly 3-4 times the size of Sweden's. This was mainly due to the lack of an experienced army and command. However, this event was an early lesson for Peter I and further altered his mercantilist ambitions as he had to fund the Great Northern War, "which had brought neither

[149] Evgenii Anisimov, *The Reforms of Peter the Great.* Trans. John T. Alexander, (M.E. Sharpe, Armonk: 1993), 251
[150] Gray, *Peter the Great*, 272
[151] Alexander Gerschenkron, "The Economic Policies of a Modern Autocrat" in *Peter I Changes Russia*, ed. Marc Raeff (Lexington: D.C. Heath & Co., 1972), 83

trophies nor new, rich, economically developed territories [in the beginning]. With the loss of all the artillery at Narva [in 1700] it had become clear that it would be necessary to re-create virtually from scratch a battleworthy army".[152] While Peter I could understand that he had to stimulate trade, had to get a seaport, and fund a military, he imposed these concepts on Russia forcefully. Commerce came from necessity, not calculated ideological economic thinking.

One of the main reasons for Russia's continual failures at the beginning of the War also came, ironically, from Peter's alliance with King Augustus of Poland. The irony comes from Peter's deep desire to have an ally when going against the Swedes, but this ally preventing him from taking decisive actions earlier in the War. This is because Augustus gave Peter I a more subordinate role in the War, meaning Peter I was forced to engage at Narva rather than head to Ingria, which was more in line with Russia's interests.[153] Therefore, another important lesson for Peter I during the Great Northern War was the double-edged nature of alliances; while he could acknowledge they were vital to conducting a war, they also could force him to act out of his interests if he was not careful or vanish, as it indeed happened with Augustus for a few years when he was dethroned during the War.

2. Ultimate Russian victory

While there were a few victories for Russia at the beginning, such as the second successful Battle of Narva in 1704, Russia still lacked the same strength as Sweden, and Peter I made a proposition to Charles XII in 1707 for a treaty, giving up everything except St. Petersburg, which Sweden rejected. However, there were three main factors that began to shift the tide toward Peter I. First, Sweden launched an offensive against Russia that lasted throughout the winter, which happened to be one of the most severe ones. This sapped Swedish forces of much of their strength.

[152] Anisimov, *The Reforms of Peter*, 71
[153] Ibid., 56

Second, Peter I implemented scorched earth policies against his own lands, depriving the Swedish forces of the ability to replenish their resources.[154] Charles XII, who was accustomed to the Swedish way of including citizens in making decisions and protecting them, was sure that Russia would not destroy its own lands and people for the sake of the war. This was another reason then that he felt confident that he could win the Great Northern War. He only had to get supplies from the Russian countryside.[155] However, Peter *did* destroy his own lands, which was essential to winning the war but was unthinkable for Charles XII.

Third, Peter's military reforms were beginning to work. Not only was his army more experienced, but Russian diplomacy had changed to a point where Russia was acquiring new allies and staving off potential distractions from the Great Northern War. Diplomacy in particular was an interesting comparative advantage for Peter. As Evgenii Anisimov describes:

> The Russian tsar very early understood that in the sphere of international relations Russia needed reform. The matter concerned changing the traditional forms of Russian diplomacy, rejecting embassies as peculiar kinds of diplomatic caravans in favor of standing representation made up of diplomats who know the country to which they are accredited and the international context. Peter understood that it was necessary to reject the age-old forms of protocol thanks to which Russian ambassadors might undermine negotiations critically important to the country.[156]

While Charles XII did value alliances as well, Peter I was in the midst of reforming the diplomatic system of Russia during the War. Two outcomes came from this: first, Peter I acknowledged the weakness of Russian diplomacy. This meant he was approaching the international system without necessarily a specific set of ideas about how he should be conducting affairs based on Russian tradition. This allowed him more flexibility than Charles XII, who already had a set, traditional way of conducting diplomacy. Second, Peter I also had seen Russia failing in the War, and so he

[154] Massie, *Peter the Great*, 449
[155] Ibid., 449
[156] Anisimov, *The Reforms of Peter*, 102

could easily understand the value of strong allies and the need for them. Charles XII, meanwhile, at this point, had started believing Sweden was invincible (indeed, a thought shared by most of Europe) and had less of a need for allies.

Both these aspects led to Peter I's more successful diplomatic relations during the War, which ultimately contributed to Russia's victory in two concrete ways. First, Russia managed to keep the Ottomans mostly out of the War, which allowed him to focus his resources on Sweden when the Swedes went south during the winter. Second, Russia's military successes and the growing fragility of the Swedish forces began to indicate to other European states that Sweden might not win. After about ten years of predominantly Swedish wins, Peter had a triumphant win at Poltava, in present day Ukraine.[157]

Peter I's success with Poltava in 1709 was, "the first thunderous announcement to the world that a new Russia was being born. In the years that followed, European statesmen who theretofore had paid sacredly more attention to the affairs of the Tsar than to those of the Shah of Persia or the Mogul of India learned to reckon carefully the weight and direction of Russia's interests".[158] During the War, Peter had slowly learned painful lessons about how to wage war, but finally, the lessons paid off with Poltava. In short, it was a strong statement to the other European powers that Russia could potentially join their system and as an equal. Seizing upon this change of attitude, Peter I managed to ally with some German states, like Hanover and Prussia.[159]

This second diplomatic success had more important consequences beyond the War, however. While the German states believed they would be able to choose what they would want

[157] It should be noted that during that time, Russia was not constantly losing. Indeed, St. Petersburg was founded during this time, and there were gains in Ingria. However, Russia still did not look poised to win the war ultimately yet.
[158] Massie, *Peter the Great,* 509-510
[159] Ibid., 262

from former Swedish territories, they soon realized, "the destruction and disappearance of Swedish power was being accompanied by the rise of a new and greater power, that of the Russian Tsar".[160] Therefore, not only did Peter's success in diplomacy lead to a better outcome in the Great Northern War, it also contributed to establishing Russia as a new European power. With these repeated occurrences of attempts to make alliances, and the successes and failures certain diplomatic engagements brought Peter I, we can begin to see the formation of a regularity – diplomacy - that can contribute to the overall discursive formation of Ideal Type I. Diplomacy here granted Peter I access to the system, but it also had to be performed skillfully. Wanting alliances also indicated a respect for the system and *wanting* to be a part of it as an equal player.

However, Petrine Russia's victory in the Great Northern War also signified a change to the external system itself. To make room for Russia as an ally, trade partner, and/or threat meant that the European system itself had to adjust. This meant it was not only Peter I who was making maneuvers and reforms to better fit the system. As the alliances with the German states show, certain European actors now had to consider a new actor. While Peter I understood the external system as having a common-sense based on commerce and going to war to achieve this goal, it does not necessarily mean that this *was* the common-sense of the system. Yet, by achieving certain successes and entering the system to some extent, Russia changing its position within the external system meant, regardless of any actor's intentions, changes not only to the dynamics of the external system but a reproduction of a *certain* common-sense. The issue is that while Peter I did manage to achieve some aspects of the common-sense, there were others that he did not notice and/or adhere to, given his own domestic restraints, which can be seen through his domestic reforms.

d. Domestic reforms

[160] Massie, *Peter the Great*, 627

The exploration of Petrine domestic reforms gives an insight into more nuances of Ideal Type I. First, by better understanding Peter I's perception of Russian superiority and inferiority to the external world and how Russia could become an equal to these powers, we can see how Peter I understood the external system and its common-sense in comparison to Russia's domestic common-sense. Furthermore, Petrine domestic reforms give theoretical insight to how a challenger both secures its domestic hegemony while attempting to create change externally.

Reforms were typically focused on what Peter I had identified as Russia's deficiencies to the powers he wished to join: trade, religious tolerance, technology, the relationship between the Church and State, and Russia's reputation. Three of these areas (trade, technology, and reputation) could be solved, more or less, by specific reforms, and Peter I could use techniques imported from Europe for this. Moreover, these reforms aided Russia in waging the Great Northern War, which would grant it access to the sea. Yet religious tolerance and the relationship between the Church and State were of a different nature – they had more to do with the internal structure of the state and, therefore, the pre-Petrine common-sense. This meant that while some reforms were carried out, Peter I was limited to an extent.

Consequently, those reforms were done in a more delicate manner. The danger in changing the common-sense is that a hegemon can lose its own legitimacy to rule. The difference in approaches can be seen in both his reforms to the Church and to Russian culture. Yet Petrine Russia managed to keep and secure its domestic hegemony while changing Russia's image internationally. Whether Peter I was consciously aware of this need or not, his government managed to balance reforms with preserving the hegemonic common-sense that allowed it to implement the reforms.

1. Cultural reforms

In terms of culture, Peter I had a bit more space to make his reforms. This is because Petrine Russia's right to govern came more from Peter I's authority as a supreme power through Orthodoxy rather than through cultural practices. Given this, cultural reforms in a way gilded Petrine Russia, giving it the appearance of a European power while still having a different base. Returning to Gramsci, it is understandable why culture and values had to be reformed as well as military and economics, and Peter I understood this as well. The idea was that:

> these were not merely changes in everyday life, manners, dress, and architecture. All these were manifestations of cultural reform. Its crux, as we know, involved a shift of the language of culture when its definite orientation gave way to the Western prototypes recognized as the best. Through this reform the foundations were laid of a new infrastructure on which a new culture could be developed.[161]

When certain European powers looked at pre-Petrine Russia, they saw barbaric lands, and this was not due only to the unstructured army and limited trade. Russians looked and acted differently, and from this angle, they were perceived as being uncivilized. However, the actions of Europeans were led by years of a different intellectual tradition than the one that existed in Russia. In some ways, Peter I understood this, and this is why he implemented reforms to try, as Anisimov wrote, to lay a new infrastructure for culture.

Many reforms took place after Russia's borders and military capabilities were more secure, mainly after its successes during the Great Northern War. Peter I could then turn inward to ensure Russia's domestic society would match Russia's new European way of conducting war. This further illustrates that Petrine Russia kept its domestic hegemony stable as it attempted to engage more actively with the external system. As Massie describes the situation after Poltava, "As the demands of war diminished, Peter I became more interested in other kinds of manufacturing, those designed to raise Russian life to the level of the West and at the same time to make Russia less

[161] Anisimov, *The Reforms of Peter*, 223

dependent on imports from abroad".[162] In this sense, Peter's cultural changes were also meant to boost the Russian light industry and bolster Russia's independence. It also changed the conversation – Petrine Russia no longer was coming from a place of perceived inferiority; it had seemingly earned an equal place in the system and could shed some of its internalized sense of inferiority to other European powers. This marked difference indicates that Petrine Russia was able to achieve a change to the external system in the way it had hoped.

Peter I still aimed, however, for Russia to be "a well-ordered and wealthy country, standing secure and equal with the West, and one in which all his subjects would serve and share".[163] This meant that several of Peter I's reforms indicated a shift of what should be valued. For instance, one of Peter I's cultural reforms was to change how Russians, especially Russian elite, dressed.[164] For certain areas of Russia, owing to the weather, this dress was rather impractical, but it was practical from the standpoint of having Russian aristocracy dress more in a European manner.

Peter I's reforms extended beyond the appearance of Russians, however. In particular, Peter I raised the social status of upper-class women, who previously were often relegated to *terems*,[165] and they were not often encouraged to participate in social activities. One of Peter's earliest reforms was to insist that these women join social life and not stay primarily in the *terems.*[166] After years of reform, Peter I was rewarded, not only with victory in the Great Northern War, but also with the marriage of Anne, Peter I's daughter, to Duke Charles Frederick of Schleswig-Holstein-Gottorp, a prince of an important German state. This had been the first time in 200 years a Russian princess had married a foreigner, and "Her acceptance was a sign of

[162] Massie, *Peter the Great,* 770
[163] Gray, *Peter the Great*, 382
[164] Traditionally, Russians in the colder areas of Russia had worn long coats and wool boots, owing to the strong winters. Peter I requested aristocrats dress in the same style as European aristocrats, which, at the time, consisted of shorter pants (breeches), silk stockings with linen coverings, shorter, lighter coats, and ankle boots.
[165] *Terems* were usually the second floor of the house where more domestic activities took place.
[166] Gray, *Peter the Great*, 206

Europe's recognition of Russia's new status and signaled that thereafter Peter and subsequent tsars could use marriageable Russian princesses to intervene in the complicated dynastic affairs of the German states".[167] Thus, Peter I's reforms did have the effect of giving Russia the appearance of a European power, and Russia was slowly entering the European cultural sphere.

2. Judicial reforms

There were still limits to these social reforms, however, and these usually had to do with the bases of the law and justice system; again, the practices of these systems did change, just not the justification for why the laws were in place and who proceeded over the law.[168] Overall, the system became much more bureaucratized, but laws limiting mobility and religious freedom were still in place. Interestingly, this created a particular dilemma for Peter I, who believed he must grant more religious tolerance to be more European and to attract more European specialists. Peter I's solution was to, rather than update the Russian civil code, create a parallel system of justice for foreigners:

> All foreigners in Russian service were placed under the Tsar's protection, and any legal dispute affecting them was to be judged not by Russian law and Russian courts, but by a special tribunal composed of foreigners following the procedure of Roman civil law. Further, all foreigners were promised absolute religious freedom while in Russia.[169]

This ties into the same limitations that Peter I faced when he made reforms to the Church. It was fine to change the mechanisms and practices of the system, but the domestic common-sense, such as the laws or basic theology, had to remain the same for Peter I legitimately to maintain his rule.

3. Church reforms

Despite his reforms, Peter I kept certain features of Orthodoxy and the Church present in the Russian polity, either because he himself saw it as unchangeable common-sense and/or critically understood that this was the tradition that kept him in power. While Peter I noted that there were

[167] Massie, *Peter the Great,* 521
[168] It is important to remember that Gramsci considered laws as a hegemonic strategy for containing discontent and maintaining the hegemonic common-sense.
[169] Massie, *Peter the Great,* 391

ideological differences in governing between Russia and the European countries he had visited, Peter I did little to change this. Instead, he made Church reforms that focused on practices but left the ideology intact. As Gray notes, "The reforms produced a revolution in the church, but it was a revolution of customs and institutions, not of doctrine and ideas, and did not offend against the national faith".[170] The outer structure of this arrangement could change, and it did change, but the base did not change, preserving Peter I's right to rule.

This lies also in an understanding of Tsarist rule coming from the concept of *Velichestvo,* which in this use by Theophan Prokopovich, is translated as supreme power, specifically:

> When [we] say that the supreme power called VELICHESTVO is not subject to any law, it should be clear that we only speak about human law: for it is subject to God's power … and should obey the ten commandments … Yet, it is subject to God's law in such a way that for its violation should be held liable in front of God alone, and not the human court.[171]

What is important to register here is that Prokopovich, one of the main ideological theorists of the Petrine era, describes Peter I's authority quite similarly to a common-sense. *Velichestvo* can be considered one of the main tenants of Peter I's rule that allowed him to issue a vast number of reforms without being held responsible by other people – the 'human court'. Instead, it can be understood as a common-sense that gave Petrine Russia its hegemonic legitimacy. It was then necessary for Peter to not disturb *velichestvo* in the language of his reforms, and Prokopovich's writings indicate that "the Russian political regime remained explicitly connected to its religious sources with providence and God's will being both the foundations and the instruments of sovereignty".[172]

[170] Gray, *Peter the Great*, 402
[171] Theophan Prokopovich, *Pravda voli monarshey… [The Truth of the Monarch's Will…],* (Moscow: Sinodalnaya tipografiya, 1726), translation from Anatoly Reshetnikov in *Chasing Greatness: On Russia's*.
[172] Reshetnikov, *Chasing Greatness: On Russia's*

It was Peter I's ambition to bring a different kind of education to Russia, which conflicted with apophaticism. Notably, however, Peter I did try to confine education to practicalities, much like he did with his Church reforms.[173] There was little effort to push for an increase in the study of philosophy, for instance. For Russia's policy objectives, there was a practical need for education in certain professions, like navigation and shipbuilding. Additionally, quality education was perceived as necessary "to raise Russian society to equality with Western society".[174] However, reforms rarely stay confined to one level, in this case, the practical level, but the effects on Russia's common-sense from these reforms did not happen so quickly as to affect Peter I's ability to rule.

In short, the Petrine domestic reforms can show how a challenger maintains its legitimizing common-sense while conversing still with the external system. It also shows how changes in the actor's perceived inferiority and superiority alter how they interact with their domestic hegemony and external hegemonic system. In the case of Petrine Russia, once Peter I was more secure in its position in the external hegemonic system, he was able to adjust, to an extent, its domestic hegemony, yet he was still confined by the domestic common-sense, even if altering it would have made Russia adhere to the external system better.

e. The end of the Petrine Era (1721-1725)

The Great Northern War established Russia as a European power in a certain sense, leading to a new perception of Russia by the West, bolstered by Russia's continual internal reforms. Russia now had a say in which territories it wanted, and moreover, it had enough strength to have a stronger voice in the decision-making process. This meant that Peter I began looking south near the end of his life, following the idea that he himself saw Russia as an established European power

[173] Paul Miliukov, "Secular Schools Under Peter the Great" in *Peter I Changes Russia*, ed. Marc Raeff (Lexington: D.C. Heath & Co., 1972), 124
[174] Gray, *Peter the Great*, 406

that should now become an even more important actor in southern trading. Additionally, when he began to feel more secure in his position, even during the end of the Great Northern War, Peter I took to altering his own sovereign title to strengthen this new perception of Russia as a European power. This action is notable because it was perhaps the closest Peter I ever came to offsetting the balance of his own rule for the sake of joining the European system.

1. New foreign policy

When his Baltic ports were basically secure, Peter I did not neglect trade elsewhere. Toward the end of his reign, his ambition was to turn southward. Thus, Peter I was still engaging in warfare and sending diplomatic missions, but this time, it was toward the south.[175] He did not, however, want to be seen as an equal power by the empires and states in the south, such as Persia and the waning Ottoman Empire, which was a different motivation than when in the 1690s he turned his attention to Russia's northwestern border. Instead, he wanted to still be seen as an equal to European powers by taking on a goal that they had as well – securing a trade route to the 'Orient'.

In short, Peter I understood that trading, and more importantly, excelling at trading, was one of the rules that his country would have to master in order to be accepted as a European power.[176] However, unlike with the military, which responded well to top-down reforms, trade was more difficult, and by the end of his reign, Russia was still not as strong economically as other European powers. It should be noted, however, that Peter was still attempting to secure his goal of being an established European power even after the end of the Great Northern War, meaning there was still a perceived inferiority or need to defend Petrine Russia's new status. With the importance

[175] Anisimov, *The Reforms of Peter*, 255

[176] Here, an interesting debate could be further explored – while Peter I might have perceived this as a rule, owing to the fact that Peter I mostly enhanced Russia's commerce by creating monopolies and conceding to European traders, from a different perspective, it can be seen as an exploitative policy from some European monarchies, leaving the question of whether this actually improved his image or was taken advantage of for the sake of a perceived change in status. This question deserves to be explored further, but as Peter I perceived this as a rule and guided Russia in this direction, this chapter will not explore it further than this for the sake of streamlining this particular argument.

put on trade once again, even after the Great Northern War, we can see signs of a regularity appearing. Here, trade is still dominant, perceived as the external common-sense for which Petrine Russia must still strive.

2. New perception of Russia

Peter I had not been incorrect in his assessment of how to become a European power; he followed the rules to the point that "For the first time in history Russia had emerged as a major factor in European affairs. Peter had proved his new army and was building a navy, a force which Russia had never before possessed. Suddenly western Europe as a whole watched the Tsar with suspicion and fear, an attitude which was to condition their policies in the years ahead".[177] In terms of understanding the role of warfare in becoming a European power, Peter I had excelled, and the leaders of other European powers now noticed the newly-Christened Russian Empire. This does not mean that they viewed him as an equal completely – as Gray wrote, they still viewed him with suspicion. However, by including Petrine Russia more in the European system, especially in terms of alliances and commerce, there was an acknowledgment that Petrine Russia could not be ignored, either because it was a threat and/or a potential ally. Peter I managed to illustrate he shared an understanding of power with the European system, to an extent.

Peter I exemplified this shared concept of power by altering his own sovereign title, showing that he himself perceived Russia as having entered the European system to some degree. The difficultly lied in adjusting the notion of sovereignty to make Russian sovereignty *European enough* while still maintaining his domestic legitimacy. For instance, Peter began referring to himself as a 'Christian Sovereign' instead of an Orthodox one. What this meant was "a greater depersonalization, a greater abstraction of the ruler. All the European rulers were Christian, hence

[177] Gray, *Peter the Great*, 306

all had equal and identical power," and with this slight change, Peter I could create a common framework with which he could use to interact with other European powers as an equal.[178] It did create some minor domestic issues, like with the Old Believers, but overall, he successfully maneuvered the new title into Russian discourse. It also did not, in principle, upset the Orthodox base of his legitimacy, since Orthodoxy is a Christian faith.

Peter I further Europeanized his sovereignty by gaining the title of emperor, but he again was careful in how this was done. In 1717, Mikhail Shafirov, brother of the Vice Chancellor, found a letter from 1514 written by the Holy Roman Emperor, Maximilian, to Tsar Vasily Ivanovich, in which the Emperor addressed the Tsar as "'Great Lord, Vasily, Emperor and Dominator of All the Russians'".[179] Then:

> When Shafirov showed Peter the letter, which was written in German, the Tsar immediately had it translated into all languages and gave copies to all foreign ambassadors in St. Petersburg. Simultaneously, through Russian diplomats and agents, he had the letter published in newspapers throughout Western Europe along with the notice, 'This letter will serve to maintain without contestation the said title to the monarchs of all Russia, which high title was given them many years past and out to be valued so much the more because it was written by an emperor who by his rank was one of the first monarchs of the world'.[180]

Peter was very intent upon showing that he stood on equal ground with the other European powers because he understood the importance of having common customs and values. Most of all, however, he understood that it was important to show that he had a shared understanding of power, and, in the case of Europe in the 17th century from his perspective, this came from the sovereign.

Of course, Peter I's actions and the success of the Great Northern War did not completely convince the European powers that Russia was an equal, as is exemplified by one current of British opinion at the time, which "tended to be impressed with the idea that here was a great example of

[178] Michael Cherniavsky, "The Sovereign Emperor" in *Peter I Changes Russia*, ed. Marc Raeff (Lexington: D.C. Heath & Co., 1972), 157
[179] Massie, *Peter the Great,* 724
[180] Ibid., 742

Reason, forcing men to be obedient and civilized, as well as progressive".[181] What this illustrates is that, despite the transformation of Petrine Russia, Russia was still part of some discourse among European powers that viewed Russia as some civilizing project, or in simpler terms, as an inferior power. However, a new line of discourse still grew during this time that did treat Russia as a new and growing power, one equal enough to sit at the table with the other European powers.

This then led to a change in the external system itself. Peter I was able to change Russia to an extent. This extent is reflected in the limits of his domestic reforms. While he managed to make reforms actively to improve commerce and war-making, he was constrained in the reforms he could make to the judicial system and the Church, which were important to the external system. This was evidenced in Peter I's own travels to Holland, which boasted religious tolerance at the time and credited it, in part, to its success in trade. Yet, the European system had to make some space for Petrine Russia, despite, as noted above, a certain view that Russia was inferior. The European system then had to contend with admitting into their ranks an actor that somehow as both worthy and unworthy of being there. This in some ways jarred the external system's common-sense, which had specific rules and ideas about *how* an actor succeeds in war and commerce, and this was not matched in the how of Peter I's reforms.

4.2 Post-Petrine Russia

Peter I had inherited a system that was already in the process of reforming and Europeanizing. However, Peter I's reign, including his successes and failures, built a specific post-Petrine Russia, and it was one that continued to have lasting effects. As Massie summarizes, after Poltava, "The new balance of power [that had been] established… continued and developed through the

[181] Benedict, H. Sumner, "Peter's Accomplishments and Their Historical Significance," in *Peter I Changes Russia*, ed. Marc Raeff (Lexington: D.C. Heath & Co., 1972), 194

eighteenth, nineteenth and twentieth centuries".[182] Massie is not incorrect in his assessment, as even recently, there were debates on whether Russia is a European power, whether Russia wants to be a European power, et cetera.

The lasting effects of Peter I's reforms on the international status of Russia already seemed to be acknowledged within Russia after his passing. In Prokopovich's funeral speech for Peter, he stated, "'We are burying Peter I… But his strength and glory are with us. Russia will keep all he has done. Russia is a nightmare for the enemies, and it will continue to be a nightmare; Russia is glorious, and Russia cannot stop to be glorious. He has left us spiritual, civil and military improvements'".[183] What should also be noted is that Prokopovich mentioned how 'Russia is a nightmare for the enemies,' which clearly indicates that he at least viewed Russia's new external position as longstanding.

There is another notable remark coming from Prokopovich's speech, and this is his emphasis on the three areas Peter improved: 'spiritual, civil, and military'. While all these reforms have been outlined previously, it is important to reflect on the ramifications of Peter I's attention on these three fields, mostly in the realm of spiritual and civil. As has been discussed, Peter I was careful in the process of his reforms to not delegitimize his own authority.

What we are left with then is two parallel conversations during Peter I's reign. First, there are changes between Petrine Russia and the external European system. Peter I engages with Europe, first in a diplomatic mission, and then through war and commerce. Simultaneously, reforms are made to Petrine Russia's domestic hegemony. These begin with reforms designed to improve Russia's ability to wage war, but after Russia becomes more secure externally, Peter I is

[182] Massie, *Peter the Great,* 510
[183] Tatyana Chernikova, "New World Outlook in the Light of the Westernization of Peter I," *MGIMO Review of International Relations*, 2, No. 59 (2018), 14

able to implement reforms regarding governance, culture, and religion. From this example, we can see then that the challenger was in a conversation with its external system. Over time, Petrine Russia shifted its attention on different aspects of what it thought it should do to gain recognition in the system as well as its relationship to the value of that recognition. After all, by the end of his reign, it was not the European system that claimed Peter I was an emperor, but Peter I himself. At some point, therefore, it seems the first ideal type will give itself its desired status.

4.3 Petrine Russia as a Challenger

Returning to the discussion of the Ideal Type I, we can now reflect fully on Peter I's reign to solidify the concept of Challenger I. To do so, we must see if, through the examination of Petrine Russia, a regularity occurred 'between objects, types of statement, concepts, or thematic choices', which can be understood as a discursive formation for Ideal Type I. To help us with this, we relied on three characteristics of Ideal Type I that had been previously outlined including discussions of inferiority/superiority with the external system itself, arguments about that actor's right or value in the system, i.e., why the actor should be seen as an equal, and the actor's ability to act with a long-term strategy to build long-lasting connections with the existing system. While these signposts helped to guide the research, they themselves changed with the empirical addition.

At the beginning of his reign, Peter I inherited a Russia that was typically unengaged with the affairs of Central and Western European powers. Petrine Russia, however, aimed to engage with this system, as it accepted the system and the system's values, which predominantly was commerce. This can be seen in Peter I's consistent efforts at establishing seaports and building a navy. In these efforts, Peter I was confronted with the fact Russia was a peripheral to this system as he attempted to gain allies to fight the Ottomans; there was an internal perception that Russia

was inferior to this external system. Thus, Petrine Russia aimed to change its position within the existing system.

After this diplomatic failure, there was an acknowledgment that Russia could not easily change its position, and it would have to do so through warfare. Therefore, Petrine Russia turned to its Baltic border and engaged militarily with Sweden. After Poltava, primarily, Peter I secured a different position for Russia, wherein Russia at least now could form alliances against Sweden, and in these alliances, it could maintain its interests. This position had to be maintained by further reforms that were not just military or economic, which had allowed Petrine Russia to reach this point. These reforms instead aimed to further demonstrate Russia's willingness to join its external system and be an equal member of it. The reforms had a red line, however, which returns to Russia's domestic common-sense. This common-sense was rooted in Orthodoxy and the judicial system, both of which could then be reformed *to an extent*. This common-sense gave Peter I the justification for his actions and the right to be in the external system. Ultimately, then, through the reign of Peter I, we see the emergence of a discursive formation for Ideal Type I.

To illustrate this discursive formation, it is beneficial to turn to a note Peter I left for his son. In the note, Peter I tried to convince him to learn the art of war after the success of the Great Northern War:

> A Declaration to My Son:
>
> You cannot be ignorant of what is known to all the world, to what degree our people groaned under the oppression of the Swedes before the beginning of the present war.
>
> By the usurpation of so many maritime places so necessary to our state, *they had cut us off from all commerce with the rest of the world*… You know what it has cost us in the beginning of this war (in which God alone has led us, as it were, by the hand, and still guides us) *to make ourselves experienced in the art of war* and to put a stop to those advantages which our implacable enemies obtained over us.
>
> We submitted to this with a resignation to the will of God, making no doubt that it was He who put us to that trial till He might lead us into the right way and we might render ourselves worthy to experience that the same enemy who at first made other tremble, now in his turn trembles before us, perhaps in a much greater degree. These are the fruits which,

> next to the assistance of God, we owe to our own toil and to the labor of our faithful and affectionate children, our Russian subject
> …
> But you even will no such much as hear warlike exercises mentioned; *though it is by them that we broke through that obscurity in which we were involved, and that we made ourselves known to nations whose esteem we share at present.*
> *I do not exhort you to make war without lawful reasons*; I only desire you to apply yourself to learn the art of it. For it is impossible to govern well without knowing the rules and disciplines of it, be it for no other end than *for the defense of the country*".[184]

Peter I's letter offers insights into how he viewed the rules of the European system.[185] He sees war as the instrument to gain power, but not any power - European power – which is noted by him stating 'we made ourselves known to nations whose esteem we share at present'.

The letter also highlights two other of Peter I's foci in his reign. Peter I wanted to engage in commerce particularly with European countries. Commerce not only offered a different source of revenue for Russia's economy, which would translate into more wealth for waging war and improving Russian elite life. It also gave a pathway for joining the system, in principle. Valuing and succeeding in commerce meant not only a respect for the external common-sense but a know-how of how to follow it. Peter I also respected the art of war, seeing European standards as lawful or correct in this matter, which is evidenced as to how he concludes his letter with the idea that you must have just war and only 'for the defense of the country'. Conducting war for the right reasons and in a technically competent way was the path for Peter I to gain recognition as an equal from Europe, and from this letter, we can see how, despite his success, he felt war was still necessary to defend this earned position.

From the analysis, one more addition should be made to the ideal type to complete it. A challenger changing its position within the existing system will attempt to maintain its domestic hegemony as much as possible. This requires that the challenger maintain a balancing act, only

[184] Massie, *Peter the Great,* 672-3, emphasis added
[185] Ringmar, "On the Ontological Status," 455

becoming seemingly bolder when it is more secure in both its external and internal positions (e.g. Peter I's adjustments to his sovereign title). The challenger will take on internal reforms to mimic the external system *to a point* – the point at which it would interfere with its internal legitimacy. This is also why the word 'mimic' is appropriate. Reforms the challenger will enact give the appearance of revolutionary change, but any interference with the legitimacy on which the ruling system is based will be avoided.

This also highlights an important dimension to this type of challenger – there is both agency and dialogue between the challenger and the international system. While Petrine Russia may have used certain policies instrumentally, ultimately, it had the agency to pursue its own policies and adjust them, which ties into the dialogical aspect of the challenger's relationship with the external system. The historical overview of Peter I's reign shows there was not a detailed long-term plan nor consistent policies for how Petrine Russia should become a European power. Petrine Russia interacted in various ways with its external environment and adjusted, and the external system responded in turn. After Petrine Russia made space for itself within the European system, soon after the European great power system emerged.[186] Peter I had altered the external system, even if this was not his intention. By making space for an actor who achieved the correct goals of the European system's common-sense but in the wrong ways, Peter I illustrated a crack in the European common-sense of the time. This crack was expanded, leading to Leopold von Ranke sometime later to summarize that the European great powers had to balance each other by appreciating, rather than admonishing, each other's differences.[187] Therefore, even the first ideal type, regardless of its motivations, can pose a challenge to a system's common-sense.

[186] Reshetnikov, *Chasing Greatness: On Russia's*
[187] Cornelia Navari, "The Gottingen Historians, Heeren (1760–1842) and Ranke (1795–1886): The Real Thing," in *The International Society Tradition*, (Palgrave Studies in International Relations. Palgrave Macmillan, Cham., 2021)

This leaves us with one final question: was the Petrine regime a challenger to the European system? Yes, but it was a challenger that only aimed to change its position within the existing system, meaning, it was not a challenger that aimed to change the basic legitimacy of the European system itself. While the European system did change with Petrine Russia's intrusion into the scene, Petrine Russia did not have a strategy or any policies to change any concepts of power that were at play within the European system. Russia engaged in war to expand trade and secure its borders, not to promote an ideology. In terms of establishing the concept of the first type of challenger, what the Petrine period tell us is that if the challenger does not aim to change the language of power but to speak it, its challenge to the system concerns its own status rather than the system itself.

Moreover, Peter I's regime is an exceptional case, meaning it quite closely followed the first ideal type. In the case of Peter I, it makes sense to wonder what kind of challenge his reign presented to the system he was attempting to join, and we are also able to understand this type of challenger better using this empirical case to build a conceptual tool. To build the other tool and complete the conceptual framework, we will turn to the Bolsheviks to construct an ideal type for the second type of challenger.

Chapter 5: Ideal Type II - The Russian Polity from 1917-1924

To complete the second ideal type, this chapter turns to the empirical mirror image of Peter I's regime –the Russian polity from 1917-1924, which was politically dominated by the Bolshevik Party. While Peter I attempted to integrate Russia into the existing external order, the Bolshevik Party found the existing order broken. Furthermore, even if the order was repaired, the Party would still fight for a different international system. In other words, the Party found that the international system was fundamentally flawed. Part of the reason for this was that the Bolsheviks did not think that power should rest in the nation state, a belief strengthened by the outbreak of WWI. Instead, the Bolsheviks perceived that the international order was based on economic status, and therefore, beyond borders.

More than that, however, the Bolshevik's perception came from a Marxist dialectic, one that affirmed that material conditions, not self-reflection, were the only way to change existing conditions. Peter I attempted to play the rules of the game, and he approached the international system in a state of dialectical, semi-adaptivity. Conversely, the Bolshevik Party, even before it gained national power, approached the international system as one that was broken, needed to be replaced, and provided concrete steps on how to replace this system. The idea was not to change the Russian polity to fit the external system – it was to replace the international system itself.

This chapter looks for regularities in the Bolshevik Party's discourse, particularly paying attention to key nodal points, to see if there is a discursive formation that expresses the second ideal type. Certain features could include antagonism, leading to the disarticulation and rearticulation of nodal points, which can take the form of complaints and criticisms focused on the system itself rather than the treatment of the actor. This antagonism requires seeing the system *as changeable*. The process of disarticulation would also take a normative dimension in the criticisms

of the previous system, i.e., why the system should *not* be a certain way. The delegitimization of the previous or current system is also likely as part of disarticulation. There would also be a normative dimension in terms of rearticulation, i.e., why the system *should be* another way. The proposed system does not have to be an entirely new creation, but it should be dressed as a new idea or as a replacement in some way.

However, the exploration of this period adds a dimension not found in the original discussion of a challenger challenging its external order, which mainly has to do with *how* the Bolshevik Party presented its challenge. First, it built on an existing challenging discourse from Marxism, which had already existed in theory long before the revolution. The Party then did not necessarily invent its own theory to replace the existing one but rather developed it. These additions, however, mainly had to do with how this could occur in practice and in the case of Russia. The specificities of this application, then, gives a more complex understanding of the second ideal type. First, however, this chapter will detail how the Bolshevik Party perceived their external order before proceeding into how their challenge was presented and acted upon.

5.1 International hegemonic system

To better understand the Bolshevik Party's position, it is important to understand how the leaders of the Party perceived their external system. The view of this system will rest solely on an interpretation of the system collated from works by the main Bolshevik political leaders, Vladimir Lenin and Lev Trotsky. Their critiques, and later practices, will then make sense within the context they are discussing. Furthermore, while the Bolsheviks interpreted certain historical events differently from Tsarist Russia, they do more or less follow an agreed upon historical timeline based on certain milestones, such as the development of specific industries and wars fought. Therefore, this chapter will proceed with an understanding of the Bolsheviks' perceived external

system, while acknowledging that this is not the only way to understand the international system at the time nor is this interpretation without critique.

Perhaps the two most important works that give insight into the Bolshevik view of the external system at the time were Lenin's *Imperialism*, published in 1917 before the Bolshevik revolution, and Trotsky's *War and the International*, published in 1914. It is understandable that much in these texts overlap in terms of how they perceived the external system, and this section primarily relies on Lenin's text. Trotsky's text forms the basis for more of the Bolshevik critiques of this system, which comes in the following section.

The main thesis of Lenin's work on imperialism is that capitalism has now "transformed into imperialism," and "imperialism has grown from an embryo into the predominant system; capitalist monopolies occupy first place in economics and politics; the division of the world has been completed".[188] The whole process of production and sales is fixed by cartels, meaning that even the basic promise of fair and free competition through markets that capitalism purports is false, especially since the economic crisis of 1900-1903.[189] What this has led to is both less or practically no control over national economies and the need for industries to expand and control resources outside of their national borders. Trotsky's work in particular paid attention to the expansion of imperialism, and how the contemporary economic system had a "natural tendency… to seek to break through the state boundaries. The whole globe, the land and the sea, the surface as well as the interior has become one economic workshop…".[190]

[188] Vladimir I. Lenin, "Imperialism, the Highest Stage of Capitalism: A Popular Outline," in *Lenin's Selected Works, Vol. 1,* trans. Tim Delaney & Kevin Goins (Moscow: Progress Publishers, 1963) via Marxists Internet Archive, 2005, https://www.marxists.org/archive/lenin/works/1916/imp-hsc/index.htm
[189] Lenin, "Imperialism, the Highest Stage"
[190] Lev Trotsky, *The War and the International (The Bolsheviks and World Peace),* Marxist Writers' Internet Archive, transcribed by David Walters, https://www.marxists.org/archive/trotsky/1914/war/index.htm

However, imperialism does not only seek to expand for economic gain but also for domestic political stability. As Lenin indicates by quoting Maurice Wahl, "impatience, irritation and hatred are accumulating in all the countries of the old civilisation and are becoming a menace to public order; the energy which is being hurled out of the definite class channel must be given employment abroad in order to avert an explosion at home".[191] Both Lenin and Trotsky viewed their contemporary external system as one that is inextricably linked by a dominant economic system, which is *naturally* driven to expand beyond any national control, both for economic gain and for the political stability of their domestic hegemonies; this system operates on a combination of a "non-economic superstructure which grows up on the basis of finance capital, its politics and its ideology, stimulates the striving for colonial conquest".[192]

This had led to a division of the world by capitalists, and "they divide it 'in proportion to capital', 'in proportion to strength', because there cannot be any other method of division under commodity production and capitalism", and this combination of division, the motivation for division, and the mechanisms has led to imperialism as the current world system.[193] In this case, we might then conceptualize Lenin and Trotsky's understanding of imperialism as a perceived external hegemonic common-sense, which is mixed with capitalism.

In addition, we should note from this Lenin's description of strength and capital being "proportional," and he similarly comments later that:

> the only conceivable basis under capitalism for the division of spheres of influence, interests, colonies, etc., is a calculation of the *strength* of those participating, their general economic, financial, military strength, etc. And the strength of these participants in the division does not change to an equal degree, for the *even* development of different undertakings, trusts, branches of industry, or countries is impossible under capitalism.[194]

[191] Lenin, "Imperialism, the Highest Stage"
[192] Ibid.
[193] Ibid.
[194] Ibid., italics in original

In other words, the way that capitalism, and subsequently, the imperialist world system, works is by dividing the globe, and those who can make the divisions and those who are divided are delineated by *perceived notions* of strength, which are grounded materially and not uniform. What this implies is that strength is based on those who are already in charge of the world system, and there is a scale when it comes to this proportional strength. It also takes away agency from those who are divided, i.e. primarily colonies, and "Those nations which are economically backward or politically feeble… threatened with subjugation by the great Powers, which are attempting by blood and iron to change the map of the world in accordance with their exploiting interests".[195] In other words, the system is also unequal, with a few dominant nations at the top of the order who divide and subject the rest of the world to strengthen their own domestic hegemonies and global positioning based on 'proportional strength'.

This drive by imperialism to expand and gain relative strength has led to a point where now the imperialists are in danger of infringing on each other's national territories, not just their colonies. At this point in time, the world is already divided, and so a process of redivision must occur.[196] Furthermore, Lenin argues that "an essential feature of imperialism is the rivalry between several great powers in the striving for hegemony, i.e., for the conquest of territory, not so much directly for themselves as to weaken the adversary and undermine his hegemony".[197] Interestingly, even though both Lenin and Trotsky see economies as something no longer under national control, they both posit that war is inevitable, because nations will still need to 'undermine' the hegemony of their adversaries.

[195] Lev Trotsky, "The Zimmerwald Manifesto," in Sam Marcy, *The Bolsheviks and War: Lessons for Today's Anti-war Movement*, (New York: World View Forum, 1985)
[196] Lenin, "Imperialism, the Highest Stage"
[197] Ibid.

In short, leading up to the 1917 Revolution, the Bolshevik leaders viewed the external system as hegemonic, with a common-sense resulting from capitalist and imperialist logics. This has several consequences. First, there is a primacy on economics and material conditions, i.e., rather than understanding the system based on nation states, it is more accurate to understand the system based on cartels and actors that are exploitative and those that are exploited. These generally are rooted in the nation state, which also are driven to continue this system and wage war to affirm their domestic hegemony while undermining *equal or greater powers.* This is the status of the world leading up to the October Revolution, and it forms the basis for the Bolsheviks' critiques and subsequent new order.

5.2 Disarticulations and antagonism

With the start of WWI, the Bolshevik Party became more vocal and focused on criticizing the external system as a part of the domestic problems facing Russia. After outlining the Bolshevik perception of this system, Trotsky, with his, *The War and the International*, laid an explicit foundation for why the international system was fundamentally flawed. These criticisms make a clear distinction then between the Bolshevik Party and Peter I, as they show the Bolsheviks' desire to, in no way, be affiliated with the existing system. These criticisms aim to disarticulate the existing hegemonic system, as the Bolsheviks understood it, and as such, there is antagonism as the Bolsheviks aim to dislodge meaning from certain nodal points.

The Bolsheviks found both the domestic and international systems flawed *owing to their nature,* the nature of capitalism, and because of this, there could be no compromise, which acts as a nodal point. For instance, the continuation of war would continue as part of the "ceaseless struggle for new and ever new fields of capitalist exploitation...".[198] This logic led to firm belief

[198] Trotsky, *The War and the International*

that it can be either war or revolution, but it could not be both, meaning implicitly that a revolution would bring peace. The Bolsheviks also criticized nationalism and chauvinism in favor of internationalism, and they criticized attempts at restoring what they saw as a broken system. By attempting to disarticulate the nodal points of the existing system, the Bolshevik Party attacked the common-sense of the hegemonic systems both inside and outside of the national borders.

a. Capitalism and imperialism

One of the main critiques the Bolsheviks presented was that the current system, regardless of any attempts to repair it, was broken. More than that, however, it was not worth repairing. This again is in direct juxtaposition with Peter I, who valued the external, European system of his time. The main reason that the Bolshevik Party believed the old, capitalist order was not only broken but irreparable came from the damage the leaders saw from WWI. The war had not only killed millions of people, but it impacted every level of economics, politics, and society: "Profiteering by financiers and arms manufacturers was notorious. Nationalism had been exploited by all governments. Churches had become megaphones for military cause of their countries".[199] These far-reaching problems helped to sustain the belief that the old order was damaged beyond repair.

Imperialism was seen as being responsible for WWI through the division of the world by a few great powers and the domination of monopolies. The war was the result of an attempt at redividing this unequal system by other powers who wanted to "obtain the opportunity and the right to rob, strangle and exploit the whole world".[200] Here, Lenin illustrates both that the war was an outcome of imperialism but also that the system itself and the war were predicated on an immoral foundation – one that was exploitative and one that wanted to continue to exploit. Lenin's

[199] Robert Service, *Comrades! A History of World Communism* (Cambridge: Harvard University Press, 2007), 66
[200] Vladimir I. Lenin, "Report On The International Situation And The Fundamental Tasks Of The Communist International," *Marxist Internet Archive,* 19 July – 7 August 1920, https://www.marxists.org/archive/lenin/works/1920/jul/x03.htm#fw1

normative discussion of the external hegemonic system reflects his attempts to disarticulate the common-sense.

Lenin further argued that even after the war, this system is trying to be maintained, specifically by the Treaty of Versailles, which he sees as just a mechanism for extending colonialism to the losing great powers of WWI. Moreover, it was discussed in the Comintern how, based on "production, trade, or credit, and not only in Europe but on all world markets, we find no reason to affirm that any stable equilibrium is being restored".[201] Not only is the world economy not functioning, but it cannot be, and is not being, repaired. Again, this is the opposite approach the Russian polity took during Peter I's reign, where the polity both wanted to and made steps toward mimicking the mercantilist policies at the time.

The war is seen as destroying productive forces in Europe, and because of this, the economy is devastated, which then only highlights and accelerates pre-existing social tensions between classes.[202] What this means is that the idea that the Treaty of Versailles will bring any long-lasting peace is absurd since, "proletarianization and pauperization caused by economic decline will give the class struggle a tense, bitter, and convulsive character".[203] Therefore, the system is neither repairable nor good – if it were to be repaired, for instance, it would only continue being exploitative and unjust. This critique further destabilizes and disarticulates the idea that the common-sense is worth saving.

One of the most fundamental differences that the Bolsheviks established between themselves and the contemporaneous order was that the Bolsheviks were for peace and an eternal

[201] "Extracts from the Theses on Tactics Adopted by the Third Comintern Congress on 12 July 1921," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 232
[202] Ibid., 233
[203] Ibid., 233

peace. War was not only what broke the system – it was an imperialist mechanism that would continue to cause more wars. This is also part of what broke the system, as war exposed the system for what it was. War then undermined the legitimacy upon which the international system had been operating. War was a part of capitalism, and unless capitalism was defeated, war would continue, and now, according to the Bolshevik leaders, no one could hide from this fact. If people did not support a Bolshevik-led communist revolution, they would be left with this war and future wars, and only a communist world system could bring peace. The presence of war, then, disarticulated the nodal point about the functionality of capitalism.

After the 1905 failed workers' revolution, Trotsky explored this theme in his work, "Results and Prospects," and he included potential scenarios for the future revolution and the issues with the external system at the time. One of the primary arguments in his work was that the European great powers will endeavor to appease the workers by promising peace but in actuality the system itself cannot allow this:

> …European governments, from the moment the proletariat began to stand on its own feet, have always feared to place before it the choice of war or revolution. It is precisely this fear of the revolt of the proletariat that compels the bourgeois parties, even while voting monstrous sums for military expenditure, to make solemn declarations in favour of peace, to dream of International Arbitration Courts and even of the organization of a United States of Europe. These pitiful declarations can, of course, abolish neither antagonisms between states nor armed conflicts.[204]

The bourgeoisie will even attempt to make institutions, or promise institutions, aimed at peace, but the bourgeois system, upheld by the European great powers, is inherently a system of war. Moreover, the reasoning behind the act of war is seen only as either protecting "vital interests" or because "a government that has lost the ground from under its feet and is inspired by the courage

[204] Lev Trotsky, "Results and Prospects," ed. Sally Ryan, *Marxist Internet Archive*, 1996, https://www.marxists.org/archive/trotsky/1931/tpr/rp09.htm

of despair".[205] In other words, war indicates the last act of a desperate government. The only possible outcome is a revolution.

Closer to the October Revolution, and with the outbreak of WWI, Lenin and Trotsky added more to this original dichotomy. Lenin roots this separation in his theory on imperialism, where he states that "in the realities of the capitalist system, and… no matter what form they may assume, whether of one imperialist coalition against another, or of a general alliance embracing *all* the imperialist powers, are *inevitably nothing* more than a 'truce' in periods between wars".[206] Once again, there is the idea that war is a systemic issue found in a capitalist system. Rather than exploring this topic with a sense of wanting to learn how to wage war to attain certain goals or respect, like Peter I did, the Bolsheviks rather demonize the idea of using war to attain power – this mechanism is for the capitalists, not for them.

And while the system is being propped up by the remaining rich states – Great Britain, the US, and Japan - they are failing to create a new world order. This means that there is a danger the Bolsheviks have spotted; the system is no longer legitimate and therefore, certain nodal points are left meaningless. However, there are no efforts to ground these nodal points, leaving the system directionless. The Bolsheviks argue this is exemplified by the League of Nations, which "provides the best propaganda for Bolshevism, since the most powerful adherents of the capitalist "order" are revealing that, on every question, they put spokes in one another's wheels".[207] In other words, even the relatively untouched countries are unable to organize and work together since they are instead trying to secure a better position than the others. Contrary, then, to Peter I, here it is visible

[205] Trotsky, "Results and Prospects"
[206] Lenin, "Imperialism, the Highest Stage," 89
[207] Lenin, "Report on the International"

that changing one's position in the existing, broken, and immoral system is not an enviable task nor is it achievable.

Moreover, there is the idea that imperialists *could not have* learned: "the inherent laws of the bourgeois order of society are driving inexorably towards a new world conflict".[208] This critique specifically ties into the idea that the order is delegitimized, mostly because it was built upon a flawed common-sense. Since the bourgeoisie cannot change because of these 'inherent laws', then the whole order itself must be changed. Nikolai Bukharin ties these themes together when he writes:

> Humanity, whose entire civilization now lies in ruins, is threatened with complete annihilation. There is only one force that can save it, and that is the proletariat. The old capitalist 'order' no longer exists; it can no longer exist. The final outcome of the capitalist system of production is chaos.[209]

Therefore, we see clear signs from Bolshevik leaders that they no longer view the surrounding international order as functioning, let alone legitimate. There is also the idea, which also existed before the Bolshevik Revolution and end of WWI, that this system is, at its very core, morally flawed – a clear distinction from Peter I, who rarely questioned the morality of Russia's external system. Even if it then is repaired, it will only be temporary, as it will merely create chaos and wars until finally the proletariats seize power. Thus, there is a clear criticism of the remnants of the former system, down to the basic legitimacy of that system, and this criticism aims to disarticulate the capitalist and imperialist common-sense of the existing system.

b. Nationalism and chauvinism

[208] "Resolution of the Fourth Comintern Congress on the Versailles Peace Treaty on 5 December 1922," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), p. 433

[209] Nikolai Bukharin, "Platform of the Communist International Adopted by the First Congress on 4 March 1919," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), p. 18

Another critique of the existing system centered around the debate concerning the role of the nation state as the building blocks of the external system. In Marxist theory, there could be a tension between these two concepts because, as some Marxist theoreticians, like Rosa Luxembourg, argued, colonies and other vassal states should instead support the international movement rather than express a desire for a nation state. However, the Bolsheviks, and specifically Trotsky, supported the national self-determination movements emerging at this time. They saw it yet again as a certain process, wherein it was important first to achieve nationhood to then be able to make the transition to communism.

Leading up to 1917, however, the focus was more on developing internationalism, against national capitalism and imperialism. Thus, the nation state as *the* main actor of a system was the nodal point being disarticulated. Much of the support for internationalism comes from the critique of the internationalization of capitalism, and in turn, its need to maintain the world market, "secured by dreadnoughts and cannon.".[210] With capitalism's step outside of national boundaries, it also limited the influence of the proletariat, whose counteractions through the parliament, for instance, no longer had as much of an effect.[211] In short, capitalism spread beyond national boundaries, but the proletariat did not, which meant that the proletariats are now stuck in and exploited by international capitalism, or rather, imperialism.

The importance of internationalism was stressed also by the critique of nationalism and "bourgeois chauvinism," understood later in the 1920s as "Great Power chauvinism". However, the development of the critique of chauvinism came primarily from the crossroads of great power interests and interactions in the Balkans during the Balkan Wars in 1912 and 1913. In Lenin's reflections in 1913 on the Balkan Wars, he questioned what the reasoning behind the wars was.

[210] Trotsky, *The War and the International*, 8-9
[211] Ibid., 9-10

While he admits part of it had to do with the "weakness of the proletariat in the Balkans," and equal party at blame was the "reactionary influence and pressure of the powerful European bourgeoisie" who "are afraid of real freedom both in their own countries and in the Balkans… they stir up chauvinism and national enmity to facilitate their policy of plunder and to impede the free development of the oppressed classes of the Balkans".[212] Here, we rather have more of the same in the Bolsheviks' critique of imperialism, but Lenin's critique goes a bit further than this when he adds "Russian chauvinism over the Balkan events is no less disgusting than that of Europe".[213]

What is different about this critique is that Lenin is not arguing for Russia to take a bigger role in the Balkans, or that Russia does not have a big enough impact in world affairs; Lenin is arguing that the state of Russia *is as at fault* as other European chauvinistic powers. Therefore, in this argument about nationalism and chauvinism, Lenin does not remove Russia from the overall issue with the international order. Unlike Peter I, Lenin is specifically *not* looking to be an equal to Europe, and he is *not* looking to improve the state of Russia. He is looking to eradicate the whole system of nation states; he is looking to disarticulate this particular nodal point. This critique shows that Lenin is opposed to the very foundation of both the domestic state and international system based on this so-called Great Power chauvinism. This also puts the Bolsheviks at odds with other popular movements at the time, such as supporters of fascism, who valued and relied on the working class, but rooted worker strength and success in the nation state.

These disarticulations illustrate a difference between the Bolsheviks and Peter I, the second ideal type and the first. Wherein Peter I did not intend to undermine the common-sense and respected the meaning of the established nodal points, the Bolsheviks aimed precisely and

[212] Vladimir I. Lenin, "The Balkan War and Bourgeois Chauvinism," 29 March 1913, *Marxists Internet Archive*, https://www.marxists.org/archive/lenin/works/1913/mar/29.htm
[213] Ibid.

consciously to do just that. They criticized, meaning, they showed the fundamental flaw with two primary nodal points of the existing system, from their perspective. The first was capitalism itself, the economic structure of the system, which was broken and could no longer function to serve anyone, let alone the majority. Second, there was the nation-state, which was understood as the proper actor in the existing international hegemonic system. The Bolshevik Party aimed to disarticulate both by illustrating their ineffectiveness and their exploitative nature.

5.3 Rearticulation

The second ideal typical challenger should also rearticulate the nodal points, which can sometimes also take on the appearance and function of presenting an alternative to the existing system. The Bolsheviks showed they had this intention in their critiques, but when they gained some semblance of domestic control, they also showed their commitment to a new international system through their actions. This section will highlight some of the features of their actions that contrast to Peter I's policies that had been motivated by his desire to change the status of Russia. Therefore, this section shows how rearticulation occurs and how the Bolsheviks attempted this.

a. The Communist International

The Third International replaced the Second International, which had been discredited by the advent of WWI. It was founded in March 1919, a year after the end of WWI but during the midst of the Russian Civil War. With the Bolshevik government still not recognized by many countries, the Third International did not manage to have broad international attendance. They were impeded by the fact, for instance, that most of their diplomatic communication with Europe was facilitated only by radio.[214] This meant that most attendees were former citizens of the Russian Empire and

[214] Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 1

either were chosen by the Russian central committee, or "they were war prisoners or foreign radicals who happened to be in Russia at the time".[215] It also meant that first formation of the Executive Committee of the Communist International (ECCI), the leadership body of the Communist International (Comintern), was predominantly from the Russian polity.

Therefore, the foundation of the Comintern, despite the Bolshevik Party's emphasis on internationalism, was decidedly Russia-based, and this continued throughout the next few years. Even Lenin commented in 1921 that at least one Comintern resolution was much "too Russian".[216] Without a stable state and ability to transmit a clear foreign policy, the Comintern documents at this time represent what can be understood as a Soviet foreign policy. Trotsky even suggests this when he writes: "The Communist International has proclaimed the cause of Soviet Russia as its own".[217] These documents show us two important features of Bolshevism: first, it shows us how the Bolsheviks saw the new international system; and second, it does show a growing dialogue between the Bolsheviks and other socialist parties around the world, illustrating, that like with Peter I, challengers are often in a dialectical conversation with their external systems– changing and adjusting with time.

Certain discursive patterns emerged from the Comintern itself as a governing mechanism. First, there was the idea that the Comintern was *the* center for the international revolution "for the purpose of maintaining permanent co-ordination and systemic leadership of the movement", and in this, "subordinating the interests of the movement in each country to the common interest of the

[215] "Invitation to the First Congress of the Communist International on 24 January 1919" in Jane Degras, *The Communist International: 1919-1943 Documents*. Vol. 1 1919-1922 (London: Oxford University Press, 1956), p. 6
[216] "Extracts from the Theses on the Structure of Communist Parties and on the Methods and Content of their Work, Adopted by the Third Comintern Congress on 12 July 1921," in Jane Degras, *The Communist International: 1919-1943 Documents*. Vol. 1 1919-1922 (London: Oxford University Press, 1956), p. 257
[217] Lev Trotsky, "Extracts from the Manifesto of the Second World Congress of the Communist International on 8 August 1920," in Jane Degras, *The Communist International: 1919-1943 Documents*. Vol. 1 1919-1922 (London: Oxford University Press, 1956), p. 177

international revolution".[218] It was stressed that: "The international organization of the proletariat can be strong only if, in all countries where communists live and fight, the ideas about the role of the communist party here formulated take firm hold".[219] Here the Comintern illustrates that it is the center for guidance and the correct guidance; it alone can lead the international revolution and give advice to domestic communist parties. Whereas the previous system was nation-state focused, this system was articulated as party based.

This pattern crossed into another one, which was the idea that the Comintern was a kind of savior as well as the stronghold for the correct ideals; whereas the previous system was morally corrupt, this system was rearticulated as being not only morally good but a savior. It was seen, for instance, as the only refuge for recently decolonized and decolonizing states: "In present international conditions there is no salvation for dependent and weak nations except as an alliance of Soviet republics".[220] This sentiment was echoed by Trotsky, who, when addressing the 2nd World Congress in 1920, stated:

> The Communist International is the party of the revolutionary insurrection of the world proletariat. It rejects all those groups and organizations which openly or covertly stupefy, demoralize, and weaken the proletariat; it exhorts the proletariat not to kneel before the idols which adorn the facade of the dictatorship of the bourgeoisie: legalism, democracy, national defence, etc.[221]

This black and white framing is reminiscent of the Bolsheviks' writings before the Revolution, where, for instance, the only salvation from war was revolution. However, it is also given the

[218] "Invitation to the First," 5
[219] "Theses on the Role of the Communist Party in the Proletarian Revolution Adopted by the Second Comintern Congress on 24 July 1920," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 135
[220] "Theses on the National and Colonial Question Adopted by the Second Comintern Congress on 28 July 1920," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 144
[221] Trotsky, "Extracts from the Manifesto," 181

added value of upholding certain ideals and guiding the proletariat away from seemingly positive concepts, like legalism and democracy, which are actually bourgeois lies.

However, unlike before where the Bolsheviks were limited by their lack of domestic power, in the Comintern, they stressed that this was an organization for action. From the Second Congress in 1920, it was stated that: "Now it is no longer merely a question of propaganda for the communist idea. Now the era is opening of organizing the communist proletariat and of the direct struggle for the communist revolution".[222] It was "a fighting association," not contained by the same limitations as the Bolsheviks had before the revolution.[223] From the beginning of its formation, in fact, the first step that was stressed was for "the proletariat… to seize State power immediately. The seizure of State power means the destruction of the State apparatus of the bourgeoisie and the organization of a new proletarian apparatus of power".[224] Here, there are clear steps and a clear understanding that the old system must be destroyed and a new one put it its place, and moreover, there is a stress on action. Whereas the previous system allowed the nodal points to remain untethered, the Bolshevik Party could give them meaning and rearticulation.

In more basic words, Grigory Zinoviev, chairperson of the Comintern, claimed "the International must be a single communist party with sections in the different countries".[225] By 1922, three years later, there seemed to be positive signs for the Comintern, and in the Fourth Congress, Zinoviev, remarked, "The Comintern was at last acting as an international party, giving advice and differentiated instructions to its members on all questions relevant to the victory of the

[222] "Extracts from the ECCI Circular Convening the Second Congress of the Communist International in Jun 1920," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 104
[223] "Extracts from an Open Letter from the ECCI to the Members of the German Communist Labor Party on 2 June 1920," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 98-9
[224] "Invitation to the First," 2
[225] "Theses on the Role," 127

world revolution".[226] The Soviet Union was also gaining more international recognition at this time. For instance, they were invited to the 1922 Genoa Conference, where European countries were attempting to figure out how to rebuild post-WWI Europe. The Bolsheviks there were antagonistic, signing the Rapallo Treaty with Germany, and stating in the Comintern later, "Alone in Genoa the Soviet delegation represented the future of humanity while all the bourgeois delegations represented the decaying past".[227] What the Comintern illustrates from its own existence was that not only was it a concrete step in building a new international system, but it had specific ideas on how to do this and a clear goal on action, which meant a willingness to rearticulate nodal points the Bolsheviks had disarticulated.

b. Promise of a future

While the Bolsheviks were establishing their country and the Comintern, they had a unique combination of being specific and vague. In this section, the focus is on their vaguer rearticulations and normative promises to better understand what kind of moral framework the Bolsheviks believed could replace the broken, imperialist order.

An important part of the Bolshevik discourse in the Comintern was the reference to the idea that there was a utopian future based on communism, and it was perfect. This is noted by reference to the "moral victory" that the Bolsheviks won after their successful revolution in 1917.[228] While often the Comintern was rather practical, there were instances that harkened back to the original theoretical works. For instance, in 1919, a manifesto presented to the Comintern references how the "proletarian dictatorship" needs to save "the starving masses and to this end

[226] "The Fourth Congress of the Communist International in November 1922," in Jane Degras, *The Communist International: 1919-1943 Documents*. Vol. 1 1919-1922 (London: Oxford University Press, 1956), 375
[227] "Extracts from an ECCI Statement on the Genoa Conference on 19 May 1922," in Jane Degras, *The Communist International: 1919-1943 Documents*. Vol. 1 1919-1922 (London: Oxford University Press, 1956), 346
[228] "Extracts from the ECCI Circular Convening," 104

[it] mobilizes all forces and resources, introduces universal labour conscription, establishes the regime of labour discipline… not only to heal the gaping wounds inflicted by war but also to raise mankind to new and unimagined heights".[229] The last sentence, where the Bolsheviks reference raising humankind to a new level, also indicates a challenge to the common-sense of the international system of the time, since it suggests there is another level which does not currently exist but is attainable.

There is also a direct reference to this impossible task being accomplished. For instance, in a discussion at the 2nd Congress, it is discussed:

> The great revolution undertaken to guide socialist doctrine, so long corrupted by the opportunists, back to its original source, Marxism, the superhuman efforts made for nearly a year and a half to create, in the place of the old bourgeois world, a new communist social order, both in moral and intellectual culture, as well as in the material spheres, collective or individual, of political, economic, and social life...[230]

Here, what is stressed is this 'moral and intellectual' sphere as well as material conditions. It can be said that while the Bolsheviks were discussing specifics in the Comintern, there was an underlying idea that there was always an aspect and that the Soviet delegation "represented the future of mankind".[231] While this is an important aspect about the Bolsheviks, it should be stressed that in the Comintern, vague speech about the future was rather subsumed by much more direct advice about how parties and states should act, which was explicitly compared to the Bolshevik case in Russia.

c. The Bolshevik case

[229] "Manifesto of the Communist International to the Proletariat of the Entire World on 6 March 1919," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 41

[230] "Extracts from the Appeal of the First Congress of the Communist International to the Workers of All Countries on 5 March 1919," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 28-29

[231] "Extracts from an ECCI Statement," 345

Often in the Comintern, there were references by the Bolsheviks to the transformation of the Russian Empire into Soviet Russia as an ideal case. This counters Peter I's reign, especially in the first decades, where policies or actions being done in Russia were hardly presented as an ideal in any case, let alone an ideal to a European power. This rearticulation also illustrates, not through statements, but through actions, what the common-sense of the international system could look like.

Sometimes, the Bolsheviks were an example for other European and non-European countries. This was particularly stressed, and only in 1922 did Lenin reflect that the Russian case may not be universal. Most of all, the Bolshevik case was presented to show Soviet Russia as a leader for the socialist and communist cause. This also contrasts Peter I's reign, where Russia was not seen as being a counterweight or leader in the existing system, but at most, an equal. There was, however, also the seemingly contradictory idea that Soviet Russia needed to be protected, rather than Soviet Russia protecting. This came in part from the domestic insecurity Soviet Russia was facing at the time because of the ongoing civil war. However, in general, the two dominant patterns were the Bolsheviks as an example and the Bolsheviks as leaders.

1. Bolsheviks as an example

First, there are instances where the Bolsheviks seemingly are an achievable example for the rest of the Comintern members. It is not as though the Bolsheviks did not have opponents to their goal, specifically the Mensheviks and SRs, but they still "assumed that their success would become permanent in Russia and that the rest of Europe would follow their example".[232] The idea that Soviet Russia was an example was common in Comintern documents. Even though the Soviets had about two to three years more governing experience than other parties, and even though there

[232] Service, *Comrades! A History*, 67

was an ongoing civil war, the Bolsheviks felt entitled to describe their experience as a beacon of success.

For instance, although they certainly did not have a stable and secure domestic hegemony, in the Comintern, they stated that "Through the Soviets the working class, having conquered power, will manage all spheres of economic and cultural life, as it the case at present in Russia".[233] There is both the idea of the present and the future in this statement. First, the Bolsheviks have indeed claimed some power in Russia and from this, they, second, *plan to* have a future where they are able to manage 'economic and cultural life'.

The Bolsheviks extrapolated even more from their revolutionary experience to the point where they claimed that "without a centralized and powerful communist party the working class cannot win the civil war".[234] Even without their own domestic hegemony secure, the Bolsheviks were willing to claim that their path was the correct one and an example for others to follow. Moreover, the idea that Russia was first to have the revolution meant that there was already some kind of implicit superiority. And while Lenin and others tried to convince the other members of the Comintern that they were equals, there was still certainly discourse to the other effect.

This was shown when the Bolsheviks were confronted with challenges from Western European communist parties that would sometimes claim that the conditions in Western Europe were different, and they could not stage a revolution. Most of these examples come from interwar Italy and Germany. For instance, in 1920, and Italian Marxist, Amadeo Bordiga, was questioning some of the recommendations being agreed upon in the Comintern, and Lenin replied "You are aware that we in Russia proved our determination to destroy the bourgeois parliament, not only in

[233] "Manifesto of the Communist," 45
[234] "Extracts from an Open letter from the ECCI to all Members of the USPD on 28 September 1920," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 197

theory, but in practice as well," before continuing the detail how the Bolsheviks managed to seize power, after a "period of bourgeois democracy" and by using existing structures to convince parts of the population, like the peasants.[235] The ECCI even stressed this in 1919, when it proclaimed that the Soviets are the favored form of proletarian dictatorship as "has been proved by the Russian experience, which has universal significance".[236] Instances like these indicate how the Bolsheviks consistently stressed how they were a *universal* example, and they were not just an outlier or did not have the legitimacy to give advice to Western Europe. Since they had managed the process of disarticulation and rearticulation, and they created their own hegemony along these lines, they were entitled to distribute advice.

However, this also meant that sometimes the Comintern had blinders to affective local conditions, which inspired Herman Gorter to leave the Communist Party and form the Communist Labor Party of Holland. Reportedly, after visiting Russia in 1920, he claimed that Lenin "saw all things only from the Russian point of view,' not in the sense of Russian interests, but of the universal validity of Russian experience".[237]

Yet by 1921, Lenin did become aware of this blind spot and even brought it up at the 3rd Congress, where he critiqued one of the passed resolutions for being "almost entirely Russian… everything in it is taken from Russian conditions".[238] He continued that this meant "scarcely a single foreigner… can read it" since it draws too much from the "Russian spirit," is written in a long style, and would not be able to apply it.[239] The problem, however, is not that the information is wrong but how it was presented was not right. What this indicates is that while there was some

[235] Lenin, "Report on the International"
[236] "Extracts from an ECCI Circular Letter on Parliament and Soviets on 1 September 1919," in Jane Degras, *The Communist International: 1919-1943 Documents*. Vol. 1 1919-1922 (London: Oxford University Press, 1956), p. 68
[237] Ibid, 66
[238] "Extracts from the Theses on the Structure," 257
[239] Ibid., 257

self-reflection on the focus of RSFSR as a case, it was only seen as a negative in the sense of communication, not content nor legitimacy. The Bolsheviks stood fast to the idea that they were rightly a universal example. Interestingly, while Peter I did have a secure domestic state, the policy actions he took were still from a place of perceived insecurity in comparison to the external system. Meanwhile, the Bolsheviks, relatively speaking, were in a far greater position of insecurity, in terms of protecting their domestic stronghold, yet perceived themselves in a superior position to the external system.

2. Bolsheviks as leaders

The Bolsheviks, however, also presented themselves as something more than just a universal example – they were also the leaders. In principle, this coupling makes sense – if you are an example and the only example, then of course you should also be the one dispensing advice. Occasionally, the ideas were also grouped together discursively, such as when the ECCI published that "The existence of Soviet Russia is a powerful incitement to the workers of all countries to conquer State power, establish their dictatorship and uproot capitalism".[240]

Yet how this was conveyed took certain forms. Practically, the Comintern's Executive body was physically located in Russia, as it was "the first proletarian State,"[241] and it was understood that "the Soviet movement and the Soviet states [were] headed by Soviet Russia" against the surrounding hostile imperialist states.[242] In more discursive terms, the Bolsheviks presented themselves as a symbol to uphold – by supporting them, you were supporting world communism. Second, there was also the idea that, despite the civil war, they were gaining strength

[240] "Extracts from the ECCI Theses on the Fight against the War Danger in March 1922," in Jane Degras, *The Communist International: 1919-1943 Documents*. Vol. 1 1919-1922 (London: Oxford University Press, 1956), p. 330
[241] "Extracts from the Resolution on the Organization of the Executive Committee of the Communist International Adopted by the Third Comintern Congress on 12 July 1921," in Jane Degras, *The Communist International: 1919-1943 Documents*. Vol. 1 1919-1922 (London: Oxford University Press, 1956), p. 273
[242] Lenin, "Report on the International "

domestically and internationally. Third, and the most complex narrative of the three, was that other socialist parties had to aid the Bolsheviks. This last point meant the Bolsheviks somehow were both exhibiting strength at the same time showing that they desperately needed help because of the civil war.

The Bolsheviks believed that fighting for the cause of international communism meant fighting to support them as well. However, the Bolsheviks were also there to fight for the socialist parties that had yet to have a successful revolution. Moreover, Soviet Russia was *the only* national representative of communism, and the only state supporting socialist parties in other countries. As Trotsky explained in context of the Russian Civil War:

> 'the communist workers who form the real kernel of the Red Army, are acting not only as troops defending the Russian socialist republic, but also as the Red Army of the Third International'. Those who fell died not only for Soviet Russia, but for the Third International too. When the call came from their brothers in the west, the Red Army would answer 'We are here, we have learned the use of weapons, we are ready to fight and to die for the cause of world revolution'.[243]

The civil war being fought in Russia at the time then was symbolic of how the Bolsheviks would literally fight for their future vision, and it was also a promise for other countries that they would be there for other socialist parties.

This reflects a pattern we have already seen, wherein the Bolsheviks act as a symbol in real-life of how the world *could* look. This was then solidified in a statement from the enlarged ECCI, which "will devote their entire strength to extending the alliance between the revolutionary vanguard of the world proletariat and the Red Army" so that in the future "the red army of the next European Soviet republic will march side by side with the Red Army of Soviet Russia".[244] What

[243] "Message from the Enlarged ECCI on the Fourth Anniversary of the Foundation of the Red Army on 22 February 1922," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 322
[244] Ibid., 323

is also notable here is that, practically, the Bolsheviks were explicitly signing up their army to the international Soviet movement, which also reflects this leadership position they were occupying.

Another aspect of fighting for the cause comes from their strong perception that they were being encircled by imperialist states that wanted to end the first proletarian state.[245] Therefore, there was the pronounced idea that Bolshevik supporters had to understand that the fight was still ongoing and will have universal consequences, despite Soviet Russia remaining "untouched" after years of "chaos and of progressive capitalist decline".[246] It is the lone state fighting against the "demands of the capitalist World" which is not just about Russia, but about "the development of European socialism" and "it is your fight".[247] The Bolsheviks stressing their universal intentions about their army and the idea that the civil war in Russia went beyond borders indicates already that the Bolsheviks were framing their revolution and their army as leaders and the first step to an international Soviet revolution.

The Bolsheviks also promoted the idea that, despite the encirclement and the ongoing civil war and domestic instability, they were actually growing stronger. This discourse helps to balance this defensive position that the Bolsheviks sometimes put themselves in to gain support for their cause from the other socialist parties. Like above when the Bolsheviks highlighted that they were the only state to stand against the imperialists, this is further expanded to diplomacy. While diplomacy was also a pattern for the first ideal type, here it functions as a step toward diplomacy *in the future*, where a communist system will be in place so the Bolsheviks will want to be a part

[245] This chapter deals predominately in perceptions, but it should be noted that during the civil war, many countries, such as the United States, were indeed supplying funds and weapons for the Whites against the Bolsheviks in the war. Many countries also did not recognize the legitimacy of the Bolsheviks nor would have diplomatic relations with them, and there was also a financial blockade imposed on them. All of this is to say that there was a basis for these suspicions.

[246] "Extracts from the ECCI Theses on the Fight," 336

[247] "Extracts from an ECCI Manifesto on the Conclusion of the Hague Conference on 22 July 1922," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 361-2

of it. They were still, however, staunchly against diplomacy with non-communist countries. For instance, at the conferences in Genoa and the Hague with the other states, the Bolsheviks argued that these capitalist countries tried to get Soviet Russia to "abandon the nationalization of industry and to impose on it a burden of debt," but the "proletarian State was however strong enough to resist these arrogant intentions".[248]

This is because the capitalist states were becoming aware of the strength of Soviet Russia, especially as its financial blockade did not stop Soviet Russia's economic reconstruction. Moreover, the Bolsheviks were outsmarting the financial blockade, since capitalist competition between states would lead "them to conduct negotiations separately with Soviet Russia," and thus acknowledge its legitimacy.[249] The Bolsheviks also argued that their sheer size and Soviet Russia's "mere existence… represents a permanent element of weakness in bourgeois society".[250] The acknowledgement of the rising strength of Soviet Russia is shown by the capitalist countries' reaction, which was to create "a wall of small vassal States around Russia [after WWI]… to strangle Soviet Russia when a suitable opportunity occurs".[251] Yet, the Bolsheviks reassured their supporters that "If the Soviet Government is the victor in this struggle then… [you] will be able… to rely on a strong State ruled by the proletariat, whose tremendous economic strength will be put at the service of the proletarian revolution. . . .".[252] Therefore, Soviet Russia is showing its strength through economics, military, diplomatic skill, and by its mere survival.

This ties into the idea that the Bolsheviks, despite their strength and leadership role, also needed to be supported. What is interesting is that in order to still put itself in a position of strength

[248] "Extracts from Theses on Tactics Adopted by the Fourth Comintern Congress on 5 December 1922," in Jane Degras, *The Communist International: 1919-1943 Documents*. Vol. 1 1919-1922 (London: Oxford University Press, 1956), 420
[249] Ibid., 420
[250] Ibid., 420
[251] "Resolution of the Fourth," 429
[252] "Extracts from an ECCI Manifesto," 361-2

and authority, the Bolsheviks frame this aid and help in terms of a duty owed by other socialists. This framing allows for the Bolsheviks to retain their position of superiority while also rally supporters and the help they need. In some ways, this does reflect Peter I's development of Russia's diplomacy. However, the desire for the Bolsheviks to gain allies came not from a perceived inadequacy in this department, nor the necessity to gain allies to wage war, but from the idea that Soviet Russia is the *only* state that can represent and defend socialist parties. In other words, it is a duty to defend Soviet Russia because what other option is there; only Soviet Russia had been able to rearticulate the nodal points, and therefore, it should oversee and lead the new hegemonic system.

In a statement on tactics from 1921, the Comintern explicitly states that to "bring about a unified international leadership of the revolutionary struggle. The Communist International imposes on all communist parties the *duty* of rendering one another the most vigorous support in the struggle".[253] What this includes are economic interventions when other socialist parties (and future states) are struggling, as well as interrupting trade relations with countries attempting to import to counter striking workers. It also means doing more than protesting, i.e., "everything possible to obstruct their government," when their domestic capitalist government is using "coercive measures" against another country.[254] In this abstract way, the Bolsheviks first insert the idea of duty onto other socialists to aid Soviet Russia, should there be a need, and it is framed precisely in this way to unify the 'international leadership' of the struggle.

However, this sense of duty is also underlined by stressing how, if anything were to happen to Soviet Russia, the international cause for socialism would end. This again positions it as the

[253] "Extracts from the Theses on Tactics Adopted by the Third," 255, italics added
[254] Ibid., 255

leader because it indicates that the whole success or failure of a cause rests on its continued existence. For instance, in the Bolsheviks' appeal for help in the Comintern in 1921, they wrote:

> You must all understand that the only guarantee for your victory is your own strength, your own proletarian power. Who at the present time holds in check the insane plans of the capitalists? Who fills them with terror and fear? Your Soviet Russia! ... For every capitalist government understands that Soviet Russia is to-day the chief instrument, the main weapon in the hands of the world proletariat.[255]

Here Soviet Russia's singularity is stressed as the only defense to the capitalist governments, and therefore needs to be protected; it has positioned itself as the protector of the newly articulated nodal points.

The combination of these narratives, as well as the emphasis on future military and financial support to socialists without their own Soviet governments, illustrates that the Bolsheviks did not only stress the universality and singularity of their example but also how this example was leading the way, and therefore, needed to be protected. The posturing of themselves as leaders in these ways that includes a sense of duty to protect an actor that is both leading and exemplifying a cause shows an overarching pattern – the second ideal type displays leadership.

d. The Comintern in action

One of the most important facets of the Comintern to highlight is that it was, above all, an institution meant for action. While it did work on the disarticulation and rearticulation of nodal points, part of this movement and antagonism is acting upon what has been rearticulated. The Comintern's existence shows that not only were the Bolsheviks writing and thinking about internationalism and the worldwide revolution, but they also constructed an organization to fulfill this goal. The actions that the Comintern took, the intricate details of their meetings and their letters

[255] "Appeal of the ECCI for Help for the Famine-Stricken Areas of Russia on 4 December 1921," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 302

to other socialist parties around the world, show the level of dedication the Bolsheviks had toward putting their ideas into action.

In their theoretical works, Lenin and Trotsky aimed to build a strong foundation for a party program that would eventually be implemented on an international scale. However, originally, Lenin's aim of "making the Soviet state a Bolshevik-ruled party-state" came more from "an urge to power for the sake of leadership of the society by the sole political force in possession of the Marxist truth as guidance for politics".[256] A communist party was essential to ensure that the proper Marxism would be implemented, and it was often advocated as the first step for other Comintern members to take.

Part of this, interestingly, came also from Lenin's study of methods used by the Germans, which he claimed "now personify, besides a brutal imperialism, the principle of discipline, organization, harmonious cooperation based on modern machine industry, and strict accounting and control. And that is just what we are lacking. That is just what we must learn".[257] In part, the Bolsheviks willingness to look beyond both the war and the nation state meant that they were more willing to embrace outside techniques, and in some ways, this reflected Peter I's attitude toward other European states as well. However, instead of importing methods to change the status of Russia within the existing system, Lenin aimed to import methods to change both his own country and the external system. This aspect of changeability is also important to highlight. By changing the Russian polity, or rather, by radically transforming it, Lenin envisioned that the external system also *could be* changed, meaning, there was space for rearticulation.

[256] Robert C. Tucker, "Lenin's Bolshevism as a Culture in the Making," in *Bolshevik Culture: Experiment and Order in the Russian Revolution*. Eds. Abbott Gleason, Peter Kenez, and Richard Stites, (Indiana University Press: Bloomington, 1985), 32
[257] Ibid., 35

With the formation, then, of the Comintern, Bolshevik theories and practices were ascribed to other socialist parties globally, and they highlight what the Bolsheviks viewed were the key steps to take to change the international order, which were primarily based on internal changes to nation states. The internal changes focused on the organization of parties, changes to the domestic economies and politics, and even reusing old, bourgeois methods.

In general, it was assumed that the current international system and most bourgeois nation states, despite being broken, would not take to these changes easily. Taking action then, including potential "armed struggle," was essential in order to end the previous order, which was, after WWI, attempting to repair itself.[258] Therefore, it was also stressed that "The task of the international communist party consists in overthrowing that order and erecting in its place the edifice of the socialist order".[259] Once both the system was overthrown and these steps by national communist parties were completed, individual state revolutions would eventually lead to a proletarian world system.

1. Implementing change

Implementing change rested on three primary areas: organization, radically changing politics, and economics. For Lenin and other Bolsheviks, such as Bukharin, one of the primary tasks of the Comintern was to turn chaos into order. In doing so, coupled with the knowledge that the bourgeois order would not go easily, the Bolsheviks advocated against reform: "The communist parties do not put forward any minimum programme to strengthen and improve the tottering structure of capitalism. The destruction of that structure remains their guiding aim and their immediate

[258] "Statutes of the Communist International Adopted at the Second Comintern Congress on 4 August 1920," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 163
[259] "Manifesto of the Communist," 47

mission".[260] What this then lent to the Comintern was an emphasis on making concrete steps that were not reformist but would radically transform the nation state into a functioning Soviet one.

Changes to politics

Here specifically what is meant by changes to politics refers to the practices of enacting political decisions that had already been made. In other words, the normative discussions and changes the Bolsheviks had implemented and previously discussed do not fall under this section. Instead, this section is about how the Bolsheviks put these ideas into practice, which mostly involves changes to the structure of the state. While ultimately, the goal was the end of nation states, securing domestic hegemony was seen as the first step for moving toward a proletarian world system. It was only a government that could do the necessary tasks to break capitalist control, such as seize property and redistribute it, and to disarm the capitalists.[261] Once these tasks were accomplished, however, and communism was secure, the state would be dismantled.

However, and therefore, the proletariats first had to organize themselves, "to rally the scattered communist forces, to create a united communist party in each country… to multiply tenfold the work of preparing the proletariat for the conquest of State power in the form of the dictatorship of the proletariat".[262] Only organizing a country based on soviets could "destroy, at one stroke and completely, the old, that is, the bourgeois apparatus of bureaucracy and judiciary," and it was essential to destroy this previous structure before building a new one.[263] Unlike Peter I,

[260] "Extracts from the Theses on Tactics Adopted by the Third," 248
[261] "Extracts from a Letter from the ECCI to the Industrial Workers of the World in January 1920," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 73
[262] "Theses on the Basic Tasks of the Communist International Adopted by the Second Comintern Congress on 19 July 1920," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 118
[263] Lenin, Vladimir I. "Theses on Bourgeois Democracy and Proletarian Dictatorship Adopted by the First Comintern Congress on 4 March 1919," in Jane Degras, *The Communist International: 1919-1943 Documents.* Vol. 1 1919-1922 (London: Oxford University Press, 1956), 14

who aimed to preserve the judicial system and base legitimacy of the regime, for the Bolsheviks, it was essential to start with a clean slate.

Therefore, while the Bolsheviks were securing their own domestic control, they were still intent upon fomenting revolution abroad and spent time detailing to other parties in the Comintern how they could specifically accomplish this. Much of this rested on establishing and organizing a strong communist party that would take control of the existing state, execute communist policies, and then dissolve, and this countered not only to the common-sense of the time but other existing oppositional parties at the time, such as national socialists.

Changes to the economy

Changes to the economy were an essential part to changing both the international and domestic orders owing to the fundamental idea coming from Marxism that material conditions are responsible for a person's ability to live a good life. Here, the Bolsheviks were inclined to give step-by-step instructions for implementing specific economic policies. For instance, Bukharin explained to the other Comintern members that one of the first steps to take was nationalizing the economy, including the nationalization of banks, extending control to the municipalities, nationalizing industries, and so on.[264] As outlined in the previous section, the key was to move the modes of production over to workers' control, but since the proletariats did not have enough strength by themselves, it was necessary to move this into the existing state structure to then transfer the modes of production back to the workers, in principle. This outlines the middle step to this, which is the transference of, mostly, capital and land to the communist state.

One of the other changes to economic policy involved trade. While for Peter I, trade, specifically mercantilist trading, was an instrument for gaining acceptance to the West and core to

[264] Bukharin, "Platform of the Communist," 21-22

the common-sense at the time, both through the practice and by building an economy, the Bolsheviks initially aimed to "replace trade by the correct distribution of goods".[265] In order to manage this, businesses had to be nationalized, and the eventual centralization of these businesses and trade would lead to "a unified whole effecting a rational distribution of goods".[266] Like Peter I, the Bolsheviks saw a need for specialists to accomplish this, but only "when their political resistance has been broken and they have learned to adapt themselves not to capital, but to the new system of production".[267] Therefore, the goal of changing economic policy was not to become an equal or a respectable player in a recognized game, like with Peter I, but it was rather to fundamentally change the game itself.

Using pre-existing methods

It should be noted, however, that the Bolsheviks were not always capable nor willing to push an agenda that completely dismissed the previous order. Like with specialists, the Bolsheviks sometimes acknowledged the benefit of using pre-existing structures and methods to accomplish tasks for the long-term goal of building communism. Sometimes, in fact, quite the opposite happened, where the Bolsheviks would convince some Comintern members to use existing bourgeois infrastructures, such as the parliament. In one heated exchange, Lenin stated: "How will you expose the various parliamentary manoeuvres, or the positions of the various parties, if you are not in parliament, if you remain outside parliament?"[268] This approach is not outside of Marxist theory. Only a decade later, Gramsci would write his *Prison Notebooks*, where he details the War of Position, wherein one strategy that could be taken by proletariats is to slowly gain political power to increase territory before reclaiming the state. In this case, it does not seem odd for the

[265] Bukharin, "Platform of the Communist," 22
[266] Ibid., 22
[267] Ibid., 22
[268] Lenin, "Report on the International"

Bolsheviks to suggest using previous methods or infrastructures to build their new order, despite their previous push for starting with a clean slate.

However, there is an element of pragmatism to this decision as well, which complicates the picture. The Soviet economy was having difficulty in the late 1910s and beginning of the 1920s, owing to the revolutions, war, and civil war. In addition, many still did not recognize the state, and therefore, trade and diplomacy were extremely difficult to conduct. These pressures may have led to a more lenient approach toward the desire to demolish the old order entirely, which was hinted at in the Comintern, on more than one occasion:

> [The Soviet Government] knows that the Russian economy cannot be restored without the help of European economy… Therefore the Soviet Government declares: We need world capital and therefore we must give it profits… Fools, who call themselves communists and even left communists, have accused us on this account of treachery to the proletariat. ... We answer: 'Then show us another way…'[269]

In some ways, the Bolsheviks were attempting to challenge the pre-existing order, and they did have a clearly expressed desire to replace it with a fundamentally different system. But these practical issues bring up another strain of discourse in the Comintern, one where it seems that the two systems did have at least one overlap. While the Bolsheviks presented a framework and a desire to produce a fundamentally new system, the question becomes whether this system was so radically different.

For instance, at the 2nd World Congress of the Comintern, Trotsky states, "The Supreme Economic Council of the Entente imperialists must be replaced by the Supreme Economic Council of the world proletariat".[270] This quote represents an implicit trend that has been throughout this section – the Bolsheviks create new policies, new places of power, new leaders, and new mechanisms for power – but they do not seem to have a problem with power itself. The Bolsheviks

[269] "Extracts from an ECCI Statement," 342-343
[270] Trotsky, "Extracts from the Manifesto," 173

presented a counter-hegemonic idea, yet the idea of there being a system was not questioned, only the morality and structure of that system. This basic agreement allowed the Bolsheviks to use pre-existing methods to affect change, but it also limited the challenge the Bolsheviks presented. Therefore, a counter-hegemonic challenger should support the idea of hegemony but aim to impose a new common-sense in place of the other. It may use similar tactics or have similar institutions in the process.

This also shows the reverse of what we have seen with Peter I. While Peter I aimed to join the existing system without changing the common-sense, the international system *did* alter when he joined it. However, while the Bolsheviks aimed to change the international system, the international system had the ability to change the domestic structure of the Bolsheviks; to survive, they had to acquiesce to parts of the international system. This highlights that, despite the intentions of either challenger, outcomes of a challenge are unpredictable and are dialectical – they depend on the response and conversations with the system being challenged.

5.4 Bolshevik Russia as a counter-hegemonic challenger

Ultimately, then, what kind of challenger were the Bolsheviks? Unlike Petrine Russia, the Bolsheviks did not want to be a part of the existing order, nor did they believe in the legitimacy of the existing order. Because of this, they aimed to disarticulate certain nodal points that they viewed, underpinned the system (e.g., capitalism, the dominance of the nation-state). More than this, however, they believed the existing order was broken and, even when it was not broken, was morally wrong. On this premise, they endeavored to create a new system through the rearticulation of nodal points before the previous imperialist order could be repaired, and they aimed to rally other communist parties behind this goal.

There were several patterns that emerged through statements, actions, and concepts, and they can account to a discursive formation of the second ideal type. The Bolsheviks were critical of the existing system by detailing how it was broken and how it was morally wrong, owing to the inequalities, warmongering, and chauvinism that were inherent to imperialism. The issue was again with the system itself, not the Bolsheviks' place within the system. Rather, contrary to this, through the discussion of nationalism and chauvinism, the Bolsheviks were distancing themselves from the Great Power status that the Russian Empire had, which is in direct opposition to the goals and desires of Peter I's reign. Moreover, they were also attempting to disarticulate certain nodal points, capitalism and imperialism, which were important to the existing external system.

However, and importantly, the Bolsheviks went beyond their critiques and created the Comintern in an effort to implement their theories and domestic practices in the world and to rearticulate the disarticulated nodal points. In their discussions, letters, and reports, the Bolsheviks presented a vision for the future based on a vague and idealistic future communist world, which was morally superior to the imperialist order because in this world, the proletariats had the means of production and war would not occur. Yet, the details of implementing this on a global scale were generally absent.

Rather, the Bolsheviks focused on presenting themselves as an example, and relatedly, as a leader to the other communist parties in the Comintern. Part and parcel to this, the Bolsheviks gave specific instructions, often specific to the countries requesting advice, on how the economies and politics of a communist society should look. Given the practicalities of the time, wherein the Bolsheviks were not strong enough to back the parties abroad as they were fighting for their own survival at the time, the Bolsheviks did fall back on using traditional methods and infrastructures in place. Here, they presented a paradox – how can you advocate for demolishing the existing order

when you simultaneously advocate for using it? While pragmatism can account for this partially, another strain throughout shows that the Bolsheviks, while against the morality of the imperialist system, were not against the idea of a world system. Power structures and effective mechanisms, therefore, could remain if they could be reappropriated. Here, there is then some tangential similarity to Peter I, who also imported methods as long as they would not interfere with his domestic legitimacy.

While Peter I and the Bolsheviks overlap in their acceptance of a hegemonic system, they do differ in the challenges they presented and how they presented them. Unlike Peter I, the Bolsheviks worked to dismantle the institution, the bourgeois state, that theoretically was a base of control. They first developed their own system of governance, still based on the state, and then quickly promoted it via the Comintern. Abstractly, they promised a moral, communist order once this step was accomplished, and all states were dismantled.

The Bolsheviks, like Peter I, did look abroad for inspiration, but the Bolsheviks aimed to create a new system based on a code of morality that they argued was better. They had no interest in interacting with the system nor being recognized by it until it was absolutely, pragmatically necessary. This is important to stress, though – the Bolsheviks did have to accept part of the external system; they did not manage entirely in their disarticulation and rearticulation efforts, and while they gained some supporters, they ultimately failed in articulating a hegemonic international system based on their conceptualization of communism.

The completed second ideal type that emerged from this discursive formation is a challenger that sees the system as changeable, which is evidenced through critiques aimed at disarticulating the current hegemonic common-sense. The challenger then, based on the external system, will rearticulate its own idea of an alternative that has an another common-sense. There

should also be concrete actions taken toward its implementation. Reflecting on Chapter 2, we can also see here that methods alone do not indicate if there is a counter-hegemonic challenger. The second ideal type may use methods and institutions existing from the former hegemon to build its new world. With now both ideal types complete, the following chapter will apply these developed concepts to contemporary Russia.

Chapter 6: After the Annexation

After Chapters 4 and 5, we are left with two ideal types. Challenger I counters the existing system in terms of vying for a different position, status, or recognition. A counter-hegemonic challenger (Challenger II), on the surface, may not seem so different from this, and at this point, it should be clear the delineation was made more for conceptual purposes rather than an expression of some Reality. However, this type of challenger presents a different danger, which is that the counter-hegemonic challenger has lost its belief in the hegemonic principle. This principle then also has lost value and meaning to the actor except when it suits the actor. This challenger can become rather more chaotic, because if the order is broken, why follow it? Why respect it? Why not ensure the safety of your own country even if it disrupts this, now sham, of an order? An additional feature, however, of a counter-hegemonic challenger is that it has discussed its vision for an alternative. Without this alternative hegemonic principle, the actor may be counter-hegemonic but not necessarily a challenger. In this chapter and the next, I examine if Russia is challenging the hegemonic international system, as it was defined in Chapter 2 as well as add further details to this system from Russia's perspective.

With the two ideal types now ready to use, I will analyze Vladimir Putin speeches from 2015-2019 in Chapter 6. These ideal types and their discursive formations will provide signposts to better understand Russian foreign policy discourse, and which challenges it presents. Particularly, I will examine four speeches that were repeated yearly: the Victory Day Address, commemorating the end of WWII; Putin's Direct Line, where he takes calls and questions from (as it is advertised) average Russians; the Valdai Discussion Club, where many experts discuss international affairs; and Putin's Annual News Conference, where he addresses questions from the

press. I added speeches that were significant regarding certain topics, like Syria or Ukraine. The regularity of these speeches allows for some baseline to exist in the analysis.

In some ways, this is a limiting scope, as the Russian government is not Putin, and there are domestic considerations at play that affect Russia's foreign policy decision-making. Importantly, aside from the Victory Day speeches, the selection of Putin's discourse is more dynamic – they are all Q&As. This allows us to see how these concepts are used in a more active environment and in the absence of perfect planning. Additionally, I chose to focus on Putin's discourse because the approach taken to discourse and foreign policy in this dissertation is specifically foreign policy discourse as performativity. The discursive focus was on two internationally attention-grabbing events: Russia's Annexation of Crimea and Russia's involvement in Syria. These cases are not taken in isolation, as foreign policy discourse does not talk only about one actor in a vacuum, and thus, the chosen speeches are read in their entirety.

In Chapter 6, I will use the two ideal types and their associated discursive formations as signposts to attempt to understand which type of challenger Russia was, how this was expressed, and if the type of challenger Russia was changed at any point. Yet it is important to keep in mind that these ideal types are exactly ideal; contemporary Russia will not be a perfect fit with either of them, but with the dynamics of the empirics, it may be possible to grasp, rather than ambiguously decide, which kind of challenger Russia was and is.

With the Annexation of Crimea, some argued that Russia was beginning to delve into normative debates about the structure of the global system, primarily through criticizing the unipolar order.[271] Although there were instances of Russia having these critiques, the Annexation

[271] See, for example, Alla Roşca, "Power Distribution on the World Stage: The Impact of the Crimean Crisis," *Journal of Eastern European and Central Asian Research,* 1, No. 2 (2014); Eiki Berg & Martin Mölder, "The politics of unpredictability: Acc/secession of Crimea and the blurring of international norms," *East European Politics,* 34, No. 4 (2018)

seemed to be an inflection point in how Russia was being perceived as a challenger. Yet, expressing this alone merely gets us to a baseline that requires further exploration. Therefore, this chapter will chronologically examine Russia's foreign policy discourse, as expressed through several public events attended by President Putin. The starting point of this chapter is 2015, after the upheaval of 2014, when the Russian Federation annexed Crimea and began supporting the separatists' movements in the Donbas. This chapter will then end with 2019, the year before the global pandemic, which marks another turning point in Russia's foreign policy discourse. From 2020-2021, Russian foreign policy takes a different approach, and for this reason, it is explored separately in the next chapter. The question, therefore, for this chapter is whether there was a discursive formation in Russian foreign policy, and if so, did it exhibit any regularities in common with the two ideal types? What is the context and greater picture of these expressions, and what is missing from the constructed challenger dichotomy presented here?

The chapter is structured by an in-depth analysis of illustrative pulled quotes in a chronological order. The benefit of this structure is that as a researcher, I can act as a guide through the research process, through the puzzle I saw, and how I believe the pieces fit together. The drawback of this is that it paints a clearer picture than exists during this timeframe. To allow some of this chaos to emerge, I included longer quotes to allow the reader also to judge for themselves my interpretation of the discourse as well as to see that when we speak of challengers, it is not a clean theoretical duality.

Throughout this chapter, I will suggest moments where Russian foreign policy is discursively performing Challenger I, II, or both, but the point of this is not to make predictions or support cases of inevitability. It is rather the opposite. It is to show that along the way there were no certainties that Russia would launch its full-scale invasion of Ukraine; no certainties that Russia

would become as isolated economically and politically as it is now; and no certainties that this is the end of Russia's foreign policy ambitions outside its borders. It is to say that, although at some points Russia veered toward one end of the spectrum and the other, there was no moment Russia was definitively one of the challengers; from 2015-2019, it did not present a clear ideal typical example.

These suggestions are also to encourage those outside of Russia to reflect on our own understanding of the international system. While there may be a strong showing of support in many European nations, the complaints and criticisms Russia brought against the international order found support outside of the traditionally understood "West".[272] Russia's invasion of Ukraine provides us with an opportunity to reflect on prevailing global inequalities between the Global North and Global South, the lingering and looming effects of imperialism and colonialism, and to perhaps make changes before the international order changes itself. In short, it is also an argument that counter-challengers and counter-hegemonic challengers provide an opportunity for critical self-reflection and action that should not be avoided.

6.1 2015-2019

This analysis begins after the Annexation of Crimea, which is understood here as an inflection point in Russian foreign policy. As Ukraine is also one focal point here, along with Syria, the Annexation marks an important starting point for both military involvements. The foreign policy discourse around the Annexation itself was not included, as the main question of this dissertation is what kind of challenger Russia was during the period after this point. The ending point for the first section of analysis is the start of the Covid-19 Pandemic because Russia, like many other

[272] Roşca, "Power Distribution on the World"; See also Roberto S. Foa, Margot Mollat, Han Isha, Xavier Romero-Vidal, David Evans, & Andrew J. Klassen, "A World Divided: Russia, China and the West." (Cambridge, United Kingdom: Centre for the Future of Democracy, 2022)

countries, is forced to look at this crisis on the global level and evaluate what works and does not work there.

a. 2015

In 2015, Russia became involved in the Syrian Civil War. How Russia justified its involvement was rooted in its belief of *legitimate* interventions, sanctioned by either the UN or a sovereign state, although ideally both. As Putin explained, "After Syria's official authorities reached out to us for support, we made the decision to launch a Russian military operation in that nation. I will stress again: it is fully legitimate and its only goal is to help restore peace".[273] Russia rooting its justification within the sovereign state indicates a belief, first, in an international order based on the principle of state sovereignty, and second, a belief that this principle still exists and is followed by Russia. Although in Chapter 2, neither of these were particularly highlighted as main nodal points for the current international hegemonic system's common-sense.

Additionally, when it came to Syria, Russia had a concrete action plan. Notably, this plan could also be found in one of Russia's older foreign policy tropes: eradicating terrorism. In this case, there is a sense of returning to an old, unifying value that was once shared between Russia and the West, spurred by the 9/11 terrorist attack in the US. The first step, in Russia's view, was to eradicate terrorists from Syria, and to do so, there must be cooperation, and any "joint anti-terrorist action must certainly be based on international law".[274] Here, Russian foreign policy is in line with Russia as Challenger I – it is not challenging the system but rather trying to protect certain values and mechanisms within that system.

[273] "Meeting of the Valdai International Discussion Club," transcript of discussion in Sochi, Russia, 22 October 2015, http://en.kremlin.ru/events/president/news/50548
[274] Ibid.

Russia's involvement in Ukraine, however, is approached in a different way. While Russia does legitimize its Annexation and continued support for the separatists in the Donbas, Russia cannot claim that its actions were sanctioned by the UN nor were asked for by a sovereign state. Putin does not dismiss these values as unimportant, but instead he seeks to delegitimize the Ukrainian state, meaning that he was unable to follow either protocol because Ukraine is not an equal actor in the international arena. For instance, Putin often references how the Ukrainian government is unable to provide for its citizens, and typically, its pensioners. For Putin, the purported failure of Ukraine to pay pensions means "that the current Kiev authorities are cutting Donbass from Ukraine themselves".[275]

Putin also often puts blame on the Ukrainian government, indicating that because of its failure, Russia *had to* step in. Because Ukraine is unable to cooperate, Russia *must* act this way. Moreover, Ukraine cannot protect the rights of, for lack of a better word, cultural and linguistic Russians:

> It is also very important that [Kyiv officials] observe the legitimate rights and interests of Russians living in Ukraine and those who consider themselves Russian regardless of what their passports say. People who consider Russian their mother tongue and Russian culture their native culture. People who feel an inextricable bond with Russia. Of course, any country cares about people who treat it as their motherland (in this case, Russia).[276]

Here, Russia positions itself as the protector of an international right that Ukraine is failing to honor – the protection of ethnic minorities within a country. '*This is nothing extraordinary.'* It is status quo, and it is a standard right protected by any sovereign state. Notably, Russia frames its involvement in Ukraine as trying to be seen 'as an equal,' which is rather open to interpretation. An equal in terms of cooperation? Diplomacy? Or an equal partner in deciding how Ukraine treats

[275] "Direct Line with Vladimir Putin," transcript of discussion in Moscow, Russia, 16 April 2015, http://en.kremlin.ru/events/president/news/49261
[276] Ibid.

its minority groups? A desire for equality within the system falls more under Challenger I than Challenger II discourse, as to want equality in the system, it indicates you believe this can be achieved within the pre-existing system.

This becomes altogether more complicated, however, when Putin describes how Ukraine is a sovereign state:

> Ukraine is an independent state and we must respect this. We alienated all this ourselves at one time when we made a decision on the sovereignty of the Russian Federation in the early 1990s. We made this decision, didn't we? We freed them from us but we took this step. It was our decision. And since we did this, we should treat their independence with respect. It is up to the Ukrainian people to decide how to develop relations.[277]

Ukraine's sovereignty here is described as only existing because Russia gave it to them. While Putin acknowledges Ukraine's independence, he emphasizes the Ukrainian people's right to decide the future of Ukraine, not the government. Moreover, it is embedded in a discourse that makes it seem Ukraine's independence is predicated on Russia's acceptance of its independence. The phrasing of this then allows Putin to assert Russia's right once again to be involved in Ukraine. Having a right to be in the system follows signposts closely aligned with Challenger I.

Because Ukraine has failed as a democratic state, the issues facing Ukraine are "not [Russia's] failure. This is a failure within Ukraine itself".[278] Why Ukraine is a failure is an important part of this story – for Putin, the events of Maidan delegitimized the Ukrainian government. Putin found the way in which Viktor Yanukovych lost and Viktor Yushchenko came to power illegitimate as it came after three rounds of voting, and this procedure does not exist in the Ukrainian constitution. As Putin rails: "What kind of democracy is this? This is simply chaos. They did it once, and then did it again in even more flagrant form with the change of regime

[277] "Direct Line with Vladimir," 2015
[278] Ibid.

and coup d'état that took place in Ukraine not so long ago".[279] Ukraine, as of 2015, lacks the ability to govern itself, and even if it can act as a sovereign state, it is based on an illegitimate election.

In this case, while Putin respects democratic countries, Ukraine is not one; certain voices in Ukraine are not being represented. Putin then declares that Russia opposes "this method of changing the government, [which is] completely unacceptable in the post-Soviet region, where, to be frank, many former Soviet republics do not yet have traditions of statehood and have not yet developed stable political systems".[280] This is coupled with Putin stating, "Ukraine genuinely is a brotherly country in our eyes, a brotherly people. I don't make any distinction between Russians and Ukrainians".[281] In this way, the framing of Ukraine as a failed democracy heightens Russia's right to be in the system; its own 'brothers' and cultural and linguistic Russians are being mistreated by a state that, like other post-Soviet states, have not developed yet to a point where it can be a fully independent democracy.

This is used to counter the West's accusations that Russia is against a democratic government in Ukraine and brings us to Russia's view on the international order. Putin argues:

> Do you imagine we could be opposed to having democracy on our borders? What is it you call democracy here? Are you referring to NATO's move towards our borders? Is that what you mean by democracy? NATO is a military alliance. We are worried not about democracy on our borders, but about military infrastructure coming ever closer to our borders. How do you expect us to respond in such a case? What are we to think?[282]

Here, Putin is asserting that he does not care if Ukraine is democratic, contrasting his earlier position about ensuring the representation of voices in Ukraine. Rather, Putin cares about Ukraine's position in terms of Russia's security.

[279] "Meeting of the Valdai," 2015
[280] Ibid.
[281] Ibid.
[282] Ibid.

This takes us away from the narrative that Russia intervened in Ukraine because it had to protect underrepresented voices and ensure human rights, and it places Ukraine in Russia's larger view of the external hegemonic system. With this pivot, we begin to see more Challenger II signposts but mostly through complaints and criticisms against the system. Most of the complaints adhere to two themes: the US acts to disrupt the system and cause insecurity; and international law is under threat, primarily because of the US.

Typically, this takes the form of Putin complaining about the US testing an anti-missile defense system in Europe to "mislead us and the whole world… about an attempt to destroy the strategic balance, to change the balance of forces in their favour not only to dominate, but to have the opportunity to dictate their will to all".[283] The US attempting to dominant the hegemonic system by force appears again when Russia warns against using "common threats" as a pretext "just to remind the world who is boss here, without giving a thought about the legitimacy of the use of force and its consequences".[284] Alongside this are Putin's warnings about the danger of not cooperating and attempting to enforce a unipolar world. This strand of narrative, then, appears as a counter-hegemonic complaint, but Putin is not suggesting a different system nor the destruction of the existing system; he is complaining that the system itself, as far as it is outlined in international law, is being ignored and violated. These criticisms aim to disarticulate the nodal point that the US upholds international law.

These principles "have been hard won by mankind as a result of the ordeal of the war".[285] And this gives us some better understanding of Russia's foreign policy, in 2015, positioned itself

[283] "Meeting of the Valdai," 2015
[284] Ibid.
[285] Vladimir Putin, "We pay tribute to all those who fought to the bitter for every street, every house and every frontier of our Motherland," transcript of speech delivered at Moscow, Russia, 9 May 2015, http://en.kremlin.ru/events/president/transcripts/49438

relative to its external hegemonic system. This system was constructed after the defeat of Nazism; rules and moral values were sanctified into the United Nations; this has kept most conflict at bay, even during the Cold War; because Russia was a part of this construction, Russia, as inheritor of the Soviet Union, is an *equal player* within the current system. To ensure the continuation of the system, the rules must be respected and cooperation between the equal players *established from World War II, not all countries.* It is a multi-polar order with limits of who is included in "multi".

However, despite the complaints and criticisms Putin mounts, the majority of the discourse in 2015 leans more toward Russia only challenging the system in terms of protecting the status quo, and more specifically, its privileged position. This includes its right to be involved in Ukraine and Syria, although justified in different ways. At this point, Putin does not suggest an alternative or even a suggestion for a different system. When asked at the Valdai Discussion Club about his opinion on Russia's role in the future, he believes that "the role and significance of any state in the world will depend on the level of a particular nation's economic development. It will depend on how modern the economy is and how much it strives toward the future, the extent to which it is based on the newest technologies, and how quickly it adopts the new technological order".[286] Given the common-sense of the hegemonic system, there is nothing counter-hegemonic in this answer, and despite the events of 2014 and 2015, Putin seems to generally believe the existing common-sense and only aims to protect Russia's position, which also does not set it firmly in-line with the first type of challenger either.

b. 2016

Putin's approach toward Russian foreign policy in 2016 extended themes from 2015. Little was discussed about Syria aside from the success Russia was having there, mostly in terms of how it

[286] "Meeting of the Valdai," 2015

was able to cooperate with the *major players* of the conflict, i.e., the Syrian government, Iran, Turkey, and Russia. Putin double-downed on the idea that Russia was a mediator and keeper of the system's common-sense, and any progress made in Syria "would have been simply impossible without our participation, without Russia's participation".[287] Syria, then, for Putin is a chance to show Russia's value within the existing system and Russia's ability to cooperate, which reflect two main features of Challenger I.

Russia's feeling of success with Syria is contrasted with Russia's inability to agree with Ukraine on the future of Crimea and the Donbas. Part of Russia's rhetoric reflects its goals in Syria – it wants to act and sees its value in the conflict as a mediator. However, the rationale behind getting involved in Ukraine is different. First, unlike in Syria, Russia is backing the separatists in Ukraine, not the government. Second, while Russia claims to be upholding international law, it is doing so to protect ethnic and linguistic Russians and its own security neighborhood rather than the global order at large.

This does not mean that Russia does not have complaints against the global order that appear in its conflict with Ukraine. Once again, Putin criticizes the Ukrainian government, but more that it had been misguided by lies from the EU about its potential accession. Putin argues that:

> Mr. Yanukovych said too in the end that, "I want to join this agreement, but I need to reflect on the accession terms and settle them within our own government and consult with Russia, because we have very close economic ties with Russia and we need the Russian market. We have a high level of cooperation." But our European partners said no. How can one act that way? We therefore do not consider ourselves to blame for what happened. We did not start this chain of events.[288]

[287] Vladimir Putin, "Vladimir Putin's annual news conference," transcript of speech delivered at Moscow, Russia, 23 December 2016, http://en.kremlin.ru/events/president/news/53573
[288] Ibid.

In Putin's version of events, the EU made a false claim, attempted to be too stringent in its demands, and most of all, attempted to exclude Russia from decisions about Ukraine. Because this decision was then dragged out, and then because the EU changed its mind, the "coup" happened, which triggered Russia's actions to protect ethnic and linguistic Russians in Ukraine.[289] This reflects Putin's greater frustration with the EU being inconsistent and dominating, as well as excluding Russia from European affairs.

Putin also frames the EU as using Ukraine as a political pawn, not caring about what happens to the country. He also refers to the EU Association Agreement as "some kind of man-made thing".[290] The phrasing of this is interesting because Putin here is negating the idea that some people in the country may have genuinely believed in the agreement, that it might have some base in Ukraine's common-sense, even if not in his perception of the external hegemonic common-sense. Moreover, he refers to it as an "instrument" for regime change, which again, moves agency outside of Ukraine and formulates this decision as a complaint against the EU. This ties into the theme from 2015, when Putin claimed that Ukrainians and Russians are "one people".[291] He once again states, "for the majority, we are one people, a people who share a common history and culture and are ethnically close" – it is others that try to divide this *natural* bond.[292]

Because the Ukrainian government is illegitimate and does not actually care about its own people, the Minsk agreements failed. Putin argues that Ukraine purposefully did not enact constitutional changes it had agreed upon and put obstacles up to prevent passing the law that would redefine the geographical territories of Ukraine and the breakaway regions. Putin believes

[289] "Vladimir Putin's annual news," 2016
[290] "Direct Line with Vladimir Putin," transcript from discussion in Moscow, Russia, 14 April 2016, http://en.kremlin.ru/events/president/news/51716
[291] "Meeting of the Valdai International Discussion Club," transcript from the discussion in Sochi, Russia, 27 October 2016, http://en.kremlin.ru/events/president/news/53151
[292] Ibid.

this law "is absolutely key to a political resolution to the crisis," and the Ukrainian government's seeming sabotage of this might indicate that Russia would find the system broken.[293] On the other hand, Putin adds that, while he is frustrated with the Minsk agreements and Ukraine, there are still areas of cooperation and progress, like the Normandy format. He argues it is irrelevant if is useful or not, there is simply "no alternative".[294] The 'no alternative' rhetoric can indicate that, at this point, Russian foreign policy still finds value in diplomacy and cooperation, which shows that there is a basic acknowledgment the system and international relations can still function.

This is matched with Putin making repeated calls for cooperation and arguing that it is not Russia that impedes global collaboration. These calls are typically rooted in addressing security issues, particularly global terrorism. Moreover, Russia places the blame for worsening relations with the West on Western countries, although typically ending his complaints with a call for cooperation:

> It was not we who initiated the worsening in relations with Europe, including with Germany. We did not impose any sanctions on European countries, including Germany, none at all. All we did was to take measures in response to the restrictions imposed on our economy. We would be happy to lift these measures if our partners, including in Europe, lift the anti-Russian sanctions, even though our farmers are asking us not to do this.[295]

Interestingly here Putin argues that, not only is Russia not to blame for the economic sanctions it put on Europe, despite its actions in Ukraine, it is the one calling for cooperation. This cooperation might even go against the interests of some of its citizens.

This ties into Putin's narrative of Russia's value in the system and its desire to protect the existing order, which is often exemplified by Putin's discussion of the UN. As he states:

> On the matter of the UN, I have said before but will say again now that we must return to what is written in the UN Charter, because there is no other such universal organisation

[293] "Meeting of the Valdai," 2016
[294] Ibid.
[295] Putin, "Vladimir Putin's annual news," 2016

> in the world. If we renounce the UN, this is a sure road to chaos. There is no other universal alternative in the world.[296]

Once again, we see this expression 'no alternative'. Putin warns against global instability caused by dismantling the system and replacing it with an alternative, which, according to him, does not even exist. This narrative strongly indicates Russia in 2016 was not a counter-hegemonic challenger, but again, it also does not make it Challenger I either, as the UN being a staple of the system is not a key nodal point to the operating common-sense. Nor is Russia advocating for a new position, but rather, it aims to keep the status quo in some respects.

However, some of Russia's actions and justifications show that Challenger II discourse still existed. For instance, Putin discusses how Russia is strengthening its bonds with Asian countries. Rather than them being an alternative to Europe and the US, Putin claims that "life itself dictates this choice… The Asian countries' development and influence is growing and will continue to do so, and, what's more, they are growing fast. With a sizeable part of its territory in Asia, Russia would be foolish not to make use of its geographical advantages and develop ties with its neighbours".[297] Thus, although Putin continues to argue for the system to stay the same, he himself notes how the system is changing, mostly in terms of economics but also in terms of Russia's potential avenues for cooperation. While this may mirror more of Challenger I, there is an underlying indication here of Putin seeing the system as changeable, i.e., the common-sense as changeable, and this can lay the groundwork for a counter-hegemonic challenger.

Coupled with this, Putin also made complaints against the system that would more align with Challenger II. For instance, Putin argued that the behavior of the West, particularly the US, to target Serbia, Iraq, Libya, and Afghanistan, all without UN approval, "broke apart

[296] "Meeting of the Valdai," 2016
[297] Ibid.

the international legal framework that prohibited deployment of new missile defence systems" and created terrorist groups.[298] In this way, Putin notes ways in which the system has already "broken". He continues this train of thought with his frustration over the US withdrawing from the Anti-Ballistic Missile Treaty (ABM). By its actions, the US forced Russia then to build up its defense – once again, Russia is not to blame for issues in cooperation or with the fracturing of the international order. The US, by promoting a unipolar world after the collapse of the Soviet Union, has decided this, and its decision will, first, provoke Russia, and second, lead to the devolution of the values underpinning the international order since WWII.[299]

To correct this, the international system must adhere to the values and rules outlined by the UN as well as listen to the interests of citizens and not push and enforce a unipolar order. Rather than present this as an alternative, however, Putin seeps this into the past – the legacy of WWII and the order built by the victors. Neoliberalism, it seems to him, has run its course as it is causing problems with domestic and international inequalities and has forsaken the domestic in favor of the international, which can be seen as an attempt to disarticulate a nodal point.[300] Putin lists that, instead of the "expanding class of the supranational oligarchy and bureaucracy," citizens want "simple and plain things – stability, free development of their countries, prospects for their lives and the lives of their children, preserving their cultural identity, and, finally, basic security for themselves and their loved ones".[301]

What Putin describes as ordinary citizens' values also reflects another important feature of Russia in 2016 that aligns more with Challenger I. While Putin expresses the idea that Russia is a safe country, (e.g., "I think as a person living currently in Tomsk in Siberia you can rightly speak

[298] "Meeting of the Valdai," 2016
[299] Putin, "Vladimir Putin's annual news," 2016
[300] "Meeting of the Valdai," 2016
[301] Ibid.

of a greater feeling of security than in Europe"), he also admits that Russia should focus on its own affairs rather than get too involved in the international order.[302] This also ties back into Putin's narrative from 2015, that to be a strong country internationally, a country must have a strong economy. When asked by a young girl in the 2016 Direct Line if she could become president or if only a man could "deal with America", Putin responds that Russia's focus should not be on the US, but our domestic affairs and problems, our roads, our healthcare, education, how to develop our economy, restore it and reach the required growth pace".[303] One of the important features of Challenger II is that it feels secure in its domestic hegemony to then challenge the external hegemonic system. At this point, Putin has indicated in 2015 and 2016 that Russia is still behind the West, especially in the one area he deems necessary to be strong in – the economy. Yet, Russian foreign policy is also not exactly aiming to change its position within the system, which is critiques and sometimes attempts to disarticulate certain nodal points.

c. 2017

Part of Putin's 2017 discourse concerns Russia's perceived success in Syria. There are two main lessons Putin draws from Russia's involvement in Syria. First, Putin argues that Russia has showed the proper way of a state intervening in a domestic conflict as "Russia is opposing terrorists together with the legitimate Syrian Government and other states of the region, and is acting on the basis of international law".[304] This solidifies Russia's value within the existing system by showing how a state can properly intervene according to international law. This matches how Challenger I attempts to both be in the system and be respected by others in it.

[302] "Direct Line with Vladimir," 2016; Putin, "Vladimir Putin's annual news," 2016
[303] "Direct Line with Vladimir," 2016
[304] "Meeting of the Valdai International Discussion Club," transcript from the discussion in Sochi, Russia, 19 October 2017, http://en.kremlin.ru/events/president/news/55882

Another lesson Russia proports to have learned from Syria is how strong Russia's Armed Forces are.[305] This is important to Russia for two reasons: first, Russia is able to test its weapons and see their capacity; second, Russia could also advertise its arms to potential buyers. These two lessons contribute to better understanding how Russia viewed strength in 2017; a country had to be competitive economically and able to secure domestic and international interests. Both align with the common-sense of the international system at the time. Syria was an opportunity for Russia to test its army and evaluate this ability.

Putin also discusses Russia's strength in relation to Ukraine, although this takes a different format. For instance, often Putin attempts to show that Ukraine is not developed enough to be considered European, e.g., "If someone wants to be a European, they should first close their offshore accounts".[306] This theme harkens back to the idea that Ukraine's elite cares more for itself than its citizens and is out of touch. Putin uses this as a warning of what could happen to Russia if the government is ever weak, "like it was in the 1990s or in Ukraine today. Do we want a replica of today's Ukraine in Russia? No, we do not want it and will not allow it".[307] In this case, Putin uses the trope of a weak Ukraine to show the importance of domestic strength and how this translates to earning a right to be in the system – in this case, the more regional European system.

It also translates to Putin expressing how Russia has a right to be involved in Ukraine's affairs. Part of this comes from the perceived government weakness of Ukraine, while another part comes from Putin's notion of Ukrainian statehood: "I really regard the Ukrainian people as a brotherly nation if not just one nation, part of the Russian nation".[308] These purported ethnic,

[305] "Direct Line with Vladimir Putin," transcript from the discussion in Moscow, Russia, 15 June 2017, http://en.kremlin.ru/events/president/news/54790
[306] Ibid.
[307] Vladimir Putin, "Vladimir Putin's annual news conference," transcript of speech delivered in Moscow, Russia, 14 December 2017, http://en.kremlin.ru/events/president/news/56378
[308] "Meeting of the Valdai," 2017

linguistic, and historical ties seem to trump Ukraine's statehood. Given Putin's continual reference to the primacy of sovereignty in international relations, this should be highlighted. It is not exactly a definite statement of a different value or alternative system, but it is a discourse that allows for the idea that different values in international relations exist outside the purported common-sense.

Moreover, Putin remarks after this that "Sooner or later, it will happen – reunification, not on an interstate level but in terms of restoring our relations. The sooner, the better, we will do our utmost towards this end".[309] While Putin spoke before about Russia and Ukraine being one nation, what is interesting here is his choice of the word 'reunification' in terms of 'restoring relations'. On the surface, this may seem like a call for cooperation, but the phrasing of it is vague enough to allow for some room for interpretation, especially when we keep in mind how Putin has often cancelled the idea of a separate Ukrainian culture: "Ukraine… has many wonderful unique features in its language and culture – in everything. They are all cherished in Russia and considered to be part of our own culture".[310]

This does not mean at this point that Putin has some strategic vision regarding Ukraine-Russia relations; it rather indicates more that discursively, there is not one narrative being told and, and there is room and options for different narratives to develop, recede, or move in other directions. In this case, one narrative outside of a strict, sovereign understanding of the external system comes to us through culture and history.[311] What is interesting then about this theme in Putin's discourse is it rather straddles Challenger I and Challenger II. There is a desire for things

[309] "Meeting of the Valdai," 2017
[310] Putin, "Vladimir Putin's annual news," 2017
[311] For example, in the same speech, Putin remarks: "In the 19th century some people started saying that Ukraine ought to be independent and self-sufficient. Did they have the right to say this? Yes, they did, especially considering that they lived in an empire where there was probably some forced Russification. But for Ukraine this was the least important thing because after all it is an Orthodox country. This was important at that time. Let me recall that passports identified religion rather than ethnic origin. There was no difference at all between a Russian and a Ukrainian." Putin, "Vladimir Putin's annual news," 2017

to go back to how they were and to increase cooperation (I), but there is also a disregard of the values that Putin claims uphold the international system, i.e., sovereignty and international law (II). Meanwhile, there is continued frustration with the Minsk format, similar to the one espoused in 2015 and 2016, e.g., that Ukraine has no political will to solve this and also lacks to ability to do so.[312]

However, it seems as though this straddling only appears in reference to Ukraine. When talking generally about states and international affairs, Putin still promotes the prevailing common-sense:

> *Naturally*, the interests of states do not always coincide, far from it. This is normal and *natural*. It has always been the case. The leading powers have different geopolitical strategies and perceptions of the world. This is the *immutable essence* of international relations, which are built on the balance between cooperation and competition.[313]

He once again stresses that "it is only *natural* that each state has its own political, economic, and other interests".[314] In this case, there is a strong narrative from Putin that supports the current common-sense, especially indicated by his repetition of the word 'natural', and other similar descriptors. The deference given then to this aspect of the system reflects more Challenger I.

There are many more examples of this throughout his 2017 discourse. Sometimes, it appears in relation to the issues with North Korea, which can "only be resolved through dialogue" and "we must not forget that that the Democratic People's Republic of Korea is *a sovereign state*".[315] Once again, Putin also stresses the importance of the UN, stating "there is no alternative to the UN today".[316] Part of Putin's praise of the UN is owing to its "representative nature. The absolute majority of the world's sovereign states are represented in it" and it hold values that were

[312] Putin, "Vladimir Putin's annual news," 2017
[313] "Meeting of the Valdai," 2017, italics added
[314] Ibid., italics added
[315] Ibid., italics added
[316] Ibid.

decided upon after WWII, with the Soviet Union's involvement.[317] The support of the UN and emphasize on sovereignty upholds the existing system (Challenger I).

Putin still stresses that he can maintain and expand diplomatic relations, although like in 2016, he tends to focus on non-Western relations. For instance, he talks about how Russia has good relations with Saudi Arabia because, unlike during the Soviet Union, there are no ideological constraints in working with them.[318] Most often, Putin talks about Russia's relationship with China: "As you may know, during our meetings we publicly call each other friends. This speaks to the level of the relationship that has evolved between us on a human level. However, in addition to that, we uphold the interests of our states".[319] When it comes to China, we see a bit of the same straddling between the two challenger types like with Ukraine; there is a focus on diplomacy and the rules of the international order (I), but there is also something beyond that based on shared interests and values (II), some of which are about maintaining the status quo (I).[320]

Along the lines of Challenger I, however, Putin does emphasize that Russia is still able to cooperate with the West, and the US in particular, despite all of Russia's complaints against the US. Once again, Putin grounds this in a more standard state rationale, where he claims the US is a great economic and military power, significant in the global order, and therefore, important for Russia as a partner.[321] Russia even acknowledges the US' value in some global affairs, like how it contributed to the Astana talks regarding Syria, and claims that where the US is concerned, "there are more positive than negative elements in our cooperation".[322] Cooperation and diplomacy, as

[317] "Meeting of the Valdai," 2017
[318] Ibid.
[319] Ibid.
[320] Ibid.
[321] Ibid.
[322] Ibid.

well as seeing these as parts of maintaining the existing system, are a large part still of Putin's 2017 discourse, and these are signposts for Challenger I.

This is not to say that there are not complaints still against the system and indications that Putin sees the system as changeable (II). For instance, about Russia's relationship with the US, Putin explained how in the 2000s, Russia and the US had a "truly equitable partnership… But to all intents and purposes, the US side unilaterally halted work within its framework in 2014".[323] Putin also positions itself as being open and willing to be flexible in the 2000s, and it was rewarded with betrayal over Yugoslavia and support for "separatism in the Caucasus".[324] Putin blames this on force dominating the adherence to international law; without the Soviet Union keeping the West in check, "international law appeared to be unnecessary".[325] The fraught relationship with the US shows how Putin in some ways views the system as changeable.

While perhaps in the 2000s, Russia could allow some leeway in terms of the violation of international laws, after 2014, it rarely takes this position. Is this because it no longer respects international laws, in principle, or no longer believes in their value? I would argue that these complaints are more a flexible discursive moment; on the one hand, they can be seen as complaints at the core of the system and show that, despite Putin's claim of the naturalness of national interests, there are instances where certain values do not seem natural to him. On the other hand, these complaints can also be seen as a desire to return to the status quo – not the Soviet Union and the bipolar world, but to a world where multiple, not all, voices are considered in global decision-making, like immediately after WWII. This is not exactly a disarticulation of a nodal point but an attempt to rearticulate a nodal point that has not been disarticulated.

[323] "Meeting of the Valdai," 2017
[324] Ibid.
[325] Ibid.

Especially when we examine Putin's continual criticism about the NATO bombing of Serbia, we can better understand why 2014 might have been a pivotal moment in terms of Russia as a challenger and building a narrative that would suit a counter-hegemonic challenge. As Putin mentions at the Valdai Discussion Club (and this also acts as an example of other moments he frequently refers to Kosovo, Serbia, and the NATO bombing), Kosovo seeking independence, and having it approved by the Hague Court, "opened Pandora's box".[326] Kosovo's actions now could be applied to any state and separatist group; in essence, the West created what Putin often refers to as a "precedent". In 2014, Russia uses this same 'precedent' to justify its actions in Ukraine, and part of its frustration as well as muddled challenger discourse, comes from the non-recognition of this precedent and what Russia did with Crimea. Therefore, we see an attempt at following a perceived nodal point and feeling frustrated when this articulation is met with a negative response.

By 2017, we see Putin expressing the idea that the system is changeable, but if a state would like to change it, then it should apply to everyone. As he summarizes:

> Our most serious mistake in relations with the West is that we trusted you too much. And your mistake is that you took that trust as weakness and abused it. It is therefore necessary to put this behind us, turn the page and move on, building our relations on the basis of mutual respect and treating each other as equal partners of equal value.[327]

Possibility for cooperation still exists (Challenger I), an adherence to an existing value, e.g., mutual respect, exists (Challenger I), but a recognition that change is necessary because of problems within the system, and that already relations have changed, also exists (Challenger II). However, there are stilted efforts at dis- and rearticulation of nodal points, which means this discourse is not yet counter-hegemonic.

d. 2018

[326] "Meeting of the Valdai," 2017
[327] Ibid.

By 2018, we can see an increase in Putin's complaints against the system as well as bolstering Russia's own position in relation to the West, especially when Putin discusses Russia's involvement in Syria. Primarily, Putin discusses Russia's successes in Syria, in particular, its diplomatic success and the success of its armed forces. While Putin still justifies Russia's involvement in Syria, he does so more by framing it as a security issue for Russia rather than upholding the international order:

> It is better to worry about our military personnel on the territory of Syria instead of having to worry about our fighters on Russia's territory. Fighting terrorists while they are still far away from our borders is better for us in order to prevent them from coming to our country.[328]

While there is still his traditional framing of terrorism as a global issue that requires cooperation from all *major* countries to eradicate, bringing the issue of Russian state security also indicates that Putin is attempting to reassure a domestic audience and to reinforce Russia's domestic stability.

However, Putin paints Russia's involvement in Syria as a wild success. He claims Russia with the Syrian government forces "liberated almost 95 percent of the entire territory of the Syrian Republic" and that "Many of [the terrorists] were eliminated, and some of them, thank God, decided they wanted out: they laid down their arms after losing faith in the principles they considered right".[329] In this way, Russia was responsible for not only reclaiming territory but also changing the terrorists' moral values. Here, then, in the context of Russia's intervention in Syria, we can see an understanding that changing values can lead to the success of Russia's stated goals. This phrasing and emphasis are yet again a sign that Russian foreign policy is somewhere between Challenger I and a burgeoning Challenger II discourse, wherein there is discursive groundwork for

[328] "Meeting of the Valdai International Discussion Club," transcript from the discussion in Sochi, Russia, 18 October 2018, http://en.kremlin.ru/events/president/news/58848
[329] Ibid.

a counter-hegemonic challenger, but it is not quite developed into an alternative or clear action. Meanwhile, there are ongoing calls for cooperation and the value of sovereignty and international law.

Mostly, Putin declares its intervention a success as it has stabilized "Syrian statehood" and "generally achieved the goals we had set for ourselves".[330] He contrasts this to the involvement of the Americans, as they are relying on non-state actors, which has allowed ISIS to continue.[331] Despite the US being unable to solve this crisis, unlike Russia, Putin still managed to cooperate with the US as well as Iran and Turkey.[332] Therefore, what we see more of in 2018 with regard to Syria is a confirmation that Russia was right to intervene, that it has done so successfully, unlike the US, and not only has it managed to achieve its goals, it has also increased international cooperation and changed terrorists' minds. Syria is promoted as a clear success; Russia has maintained order, protected sovereignty, and showed diplomacy is possible. Arguable, the Syrian case in 2018 meets most of the signposts for Challenger I.

Once again, however, Syria is a different case than Russia's occupation and involvement in Ukraine. Yet one similar narrative arch is that Russia views Ukraine and the Ukrainian government as being unstable, and because of this, Ukraine causes a security risk for Russia. For instance, Putin finds some of Ukraine's policies paradoxical: "How is it possible to consider this territory and these people as your citizens and keep subjecting them to artillery attacks, causing civilians to suffer?"[333] Additionally, Putin warns, Ukraine's ineptitude is leading it into a situation similar to Georgia under Saakashvili, wherein Georgia "has lost vast territories," and it would be

[330] "Meeting of the Valdai," 2018
[331] Ibid.
[332] Ibid.
[333] "Direct Line with Vladimir Putin," transcript of discussion in Moscow, Russia, 7 June 2018, http://en.kremlin.ru/events/president/news/57692

"very sad, if the current Ukrainian authorities followed suit".[334] In this way, there is a thinly vailed threat to Ukraine as well as a justification for Russia's intervention on security grounds.

Putin, however, also justifies Russia's intervention based on the rights of ethnic and/or linguistic Russians in Ukraine as well as seeing Ukraine "as a brotherly nation," and once again stating, "I consider Ukrainians and Russians to be practically one people".[335] While typically Putin would then harken back to rights and a justification for Russia to be involved based on international law, Putin goes further to accuse Ukraine of "pursuing a historic task of separating the peoples of Russia and Ukraine".[336] This is an important divergence; where typically Putin would discuss history and Russia and Ukraine's ethnic ties to justify Russia's actions in Ukraine, but this now goes one step further, wherein Ukraine has now made it about 'separating peoples', and this begins to cross the line into violating Russia's purported moral values.

Another example of this is Russia's complaint against the Orthodox Church of Ukraine, which previously was under the Moscow Patriarchate, but was granted autocephaly by Bartholomew I of Constantinople, representing the Ecumenical Patriarchate of Constantinople.[337] Putin claims, first, this autocephaly "is meant to further widen the gap between Russian and Ukrainian people," and second was perhaps not entirely Ukraine's decision but came also from "a tip from Washington".[338] Putin refers to this as a "fragrant violation of the freedom of religion".[339] Altogether, this example provides a more accurate view of Russia's complicated view toward Ukraine. This act both violates international values (e.g., religious freedom), but it goes further

[334] "Meeting of the Valdai," 2018
[335] "Direct Line with Vladimir," 2018
[336] Vladimir Putin, "Annual News Conference," transcript of speech delivered in Moscow, Russia, 20 December 2018, http://en.kremlin.ru/events/president/news/59455
[337] Andrew Roth & Harriet Sherwood, "Russian Orthodox Church cuts ties with Constantinople," *The Guardian,* 15 October 2018, https://www.theguardian.com/world/2018/oct/15/russian-orthodox-church-cuts-ties-with-constantinople
[338] Putin, "Annual News Conference," 2018
[339] Ibid.

and attempts to separate Russia and Ukraine, violating a historical Truth (i.e., they are one people). Moreover, there is still the suggestion that Ukraine is not running its own government and is merely a puppet of the West, trying to separate Russia and Ukraine to make Russia weak. This example shows the interplay of the signposts from Challengers I and II, although we still do not see Russia proposing an alternative, rather Putin suggests that a domestic value (e.g., Ukrainians and Russians are one people) deserves to be articulated as a value in the international system.

It is also important to note that in 2018, there are stronger signs that Russia feels more secure in its domestic hegemony as well as its ability to project strength on the international level. According to Putin, "we live in a world where security relies on nuclear capability. Russia is one of the largest nuclear powers" because of this, Putin feels quite confident about Russia's security. He further states:

> We are not going anywhere, we have a vast territory, and we do not need anything from anyone. But we value our sovereignty and independence. It has always been this way, at all times in the history of our state. It runs in the blood of our people, as I have repeatedly said. In this sense, we feel confident and calm.[340]

Here, in terms of Russia's domestic hegemony and its common-sense, we can see a common-sense emerge based on how Russia's ability to be sovereignty and independent, and its desire to be this way 'runs in the blood of our people'. This exists outside of international laws and values, and it provides Russia with its own common-sense, which indicates Russia is now operating with a domestic common-sense and hegemony.

An even stronger example of this occurs later in the speech when Putin also argues that, because of Russia's nuclear capabilities, any aggressor should be warned of a nuclear retaliation. Putin then states that "we as the victims of an aggression, we as martyrs would go to paradise

[340] "Meeting of the Valdai," 2018

while they will simply perish because they won't even have time to repent their sins".[341] This phrasing stands out as it has a strong normative dimension through the lens of religion. While not entirely unusual, this discourse, especially at the Valdai Discussion Club, a rather international format, shows Putin's confidence as well as his certainty in Russia's moral values. This matters since this shows that Russia has the ability now to project more firmly into the international order, like both the Bolsheviks and Peter I later in their regimes.

This posturing is incorporated into some international values. For instance, Putin discusses how the Russian state was founded "on the basis of a common market, the power of the prince, a common language and, later, a common faith, the Russian nation emerged".[342] Russia "developed as a multi-ethnic state first, and then as a multi-religious state," but it has remained stable because "all the ethnic groups within the state and the representatives" were tolerant of each other.[343] This matches Putin's constant call for multilateralism in international affairs; an international order based on tolerance despite differences. While this is arguably not the true foundation of the Russian state, this myth gives Putin a basis for projecting his vision for multilateralism onto the external order.

Coupled with this, Putin also criticizes the US more strongly than before, especially over its withdrawal from the ABM as well as NATO's expansion. When it comes to the ABM, Putin, although he complains about the US' withdrawal, states that "Russia has gained an advantage," as Russia was "forced to respond by developing new weapons systems that could breach these ABM systems".[344] While other "leading powers" have yet to develop these, Russia did it only for "the

[341] Ibid.
[342] "Meeting of the Valdai," 2018
[343] Ibid.
[344] Putin, "Vladimir Putin's Annual News," 2018

preservation of parity".[345] In this way, Putin posits that Russia was forced into a position of superiority although it would prefer equality, which ties back into its own domestic common-sense and view of how the international order *should be* (Challenger II).

Putin also manages this by positioning Russia in an inferior position in the US, but he does this to boost Russia's image as an advocate for equality and multilateralism in the international order. Putin argues that the US' defense spending, its role in the global economy, and NATO's overall population is greater than Russia's, and he asks, "you think our goal is to rule the world?"[346] Instead, Russia is used by the West as a threat because it is a nuclear power. This contributes to the US and Russia's overall decline in relations, and Putin believes it still has not reached rock bottom[347]. From there, the US and Russia's relations can improve, and should, since it benefits no one to have poor relations.[348] This argument aligns with Challenger I's desire for diplomacy and complaints about how it is positioned within the existing order.

However, Putin's complaints against the US and the system extend further than this. For instance, Putin argues that the US arguing about the value of the US dollar in international transactions is a "typical mistake for an empire. Why is this happening? Because… an empire always thinks it can make minor mistakes and allow excess, because its might makes it all irrelevant".[349] Here, there are normative complaints about the system that also directly contrast to Russia's purported support of multilateralism. The idea that "might makes right" is also expressed when Putin criticizes the US for destroying an existing regime in a country without providing an

[345] Ibid.
[346] Putin, "Vladimir Putin's Annual News," 2018
[347] Ibid.
[348] Ibid.
[349] "Meeting of the Valdai," 2018

alternative, which he calls an "immoral policy that leads to the worst results".[350] In this way, Putin challenges certain moral nodal points, especially the moral role of the US (Challenger II).

Once again, the line is blurred between Challenger I and II when Putin states directly what Russia's main foreign policy goal is:

> to provide favourable conditions for the Russian Federation, its economy and social sphere, to ensure unfettered movement forward and to strengthen our country from the inside, above all, so that it can take its rightful place in the international arena as an equal among equals.[351]

Here, it seems as though Putin wants to change Russia's position within the existing system, especially as he still gives importance to improving the economy, which is a tenant of the hegemonic international system's common-sense. However, as Putin wants to provide 'favorable conditions' for this to occur, it implies that some change of the system itself is necessary. Once again, however, Putin does not provide an alternative to the existing system.

Yet, even how Putin refers to the UN has changed. Following from his discussion on multipolarity, Putin argues that "the world is becoming or has already become multipolar, and it will *inevitably* lead to the need to recreate the importance of international law as well as international global institutes such as the United Nations".[352] While Putin has mentioned that the UN needs to be reformed, the sense of inevitability and that the world is changing follows more closely in line with Challenger II. However, while the mechanism of the UN needs to be changed, Putin argues that certain values enshrined in the UN Charter should remain, such as mutual trust (Challenger I).[353]

[350] Ibid.
[351] Putin, "Vladimir Putin's Annual News," 2018
[352] "Meeting of the Valdai," 2018, italics added
[353] Ibid.

Throughout the year, we once again see discursive indicators that align with both Challenger I and II, although Putin has yet to introduce an alternative or plan that is radically different from what currently exists. Although he makes normative complaints more frequently and intensely, the normative alternatives he provides, like multilateralism and equality, are moral values that fall under both Challenger I and II. Moreover, discursive complaints are yet to be firm disarticulations of nodal points central to the system, such as capitalist economics. What is noticeable particularly in 2018, however, is the growing strength of Putin's view of Russia's domestic hegemony and its own common-sense, which leads to the greater promotion of Russia's value and own concepts of morality internationally.

e. 2019

If in 2018 we were left with the impression that Putin was feeling stronger about Russia's domestic hegemony and more certain about expressing its opinion on normative discussions in the international arena, by 2019, these discursive signposts have become more obvious and frequent. Yet again, this is typical of both challengers. In particular, we begin seeing the growing importance of World War II in terms of how Russia sees its value and right to the international system. While this, known in Russia as the Great Patriotic War, has always been a significant national holiday, starting in 2019, it took on a different role in Russia's foreign policy performance. Rather than before, when Putin would focus on how Russia perceived the Great Patriotic War and remembering the war veterans, now his Victory Speeches (from 2019-2021) become more internationally focused. Putin states:

> Today, we see how a number of countries are deliberately distorting war events, and how those who, forgetting honour and human dignity, served the Nazis, are now being glorified,

> and how shamelessly they lie to their children and betray their ancestors. Our sacred duty is to protect the real heroes.[354]

Part of the reason why Russia must protect the legacy of the war is because "the truth about it is part of our conscience".[355] In this way, Putin has tied Russia's historical portrayal of World War II in with its domestic hegemony, as it is in the *conscience* of Russian citizens, which indicates it is part of a domestic common-sense, and attacks on this common-sense are therefore a threat then to Russia.

A stronger domestic hegemony then allows Putin to speak more from a position of strength on the international level. Part of this is also based on a better sense of what Russia's interests are, which means that even when politicians make statements about Putin, he can disregard them, as they have "absolutely no relevance compared to the fundamental tasks Russia is interested in solving".[356] In this regard, Russia positions itself in a similar position to China in the international system. Since China is a rival to the United States, the US has been trying to "hold back [its] development," and now "the same is happening with Russia".[357] This will continue to happen as long as Russia wants to "occupy a worthy place under the sun" so Russia "must become stronger, including, and above all, in the economy".[358] Once again, we see a combination of discourse from Challenger I and II. On the one hand, Putin is expressing how Russia would like to change its position (e.g., 'must become stronger'), but it acknowledges the system in which it would like to be in is changing. There is still a reference to the idea that the economy makes a state strong, which follows the common-sense of the international system at the time.

[354] Vladimir Putin, "Victory Parade on Red Square," transcript of speech delivered in Moscow, Russia, 9 May 2019, http://en.kremlin.ru/catalog/keywords/117/events/60490
[355] Ibid.
[356] Vladimir Putin, "Vladimir Putin's annual news conference," transcript of speech delivered in Moscow, Russia, 19 December 2019, http://en.kremlin.ru/events/president/news/62366
[357] "Direct Line with Vladimir Putin," transcript from discussion in Moscow, Russia, 20 June 2019, http://en.kremlin.ru/events/president/news/60795
[358] Ibid.

The adherence to certain aspects of the prevailing common-sense is then matched with Putin still promoting avenues for cooperation and the idea that diplomacy is still possible and necessary (Challenger I). However, unlike before when Putin would complain about cooperation opportunities he was excluded from, he now talks more about cooperation and diplomacy as necessary steps to curtail worse international outcomes. He finds the cooperation between Russia and China, for example, "a major factor of international stability, including the strengthening of international law and the creation of a multipolar world".[359] Along these same lines, he argues at the 2019 Valdai Discussion Club that, like the 19th century Concert of Powers, we should talk about a "global 'concert' of development models, interests, cultures, and traditions".[360] Most of all, the international order needs "solid relations," which can only be "built between independent and sovereign states".[361] Putin continues that Russia is taking steps through the UN and its actions to bolster security to build "a system of equal and indivisible security resting on far-ranging and collective work".[362]

Yet, although Putin discusses cooperation and values he views are part of the external system's common-sense, like sovereignty, the framing of it leans more toward Challenger II discourse, as Putin states that Russia is attempting to build a new system based on new, yet old and familiar, values. The reference to the Concert of Europe is also particularly telling as he is once more harkening for an older state of affairs. It is also noteworthy that the Concert occurred after four powers, Austria, Prussia, Russia, and the United Kingdom, joined forces to defeat France in the Napoleonic Wars. After the war, France was later included, leading to a system for about

[359] Putin, "Vladimir Putin's Annual News," 2019
[360] "Valdai Discussion Club session," transcript of discussion in Sochi, Russia, 3 October 2019, http://en.kremlin.ru/events/president/news/61719
[361] Ibid.
[362] Ibid.

100 years that was led by these five powers. Therefore, even then there was not broad equality – there was equality among the great powers. In this case, it seems as though Putin is arguing for a different system, one that has already existed (either the post-WWII system or the Concert of Europe), to boost Russia's existing position in international affairs.

One area where Putin feels he showed the benefits and possibility of cooperation and diplomacy is Syria. For Putin, in 2019, Syria was a clear success story – at this point, according to him, it was free from most terrorists, and the US, Russia, Iran, Turkey, Israel, Saudi Arabia and other countries in the region managed to come together to work together in Syria.[363] Because of this, Putin views "the Syrian settlement" as "a model for resolving regional crises where diplomatic mechanisms will be used in the vast majority of cases" even when faced with an extreme terrorist threat.[364] Now that Russia withdrew most of its forces, the next step was to form a Constitutional Committee, facilitated through the UN, which was also accomplished.[365]

If this was indeed the outcome, then Russia would have cause to celebrate. However, while Russia did limit its military intervention, present-day Syria is in an even worse position than it was in 2019, and now Russia is paying little attention to the problems in Syria. Thus, even though Russia can, in some ways, claim its intervention as a success, this is primarily because of how it had defined what would be a success in its intervention. The performative function of the discourse surrounding Russia's intervention in Syria primarily is used to show that Russia managed where the West and the US have failed; it intervened, rescued the government, and brought change that the country wanted, all according to international law. In a way, it is Russia's attempt to show its right to be in the system (Challenger I).

[363] "Valdai Discussion Club session," 2019
[364] Ibid.
[365] Ibid.

Putin also argues progress has been made in Ukraine. There have been several troop pullbacks and the law on the special status for ethnic and linguistic Russians has proceeded. For Putin, this means there is room to continue the Normandy format (Challenger I).[366] This is beneficial, as Ukraine being more stable leads to more stable relations between Europe and Russia as gas supply will be more reliable.[367] Yet, Putin still sees the Ukrainian government as illegitimate, claiming that the main problem with Ukraine is that "there is a lack of willingness to resolve this question through dialogue with the people".[368] The critique, then, is that Ukraine is following the footsteps of the West, where might makes right.

Moreover, Ukraine and Georgia stepped out of line when they did not attend the 2019 Victory Day celebration in Moscow. Putin argued that "if someone misses the event due to some interstate relations, I think they will make a big mistake. Because it will mean that they do not show respect for the people who fought and gave their lives for the independence of their Motherland".[369] It is a symbolic gesture to "those who saved our statehood and independence, and who preserved *our peoples*".[370] The last phrasing of this ties into the new dimension Putin is adding to Victory Day – that is a moral framework, a common-sense, for the Russian Federation. We can see this by Putin explaining that Nazi Germany was intent upon "our extinction. So that fight, it was not just about preserving our statehood, but about preserving the East Slavic ethnic group, both Russians and Ukrainians".[371] In this way, Putin manages to connect Russia's common-sense with its right to be involved in Ukraine, thereby expanding this common-sense internationally. And this common-sense is not based on international law but survival, not of a state, but of an

[366] Putin, "Vladimir Putin's Annual News," 2019
[367] Ibid.
[368] Putin, "Vladimir Putin's Annual News," 2019
[369] Ibid.
[370] Ibid., italics added
[371] Ibid.

ethnicity. This discourse then is attempting not only to disarticulate a nodal point (international law) but to rearticulate it along other lines (survival of an ethnicity), and therefore, we can start seeing a stronger sign of Challenger II.

Like in 2018, Putin's complaints against the system become stronger, seemingly aiming to disarticulate certain nodal points (Challenger II). They also become more black and white. For instance, at the Valdai Discussion Club, he states that the authors of the Club's annual report have declared "we have entered an era with no world order whatsoever".[372] How Putin continues, however, indicates that he sees the system as changeable and changing:

> I would like to hope that however complicated the relations between countries, however dangerous the legal lacunae might be, such as in nuclear and missile weapons areas, the world order, based on the key role of international law, *will be transformed, but it will remain*. We will all be working to protect it.[373]

While this is not particularly new, what is new is that he feels certain it 'will be transformed'. There seems to no longer be a question of preserving the status quo, but the question now seems to be how much can be saved.

Moving away from the mere preservation of the status quo or restoration to a former time of global stability, Putin suggests ways forward, which also makes a break from his past discourse:

> we also need both flexibility and, let me add, non-linearity, which would not mean a rejection of the system but the capability to arrange a complex process rooted in realities, which presupposes the ability to consider various cultural and value systems, the need to act together, dismissing stereotypes and geopolitical clichés.[374]

It is important to note that Putin is not being anti-systemic; he believes a system is necessary for the effective functioning of the international order. Building on the growing domestic common-sense, there is once again a focus on adding a dimension internationally that accounts for different

[372] "Valdai Discussion Club session," 2019
[373] Ibid., italics added
[374] Ibid.

'cultural and value systems'. While Putin may not explicitly understand it as such, this is a normative challenge to the existing system, as it indicates that the values currently underpinning the system are not enough (Challenger II).

Putin adds further details to his vision later when he discusses the growing influence of Asian countries in the international order. He once again expresses how quickly the world is changing, and states that "For the existing system and its institutions to last, it has to correspond to the realities of the ever-changing world. I believe that we must not destroy what has been created in the past decades, but should gradually transform it and adapt it to these realities, with due consideration of the growing power and prospects of Asia's development".[375] Here, however, we can see Challenger I discourse reappear, as part of Putin's argument is still based on development, and how China's GDP is now greater than the US', which "inevitably leads to changes in many other areas".[376] Grounding the discussion of systemic change into economic leadership returns to an old and familiar common-sense. In some ways, it rather seems Putin falls back onto liberal concepts, despite his claims that there are normative gaps in the international system.

By the end of 2019, we are left then, yet again, with a more intense discourse than the previous year. While there were more normative discussions, particularly based on differences in ethnicities, values, and cultures, Putin still returned to certain staples, like strength based on security, economics, and independence. Putin also attempted to give more depth to his discussions on how things *should be* (Challenger II). Moreover, there was a clear acknowledgement that the system is changing, although there were variations in how the system might change, how it should change, and which aspects of the system were worth saving. While there is still respect for

[375] "Valdai Discussion Club session," 2019
[376] Putin, "Vladimir Putin's Annual News," 2019

economic strength and the UN, there was also a discursive trend about changing peripheral values, primarily, it seems, about human rights and the rights of diaspora abroad. It also seems there could be space for normative discussions on security, as Putin held up Syria as an example and expressed concern at the end of the START treaty.[377]

6.2 Russia as a challenger in 2015-2019

Throughout 2015-2019, Putin's Russia was neither Challenger I nor Challenger II. While certain previously discussed discourse worried, and continues to worry, over challengers, we can see from this period at least, Russia was not solidly either challenger, responding dynamically to its external system. Discursive signposts existed for both kinds of challengers, and certain common-sense staples remained, making it appear as though Russia was still vying for a different position in the international system; therefore, overall, the discursive formation seemed to lean more toward Challenger I. What is concerning about 2019, however, is that there were more intense discursive elements from Challenger II as well as attempts to begin formulating an alternative. While this by itself does not mean Russia toward the end of this period was a counter-hegemonic challenger, it does mean that at this point, Russia had discursive material to indicate it *could become* a counter-hegemonic challenger. There is not an inevitability about this, and it remained unclear what kind of challenger Russia would be in 2020-2021.

[377] Ibid.

Chapter 7: Russia and the Pandemic

We left 2019 with the consistent presence of discursive elements from both Challenger I and II. While Russia was not solidly in either category, the manifestation of how Russian foreign policy interacted with the existing external common-sense makes it seem that from 2015-2019, Russia was still using more Challenger I discourse. However, 2020 and 2021 presented yet another dynamic, which came also from a major global event that shifted most countries' attention – the Covid-19 Pandemic. This event acted as an inflection point, allowing different discursive eruptions to emerge and alterations in the existing discursive formation.

In these years, we can indeed see discursive differences between the years immediately after the Annexation to the years right before Russia's full-scale invasion of Ukraine. This is not to say that this event led to the full-scale invasion or to give predictive power to these events. Rather, it acted as an event in the international system that provoked responses in Putin's discourse, and these reactions were different than reactions Putin had in 2015-2019. In short, it is not because of the pandemic that the discourse changed; the discourse around this event, however, shows that Russian foreign policy was changing.

7.1 2020

Once again, in 2020, we see signs of Putin perceives Russia's domestic hegemony is more secure, based on his discussions of the external system and Russian foreign policy. For instance, Putin boldly states at the 2020 Valdai Discussion Club that "Russia is not afraid of anything… we are not in a position where we should be afraid of anything".[378] This contrasts with previous years, where Putin, especially in his Direct Lines, would discuss Russia's domestic problems, from

[378] "Meeting of the Valdai Discussion Club," transcript of discussion at Novo-Ogaryovo, Russia, 22 October 2020, http://en.kremlin.ru/events/president/news/64261

corruption, infrastructure, agriculture, pollution, to garbage collection. While he still does this in 2020, there is a bit of a twist, where he either compares Russia's failures to those in the West or describes how Russia's failures are actually beneficial, as then Russia has the chance to learn lessons:

> Yes, people are still living a very hard life, and there are very many such people. That said, the foundations of Russian statehood, the pillars of the Russian economy, and the potential of the state are incomparable with what they were in the 1990s and the early 2000s. This gives us tools we have never had before. This gives us an opportunity to focus on resolving the most important, most urgent problems without forgetting about the strategic development goals of the Russian Federation.[379]

In this way, Putin can reframe the mistakes made in the early years of the Russian Federation as character-building, and it led to Russia now being in a very strong position, even if there are still some issues, mostly with citizens' quality of life.

Putin also shows more confidence in Russia's military status, since Russia has developed hypersonic missiles, the only ones of their kind. However, "no one is talking to us," even though Great Britain and the United States want to develop them as well.[380] The phrasing of this is odd as it seems Putin suggests Russia is secure and superior to the West, but there is also a frustration that the West is still not appreciating Russia's value (Challenger I). Russia's isolation also comes out when Putin is asked in the Annual News Conference if Russia will issue international vaccine certificates to travel. In response, Putin asks "What are these certificates? I do not understand".[381] After the journalist explains the certificates to him, he agrees Russia can issue them, keeping in mind "even vaccinated people can infect others".[382] In this case, even though Putin did not even know about the international vaccine certificates, indicating he was left out of certain

[379] Vladimir Putin, "Vladimir Putin's annual news conference," transcript of speech delivered at Novo-Ogaryovo, Russia, 17 December 2020, http://en.kremlin.ru/events/president/news/64671
[380] Ibid.
[381] Ibid.
[382] Ibid.

conversations, he managed to turn this around to criticize the West, as they, unlike him, perhaps have not realized that vaccinated people can infect others.

Along with this, Putin once again reiterates that he can ignore outside criticism, since he, as the head of state, becomes "the function of protecting the interests of the Russian people and the Russian state".[383] In this way, unlike before, you have a more streamlined understanding of the Russian state, where it seems Putin thinks Russia has achieved some kind of stability and strength, based on how its economy and state functions are performing as well as its security. From this, Putin can finally focus on projecting and protecting Russia's ambitions without worrying about outside voices.

Part of Putin's sense of security also comes from the development of the Great Patriotic War as a basis for a potential common-sense. For instance, earlier Putin typically would bring up the Great Patriotic War when discussing Russia and/or the post-Soviet space, but now he also begins tying it into other international affairs. By 2020, Syria is rarely mentioned in Putin's speeches, although the pandemic and high intensity of fighting in Idlib exacerbated Syria's issues, and Syria needed further aid.[384] Despite this, Putin sees it fitting to discuss Syria in a special article he wrote for the 75th anniversary of the Great Patriotic War, and he does so by praising Russian servicepeople and medical professionals who went to serve in Syria. He states that they "proved that they deserved to inherit the feat of the warriors of our Motherland that defended it during the Great Patriotic War".[385] Putin had not mentioned Syria in previous Victory Day speeches, and the absence of it in other discursive formats indicates that he is moving Syria, announced a success

[383] "Meeting of the Valdai," 2020
[384] "The Syrian Civil War's Never-Ending Endgame," *World Politics Review*, 17 October 2022, https://www.worldpoliticsreview.com/the-syria-civil-war-might-be-ending-but-the-crisis-will-live-on/
[385] Vladimir Putin, "75th Anniversary of the Great Victory: Shared Responsibility to History and our Future," 19 June 2020, http://en.kremlin.ru/events/president/news/63527

story in 2019, into part of Russia's military history that supports what Russia is doing today internationally and domestically.

Putin also takes much space in his article to explain the True history of World War II. In this history, the West is meant to confront its own misdeeds during that time, like with the partition of Czechoslovakia in the Munich Agreement.[386] Putin also acknowledges the Molotov-Ribbentrop Pact, but he argues that "unlike many other European leaders of that time, Stalin did not disgrace himself by meeting with Hitler who was known among the Western nations as quite a reputable politician and was a welcome guest in the European capitals".[387] Moreover, the Soviet Union, unlike other European countries, was the only country that attempted to defend Czechoslovakia.[388] As this is embarrassing to European countries, according to Putin, they attempt to ignore and/or rewrite history, which also undermines the value and importance of the Soviet Union.

The issue with historical revisionism "is dangerous because it grossly and cynically distorts the understanding of the principles of peaceful development laid down at the Yalta and San Francisco conferences in 1945".[389] The principles outlined at these conferences ensured that global conflicts could use diplomacy to resolve them, giving the international order "forms of peaceful coexistence and interaction, if there is the desire and will to do so".[390] Putin therefore warns that by revising WWII history, or ignoring the contribution of the Soviet Union, the West is undermining the normative foundations of the international system. Therefore, we see once again an attempt to rearticulate a nodal point that has not been disarticulated. It is more that Putin sees

[386] This was part of the Munich Agreement, between France, the UK, Germany, and Italy, wherein by giving part of Czechoslovakia to Germany, the European powers thought they could avoid another European war.
[387] Putin, "75th Anniversary of the Great"
[388] Ibid.
[389] Ibid.
[390] Ibid.

this nodal point (WWII and the resulting order) as disarticulated and worries about the effects of this disarticulation; he then attempts to rearticulate it.

Because of the Soviet Union's "main and crucial contribution to the defeat of Nazism," Putin also argues that "It is a duty of ours – all those who take political responsibility and primarily representatives of the victor powers in World War II – to guarantee that this system is maintained and improved".[391] This is all the more important as "everything is changing, from the global balance of power and influence to the social, economic and technological foundations of societies, nations and even continents".[392] The acknowledgement that even economic foundations of societies are changing is significant, as throughout 2015-2019, Putin had referred back to economic strength as a cornerstone of great power in the international system. If Putin can see this as changeable, it seems as though we can begin to witness a discursive shift, wherein rather than seeing the changes within the system as changes with leadership (e.g., from US to Chinese leadership), changes are now affecting the underlying common-sense (i.e., the global balance is off because the foundation of that system is questionable). A dominant nodal point is being disarticulated. In this way, we do see a clearer discursive move from Challenger I to Challenger II.

In addition, we can see action supporting this. In Russia, a new project was initiated to "be honest and impartial about the events of WWII".[393] To this end, the project aims "to establish Russia's largest collection of archival records, film and photo materials about the history of World War II and the pre-war period".[394] However, the archive is only the beginning. "To prevent a rewriting of history… we need to be self-sufficient, strong in every respect, primarily

[391] Putin, "75th Anniversary of the Great"
[392] Ibid.
[393] Ibid.
[394] Ibid.

economically".[395] Putin adds that it is also important to "develop our political system" to "feel confident in our country".[396] Now, there is another dimension. While previously Putin said Russia had to be strong to defend its 'interests', vaguely speaking, he has now named Russia's interests, which include ensuring the True history of WWII. Moreover, and along with Challenger II, Russia has acted toward this goal, e.g., the archive. However, Putin still referred to the primacy of the economy when it came to national strength, which suggests this is still one facet of common-sense from the neoliberal system that remains.

By including this as one of Russia's values, however, it gives Putin more legitimacy to be involved in normative discussions on the international level, especially to pass moral judgement. For instance, when Russia's almost yearly resolution came forward to condemn Nazism in the UN General Assembly, the United States and Ukraine were the only two countries to vote against it.[397] What Putin does not note is that many countries, especially from Europe, typically abstain from the vote.[398] He thus proceeds to state that he does not think "this flatters them, to put it mildly. And it is not even clear why [they voted against it]. Well, I mean, on the one hand, it is clear".[399] This is thinly veiled association between Nazism and the US and Ukraine.

However, it seems that Putin applies this more to their current governments and politics. Putin claims that the main component of Russia's foreign policy is Russia's policies "in the post-Soviet space within the CIS framework".[400] While there are practical reasons for this, Putin argues that "we are essentially people of the same cultural space, not to mention our history. We have

[395] Putin, "Vladimir Putin's Annual News," 2020
[396] Ibid.
[397] Ibid.
[398] Les Décodeurs, "Why France and 51 other countries voted against UN resolution condemning Nazism," *Le Monde*, 9 November 2022, https://www.lemonde.fr/en/les-decodeurs/article/2022/11/09/why-france-and-51-other-countries-voted-against-the-un-resolution-condemning-nazism_6003471_8.html
[399] Putin, "Vladimir Putin's Annual," 2020
[400] "Meeting of the Valdai," 2020

a common history and a common victory over Nazism. Our predecessors – our fathers and grandfathers – validated our special relations with their blood".[401] The shared defeat of Nazism, therefore, is also a unifying principle, not just between Russia and Ukraine, like in 2019, but now for the entire post-Soviet space. Putin concludes by stating that regardless of the current political climate, these relations will thus endure.

The inevitability, normative dimensions, and common-sense framing of the Great Patriotic War's legacy does much to provide Russia with a set of moral values that it can extend beyond its borders. Part of this is due to the geographical scope of WWII, but Putin primarily uses it to defend Russia's position within the existing system (Challenger I), but it also wants to defend the Truth (Challenger II), and this now requires Russia to pursue the narrative outside its borders (Challenger II).

In addition to this, Putin repeats some of the discourse we have already seen, particularly his critiques. For instance, he repeats that Ukraine experienced two revolutions, one in 2004 and one in 2014. Because of this, Ukraine is suffering, particularly economically. Many of the suffering industries were once built and prized by the Soviet Union, but now they "are almost gone" owing to "just the stupidity of those who did it".[402] Although he hopes that "common interests" allow "common sense" to prevail.[403] In this way, we do see a disregard for the internal decision-making process of the Ukrainian government and a reinforcement that 'common sense' means Russia's thoughts on how Ukraine should be, which means an appreciation of Russia's role, a historical appreciation of the Great Patriotic War, and an acknowledgement that the post-2014 government is illegitimate.

[401] "Meeting of the Valdai Discussion Club," 2020
[402] Ibid.
[403] Ibid.

Putin argues that part of why Ukraine is unable to achieve these tasks is because there is interference from abroad, and "nothing ever good comes from abroad".[404] Putin discusses how "imported democracies" in general "are nothing more than a shell or a front with nothing behind them, even a semblance of sovereignty. People in the countries where such schemes have been implemented were never asked for their opinion, and their respective leaders are mere vassals".[405] This harkens back to the illegitimacy of the Ukrainian government and its inability to *truly* reflect the will of the people. If Ukraine had been allowed to develop without external interference (from the West), then it would still have good relations with Russia – after all, they share a common culture, common victory of Nazism, and are essentially one people, according to Putin.

Instead, the Minsk agreements are still being ignored, even though they have been "confirmed by a UN Security Council resolution, which means they are international law".[406] This means that Ukraine is not only violating cultural, linguistic, and historical ties with Russia, but it is also violating international law. Yet, because of this, Putin states "a settlement is inevitable. It will happen sooner or later. The question is when. Let me reiterate that this largely depends on the current Ukrainian government".[407] Putin ending on this optimistic statement that, because this is international law, a settlement is 'inevitable' shows that there is still a common-sense Putin adheres to on the international level, and this common-sense is deeply ingrained into the UN and international law, which is a nodal point Putin has assigned to the international common-sense. Despite certain disarticulations, therefore, there is still an element of Challenger I in his discourse.

Diving deeper into the complaints Putin wields against the international system, we see more Challenger II discursive signposts. For example, in the 2020 Valdai Discussion Club, Putin

[404] Putin, "Vladimir Putin's Annual News," 2020
[405] "Meeting of the Valdai," 2020
[406] Putin, "Vladimir Putin's Annual News," 2020
[407] Ibid.

reflects on the theme from the 2014 one, which was "The World Order: New Rules or a Game Without Rules". Now, he argues, "the game without rules is becoming increasingly horrifying and sometimes seems to be a fait accompli".[408] There is an idea that the international order is being stricken of its rules, and this process is happening despite any attempts to stop it. Putin then blatantly says that "we are talking about *a new world order*… based on consideration for each other's interests and mutual respect, and respect for sovereignty".[409] The phrasing of this shows that Putin sees the system as changeable (Challenger II), and that although these values seem to be rooted in the former order, since he refers to it as a 'new world order', he does not think they are currently working in this system, and thus, things need to change.

We can further see this when he complains about why, when talking with the US about renewing the ABM Treaty, the US suggested China should also be included, and Putin balks, "Where are the other nuclear powers?"[410] Putin is not against including China, but if China is included, then there needs to be greater multilateralism or none at all. Although his reaction suggests a preference for none at all, since Russia's involvement in the ABM Treaty is a vestigial remanent of its superpower status. Here, he is once again putting action behind a value (Challenger II). Yet, Putin concludes this discussion by reaffirming that no matter the direction the US wants to take the ABM Treaty, Russia will follow, since it is better for the international system to be diplomatic (Challenger I).

However, Putin is still skeptical about the success of Russia and the US working together, especially as the US eventually withdrew from the ABM Treaty. Putin couples this with lies that the US told Russia about NATO expansionism. Faced with two waves of NATO expansion and

[408] "Meeting of the Valdai Discussion Club," 2020
[409] Ibid., italics added
[410] Ibid.

the withdraw of the ABM Treaty "we are forced to respond by creating innovative weapons systems that can nip these threats in the bud".[411] Once again, Russia is put in a position where it *must* act a certain way, not because it wants to dismantle the system or end diplomatic relations and cooperation. Putin continues that the US also withdrew from the Intermediate-Nuclear Force Treaty and the Open Skies Treaty. The START Treaty is also expiring. Reflecting on this, Putin rails:

> So, as a NATO country, you will fly over our territory and make everything available to our US partners, whereas we would not be able to do the same with regard to US territory? You are intelligent people, what makes you think we are dumb? Why do you think we cannot analyse and understand these elementary things?[412]

There is clear frustration here with not being seen as an equal, with limitations placed on Russia's ability to form international policies with actors, and with being perceived as inferior. However, these complaints do not target the international system itself, rather Russia's position within the existing system (Challenger I).

Faced with these issues, rather than simply complain and shift blame, Putin begins to suggest ways forward. Like before, Putin still believes in the UN, although it "currently experiences certain tension in its work and is not as effective as it could be".[413] Despite this, the UN Security Council houses principles that have the ability to avoid a major conflict.[414] Because he values the UNSC, Putin has proposed a summit between Russia, China, France, the US, and the UK to find "common answers to modern challenges" and reaffirm a commitment "to those high humanist ideals and values for which our fathers and grandfathers fought shoulder to shoulder".[415]

[411] Putin, "Vladimir Putin's Annual News," 2020
[412] Ibid.
[413] Putin, "75th Anniversary of the Great"
[414] Ibid.
[415] Ibid.

With the issue of the pandemic, Putin later stresses that it is even more imperative that this group should meet to solve this crisis.[416]

Later in the year, Putin again argues that the UN mechanisms must be preserved, "which have proved to be effective" (Challenger I).[417] Having access to the UN, and being in the UNSC with a veto power in particular, gives Russia the platform it is looking for; therefore, it makes little sense to destroy this base but to transform it, as he said before, and reiterates here (e.g., "I believe that the idea of adjusting the institutional arrangement of world politics is at least worthy of discussion").[418] The value of the UN also ties into part of Russia's common-sense as the UN was created after WWII.

In this case, once again, Putin is straddling somewhere between Challenger I and Challenger II. While he acknowledges the system has changed and advocates for ways to change it (Challenger II), he still harkens back to some former values and strategies. He stresses that "we cannot do without a common, universal framework for international affairs".[419] In this way, we can once again see Russia is not anti-systemic, or even anti-hegemonic, and still values the idea of a 'common, universal framework'. While this on the surface seems to tie into Challenger I discursive rhetoric, there is space for it as well in the concept of Challenger II. After all, the Bolsheviks also valued having a common framework, although the contents and values of this framework differed from the existing system.

On the other hand, there are also more firm examples in the same Valdai Discussion Club conversation, where Putin makes stronger Challenger II statements. For instance, Putin breaks from earlier discourse (circa 2000s/early 2010s), where he used to espouse the value of democracy

[416] Putin, "Vladimir Putin's Annual News," 2020
[417] "Meeting of the Valdai," 2020
[418] Ibid.
[419] Ibid.

and liberal values. Now he explicitly states that a "state can be set up any way you like… what you call your political system is immaterial. Each country has its own political culture, traditions, and its own vision of their development… The main thing is for the state and society to be in harmony".[420] How harmony is defined or understood is left to the audience to interpret. In this statement, there is an underlying argument for respecting sovereignty, understanding sovereignty as an international value, and non-interference by the international community. While we have seen this before, the move away from stating a certain system is better than another is notable; so, we see the system has changed (Challenger II) and certain nodal points have been disarticulated (Challenger II) while some, like sovereignty, are still articulated (Challenger I).

There are also more subtle ways Putin indicates that he no longer sees the international system's common-sense as infallible. This often appears when Putin advocates for protecting the environment and acting on climate change. He argues that to address climate change, we must abandon "the practice of *unrestrained and unlimited consumption – overconsumption* – in favour of judicious and reasonable sufficiency".[421] Consumption – as one of the main tenants of capitalism and neoliberalism – is under direct critique here, although Putin does not explicitly criticize them.

This overconsumption is paired with "the loss or erosion of moral values and reference point, a sense that existence no longer has meaning and, if you will, that the mission of humankind on planet Earth has been lost".[422] Putin's discourse here stands out; it is one of the clearest statements he has made that indicates there is a crisis of the disarticulation of values on the international level. Following this, he does not believe this can be settled "through diplomatic

[420] "Meeting of the Valdai"
[421] Ibid., italics added
[422] Ibid.

negotiations" – a decidedly different approach from before, where he would often fall back on diplomacy as a saving grace. Rather, he argues that we must revise "our priorities and [rethink] our goals. And everyone must begin at home, every individual, community and state, and only then work toward a global configuration".[423] Now, the nation state and the UN cannot be responsible for finding new values – Putin is bringing down common-sense to the citizen level, which neatly ties into his repeated calls for intervening states (e.g., the US and Ukraine) to care about what citizens *actually want.*

What has seemingly spurred on this change is the Covid-19 Pandemic, which Putin claims "can serve as a point of departure for such a transformation," and it is "better to start this process now".[424] These statements then do mark a departure for Russian foreign policy discourse. While there have been signposts before signifying a counter-hegemonic challenger, the pandemic seems to have propelled this discourse further, with it becoming more direct and more frequent. The criticisms against the system are now not just about Russia's position within it but attempting to disarticulate certain nodal points of the neoliberal system. Where cooperation and diplomacy were seen as avenues for saving the international order, these are pushed to a secondary position in favor of what citizens want – in whichever political form that may take. Perhaps a firm alternative is not in place nor are there firm actions to support such an alternative, but there are signs one is being developed, and there is now enough repetition for us to see the emergence of a *counter-hegemonic critique*.

Russia has not turned its back on cooperation, however. For instance, Putin states that Russia is open to working more with China. He even agreed that it is possible to think that there could be a military alliance between China and Russia, although he does not imagine that it is

[423] "Meeting of the Valdai," 2020
[424] Ibid.

needed right now.[425] Being open to diplomacy (a Challenger I indicator) does not alone indicate that Russia developing ties to China is a signpost for Challenger I. It can also be that Putin, seeing changes occurring, is attempting to figure out where Russia will belong in a new system, meaning this can be both Challenger I and II.

Putin ends 2020 with his Annual News Conference and with a bit of an odd statement about family happiness after prompted by an audience member. He states: "As to the secret of family happiness, it is love. But this is no secret. Everybody knows that; it is a universal notion, it must be a cornerstone of relations both in families, and – since you mentioned international relations, in relations between different peoples".[426] In his Direct Lines and Annual News Conferences, Putin is usually asked general questions about family, love, happiness, et cetera, so the question in itself is not unusual. However, it is odd that Putin extended it to international relations, and in that, defining it as the 'relations between different peoples'. Once again, this gives an indicator of Putin, a long-standing supporter of the nation state, moving beyond that construct as the actor that gives values and bringing it to the societal level. There is a greater insight as to why that might be in 2021, but for now, it is yet another Challenger II signpost, showing changes in values and common-sense in the international system.

7.2 2021

By 2021, there is an even greater intensity in Putin's discourse regarding how the world is changing, especially in terms of the external hegemonic common-sense. On top of this, however, there is a proposed and developing alternative to this common-sense. Before delving into this, let us begin with how Putin discusses the changing world in 2021. According to Putin, the world

[425] "Meeting of the Valdai," 2020
[426] Putin, "Vladimir Putin's Annual News," 2020

began changing from the post-WWII order after the collapse of the Soviet Union. Putin, as he himself acknowledges, once again argues that the US took advantage of this situation and did not support Russia in this transition. He claims: "it must have seemed that we adjusted to this continuous inconstancy, unpredictability and permanent state of transition, but this did not happen either".[427] In this retelling, the US failed to establish and maintain a global hegemon; there was instead consistent instability, and since the collapse of the Soviet Union, there has not been a solid international system.

Putin suggests that the US might be aware that the world is "radically changing," but they are still "trying as hard as they can to maintain their dominant position, and hence you get threats and further destructive behaviour with those military exercises, provocations and sanctions".[428] However, Putin believes the US must see the changing world order by themselves – he cannot do anything about it. And until the US does, Russian and US relations cannot get "back on track".[429] This retelling of the past 30 years is interesting because it finds a middle ground between Challenger I and II. On the one hand, Putin has disarticulated key nodal points of the international order that has governed affairs for the past 30 years (Challenger II). However, the expression 'back on track' indicates that there is still a recourse to fall back on (Challenger I) and implying a return to the post-WWII order (Challenger I), i.e., attempts of rearticulation to previous nodal points.

Putin later states in the Valdai Discussion Club that this is not "a mechanical process," but that we can see that the "attempt to create [a new international order] after the end of the Cold war on the basis of Western domination failed… and we must learn from this".[430] The acknowledgment

[427] "Valdai Discussion Club meeting," transcript of discussion in Sochi, Russia, 21 October 2021, http://en.kremlin.ru/events/president/news/66975
[428] "Direct Line with Vladimir Putin," transcript of discussion in Moscow, Russia, 30 June 2021, http://en.kremlin.ru/events/president/news/65973
[429] Ibid.
[430] "Valdai Discussion Club meeting," 2021

that change is possible and must be initiated once again signifies an understanding that the common-sense is no longer untouchable. The transformation taking place now, according to Putin, is based on greater diversity and better distribution of resources than when the West attempted to dominate after the collapse of the Soviet Union.[431] Learning from this mistake allows for the international community to now band together and form a new order based on multilateralism and non-Western dominance, as Putin advocated previously, which positions Putin in a positive place in this order (Challenger I).

After all, the West cannot deny changes are happening, especially with China – "There is no way they can contain China's development. Eventually this will dawn on them".[432] In this way, Putin places Russia in a superior position; unlike the West, it can see the winds of change. China will lead the way of a new multilateral order with Russia being a respected great power – one among a few – that can correctly guide the international rule based on better values.

And the Covid-19 Pandemic is precisely an opportunity to rethink such values. It also reminds the international community that:

> our most important task is to ensure humanity a safe existence… we absolutely need to rethink how we go about our lives, how we run our households, how cities develop or how they should develop; we need to reconsider economic development priorities of entire states.[433]

The pandemic added an additional value to the list Putin had been accumulating. Now in addition to culture, sovereignty, the legacy of the Great Patriotic War, we now also have the preservation of humanity. Putin reiterates this idea later at the Valdai Discussion Club when he states that we must act cautiously:

[431] "Valdai Discussion Club meeting," 2021
[432] Vladimir Putin, "Annual News Conference," transcript from speech in Moscow, Russia, 23 December 2021, http://en.kremlin.ru/events/president/news/67438
[433] "Valdai Discussion Club meeting," 2021

> if only for reasons of self-preservation. The state and society must not respond radically to qualitative shifts in technology, dramatic environmental changes or the destruction of traditional systems. It is easier to destroy than to create, as we all know. We in Russia know this very well, regrettably, from our own experience, which we have had several times.[434]

Once again, Putin both adds self-preservation as a value and suggests that Russia in a position of strength relative to the international order, i.e., the international system will benefit from Russia's knowledge, and by including it, will be guided through a smoother transition.

While it is not particularly odd that a country might advocate for humanity's survival, especially during a global pandemic, Putin including it is yet another value that he discusses in 2021. These values are coupled with critiques now more visibly posed against the common-sense of the current system. He states at the Valdai Discussion Club that "Everyone is saying that the current model of capitalism which underlies the social structure in the overwhelming majority of countries, has run its course and no longer offers a solution to a host of increasingly tangled differences".[435] This is a clear disarticulation of one of the main nodal points underpinning the neoliberal international system's common-sense. Not only is it unsalvageable, but it also no longer offers any benefits.

The ineptitude of the current system, Putin argues, was evidenced by the effect of the pandemic on the order. When it could have been rallying, it instead became "divisive" as "they started looking for solutions to problems among the usual approaches… but they just do not work. Or, to be more precise, they do work, but often and oddly enough, they worsen the existing state of affairs".[436] The pandemic exacerbated the failures of capitalism – rising inequalities, the inability to solve the crisis, greater divisions – all while humanity itself was being threatened.

[434] "Valdai Discussion Club meeting," 2021
[435] Ibid.
[436] Ibid.

Therefore, the pandemic does seem like a formative moment, as during 2020 and 2021, we can see targeted disarticulations, attacking capitalism and the ability of the current system to solve problems.

On this basis, Putin also continues to develop a new common-sense and rearticulate nodal points. As previously mentioned, owing to the pandemic, although we have seen it a bit with Putin's discussion of climate change, it does seem that there is a new interest in saving humanity. Putin argues that "when a real crisis strikes, there is only one universal value left and that is human life".[437] However, unlike before when Putin would perhaps suggest that the UN should be included to solve this crisis, Putin instead claims that, as we can see with the pandemic, "each state decides for itself how best to protect based on its abilities, culture and traditions".[438] This move away from previous mechanisms and values falls more in line with Challenger II; even the UN as a nodal point has been disarticulated.

While Putin still emphasizes sovereignty (Challenger I), Putin wraps this emphasis in a criticism against the current system, stating that:

> any effective international order should take into account the interests and capabilities of the state and proceed on that basis… it is impossible to impose anything on anyone, be it *the principles underlying the sociopolitical structure or values that someone, for their own reasons, has called universal*.[439]

Here, we are presented with a counter-hegemonic critique. The common-sense has been exposed; it is not taken for granted nor assumed to be natural – '*someone has called [it] universal*'. Moreover, rather than these be values that act, for lack of a better word, commonsensically, these rules are imposed, which violates one of Russia's longstanding values – sovereignty.

[437] "Valdai Discussion Club meeting," 2021
[438] Ibid.
[439] Ibid., italics added

Not only can Putin see the common-sense for what it is, Putin also attempts to discredit the moral integrity of the West. Putin reports that in the West, "reverse discrimination" is occurring "against the majority in the interests of a minority" and those in the West are also trying to dispel with "the traditional notions of mother, father, family and even gender".[440] However, Russia has a different view of this, and it does not want these values imposed on it. Instead, Russia "must rely on our own spiritual values, our historical tradition and the culture of our multiethnic nation".[441] Here, Russia is both criticizing the West while also warning of the dangers of continuing to follow this system and/or be in a position where certain values are imposed. He is also attempting to rearticulate nodal points around culture and spirituality.

The danger of destroying gender particularly threatens Putin's new-founded value: saving humanity. As he argues, "something unites all people. After all, we are all people, and we all want to live. Life is of absolute value. In my opinion, the same applies to family as a value, because what can be more important than procreation? Do we want to be or not to be?"[442] The danger of having no gender and different sexual orientations, which then means some people will not procreate, is that this kind of value can threaten human existence.[443] And although Putin argues that the West has a right to have these values, as long as it is not imposed on others, Putin had begun this with 'something [that] unites all people,' which leaves us with the question of if gender and sex norms are universal values or if they are the right of a state to decide. Putin's uncertainty about this also indicates that the alternative he is constructing is still being constructed. Paradoxes still exist and, in some, ways, these new values are being piecemealed together during the process of rearticulation.

[440] "Valdai Discussion Club meeting," 2021
[441] Ibid.
[442] Ibid.
[443] Ironically, Putin does not seem to fear the use of contraception or abortions, both of which are legal in Russia.

He does attempt to organize these pieces under the broader term "conservatism". He first refers to Nikolai Berdyayev, a Russian philosopher expelled from the Soviet Union in 1922. Paraphrasing him, Putin argues that conservatism "is not something preventing upward, forward movement, but something preventing you from sliding back into chaos".[444] The idea of 'sliding back into chaos' can easily speak to his domestic audience because after the collapse of the Soviet Union, many people suffered from the ensuing chaos in the 1990s. However, Putin adds more to his idea of conservatism:

> It is primarily about reliance on a time-tested tradition, the preservation and growth of the population, a realistic assessment of oneself and others, a precise alignment of priorities, a correlation of necessity and possibility, a prudent formulation of goals, and a fundamental rejection of extremism as a method. And frankly, *in the impending period of global reconstruction, which may take quite long, with its final design being uncertain, moderate conservatism is the most reasonable line of conduct*, as far as I see it.[445]

What we are left with here is a defined political concept of conservatism, or at least, it is a clearer ideological statement than Putin had previously given, and it does match some of the previous discourse we have heard from him. If conservatism means being able to progress but not falling back into chaos, then this still matches his claims that we need to have some universal framework in place, typically when he calls for more respect for the UN. Most of all, however, we see a suggestion of an alternative (Challenger II), or in this case, more of a next step: 'moderate conservatism is the most reasonable line of conduct'. Already by this time, we can see both counter-hegemonic critiques (disarticulation) *and* the suggestion of an alternative (rearticulation), both signposts mostly assigned with Challenger II.

As we could see in Chapter 2, and with some of Putin's previous discourse, counter-hegemonic challengers do not necessarily change, or advocate for the change, of every aspect of

[444] "Valdai Discussion Club meeting," 2021
[445] Ibid., italics added

the previous common-sense. In this sense, we can still see some remnants of the neoliberal and post-WWII order, and this typically still is economic strength and military might. For instance, when discussing the US' withdrawal from Afghanistan, Putin argues that it perhaps will affect the US' relationships with its allies, "but the appeal of a country still depends not on this but on its economic and military might".[446] In some ways, it makes sense that of the values that Putin still adheres to, it is this type of strength. In previous years, Putin discussed the importance of economic strength consistently and connected this value to the post-WWII order. As there is still some respect for this order, we see the connection still to this value, despite his rejection of many others. This value also ties into historic periods Putin praises, like the reign of Peter I, Catherine the Great, and Alexander I; they all contributed in their own way to Russia's great power status.[447]

This also brings us to the UN, a staple of the post-WWII order and an international mechanism that has managed to keep Putin's respect for years. Even in 2021, the UN is still seen as a valuable institution ("at least for now").[448] While a small addition, it is perhaps one of the few asides Putin has made in the past few years that puts doubt into the longevity and sustainability of the UN. Why it is still valuable, according to Putin, is because it "brings a touch of reasonable conservatism into international relations".[449] Therefore, while the UN remains, its right and value to be in the international order now has to do more with its contribution to Putin's alternative – conservatism. The UN discursively functioning this way also has to do with Putin's incorrect perceived notion that the UN is a key nodal point to the existing international common-sense. He is able to therefore articulate it into his new common-sense – conservatism.

[446] "Valdai Discussion Club meeting," 2021
[447] "Direct Line with Vladimir Putin," 2021
[448] "Valdai Discussion Club meeting," 2021
[449] Ibid.

Meanwhile, we still see parallels between this proposed alternative common-sense and Russia's domestic hegemonic common-sense. During his 2021 Direct Line, Putin speaks at length about Russia's superiority, mostly to do with its multiethnic population that is "highly spiritual and possess deep historical and cultural roots".[450] Why this matters is because this translates into a "deep-down principle" where "at heart we nurture a considerable respectful attitude towards science and education".[451] While this indicates that Russia will be a tech powerhouse, he goes even further with this by stating that "The future of humankind is connected with this: with genetics, biology in the broad sense of the word, information technology, artificial intelligence and everything else at the junction of these disciplines".[452] Once again, Putin stresses 'the future of humankind' as a value, and somehow, he manages to connect this to Russia's history and culture, which then is grounded in *something* 'deep-down'.

Using these *natural* gifts, Russia's future success is guaranteed, as long as Russia can "ensure internal stability, which external forces have always been trying to disrupt".[453] Managing this will allow Russians to feel proud of their country, and "This inner feeling of our citizens and inner attitude to Russia is important and, in itself, is a vital guarantee that Russia will definitely attain all the goals it sets for itself".[454] So what we are left with is the idea that Russia will inevitably be successful because of an innate respect for science. As long as the Russian state is strong enough to repel any obstacles, this will *naturally* develop, because Russians will believe in these goals. In short, we have a common-sense operating at the base of this, which ties into themes we saw in 2020 as well as the broader common-sense Putin began promoting in 2021.

[450] "Direct Line with Vladimir Putin," 2021
[451] Ibid.
[452] Ibid.
[453] "Direct Line with Vladimir Putin," 2021
[454] Ibid.

Moreover, Putin also positions Russia as an example that other states can follow, much like the Bolsheviks did in the Comintern. Part of this is owing to the strength that Putin feels about Russia's position. Some of this comes from historical experiences Russia has had; while some of them have been difficult, it allowed Russia to develop "herd immunity to extremism that paves the way to upheavals and socioeconomic cataclysms".[455] This is primarily based on Russia's experiences in the 1990s, which taught Russians the value of stability. As a result, Putin refers to Russia as having "optimistic conservatism," – a belief that "stable, positive development" is possible, depending on "our own efforts," although Putin adds Russia is willing to work with others on "common noble causes".[456] Thus, the conservatism Putin advocates for now on the international level has a basis in Russia's domestic hegemony, signifying a step from the domestic to international level, which required stable domestic hegemony. It seems as though Putin has negotiated this step, which is a signpost for Challenger II.

However, with this perceived sense of strength comes perceived threats. For instance, Putin states that after 1991, "we divided ourselves into 12… Still, it seems that this was not enough for our partners. They believe Russia is too big as it is today".[457] By partners, Putin refers to Russia's European partners, which are all small countries, so they do not understand Russia's size. Because of this, they are wary of it, and Putin believes this "is the only way to explain this unrelenting pressure".[458] Once again, we have Putin referring to more basic understandings of strength – in this case, the size of Russia is what is intimidating to the West. Although in the case of the size of a country meaning it is strong, this does not necessarily line up with neoliberalism, which focuses more on the economic strength of a country. Once again, Putin is indicating a mismatch between

[455] "Valdai Discussion Club meeting," 2021
[456] Ibid.
[457] Putin, "Vladimir Putin's Annual News," 2021
[458] Ibid.

the existing international common-sense and his perception of it. Therefore, in this case, we may have once again a discursive straddling between Challenger I and II, wherein Putin adheres to an older concept of greatness, aiming to keep Russia's favored position there (Challenger I), but by doing so, critiques the common-sense of the system (Challenger II).

Yet another perceived threat is the supposed rewriting of WWII history, which we also saw in 2020. Now understanding Russia's internal common-sense of 'optimistic conservatism,' we can better reflect on how Putin perceives the threat of extremism. In the case of WWII, rewriting history could possibly be a slippery slope to accepting Nazism, or parts of it. Some of this fear comes from the rewriting of certain historical figures, "whose hands are smeared with the blood of hundreds of thousands of civilians".[459] Once again, it is up to Russia to protect the Truth of WWII to prevent a return to extremism and Nazism, which aligns with its new common-sense.

Moreover, there are further complaints that the West does not understand, and does not wish to understand, Russia. As Putin states, "You know, sometimes I get the feeling we live in different worlds".[460] Part of this comes from Putin's frustration that treaties and security guarantees that he believes Russia is owed fail to materialize, despite verbal assurances from the West. This particularly concerns NATO. As Putin argues:

> we have made it clear that any further movement of NATO to the East is unacceptable. Is there anything unclear about this? Are we deploying missiles near the US border? No, we are not. It is the United States that has come to our home with its missiles and is already standing at our doorstep. Is it going too far to demand that no strike systems be placed near our home?[461]

During the Annual News Conference, Putin frequently repeats this theme – the US has betrayed Russia, it has constantly expanded NATO, not given any guarantees, expects certain behaviors

[459] Vladimir Putin, "Victory Parade on Red Square," transcript of speech delivered in Moscow, Russia, 9 May 2021, http://en.kremlin.ru/events/president/news/65544
[460] Putin, "Vladimir Putin's Annual News," 2021
[461] Ibid.

from Russia while not respecting Russia's security concerns. What is absent from this complaint, however, are the desires and wishes of the country that is asking for NATO weapons. Agency once again is revoked from these countries, like Putin has done with Ukraine repeatedly.

This is not to say there is no reason for Putin to complain about NATO expansionism; rather, the point is *how* Putin complains about NATO expansionism. By discrediting the security wishes of the individual countries who have NATO weapons or would like to join NATO, Putin is delegitimizing the governments of those countries implicitly. By framing a desire to join NATO as a policy that only comes from European countries' fear of Russia reiterates a Eurocentric and Cold War framework where only Russia could be a threat to Europe. Arguably, Putin responds according to how these countries and NATO discursively frame the expansion. Yet, there is still a theme that connects to Putin's multilateralism, *only for* great powers, his erasure of the division between Ukrainian and Russian people, and his repeated accusations that if countries support the US, it is because they either have been bought or replaced by an illegal government. These complaints serve to undermine the legitimacy of the US as a leader of the international system, and they show that Putin is apprehensive about the security common-sense of this order.

Yet, by the end of 2021, Putin claims he is still open to discuss security issues concerning NATO with Biden, but he argues that the US must now make the next step. However, at this point, he believes "the overall response we have been seeing has been quite positive".[462] It seems like a willingness to have diplomatic ties (Challenger I) and continue to be connected to the existing order (Challenger I) is still in place, which means that despite the intensity and frequency of Challenger II discourse in 2021, it is not the only operating logic.

[462] Putin, "Vladimir Putin's Annual News," 2021

The emphasis and distrust of NATO permeates into Russia's ongoing conflict with Ukraine over the rights of ethnic and linguistic Russians in Ukraine, the breakaway regions, and Crimea. As a result, there is often a bi-level conversation when Putin reflects on Ukraine. At each level, Challenger I and Challenger II discursive signposts operate differently. For instance, on one level, Putin discusses Russia's relationship with Ukraine through an international lens. Even if NATO membership is not offered to Ukraine, Putin is concerned about the "military expansion… already underway" as it "really poses a threat to the Russian Federation".[463] Putin expressing a security concern ties more into the rights it expects are given to a sovereign nation in the international order (Challenger I).

However, the security threat is still framed as a threat *on* Ukraine's territory but not initiated *by* Ukraine: "we are fighting for ourselves and our future on our own territory. It was not us who covered thousands of kilometres by air and sea towards them; it was them who approached our borders and entered our territorial sea, which is a crucial component in the overall situation".[464] In this reference, Putin is referring to NATO expansionism, although right after this, he reverts back to discussing Crimea. There is a mixture, then, when Putin discusses the security threat supposed military expansionism in Ukraine poses; it is international because of the politics not because of the location.

This is confirmed by Putin's continued accusations that the Ukrainian government is not independent:

> Why meet with Zelensky if he has accepted the full external management of his country? The main issues concerning Ukraine's functioning *are not decided in Kiev but in Washington and, partly, in Berlin and Paris*. What is there to talk about then? Nevertheless, I do not refuse to hold such meetings, but I first want to understand what issues we can discuss.[465]

[463] "Valdai Discussion Club meeting," 2021
[464] "Direct Line with Vladimir Putin," 2021
[465] Ibid., italics added

In some ways, this may be the reason that Putin is still open to diplomacy – because it is not with Ukraine but with an equal sovereign state that Putin is negotiating. Mostly, however, being open for diplomacy is a marker of Challenger I, and it shows that there is still some connection to diplomacy on the greater international level.

While this may mean that Russia is still open to diplomacy on the international level, there are other issues that arise with Putin's belief that Ukraine's government is illegitimate, inefficient, and controlled by external forces. Like in 2020, Putin reiterates the idea that Ukraine does not account for Ukrainian citizens' interests, and moreover, they "are scared, because the small group that has appropriated the victory in the fight for independence holds radical political views. And that group actually runs the country, regardless of the name of the current head of state".[466] In other words, Ukraine is run by a small group of extremists that do not allow most Ukrainians to express their True beliefs.

He attempts to prove this by discussing how in southeastern Ukraine, officials elected "immediately changed their political positions… Because that silent majority voted for them in the hope that they would fulfil their campaign promises, but the loud and aggressive nationalist minority suppressed all freedom in decision-making".[467] Ukraine here is unable to protect the interests of its citizens and is falling into extremism and chaos, which goes against Russia's internal and espoused common-sense. What is alarming, however, is that Putin concludes this discussion on southeastern Ukraine by stating "This is a dead end. I do not even know how this can be changed".[468] While there can be some patience with the Ukrainian government as long as Russia

[466] "Valdai Discussion Club meeting," 2021
[467] Ibid.
[468] Ibid.

can negotiate through them with greater powers, Putin leaves little room for diplomacy when it comes to the Donbas and the rights of ethnic and linguistic Russians.

He double-downs on this argument in his Annual News Conference, which concludes 2021. In his view, Russia is a mediator between Ukraine and the separatists in the Donbas, and "the future of Donbass must be determined by the people who live in Donbass".[469] The problem is that Russia is not being seen this way by others; they position Russia as a "party to this conflict," which goes against what Russia agreed to in the Minsk agreements.[470] Once again, there is a duality between Russia's position with Ukraine and with the external system. Russia aims to be a mediator, but it is not seen this way; it believes itself to be a mediator because of its brotherly ties to Ukraine, but these are being destroyed.

The destruction of these ties also worries Putin, and once again, he frames this issue in a discourse of rights. Putin discusses how a draft law was submitted to the Verkhovna Rada that states Russians are not indigenous people in Ukraine, which Putin claims "defies comprehension".[471] This would mean some would leave the country, and some would "reregister [as Ukrainians], because they would be second-class citizens otherwise," leading to a decrease in the number of Russians in Ukraine.[472] Putin equates the damage this law would cause to "the negative impact of weapons of mass destruction".[473] In this case, Putin perceives a real and present danger to ethnic and linguistic Russians abroad, and his claim goes further than just a discussion of violating rights and begins to indicate he believes Ukraine is attempting to purge Ukraine of Russians.

[469] Putin, "Vladimir Putin's Annual News," 2021
[470] Ibid.
[471] "Direct Line with Vladimir Putin," 2021
[472] Ibid.
[473] Ibid.

Thus, while the conflict may have a dimension that is outside of Ukraine and in that dimension, diplomacy exists (Challenger I), the other dimension of the conflict with Ukraine falls in line more with Challenger II. This is because we can see the development of criticisms against Ukraine and its government that are, according to Russia, extremist red flags. The government cannot operate by itself; it does not listen to its citizens; and Russians are being exterminated. To end 2021, Putin concludes that Zelensky himself is compromised "having fallen, like previous leaders, under the influence of radical elements that are called "natsi' [Nazis] in Ukraine".[474] With this, Russia's common-sense, which as we saw, grew in part from its interaction with Ukraine, is under threat. At this point, diplomacy is not closed, but the door for diplomacy is only open through the international system, which itself faced Russia's disarticulation and rearticulation in 2021.

7.3 Russia as a challenger in 2020-2021

I began my analysis of contemporary Russia by arguing that there is not such a strict duality when it comes to Challenger I and Challenger II, and often statements can be interpreted to fall under both labels and straddle the two conceptually. I would like to stress that 2020 and 2021 have been described in a clearer way than Putin's discourse was, but I did so to express trends that appeared after reading years of his speeches. Mostly, the trends of 2020 and 2021 were a marked rise in counter-hegemonic disarticulations of the external system's nodal points, the rearticulation of these nodal points into an alternative common-sense that came from a domestic common-sense and feeling of security, and finally, a connection between the behavior of Ukraine's government and perceiving a threat to Russia's common-sense. Much of this common-sense has to do with survival and ethnicity, particularly tied into the historical memory of the Great Patriotic War, which serves as an example of the last time the survival of Russians (in terms of ethnicity and

[474] Putin, "Vladimir Putin's Annual News," 2021

nationality) were at stake. Positioning itself as immune to extremism, Russia consequently positions itself as the state that can provide order and can, like in WWII, restore order between equal great powers and rid the world of extremism that leads to genocide.

When looking at 2020 to 20201, we can see more signposts showing Russia not only as a counter-hegemonic criticizer but a counter-hegemonic challenger. Putin went further than pointing out the failings of the system – he targeted the basic underpinnings of the system. There were moments were Putin expressed his belief the system is changeable and constructed, and after this, there were more moments where we can see Russia positioning its own alternative common-sense onto an international level. Yet, there were still many doors open to cooperation and diplomacy, especially with China. Aiming to keep relations and develop them shows there is still some belief in an operating system (Challenger I), and this should not be overlooked. Moreover, although Russia uses more counter-hegemonic discourse in 2021 especially, this did not guarantee that it would launch a full-scale invasion of Ukraine in 2022, nor is this the point of the analysis. It is to show that in Russia's dialectical relationship with its external system, over a period of time, a discursive formation appeared that highlighted Russia's loss of belief in this system and its attempts to rearticulate certain nodal points. Like with the Bolsheviks and Peter I, however, it remains to be seen the exact effects of Russia's actions on the international system, as Russia is not in control of this.

While reading Putin's speeches in hindsight of its full-scale invasion of Ukraine in 2022 undoubtedly has colored this analysis, and it also led me to conclude my empirics with 2021. The ongoing conflict is far from stable, and while it may bolster or contrast my argument, concluding in 2021 allows me to show the changes, mutability, and effects of external events on Russia's counter-hegemonic discursive development. Yet, as it has been shown through 2020-2021, and

like with 2015-2019, while perhaps one trend was stronger than the other, we cannot show concretely that Russia was one type of challenger. What this period has done is highlight how dynamic, situation, and opportunistic actors can be, all while seemingly expressing different kinds of challenges. Furthermore, Russian foreign policy from 2020-2021 also shows the impact that strength in an actor's internal common-sense has on their interactions with its external environment, and how these interactions also contribute to the dynamism of understanding challengers.

Chapter 8: Conclusion

What kind of challenger is contemporary Russia? This question was the starting point of the dissertation and emerged from other research that had been conducted regarding Russia, and other actors, like China, as a challenger to some international system. Within this question, there was already some implicit understanding of what this system might be. Therefore, some scholars focused on how a challenger may challenge its position within this system or challenge the system itself. This dichotomy emerging from the literature then seems able to start answering the question when it is directed toward contemporary Russia. Yet as this dissertation progressed, this seemingly simple dichotomy and related international system took on more layers and complications to the point that by the end of the research, we are left with the realization that not only is this question not the right one to ask about contemporary Russia, but it is not the right one because of this static theoretical dichotomy that has been espoused so far.

8.1 Strengths and limitations of the concepts

This dissertation began with an attempt to understand, first, the many ways challengers are discussed, and second, what a challenger is challenging. To do so, I first established that there were generally two types of challengers that emerged from the literature. One that wanted to change its position in the system and the other that wanted to change the system itself. However, to better understand what was being challenged, I explored the concept of hegemony, which allows us to explore systemic challengers in-depth. As the question about Russia as a challenger implicitly indicated that it was presenting a systemic challenge, using a post-Marxist hegemonic approach began showing the signs that this question required more theoretical complexity than it was usually given.

In post-Marxist hegemony, challengers are part of a complicated oppositional landscape. At times, they reproduce the existing common-sense, while at other times, they act, intentionally or not, to disarticulate existing nodal points. Antagonism to disarticulate these nodal points creates a challenge to hegemony, which relies on existing nodal points to support the common-sense. A counter-hegemonic challenger, therefore, aims to disarticulate the nodal points and its continued antagonism then aims to rearticulate the nodal points along the lines of its alternative common-sense. Presenting an alternative common-sense is a key part of a counter-hegemonic challenger, and this disarticulation is not strategy dependent; often counter-hegemonic challengers will use a myriad of methods to disarticulate nodal points.

To understand how Russia fits into this milieu, it was important to understand the nodal points of the current international hegemonic system. From Mouffe, it was understood that while hegemonic leadership matters, there is a system in place outside the hegemon. I formulated a concept of the international system based on a combination of Russia's perspective and existing, associated literature. In this concept, the hegemonic structure was put in place by the US, but this is relatively insignificant compared to the common-sense. It does help us to understand, however, the change to the international system after the collapse of the Soviet Union, which led to a rise in neoliberalism. Two key nodal points emerged in this hegemonic international system. One was neoliberalism's focus on the relationship between capitalism and globalization. Economic strength is seen as a key tenant of the international system, even if economic strength is no longer rooted in the nation-state. Moreover, there is a sense that neoliberalism is overwhelming and too complicated; there is a sense of inevitability about it that has led to a general malaise – the depoliticization of politics.

From this, it was possible to understand what potentially Russia was challenging. However, how would it be possible to identify what kind of challenger Russia was in this environment? For this, I built Weberian ideal types in Chapters 3, 4, and 5. The empirical, historical cases in Chapters 4 and 5 were precisely this – they were ideal typical cases; they were chosen as seemingly the closest possible examples of these challengers. From this process, two workable ideal types were left to use to analyze contemporary Russia. Ideal Type I saw the external system as superior to its internal system, and it aimed to adjust to change its position within this system. Ideal Type II disagreed with the external system at its core, and it sought to disarticulate nodal points to replace them nodal points befitting Ideal Type II's alternative common-sense. The ideal types provided signposts with which I could attempt to find discursive formations, indicating what kind of challenger Russia was.

From Peter I in Chapter 4, certain signposts appeared in a discursive formation for the first ideal type. Peter I understood that to engage in commerce, it was necessary to go to war, and to go to war, it was necessary to build an internal infrastructure to do so as well as have valuable diplomatic ties. Peter I's focus on commerce, and his perception that this mattered to the common-sense, also lent itself to comparison with Russia from 2015-2021, which took economic strength as an important nodal point in the hegemonic system. Peter I perceived part of Russia's internal structure as inferior to what he saw in Europe, and he aimed to make reforms to improve Russia *to a point*. Whether consciously or not, Peter I balanced his reforms to not upend the common-sense of his own system while trying to restructure it enough to join the European one. The interaction between Petrine Russia and the European system was not static; both changed because of the other. While Peter I aimed to change Russia's position within that system, by forcing the system to accept him, primarily by defeating Sweden in the Great Northern War, the system was

fundamentally changed. The example of Petrine Russia, therefore, solidified the concept of Challenger I.

Similarly, in Chapter 5, the Bolshevik example built a concept of Challenger II and solidified the second ideal type, but it likewise showed that challengers, no matter their goals, are not static concepts. Like Peter I, the Bolsheviks engaged with conversations with their external system. Unlike Peter I, however, the Bolsheviks did not want to join this system. They aimed to disarticulate certain key nodal points (primarily capitalism and imperialism) and replace it with their own nodal points (communism and the international). They acted upon this through the construction of the Comintern, and through this, we can see the adjustments the Bolsheviks made throughout their rule, as they attempted to challenge the external system and build their domestic hegemony. Like Peter I, their apparent goals were not necessarily the outcome. Instead of changing the system, the Bolsheviks themselves were changed, having to engage more with the economy of their external system and deal with the limitations of the Comintern.

Therefore, both ideal types, while representing each type of challenger well, show that the dichotomy is a dynamic one, meaning in between both ends, there is a spectrum of possible challengers and challenges. Despite intentions, the outcomes of challengers are varied, and they are as affected by the system as they attempt to affect it. However, there are still benefits from seeing certain signposts, like disarticulation and rearticulation, which are indicators that there are counter-hegemonic elements in the discourse. This conceptual framework and the process of forming the concepts also brought to light an unexpected finding as well. Through seeing the Bolsheviks' motivation and ultimate inability to be the counter-hegemonic challenger they envisaged, to the importance of domestic stability for Peter I's international plans, it became important to see the relationship between domestic hegemony and challenges on the international

stage. While the link between domestic hegemony and international hegemony has already been noted, the conceptual framework illustrated their mutually constituting relationship; without a strong domestic hegemon, replete with a common-sense, an actor will have difficulty acting as a counter-hegemonic challenger.

8.2 What kind of challenger was Russia from 2015-2021?

With the conceptual framework complete, I turned to the original research question: what kind of challenger was Russia from 2015-2021? Did it fit in this neat, conceptual dichotomy, or somewhere close to one end of either spectrum. From 2015-2019, there were several elements of Russia's foreign policy discourse that lent itself to both types of challengers. Starting in 2015, coming from the Annexation of Crimea and Russia's involvement in Syria, we could already begin to see a complication. Putin primarily discussed protecting the status quo, and Russia's privileged position within this status quo, and this notion does not fit neatly into either ideal type. Moreover, the way that Putin understood the status quo harkened back to the liberal international order, rather than the current neoliberal hegemonic system. Therefore, while Putin would still adhere to important nodal points, like economic strength and the value of capitalism, he also valued the UN to a level that no longer reflected the hegemonic common-sense, from Russia's perspective. In this case, the question was whether he wanted Russia to change its position within the existing system, i.e., improve it under these new circumstances, or to change the system itself back to a pre-existing system. The latter could not exactly be considered counter-hegemonic although it also had the potential to be counter-hegemonic.

Therefore, during this period, Russia was straddling the two concepts of being a challenger, often appearing at different points on the spectrum. After the Pandemic, which drew Russia's foreign policy focus elsewhere, we can see a continuation of this confusion. However, from 2020-

2021, we also see more Challenger II discursive elements. In particular, we see Putin attempting to rearticulate certain nodal points, some of which include the primacy of the UN, although he also begins including the importance of traditional values. This, he claims, is part of conservatism, which he christens this new attempt at articulation.

However, at some moments, Putin had not disarticulated certain existing nodal points, and there is frustration that these nodal points still exist, such as capitalism and violations of sovereignty. Part of this attempted disarticulation and rearticulation comes from Putin's perception of Russia's increased strength and solidifying common-sense, which reflects the conservatism he brings to the international level. It also matches the discovery made in the building of the conceptual framework; Russia's domestic common-sense only began surfacing on the international level once Russia's domestic hegemony was more secure and its common-sense developed.

This bi-level relationship between Russia's growing domestic common-sense and its attempts at disarticulation is illustrated in its relationship with Ukraine. Increasingly frustrated by the lack of progress with Ukraine and the perception that it is leaving Russia, to which it is connected through blood and history, Putin attempts to provide other nodal points, an alternative, for Ukraine and other countries to follow. Yet despite this, Russia from 2020-2021 still cannot be concretely described as one type of challenger. While we see that there are more signposts from Challenger II, there is still a willingness to be in the international system, especially in terms of its relationship with China, and a harkening back to a recently existing international system.

By exploring the theoretical underpinnings of hegemony and counter-hegemony and applying solidified ideal types to Russia, we can instead see that Russia from 2015-2021, like Peter I and the Bolsheviks, cannot be static because challengers are in a conversation with the system

that they are challenging. Regarding certain topics during certain moments, Russia presented one of the types of challengers, or a mix, and this tells us more about Russia's relationship to the topic at hand at that moment rather than Russia abstractly and wholistically.

The types of challenges Russia presented from 2015-2021 varied depending on the subject. When it came to Syria, we can see Russia attempting to confirm its existing position within the international system, but the problem comes from its view of the international system. By attempting to hold its position and give legitimacy back to the UN, Russia was not disarticulating nodal points but rearticulating nodal points of a past common-sense. In this way, Russia was not exactly Challenger I nor II but rather a combination. What is unsettling about Russia's involvement in Syria is that Russia, on the surface, is claiming to be something closer to Challenger I, but its actions more closely reflect Challenger II, as it is almost inadvertently involved in disarticulating the common-sense. Yet, the motivation for this action comes from a desire to keep its privileged position that was enshrined after WWII in the UN and its possession of nuclear weapons.

When it comes to Ukraine, there is an altogether different picture. Here we see that in the beginning of 2015, there are attempts to also rearticulate a lesser nodal point – respect for international law. Russia presents bi-level reasons for its involvement in Ukraine. One speaks more about international law, the rights of minorities (in Ukraine), and Ukraine as a failed state needing rescued. All of this, from Russia's perspective, are actions the US has taken during the post-Cold War era, most notably, from Putin's perspective, with Yugoslavia. In this case, like with Syria, Russia aims to hold its privileged position by attempting to keep tenants of its authority stable in the international system.

Yet another line of reasoning develops throughout 2015-2021, particularly from 2020-2021, and this line comes from a different place. Russia claims it has the right to be involved in

Ukraine not only because of these international legal reasons but because Russia and Ukraine are one nation. To accompany this claim, there is also a deep-dive into WWII history and the history of the Soviet Union, as well as earlier periods, to show that Ukraine and Russia were only arbitrarily separated, and since Ukraine is unable to take care of itself, Russia must intervene out of a sense of duty. To get to this conclusion, much work was done on Russia's own domestic common-sense, which then Putin begins projecting onto Ukraine, and later in 2020-2021, to the international level. He entitles this new common-sense conservatism, and this ties back into Russia's desire to maintain a status quo that grants it the same privileges it used to have. However, conservatism goes further than this, and it aims to battle ills that Putin sees in society, such as questions on gender.

Therefore, when it comes to Ukraine, it is not only about Russia's position within the international system, but it is also about a new common-sense that has been articulated in Russia's domestic sphere. Russia then no longer approaches Ukraine and the rest of the international system through a prism of legality but of morality. This specific challenge, therefore, is notable and different from what we have seen previously, and it shows that Ukraine is a particular triggering point for contemporary Russia, one that evokes a certain kind of challenge to the international system, and this challenge has much more to do with a growing alternative common-sense than with Russia's position within a system that it has begun to delegitimize. There are still moments when it respects the international system, especially in terms of its diplomatic ties with different countries, but by the end of 2021, these moments have become less frequent.

Herein lies an important point that came through the discourse on Ukraine and Russia's perception of the international system. While there were signposts for being both Challenger I and Challenger II, and while in 2020-2021, there were more attempts at articulation and disarticulation,

it cannot be said that the Russo-Ukrainian War in 2022 was inevitable based on the existing discursive formations. These discursive formations would later provide justification for Russia's actions as well as be developed into a stronger oppositional discourse toward the perceived international system, but from 2015-2021, while the possibility for war existed and animosity and hostility toward Ukraine was clear, it was not clear, from the existing discursive formations, what Russia would do.

Instead, reflecting on this period from 2015-2021 and the 2022 full-scale invasion of Ukraine, it is more useful to see this period as a moment where discursively Russia, through Putin's speeches, experimented and developed discursive formations based on moments and perceived frustrations it experienced. Moreover, it cannot be said that these developments or experiments were premeditated. Owing to the contradictions and misinformation present in the discourse examined here, it is also worth asking the question as to whether one strategy employed, if one at all, was to confuse the audience – to keep a common-sense neither disarticulated nor articulated – allowing the regime to operate opaquely in this confusion. This, however, would require further examination.

8.3 Questions remaining

However, wondering if Russia is a challenger that aims to change its position within the existing system or the system itself does not appear to be the right question post-2022. First, the war between Russia and Ukraine is ongoing and changing constantly. Moreover, this war has left a huge mark on the international system, the relationship between Russia and Ukraine, Russia and the US, and Russia and Europe, that to judge it as a challenger during this period seemed next to impossible to do. While it is a challenger, what kind it is seems an exceptionally chaotic question. Moreover, with the misinformation and chaotic moments of Putin's discourse, forcing Russian

discourse into a strict dichotomy seems not only untenable but purposeless. The periods that were studied here were still periods of relative stability, especially in terms of traditional relationships.

Yet, examining this chaotic period is worthwhile, and perhaps, with the right question: what kind of challenges was Russia presenting to the international hegemonic system after its full-scale invasion of Ukraine? What events, actions, or moments brought out which kind of challenges and when? Moreover, while Russia did not perhaps have an intentionality behind the challenges it presented, it will be meaningful to examine what kind of effect the war has had on the hegemonic common-sense of the international system, as it is unlikely that it will not go unscathed. Given the beginning formation of a common-sense that was promoted on the international system, looking at Russian discourse from 2022, scholars should see if this common-sense has solidified or remains in flux, providing a confusing cover for what Russia might do next.

Furthermore, this research focused on Vladimir Putin and his discourse, and he is not the sole apparatus of the Russian state, albeit an important and directive one. As we have seen with this research, there is an important connection between an actor's ability to challenge the external common-sense and the strength of its own common-sense. In this case, it would be worthwhile to explore Russia's domestic hegemony during this period in more depth. This topic could be expanded further by including more voices inside Russia, but then again, this research should ask the right question. In this case, how did Russia's domestic common-sense strengthen after the Annexation of Crimea to the full-scale invasion of Ukraine? What are the challenges being presented to this domestic common-sense internally and externally, and when do they appear? Who presents them? Does the Russian common-sense respond, i.e., is there still a conversation between Russia and its criticizers, on any part of the political spectrum?

Finally, this framework should be used and expanded on different cases, as Russia is not the only actor presenting challenges to the international hegemonic system. First, it is worthwhile to examine other purported state challengers, like China and Brazil, and even the US. Second, it is important to move this framework past state actors and understand how the type of actor affects the type of challenges that an actor can present.

While there might always be challenges, and while we should be careful in understanding what kinds of challenges exist and their potential effects, it is important to keep in mind that our perception of challenges stem from our own bias toward *what* is being challenged. This positionality can also affect how we approach the question of challenger and challenges, and this intersection would also be a fruitful avenue for future research, especially when considering the different global responses to Russia's invasion of Ukraine.

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