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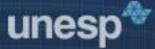
Threat Perception in International Relations: The Realist and the Liberal Accounts

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Abstract. Threat perception, i.e., the perception by one international actor that another actor or a certain behavior or action taken by that actor constitutes a threat to its security, is an important, if not crucial, component of international crises, conflicts, and wars. In this article, I seek to contribute to our understanding of threat perception by examining how two of the major schools of thought in the academic discipline of International Relations – realism and liberalism – address the issue of threat perception in international politics.

Keywords. Realism, Liberalism, Threat Perception, Security, Power, Ideas

Resumo: Percepção de ameaça, isto é, a percepção por um ator internacional de que um determinado comportamento ou ação de outro ator constitui ameaça para a sua segurança, é um componente importante, ou mesmo fundamental, de crises internacionais, conflitos e guerras. Neste artigo, procuro contribuir para a compreensão do fenômeno de percepção de ameaça examinando como duas das principais escolas de pensamento da disciplina de Relações Internacionais - realismo e liberalismo - abordam a questão da percepção de ameaça na política internacional.

Palavras-chaves: Realismo, Liberalismo, Percepção de Ameaça, Segurança, Poder, Ideias.

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Introduction

In this article, I describe how two of the major schools of thought in the discipline of International Relations − realism and liberalism − address the issue of threat perception in international politics. In the first section, I describe how the different realist schools differ in their views on threat perception. I then analyze threat perception according to liberalism, primarily democratic peace theory, in both its institutional − or contractual − and ideational versions. Finally, I argue that the study of threat perception in international politics has to rely on both power and ideational variables and that how this combination is to be made and which perspectives on power and ideational are to be used depend on the object of study.

Realism

Realism, like any other major school of thought in International Relations, is not a monolithic intellectual tradition. Rather, it is a collection of distinct intellectual groups that are united by some common assumptions about what is fundamental about international politics − e.g., that states are the primary actors, that they seek security, and that this quest for security compels them to seek power. Thus, beyond these common assumptions, we can easily find substantial differences among scholars usually labeled as realists. These differences have led to the creation of certain subdivisions within the realist paradigm that seem to be accepted by most scholars in the field. The most basic of these subdivisions is that between classical realism and structural realism − also known as neorealism; which, in turn, tends to be divided into defensive realism and offensive realism. Other versions of realist theory that have been especially influential in the field of International Relations are power transition theory and balance of threat theory. In what follows, I seek to succinctly describe these major strands of realism, focusing on how they explain threat perception in international politics.

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Realism before the publication of Kenneth Waltz's book *Theory of International Politics* in 1979 was mostly known simply as realism. Ever since Waltz put forth his argument that the study of international relations should be concentrated primarily on the systemic level of analysis, however, most realist scholars prior to 1979 began to be known as classical realists. From then on, the distinction between classical realists and neorealists

usually refers to a difference in terms of what scholars think are the factors with the greatest influence on the behavior of states.

Before Waltz, most realists tended to see war as resulting from two primary factors: Human nature and the structure of the international system. In chapter thirteen of *Leviathan*, for instance, Thomas Hobbes describes the state of nature as a condition of "war of every one against every one". This is so, he argues, because of the human inclination for competition, diffidence, glory, and, primarily, because of anarchy – that is, because of the absence of an overarching authority that can enforce rules (Hobbes, 1962). Similarly, Thucydides argued that both individual and political behaviors were motivated by interest, honor, and security (Doyle, 1997, 66). In addition to that, he believed that international politics was deeply marked by what late twentieth century realists termed "the security dilemma": the idea that, in the absence of an authority to enforce rules in an international level, states – or city-states in this case – are always worried about shifts in the distribution of power, which leads them to compete for power. In fact, Michael Doyle brands Thucydides a "complex realist" because the Greek historian believed that "important events of interstate politics can be explained by examining the roles of leadership, state regimes, and international structures." And, "at the same time", Doyle continues, "it cannot be explained by any one factor alone – not by the character of individual leaders or the proclivities of certain types of states or the imperatives of the balance of power. Only by considering all together can we gain a sense of why wars and peace occur" (Doyle, 1997, 53).

Hans Morgenthau, too, attributes the causes of war to human nature and to the nature of the international system. He believes that our bio-psychological nature drives us to seek to dominate others. This inherent lust for power makes politics – both domestic and international – the stage of a struggle for power. As Morgenthau puts it: "Both domestic and international politics are struggles for power, modified only by different conditions under which this struggle takes place in the domestic and in the international spheres" (Morgenthau, 1978, 37). By different conditions Morgenthau refers to the fact that, while in the domestic sphere there is a central authority to enforce rules and prevent violence, the international environment lacks an authority capable of preventing violent struggle for power. Under this structural condition, conflicts and wars are bound to occur. Morgenthau thinks that only a world government could prevent this struggle for power from turning into wars. "International peace", says Morgenthau, "cannot be preserved through the limitation of national sovereignty,

and…the reasons for this failure [are] in the very nature of the relations among states." (Morgenthau, 1978, 529).

According to most classical realist accounts, under this condition of struggle for power states seek to protect themselves by forming alliances and, consequently, creating a balance of power. In other words, when there is a state with preponderance of power, other states, fearing for their security, will ally in order to add up their power capabilities and, thus, create an equality of power that will prevent the most powerful state from dominating the others. Other states may also ally with the most powerful, action termed as bandwagoning. What is important here, however, is that, for classical realists, states tend to fear one another and seek to prevent one another from becoming powerful enough to dominate or even destroy them. In sum, classical realists believe that states always perceive one another as potential threats, and that threats will increase according to differences in military capability. As David Rousseau summarizes, "for classical realists….threat is a function of power asymmetries" (Rousseau, 2005, 19).

The structural realist view of threat perception is basically the same advanced by classical realists: States see one another as potential enemies because all states have the potential to become aggressors if certain conditions are met – primarily, the power capability to impose their will on others. What structural realists do differently, however, is to focus on what Kenneth Waltz, in *Man, the State, and War*, termed the third level of analysis – or the international system – and, then, explain in more detail the mechanism through which states perceive one another as potential threats and the conditions under which states tend to fight wars.

The concept that best captures neorealist thinking about the effects of the structure of the international system on threat perception and war is that of "security dilemma". In *Man, the State, and War*, Waltz demonstrates how the security dilemma mechanism operates by citing the allegory of the stag hunt used by Jean-Jacques Rousseau to illustrate his views on the inevitability of conflict among nations.

According to the allegory, five individuals in the state of nature have to decide whether to collaborate in the hunting of a stag or to defect from the group to capture a hare. If the individual defects and succeeds in capturing the hare, he gains and the other five individuals lose. If he decides to continue with the group, however, he cannot be sure that the other members of the group will not defect or that, if they continue with the group, they will find a stag. What is in play here is the fundamental decision that individuals – or states –, in

an anarchical environment, have to make: to cooperate and trust others, or to seek to fulfill their self-interest in the short term - in other words, to seek absolute or relative gains. What the allegory shows is that uncertainty about other's willingness to cooperate tends to lead the parties involved to pursue their interest in detriment to the interest of the group. Thus, in an anarchical environment, the incentives for cooperation are very limited. Later on, in his article *Cooperation under the Security Dilemma*, Robert Jervis would incorporate into the concept of security dilemma the idea of balance between offensive and defensive military capabilities. He argued that, in an environment in which offensive and defensive military capabilities are distinguishable and the defensive capabilities are predominant, threat perception is lower, whereas when offensive and defensive military capabilities are indistinguishable, threat perception is higher (Jervis, 1978).

Within neorealism there is a major divide between those who believe that the security dilemma mostly creates incentives for defensive behavior and those who argue that the security dilemma actually creates more incentives for aggressive, offensive behavior. Defensive realists such as Jervis, Waltz, and Van Evera argue that the international system offers more incentives for defense than for offense, whereas offensive realists such as John Mearsheimer claim that great powers are never satiated by just keeping the balance of power. Ultimately, he argues, they seek hegemony (Jervis, 1999; Waltz, 1979; Van Evera, 2000; Mearsheimer, 2001).

While most classical realists and defensive realists make a distinction between status quo and revisionist states, Mearsheimer believes that all great powers are revisionists; that they are always trying to maximize their share of world power to the point of hegemony. Jervis believes that the difference between offensive and defensive versions of realism can be expressed in different terms. According to him, offensive realists believe that the security dilemma is intractable – that even reduction in the level of uncertainty provided by better flow of information about intentions cannot make the international system less conflictual. Defensive realists, on the other hand, believe that "much depend on the nature of the situation: the changes required when a status quo power faces an expansionist power are very different from the changes that could increase cooperation among status quo powers that fear one another. When dealing with aggressors, increasing cooperation is beyond reach, and the analysis and preferred policies of defensive realists differ little from those of offensive realists." (Jervis, 1999, 51, 52).

In 1987, Stephen Walt published *The Origins of Alliances*. In this book he laid out his balance of threat theory, which is a modified version of the balance of power theory. In contrast to the latter's exclusive focus on power capabilities, the former includes geographic proximity, offensive power, and aggressive intensions as factors that contribute to create threat perception and, as a result, lead to the formation of alliances. Thus, although Walt acknowledges that "all things being equal, the greater a state's total resources (e.g., population, industrial and military capability, and technological prowess), the greater the potential threat it can pose to others" (Walt, 1987, 22), he claims that aggregate power explains only partially the origins of threat perception. We should also include in a theory of the origins of threat perception and alliances, he argues, the fact that "states that are nearby pose a greater threat than those that are far away" (Walt, 1987, 23). At the same time, "states with large offensive capabilities are more likely to provoke an alliance than are those that are incapable of attacking" (Walt, 1987, 24). And finally, "states that are viewed as aggressive are likely to provoke others to balance against them" (Walt, 1987, 25).

Despite their differences, classical realism, defensive and offensive neorealism, and balance of threat theory are all balance of power theories. All these theories argue that equality of power reduces threat perception and, consequently, the likelihood of major wars. Power transition theory, on the other hand, rejects the balance of power argument and postulates that equality of power increases threat perception and the likelihood of major wars. For power transition theorists, wars between the two most powerful states in the system result from growing equality of power between them. According to power transition theory's most prominent scholar, Kenneth Organski, hegemony brings stability to the international system and major wars occur when the hegemonic state is being overtaken by another state. The most dangerous period in the relation between great powers, Organski argues, begins when the rising challenger approaches the crossover point. Although in his 1968 book, *World Politics*, Organski argues that major wars tend to be fought before the hegemon's position is overtaken by the rising state, in *The War Ledger* (1980) he and Kugler posit that major wars tend to be initiated by the challenger after it passed the crossover point. In this last version of the theory he sums up his argument as follows:

> An even distribution of political, economic, and military capabilities between contending groups of nations is likely to increase the probability of war: peace is preserved best when there is an imbalance of national capabilities between disadvantaged and advantaged nations; the aggressor will come from a small group of dissatisfied strong countries; and it is the weaker, rather than the stronger power that is most likely to be aggressor (Organski and Kugler, 1980, 19)

Thus, although changes in the power structure are necessary conditions for major wars, they are not sufficient. In *World Politics* Organski classifies states into four major categories: (1) powerful and satisfied; (2) powerful and dissatisfied; (3) weak and satisfied; and (4) weak and dissatisfied (Organski, 1968, 364). Powerful or weak states satisfied with the status quo – that is, states that benefit from the international order - are less likely to try to change the system, although the strong has at least the capability to do so. Dissatisfied states, on the other hand, may want to overturn the system, but if they lack the military capability to confront the hegemon, they are unlikely to pose a threat to the international order. The "dissatisfied and powerful nations" - those with the capability to challenge the most powerful state - however, are those "that start world wars" (Organski, 1968, 367).

Threat perception and the likelihood of major wars will be a function, therefore, of changes in the power structure and the degree of satisfaction of the rising power with the status quo. In other words, "perceptions are as important as capabilities in explaining the oncoming wars" (Organski and Kugler, 1980, 53). Another, albeit less important factor that affects threat perception and the likelihood of hegemonic wars, Organski and Kugler argue, is the speed in which the power structure changes: "The faster one nation overtakes the other, the greater the chances for war" (Organski and Kugler, 1980, 62).

According to Jonathan DiCiccio and Jack Levy, on balance, the power transition research program has proved to be useful and promising but not without limitations. As they explain:

> Power transition theory and its associated hypotheses enjoy a substantial record of empirical corroboration. The confluence of a dissatisfied challenger's rise and a dominant state's decline or stagnation is correlated with the onset of major wars….One thing that is missing, however, is a specification of which states initiate wars, when, and why. (DiCiccio and Levy, 2003, 137)

Similar versions of the power transition argument are found in Robert Gilpin's explanation of hegemonic wars, in Dale Copeland's dynamic differentials theory, and in Robert Powell's argument about the role played by distributions of power and benefits in the initiation of wars.

Like Organski, Robert Gilpin explains hegemonic wars as the result of the growing equality of power between the two most powerful states in the system. As he puts it, "With the aging of an international system and the expansion of states, the distance between states decreases, thereby causing them increasingly to come into conflict with one another." (Gilpin, 1981, 200, 201). Based on the law of demand, Gilpin argues that hegemonic wars occur when a rising state perceives the potential benefits of changing the status quo as exceeding the

potential cost of such endeavor. This does not mean, however, that the rising power will always be the aggressor. In some cases it is the dominant power that will attack first in order to prevent the rising power from becoming the hegemon. The Peloponnesian War, for instance, was fought, according to Thucydides, because of the rise of Athens and the fear that it provoked in the Spartans.

Robert Powell also employs concepts derived from economic theory to understand changes in the distribution of power and its consequences for war and peace between the dominant and the rising states. In *In The Shadow of Power*, Powell claims that changes in the distribution of power that lead to disparities between the distributions of power and benefits create powerful incentives for hegemonic wars. If the new distribution of power is not followed accordingly by a new distribution of benefits, the rising state, he argues, will become dissatisfied and attempt to create a more favorable international order by force.

The central problem, however, is the existence of information problems, for "if information were complete, the declining state would know how much it would have to concede to the rising state in order to satisfy the latter's minimal demands" (Powell, 1999, 115). But since information is asymmetric, the declining state cannot be certain of what it has to concede to appease the rising power. If it concedes too much, it may become too weak and then fall prey to the challenger. If it concedes too little, it will not be able to appease the rising state. It all depends, therefore, on the declining power's willingness to use military force to bring the disparity between the distribution of power and benefits to an end.

In contrast to what Organski argues, however, Powell does not think that power transitions are the most dangerous phases of a shift in the distribution of power. Nor that the speed of the transition also affects threat perception and the likelihood that a war will occur. He thinks, nonetheless, that changes in the "technology of coercion" do affect the chances of hegemonic wars breaking out (Powell, 1999, 15, 118). "Changes in the technology of coercion" refer, in Powell's book, to the balance between offensive and defensive military capability - that, when the offense has the advantage, wars are more likely, and vice versa (Jervis, 1978; Van Evera, 1999). And for Powell, when the offense has the advantage, hegemonic wars are more likely to occur.

In *The Origins of Major War*, Dale Copeland sought to explain major wars through his dynamic differentials theory, which combines power transition theory's argument about the significance of power trends, the classical realist argument about the importance of power differentials, and the neorealist view on the importance of polarities in the stability of the

international system. Like Organski, Gilpin, and Powell, Copeland believes that major wars are, above all, the result of growing equality of power between the most powerful states in the system and the destabilization that occurs when the dominant state anticipates its decline. According to Copeland, each of the major wars fought from 1600 to 1945 – with the exception of the Seven Years War – was initiated by the most powerful but declining state. Thus, if for Organski, Powell, and – to a lesser extent – Gilpin, hegemonic wars are usually brought on by the rising power, for Dale Copeland major wars are almost exclusively initiated by the dominant state. Major wars are, in sum, preventive wars.

In Copeland's dynamic differentials theory, trends in economic power and potential power are especially important. "Probably the most destabilizing situation in world politics is one where a state is military superiority, but inferior in economics and especially potential power"[2] (Copeland, 2000a, 54, 55). This is so, he argues, because "a state….that is superior in military power but inferior in economic and especially potential power is more likely to believe that, once its military power begins to wane, further decline will be inevitable and deep" (Copeland, 2000a, 20). As a result, the greatest the relative deterioration in terms of economic and potential power, the more likely that the dominant state will wage a preventive war against the rising challenger.

In spite of the minor disagreements considered here, it is important to stress the fact that power transition and hegemonic wars scholars tend to agree that in a situation in which the dominant state is facing relative decline, threat perception will be high in the relations between the hegemon and the second-ranked state. It is particularly important to note here that, according to the theories presented above, under the circumstance of power transition – that is, when the gap between the second-ranked and the hegemon is "closing in" – the most powerful actor in the system will perceive the rise of a second-ranked actor as a threat.

Liberalism

Liberalism, like realism, is far from being monolithic. Yet, a common thread in all major modern research programs in liberal International Relations theory is that they all reject the realist assumption that states are trapped in a vicious circle of suspicion and threat

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[2] Potential power is generally defined as the size of population and wealth. Actual power, on the other hand, is based on the military forces (see Mearsheimer, 2001, 43).

perception, where everyone is considered a threat and wars can be prevented only through balance of power or hegemony.

All the three major strands of liberalism can be found in Immanuel Kant's work. In fact, as Bruce Russett and John Oneal demonstrated in *Triangulating Peace*, in Kant we find the first attempt to combine the three liberal arguments that would in late twentieth century become the cornerstones of liberalism in International Relations theory: the commercial liberal, the neoliberal institutionalist, and the democratic peace propositions. As Russett and Oneal explain:

> Kant thought that peace could be rooted in relations between states governed by three principles of conflict resolution. One is what he called 'republican constitutions', which in the present era we interpret as *representative democracy*, with freedom, legal equality of subjects, and the separation of government powers. An understanding of the legitimate rights of all citizens and republics in turn creates, in Kant's view, a moral foundation upon which a 'pacific union' can be established by treaty in *international law and organization*. Finally, what he called "cosmopolitan law", embodied in *commerce and free trade*, creates transnational ties of material incentives that encourage accommodation rather than conflict. (Russett and Oneal, 2001, 29)

The proposition that commerce and free trade affect the likelihood of military conflicts has recently become one of the most important research programs in International Relations scholarship. Although it is still too soon to draw a final conclusion from the debate, most of the evidence seems to point to the conclusion that international commerce promotes not only prosperity but also peace (see Mansfield and Pollins, 2003). This does not mean, however, that among the authors who believe that trade is a force for peace there is total agreement on the mechanism that produces this outcome. Some authors claim that trade is a force for peace because it makes easier for states to signal their intentions (Morrow, 2003; Gartzke, 2003). The majority of scholars, however, believe that international commerce reduces the likelihood of military conflicts because of the opportunity costs associated with economic interdependence: the highest the bilateral trade volume between two countries relative to their total trade volume, the lower the chances that these countries will fight each other. This is so because, if they fight, their trade flows will be disrupted and their economies will be negatively affected by the conflict (Mansfield and Pollins, 2003).

The second important component of the "Kantian peace" – international laws as expressed in international institutions – has also become a prominent subject in modern liberal International Relations theory. The German philosopher believed that international institutions would establish the framework for collective security. Neoliberal institutionalists believe that international organizations and regimes can foster cooperation by minimizing the

effects of the security dilemma. Since institutionalization provides information and increases credibility, the argument goes, uncertainty is reduced and states are thus able to cooperate (Keohane, 1984/2005, Krasner, 1983).

According to commercial liberalism, by raising the cost of wars and, hence, making states less likely to fight, economic interdependence would lead states to perceive one another as less threatening. Similarly, institutionalists will argue that institutions and regimes will reduce threat perception because international institutions and regimes contribute to reduce information asymmetry, thus eliminating a major source of uncertainty in world politics. And, as explained above, uncertainty is the primary source of threat perception according to neorealists and neoliberals.

The third liberal research program found in Kant is that of democratic peace. Although the other elements of the "Kantian peace" were also considered crucial by Kant to his idea o Perpetual Peace, the idea that republican states would not fight one another had a certain prominence in Kant's theoretical edifice. It seems also fair to say that the idea of democratic peace has proved to be the most productive research program of not only the three liberal research programs but also in U.S. International Relations in general. In 2007, for instance, a survey conducted by the College of William and Mary among 1,112 International Relations scholars concluded that democratic peace theory is considered to be the most productive research program of the discipline of International Relations in recent years by 45 percent of the U.S. respondents[3].

Democratic peace scholarship seems to be more resilient in face of close scrutiny than probably any other research program in U.S. International Relations. And although there is no shortage of criticisms of the data used and how the data are interpreted, proponents of the democratic peace thesis tend to believe that their findings strongly confirm their theory. In fact, Jack Levy went on to saying that democratic peace theory is "the closest thing we have to an empirical law in the study of international relations" (Levy, 1989, 88). And Charles Lipson argues that after over three decades of research, after "being subjected to the most sustained inquiry of any issue in modern international politics" (Lipson, 2003, 169), we are

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[3] At the same time, 45 percent of the American scholars surveyed also said that they consider democratic peace theory to be the least productive research program. In sum, democratic peace appears to be the most important and controversial theory in the field of International Relations in the United States. See Maliniak, Daniel; Amy Oakes, Susan Peterson, and Michael J. Tierney, **The View from the Ivory Tower: TRIP Survey of International Relations Faculty in the United States and Canada** (Williamsburg, VA: College of William and Mary, February 2007).

left with little doubt that there is something special in the relationship between democracies that makes them less belligerent toward one another.

A more difficult task, however, is to explain what would make the relationship between democracies so special. Democratic peace scholarship can be divided into two major strands: One that argues that democracies are less likely to fight each other because of domestic institutions, and one that emphasizes the importance of ideational factors (e.g., liberalism). In what follows I describe what I believe are the strongest versions of the institutional and of the ideational approaches to the democratic peace thesis.

In 2003, Charles Lipson published *Reliable Partners: How Democracies Have Made a Separate Peace*. In this book, Lipson advanced what is probably the strongest version of the institutional argument for the democratic peace that has been presented so far. He seeks to demonstrate the flaws of the most influential arguments against the democratic peace – primarily those which claim that democratic peace is just a statistical artifact and that democratic peace is just the product of United States dominance.

Lipson draws his argument from the rationalist theory of war. According to this theory, wars occur because of information and commitment problems. Given that an agreement is always preferable to war, why states sometimes fail to reach agreements and fight wars? According to the rationalist theory of war, if states had complete information about one another's intentions, as well as certainty that they would keep their promises, agreements would always prevail over wars because agreements would always yield more to everyone.

Based on the insights of the rationalist theory of war, Lipson argues that "constitutional democracies are simply better placed to solve these information and commitment problems" than non-democracies (Lipson, 2003, 53). As a result, he calls his version of the democratic peace "contracting explanation". According to this version of the democratic peace argument, "constitutional democracies have a special capacity to make and sustain promises with each other"…."They are better equipped to find and capture gains from mutual interests, to sustain them, and to forge durable, mutually profitable relationships" (Lipson, 2003, 4). Four attributes of stable democracies, he argues, contribute to reduce risk and uncertainty in the relations among democracies: transparency, which allows for outside scrutiny; continuity of the regime; audience costs, that is, the electoral incentives for leaders to keep promises; and constitutionalism, which makes commitments hard to overturn. All these traits of well-established constitutional democracies contribute to reduce the uncertainty

produced by the security dilemma in international relations. As a result, democratic states become more reliable partners. Trust among democracies, however, is not automatic. According to Lipson, trust relationships can only develop over time as "democracies experience dealing with each other and their success upholding agreements create a virtuous circle" (Lipson, 2003, 170).

The impact of Lipson's contracting argument on the democratic peace debate has been substantial. In fact, Lipson's contracting explanation might have given the institutional approach a new life (Owen, 2004). With the growth in the number of researches that privilege ideational explanations to international politics in the 1990s, scholars had began to consider the impact of institutions on democratic peace as secondary forces at best. In 1999, for instance, Colin Kahl proposed that institutions had only an indirect effect on democratic peace. "Democratic institutions facilitate and reinforce the process whereby collective liberal identification produces peace", he claimed. But "by themselves", his argument continued, "[…they] provide an incomplete understanding of relations between liberal democracies" (Kahl, 1999, 130). As a result, in his 1999 article he tries to build an ideational version of the democratic peace that acknowledges three secondary contributions made by democratic institutions to the peace among liberal states. First, that "democratic institutions potentially provide the mechanism through which liberal tenets influence foreign policy." Second, that "democratic institutions serve as important mechanisms to socialize individuals, thus helping to maintain the corporate elements of a state's liberal identity." And, third, that "democratic institutions serve as important signposts or cues whereby states identify and categorize one another, and themselves, as liberal in the social sense" (Kahl, 1999, 131).

Probably the most important book on the conceptualization of the ideational component of the democratic peace is *Liberal Peace, Liberal War*, by John Owen. In this book, Owen argues that what has produced peace among democracies is not necessarily the fact that they have democratic institutions, but that they are ruled by elites that share a common ideology – liberalism. Owen grounds his argument about the liberal peace in the fact that "people strongly tend to favor a foreign state if it has their preferred system of government", and that "a corresponding tendency also exists to discriminate against a foreign state that has a system of government" (Owen, 1997, 22). "Monarchists favor monarchies, republicans favor republics, communists favor communist states, Islamicists favor Islamic states", he claimed (Owen, 1997, 23). One example presented in his book about this tendency is the preference of the United States founding fathers for supporting states ruled by elites

ideologically closer to them. Thus, Thomas Jefferson favored alliance with the French revolutionaries, whereas the more conservative James Madison advocated alliance with the British against the French radicals (Owen, 1997, 32). According to this view, therefore, threat perception in international relations if a function of ideological distance: States ruled by liberal elites will tend to perceive states ruled by anti-liberal elites as threats and, conversely, perceive states also ruled by liberal elites as potential allies.

Support for the proposition that ideology strongly influences decision maker's propensity to see others as friends or foes is provided by Mark Haas in *The Ideological Origins of Great Power Politics – 1789-1989*. "The greater the ideological differences dividing decision makers from different states", Haas argues, "the more likely they are to view one another as substantial dangers to both their domestic power and the security of their respective countries" (Haas, 2005, 1). Threat perception, in other words, will depend on the ideological distance between two states.

Haas provides three causal mechanisms for his theory. The first one is demonstration effects. It posits that states ruled by leaders that hold ideologies that preach opposing social, political, and economic principles will perceive each other as threats because of the belief that the diffusion of an opposing ideology will undermine their own legitimating principles. Leaders will worry that the success of the opposing ideology will bolster domestic followers of that ideology, which will be seen as a threat to their own domestic standing (See also Walt, 1996).

The second causal mechanism is "conflict probability" as explained by social identity theory. As Haas summarizes: "People have a universal tendency both to categorize other groups into 'ingroups' and 'outgroups', and to desire their own group(s) to realize higher levels of achievement and status than others" (Haas, 2005, 9). The implication of this tendency is that intergroup interactions are "fundamentally conflictual in nature" (Haas, 2005, 9). According to Haas, the "conflict probability" mechanism adds support to the realist prediction that the relations among nations are intrinsically conflictual.

The last causal mechanism is grounded on communications theory. It asserts that ideological differences increase misperception by creating impediments to effective communication among ideological rivals. After all, different beliefs will affect the meaning ascribed to different symbols and events.

Realists usually reject the influence of ideological factors in international politics by pointing to the many instances of rivalry among countries ideologically similar and to

alliances among countries with opposing ideologies. And the Sino-Soviet rivalry is usually taken by realists to be paradigmatic in this respect. If common ideology reduces threat perception, why did the Sino-Soviet alliance end in the 1960s? To be sure, Haas deals extensively in his book with the issue of the demise of the Sino-Soviet alliance. In fact, for Haas, the demise of the Sino-Soviet alliance actually supports his theory. Realist scholars tend to argue that the alliance originated as a balancing response against the United States and that its demise occurred later on because of differences in the national interests of the two countries. But for Haas, the demise of the Sino-Soviet alliance was a product of Mao's ideological radicalization during the "Great Leap Forward". Mao believed the Soviet Union was betraying the ideals of Marxism-Leninism. This, Haas argues, created an ideological rift between the two countries that led each side to see the other as a potential threat.

Haas' analysis of the rise and fall of the Sino-Soviet alliance corroborates John Owen's claim that "ideologies that stress correctness over consent, such as Marxism-Leninism, tend to yield brittle alliances; adherents to such ideologies are quickly to pronounce one another heretical" (Owen, 2002a, 126). Alliances among liberal states, on the other hand, although not entirely free from the constraints of the security dilemma, tend to produce more durable partnerships, Owen argues, because of liberalism's emphasis on individualism and tolerance.

Despite his defense that ideology has played a crucial role in great power politics since at least the French Revolution, Haas does not claim that ideology will always trump power. On the contrary, the book is mostly an attempt to explain how power and ideology interact to form threat perception. According to Haas, "relative power concerns will tend….to exacerbate the feelings of amity and enmity predicted by the patterns of ideological affinity in the system" (Haas, 2005, 25). To put it another way, threat perception originated from ideological antagonism will be exacerbated if the relative power of the adversaries increases. At the same time, however, decreases in relative power will not be sufficient to reduce threat perception among ideological rivals, Haas asserts.

Power also plays a role in Haas' theory in two other important ways. First of all, power will always circumscribe the policies that decision makers can adopt to address threats. Secondly, Haas acknowledges that the fact that decision makers can never be sure about the intentions of others and that their preferences will never change limit his argument. He claims, however, that:

In the right ideological circumstances the potency of uncertainty as a cause of international conflict can be significantly mitigated. Although the possibility of intentions changing or leaders misunderstanding them will always remain, statesmen will tend to believe that the probability of their counterparts within their ideological community adopting highly aggressive policies will be low. Rational leaders will base their security decisions, especially such costly and risky actions as preventive hostilities, primarily on the probability of future conflict with other nations and not just the possibility that such conflict can result. Consequently, reducing decision maker's estimates of the likelihood of future conflict with particular states will most likely weaken the incentives to initiate confrontational policies with these states in the present (Haas, 2005, 27)

In 2002, John Owen published two articles in which he sought to demonstrate the validity of his argument that liberalism reduces threat perception in international relations. In *Transnational Liberalism and US Primacy*, he claimed that following the end of the Cold War, Europe and Japan have not attempted to "counterbalance U.S. power because political liberalism constitutes a transnational movement that has penetrated most potential challenger states at least to some degree". "They tend", he explained, "to interpret the United States as benign and devote few state resources to counterbalancing". "Anti-liberal elites", on the other hand, "tend to perceive a more malign United States and devote relatively more state resources to counterbalancing" (Owen, 2002a, 120, 121), as we have increasingly seen occurring in the cases of China and Russia. This is so, Owen argues, due to the fact that "ideology shapes strategic preferences because it gives its holders a transnational group affiliation" (Owen, 2002a, 122).

In the second article – *The Foreign Imposition of Domestic Institutions* – Owen analyzed data on the imposition of domestic institutions by one state over another from 1550 to 2000, and concluded that victors in war often impose new domestic institutions upon states they defeat because, by empowering leaders with similar ideological orientations in other states, they expect to transform the former adversary into an ally, as the current U.S. policy for the Middle East demonstrates – even though Owen's study did not include the Iraq War, initiated after the publication of his article.

While Owen and Haas focus on ideology, other authors have attempted to show that ideas have an important impact in the origins of threat perception in international politics through the concept of identity. This is the case especially of Henry Nau and David Rousseau.

In *At Home Abroad: Identity and Power in American Foreign* policy, Henry Nau seeks to close the gap between realist and liberal-constructivist explanations to international relations by showing how both power and identity orient U.S. foreign policy. According to Nau, the importance of power capability in interstate relations diminishes as national

identities among nations converge. When identities diverge, however, competition for power becomes more significant. Thus, power by itself does not determine threat perception. The identity of the holder of the military power is crucial in the identification of the state as a threat or not.

Nau believes that different arrangements in the structure of interaction between power and identity produce different types of international community. Accordingly, there are four distinct structures in which the United States relates with other countries: Hierarchy, anarchy, hegemony, and security community. In the first space of interaction, Nau argues, the United States "shares similar national identities with other nations but possess an unequal amount of power" (Nau, 2002, 7). This is exemplified by U.S. military relations with NATO countries and Japan. Second, in anarchy, power capabilities are roughly equal and national identities diverge. According to Nau, U.S.-Russian and, potentially, U.S.-Chinese relations in the military area are examples of contexts of anarchy. Third, hegemony refers to relations marked by different identities and power concentrated in one state, as in the case of U.S. relations with developing nations. And finally, a security community is characterized by similar identities and roughly equal power, as it occurs in the U.S. economic relations of the G-7 nations.

Nau's view of world politics as divided into areas where identity proximity or distance influences the type of interstate relations and the level of threat perception resembles Alexander Wedt's argument about the existence of different types of anarchy in the international system. In *Social Theory of International Politics*, Wendt claims that the realist idea of anarchy is only one of many possible types of anarchy. Throughout history, he argues, the international system has been characterized by three major types of anarchy: Hobbesian anarchy, Lockean anarchy, and Kantian anarchy. In a Hobbesian anarchy, states draw a sharp distinction between Self and Other, and all Others are considered potential enemies. As a result, in this system all states are potential threats. In the Lockean anarchy, on the other hand, although there is distinction between Self and Other, an Other is not defined as an enemy, but as a rival. Thus, in this Lockean anarchy, threat perception is mitigated. Finally, in a Kantian anarchy, the distinction between Self and Other is not sharply drawn, and states see each other as friends and pursue collective goals and cooperate. Threat perception in a Kantian world is therefore eliminated. In sum, for Wendt, threat perception will be a function of the type of Self-Other relationship that prevails in the system (Wendt, 1999; Rousseau, 2005, chapter 3).

In *Identifying Threats and Threatening Identities*, David Rousseau seeks to build a constructivist research program on threat perception. For Rousseau, threat perception is a function of shared identity: the greater the shared identity, the lower the threat perception and the probability of war. Thus, although, according to Rousseau's argument, shared liberal identity will reduce threat perception, so will other types of identity.

Rousseau also seeks to show that identity plays an important role in realist and liberal theories. Organski, for instance, argues that power transition will lead to hegemonic wars when the rising states are revisionists. But what makes a state revisionist? For Rousseau, satisfaction with the status quo or revisionist intentions will depend on shared identity. Threat perception, in sum, is viewed by Rousseau as mostly a matter of the line states draw between "us" and "them".

Conclusion

The ideational approaches presented above seem to provide theoretical support for the claim that democratic or liberal states are less likely to perceive one another as threats. States ruled by liberal elites and/or whose national identity is liberal would have a greater potential to enter into cooperative relationships and perceive one another as potential friends. As we have seen, however, some of these approaches are more cautious in their claims about the impact of ideational variables on threat perception. Mark Haas, for example, acknowledges the limitations of his argument in face of the fact that, in international politics, state leaders can never be certain about the intention of others and about the permanence of other's preferences in the future. In his review of Alexander Wendt's book *Social Theory of International Politics*, Dale Copeland summarizes the limits of ideational approaches that do not take into account constraints imposed by the international system and by the inevitability of uncertainty as follows:

> [B]y bracketing off domestic processes, Wendt has overlooked the irony of constructivism: that the mutability of human ideational structures at the domestic level reinforces leaders' great uncertainty about future intentions at the interstate level. The security dilemma, with all its implications, is real and pervasive. It cannot be talked away through better discursive practices. It must be faced (Copeland, 2000b, 212)

In the conclusion of his book, Rousseau says that he is both optimistic and pessimistic about the future (Rousseau, 2005, 217, 218). He is optimistic because he believes his research has demonstrated that, since threats are social constructs, a new Cold War between the United

States and China is not inevitable. He is pessimistic, however, because "leaders around the globe are insensitive to this construction process" (Rousseau, 2005, 217), which may lead to the recreation of a spiral of suspicion and competition for power. Here, therefore, Rousseau seems to be making Copeland's point: Unless *all* state leaders trust the words of the academics and start behaving according to their theories, competition for power will not go away.

Another important point to be considered is which concept can be most useful in the analysis of threat perception – identity or ideology. What is the difference between these two concepts? What do we gain or lose by using one instead of the other? Mark Haas defines ideologies as "the principles upon which a particular leadership group attempts to legitimate its claims to rule and the primary institutional, economic, and social goals to which it swears allegiance. Ideologies are, in short, particular visions for ordering domestic politics." (Haas, 2005, 5). Rousseau defines social identities as "bundles of shared values, attitudes, norms, and roles that are used to draw a boundary between the 'in group' and the 'out group'" (Rousseau, 2005, 12). Clearly, the two concepts are not synonymous. Our vision for ordering domestic politics is not exactly the same as how we define "us" and "them". It seems that concept of ideology has advantages over that of identity in that it aims to capture a propensity for political action and a propensity for expansion and allegiance that transcends political borders and thus unifies groups in different states according to these visions. Moreover, Haas persuasively shows that ideological similarities or differences contribute to increase or decrease the perception of shared identity. He summarizes this point as follows:

> The greater the ideological similarities among states' leaders, the more their political identities will be believed to overlap. Conversely, politicians from different states who are dedicated to rival ideological objectives will view one another as the antithesis of their political identities; they will be rivals in terms of both state and ideological interests. (Haas, 2005, 10)

In any case, both ideology and identity are useful concepts when it comes to the study of threat perception. Useful, but not sufficient. In fact, the increasingly popular claim among International Relations students that not only threat perception but also competition for power and wars are just products of discourse has led many to view the solution to international violence and mistrust among nations to rest on the adoption of new discourses that emphasize cooperation and peace. If we want to change world politics, the argument goes, we have to replace the hegemonic discourses with one that eliminates the concepts of power and national security from our vocabularies. But, as we have seen, the proposition that by stopping to talk

about power and national security the dilemmas that produce insecurity among nations will go away is rather doubtful.

The study of threat perception, therefore, cannot afford to discard the concept of power. The combination of power and ideology/identity is not only necessary but unavoidable for future research on threat perception. Mark Haas and Henry Nau have shown that this is a feasible endeavor for International Relations scholars, and, I would add, one that should be embraced by them. Nevertheless, how to combine the two variables and which theories about power and ideas are better suited to this synthesis is likely to depend on the researcher's object of study.

Aprendix: a Case Study

It seems that case studies provide a particularly good method for the study of threat perception in international relations. The types of cases that can furnish the material to be analyzed for this purpose may include, among others, the study of alliance formation, of foreign interventions, of national security concerns over immigration, and of national security concerns over foreign investments. It seems that a specially fruitful way of exploring the usefulness of the realist and the liberal hypotheses and of the concepts of power and ideology or identity in the study of threat perception is through the study of the circumstances under which foreign investments are perceived by decision makers and the public opinion of the nation receiving the investment to constitute a threat to national security. In what follows I briefly discuss a case in which an investment from a Chinese company in the United States was perceived by U.S. decision makers and public opinion to be a potential threat to the U.S. national security.

In 2005, the Chinese company China National Offshore Oil Corporation (CNOOC) attempted to acquire Unocal, a U.S. oil and gas company. The bid, as Graham and Marchick explain, "set the stage for a 'perfect storm' in Congress for a debate on the national security implications of foreign investment in the United States" (Graham and Marchick, 2006: 129). Graham and Marchick go on to list five main arguments used against the approval of the bid by the Chinese company:

(1) "The ownership of key energy assets by a Chinese state-owned firm would put global energy sources at risk, as CNOOC might hoard Unocal's oil and gas reserves for

China's exclusive use, taking important supplies off the global market" (Graham and Marchick, 2006: 130).

(2) The control of critical oil and gas supplies would be used by strengthen the Chinese state.

(3) Since CNOOC benefited from preferential loans from Chinese state-owned banks, the Chinese company had a competitive advantage over its U.S. competitors.

(4) The transaction would facilitate the transfer of sensitive technology to China.

(5) The U.S. should block the transaction on reciprocity grounds since China would not allow a U.S. company to acquire a major Chinese oil company.

Proponents of the approval of the deal, however, claimed that:

(1) "Since oil and gas are fungible, and oil markets are global, there would be no national security issues associated with the transaction" (Graham and Marchick, 2006: 130).

(2) Unocal's participation in the global oil and gas markets was negligible. Thus, even if CNOOC acquired Unocal, that would change little China's capacity to influence or control global markets.

(3) Chinese companies already possessed the sophisticated technology that Unocal held.

(4) Since an open investment regime benefited the United States, it should avoid the type of protectionist measure that would be represented by the blockage of the CNOOC-Unocal transaction.

(5) CNOOC was willing to sell Unocal's assets in the Gulf of Mexico.

Despite the existence of strong arguments against the blockage of the transaction, the U.S. Congress continued to mobilize in favor of government action. In June, for instance, the House of Representatives "passed a resolution declaring that permitting the Chinese company to buy Unocal would threaten to impair the national security of the United States" (IHT, 2005b). Moreover, several attempts were made in order to modify the legislation just to prevent Unocal from being acquired by CNOOC (Graham and Marchick, 2006:131-134). In face of such colossal controversy, CNOOC decided to withdraw its bid for Unocal.

One underlying factor appears to have played a major role in the controversy that ultimately derailed the transaction: the perception that, as China was growing in power, its ambitions were growing accordingly. On July, 13, for instance, James Woolsey, former director of the CIA during the Clinton administration, when testifying before the House Armed Services Committee, said that: "This is a national security issue….China is pursuing a

national strategy of domination of the energy markets and strategic dominance of the western Pacific" (NYT, 2005b). Another factor that seems to have affected – although only superficially – the process was the fact that CNOOC's bid was made after Chevron's initial and lower bid for Unocal and that Chevron apparently attempted to affect the process. One of the congressmen who worked more actively against the deal – Richard Pombo – was a Republican from California whose district includes Chevron's headquarters (NYT, 2005a; IHT, 2005a).

It seems that this brief description of CNOOC's failed attempt to acquire Unocal illustrates the manner in which the realist school, in particular, can contribute to our understanding of the underlying forces affecting the opposition to CNOOC's bid; and conversely, how a simple case of national security concern over a foreign investment can provide the material for the investigation of threat perception in international relations, and, more particularly, for the assessment of the explanatory power of different theoretical models of threat perception. In this specific case, the power transition strand of realism seems to be especially useful as an explanatory tool for the origin of the perception that the Chinese investment posed a threat to U.S. national security. After all, the most important concern for decision makers in this case was that China seemed destined to enter a power struggle against the United States in the future because of its growing power capabilities. But we should be careful not to overlook the role that ideology and identity may have played in the perception that the Chinese investment posed a threat to U.S. security. Peaceful power transitions are extremely rare events in history, and the peaceful transition from a British world to an American world about one hundred years ago seems to indicate that shared liberal ideology or identity may have played an important role in assuaging mutual mistrust and threat perception between those two nations. If this is the case, we should expect power transitions involving nations with opposing ideologies to involve a greater level of mistrust, and, hence, events that may be perceived as contributing to this type of power transition to raise concerns among the leaders of the nation whose primacy is thought to be threatened by the growth in military and/or economic power of the rising nation. In addition, in 2005, tensions between the U.S. and China over U.S. condemnations of Chinese human rights violations were still one of the predominant features of their bilateral relation, and, as we saw, one of the main concerns of U.S. authorities was that the investment could be used to increase the power of the Chinese state.

Therefore, it seems fair to say that threat perception in this case resulted primarily from the perception that the Chinese state's ownership of Unocal, with its oil and gas business around the globe, could be used to strengthen the position of China – a nation whose elite lacked in the eyes of its counterpart the appreciation for democracy and liberalism that it believed to be values of paramount importance – in that future power competition. According to one of the most influential arguments, "The ownership of key energy assets by a Chinese state-owned firm would put global energy sources at risk, as CNOOC might hoard Unocal's oil and gas reserves for China's exclusive use, taking important supplies off the global market" (Graham and Marchick, 2006: 130). Others thought that the control of critical oil and gas supplies would be used to strengthen the Chinese state. Still others argued that the transaction would facilitate the transfer of sensitive technology to China. James Woolsey, former director of CIA during the Clinton administration, went as far as to say that "this is a national security issue….China is pursuing a national strategy of domination of the energy markets and strategic dominance of the western Pacific" (IHT, 2005b).

The goal of this brief description of CNOOC's failed attempt to acquire Unocal was certainly not to advance the argument that realism and liberalism are the only theories that can be used fruitfully to explain threat perception in international relations, or that this is the only possible interpretation of the events that led to the withdrawal of CNOOC's bid for Unocal, but solely to illustrate how cases of this sort can be useful in our attempt to understand an important and common phenomenon in the relations among nations and other international actors, namely, threat perception, and how two of the major schools of thought in the academic discipline of International Relations can be useful in this respect.

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