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*Armed conflicts
in the contemporary world*

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FROM THE EDITOR OF THIS ISSUE

The present issue of our journal is devoted to the sociological analysis of armed conflicts – both international and domestic. In the history of political sociology the study of wars and other armed conflicts has a relatively brief history, as almost all studies in this field have been published after the second world war. In this respect Polish sociology played a pioneering role, with two studies on the sociology of war published during the first world war (Adam Krzyżanowski's and Mieczysław Szerer's), and an interesting program of the sociology of war proposed by Aleksander Hertz briefly before the outbreak of the second world war.

In the present issue we are honored by the contributions of prominent foreign scholars who in their papers analyze the key armed conflicts of the twenty-first century. The current publication comes at the period marked by two particularly dangerous conflicts: the Russian aggression against Ukraine and the new outbreak of violence in the Israeli-Palestinian conflict, the oldest armed conflict in the contemporary world.

Our aim is to contribute to the understanding of the nature of such conflicts by a sociological analysis of their sources and of the way they are perceived by the public opinion in the countries involved. We are aware of dangers and difficulties resulting from an attempt to approach in a scientific manner current armed conflicts. The conflicts are associated with enormous social emotions and they are subjected to strong propaganda efforts undertaken by the parties to the conflict. It hinders an impartial analysis. A separate problem for independent researchers is the lack of verified sources of information and the need to rely on journalistic accounts. Thus certain documentary deficits in some of articles presented in this issue. It also happens that some researchers face legal restraints in writing about certain aspects of the armed conflicts. Nevertheless, bearing in mind such challenges, it is worth trying to describe these phenomena from a sociological perspective.

Such an approach cannot be value-free, but it is our hope that we have been able to address the disputed conflicts in a way as objective as it is possible.

ARTICLES

*Jerzy J. Wiatr**Europejska Wyższa Szkoła Prawa i Administracji¹***CONTEMPORARY ARMED CONFLICTS:
AN OUTLINE OF A COMPARATIVE ANALYSIS**

Armed conflicts – both between states and internal – take place in history from time immemorial. Their character changes under the impact of two circumstances: the evolution of political relations and changes in the modes of struggle.

I define „armed conflicts” as such group conflicts, in which all parties are capable of using military force for a relatively prolonged period of time. Therefore, I do not include here the unilateral use of armed forces by the subject so strong that its target cannot offer an effective defense even for a few days. Therefore, I do not include here such instances of using armed forces as putting down spontaneous protests of an unarmed population, coups d’ état which have not been met by an effective opposition, and terrorist attacks directed at the defenseless population.

Calls for the sociological study of war for the first time have been formulated by Polish scholars Mieczysław Szerer (1916), Adam Krzyżanowski (1918), and Aleksander Hertz (1946). A few years later a sociological interpretation of wars appeared in Germany (Steinmetz 1929). In the between-wars period, comprehensive studies on war were undertaken in the United States, resulting in the fundamental work of the scholars from the Chicago University (Wright 1942). For years, the sociology of war have been focusing on the analysis of the social context of armed conflicts between states (Fraga Iribarne 1962) and on the psychosociological conditions leading to the decisions to launch a war (Stoessinger 1985). Relatively less attention was given to the sociological aspects of internal armed conflicts, but one should mention Ted Gurr’s interesting studies of revolts (1970, 1993), the comparative analysis of French, Russian and Chinese revolutions by Theda Skocpol (1979) and the comparative analyses of military coups d’état presented by Morris Janowitz and his collaborators (Janowitz, van Doorn 1971).

With the passing of time armed conflicts evolved under the impact of changing political relations within states and relations between states, as well as due to changes in the armaments and in the way of conducting wars. Recently, Annette Idler proposed an interesting scheme of studying armed conflicts based on five

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dimensions: actors, environment, methods, resources and consequences (Idler 2024). In all these aspects, the second world war constituted a breakthrough. It caused deep changes in the inter-state relations by creating a bi-polar division of the world, dominated by two great powers which won the war and divided Europe in their respective zones of dominance. In the last stage of the war, the United States used atomic weapons against two Japanese cities (Hiroshima and Nagasaki) initiating a new type of arms race based on weapons of mass destruction. The Soviet experimental explosion of the atomic bomb (1949) signaled the emergence of a qualitatively new type of balance of force between two superpowers based on the threat of mutual annihilation. In consequence, there emerged an understanding of the impossibility of victory in the total war between powers armed with the weapons of mass destruction (Brodie 1959; Aron 1962; Beaufre 1968). Such an understanding did not eliminate such weapons from strategic analyses. Henry Kissinger was the first to put forward a controversial thesis that in the case of the war with the USSR the United States should be the first to use nuclear bombs, since only such threat would constitute an effective deterrent (Kissinger 1957). The so-called „hypertrophy of total war” has not eliminated the armed conflicts but it gave them a new character. Contemporary wars between states are fought in the shadows of a nuclear catastrophe. Participants in such wars are aware of the fact that the escalation of the war can lead to the mutual nuclear annihilation. Such an understanding results in far reaching consequences for the way in which wars are conducted. It does not mean, however, that armed conflicts – both international and domestic – became less intense. They remained an important element of political relations, but their character changed (and keep changing). After the second world war, the French pioneer of the sociology of international relations, Marcel Merle, pointed to the growing importance of new conflicts between states, resulting less from the conflicting national interests and more from opposed ideologies (Merle 1974: 213–233). Fifty years later, it is quite obvious that the ideological conflicts have not disappeared but also that national interests as well as imperial ambitions of great powers play a growing role in armed conflicts between states, as illustrated in the current century by the American invasion of Iraq and by the Russian aggression against Ukraine.

■ ARMED CONFLICTS DURING THE COLD WAR

The social context of armed conflicts after the second world war was defined by two elements of the new international situation. The first was the ideological rivalry between the two superpowers and dominated by them blocs of states. The second type of conflicts resulted from the termination of colonial rule, first in Asia and soon later in Africa. The ideological conflict between communist and democratic states resulted in the Korean war (1950–1953), the second Vietnam war (1960–1975)

as well as in military interventions of the USSR and the USA in their respective spheres of influence. American involvement in Korea and Vietnam was motivated by the perception of local conflicts as the elements of the communist threat on the global scale (Paige 1968). The Korean war was the only conflict in which American and Chinese armed forces fought each other. During the Vietnam war, the American perception of the war stressed its ideological, rather than national, character. Lyndon Johnson, in conversations with his biographer Doris Kearns Goodwin, argued that „if the aggression succeeded in South Vietnam, then the aggressors would simply keep on going until all Southeast Asia fell into their hands, slowly or quickly, but inevitably at least down to Singapore, and almost certainly to Djakarta” (Kearns Goodwin 1976: 330). History proved him dramatically wrong. The defeat suffered by the United States in Vietnam gave birth to the critical analysis of the decision to undertake a military intervention and of its continuation (Karnow 1983; Zoellick 2020: 341–343).

Numerous domestic conflicts of the cold war era had distinctly ideological character which reflected the global ideological confrontation. One of the sharpest such a conflict took place in Argentina (1976–1982) following the military coup which terminated the rule of the Peronist party, to which the radical Left responded by launching a guerilla warfare. In several Latin American states intense domestic violence was caused by the ideological rift between the nationalist Right and the Marxist Left (Perlmutter 1977: 166–201). One of the most brutal instances of such conflicts was the massive use of force by the rebellious military in Chile after the coup of September 1973.

In the last stage of the cold war new ideological conflicts resulted from the intensification of Islamic fanaticism and its victory in the Iranian revolution of 1979. This type of ideological conflict survived the end of the cold war and colors the international relations contemporarily in the Middle East.

Ideology was not, however, the only source of armed conflicts during the cold war. Both superpowers followed their imperial interests, mostly at the expense of smaller and weaker partners. The best known and potentially most dangerous confrontation between imperial interests of the two superpowers took place in Central America where the victory of the Cuban revolution (1959) gave the USSR an opportunity to establish its military base very close to the American borders. The American response was a skillful combination of the naval blockade and the readiness to negotiate (Allison 1971). In the last years of the cold war the United States offered indirect help to the anti-Soviet guerilla forces in Afghanistan preventing the USSR from obtaining the goals of its intervention there in 1979.

The ideological conflict between two world superpowers did not exclude several local wars, caused more by conflicting national interests than by ideologies. The most important among them were: three wars between India and Pakistan (1947, 1965, 1971), five wars between Israel and its Arab neighbors (1948/1949,

1956, 1967, 1973 and 1982), two short-lived armed conflicts between China and India (1962) and the USSR (1969). In 1974, the sharp conflict between Greek and Turkish communities of Cyprus led to the political confrontation and to the oldest „frozen conflict” in Europe (Bebler 2015: 19–41).

A separate category of armed conflicts during the cold war were the civil wars in newly independent countries of Africa and Asia (Congo 1960, Nigeria 1967–1970, Pakistan 1971, Ethiopia 1974–1991 and Uganda 1981–1985). In some of them one of the superpowers (or both of them) offered help to one of the contesting parties.

From the perspective of the intensity of armed conflicts, the cold war era can be divided in two periods, with 1973 as the dividing point. The first period was marked by intense armed conflicts, particularly in Asia. This period ended with the withdrawal of the United States from Vietnam, the communist victories in Indochina and the consolidation of China’s position as the third world superpower. The remaining years of the cold war were marked by the relative weakening of the ideological confrontation between two superpowers. The policy of *détente*, however, did not last long. In 1979 the Soviet military intervention in Afghanistan caused a prolonged local war, in which the anti-Soviet guerrilla benefited from the indirect help offered by the United States. Another field of political confrontation emerged in early 1980s in Poland, caused by the repeated threats of a military Soviet intervention and the imposition of martial law in December 1981. In early nineteen-eighties nobody predicted that the cold war would end soon. In the final stage of the cold war Zbigniew Brzezinski predicted that the Soviet-American rivalry would last for several more decades (Brzezinski 1986). He was not alone. In 1978, the British general John Hackett published a fictitious history of the new world war, started by the Soviet attack on democratic states in Europe and resulting in the Soviet defeat, followed by the dissolution of the USSR (Hackett 1979). Even if such scenario remained a political fiction, the belief in the permanent character of the cold war conflict prevailed in political narrations.

In history unexpected events do happen. The election of Michail Gorbachev to the post of the general secretary of the ruling party opened a short period of a rapid political change, an important part of which was the withdrawal of Soviet military forces from Afghanistan and the acceptance of a profound political change in the Soviet dominated part of Europe. The process of a peaceful political transformation began in Poland with the round table negotiations, contested election and the formation of a new government headed by Tadeusz Mazowiecki – the first non-communist prime minister in the Soviet dominated part of Europe after 1945. Following the Polish democratization the regime change took place in all states of the Soviet sphere of influence in Europe. In all these states – except Romania – the regime change was peaceful. Accepting these changes Gorbachev became the main architect of the new period of international relations after the end of the cold war (Leffler 2007: 466 and 467). Gorbachev’s biographer Archie Brown

stressed the historical role of the last Soviet leader in attempts to create a new world order based on co-operation between nations (Brown 1996: 315–318). The end of the cold war produced, however, a very deep political conflict in the USSR which led to the abortive coup d'état of August 1991 and to the dissolution of the USSR at the end of 1991.

The rapid change in Soviet policy followed by the intense domestic conflict and the dissolution of the USSR caught almost all foreign commentators unprepared. The biggest and potentially the most dangerous international conflict of our time ended peacefully in the political victory of the democratic West.

The common characteristics of armed conflicts during the cold war was their dependence on the state of relations between the two superpowers. Even local wars – like the wars between Israel and the Arab states – were fought within limits resulting from the quite real possibility of the escalation which would bring a direct involvement of one of the superpowers (or both of them). The main consequence was the fact that wars of the cold war era were limited – both in the use of arms and in the definition of their objectives.

■ AFTER THE COLD WAR

The end of the cold war gave birth to expectations of a new world order based on co-operation of great powers and on elimination of armed conflicts between states. Effective international collaboration, based on the decision of UN Security Council, which had authorized member states to use force against the Iraqi occupation of Kuwait, resulted in the success of international military operation called „the Desert Storm” (Clancy, Franks 1997). The success of this operation created hopes for a new world order based on a peaceful co-operation of states and on the respect for international law. The reality, however, showed the futility of such hopes. The end of the cold war – universally perceived as the beginning of a new era of international co-operation – resulted in a deep change of international relations, but not in the establishment of a universal peace. New dangers emerged.

The first such a danger emerged soon after the end of the cold war as the result of a dissolution of two multi-national federations – the Soviet Union and Yugoslavia. The last decade of the twentieth century was marked by the armed conflicts in former Yugoslavia – in Serbia, Croatia, Bosnia and Herzegovina, and Kosovo. In the last two of them, the decisive role was played by the armed intervention of the USA and its allies. It was this intervention that forced Serbia to accept the peace agreement in Bosnia and Herzegovina and the independence of Kosovo.

Compared with the dramatic events in the former Yugoslavia, the dissolution of the USSR was a relatively peaceful process. There were, however, several armed conflicts between ethnic minorities and the newly independent republics. In several

cases such conflicts resulted in the de facto secession of regions populated by ethnic minorities, particularly in Georgia and Moldova. In the Russian Federation the sharpest armed conflict took place in the autonomous republic of Chechnya, which declared its independence in 1994 and was subdued by the Russian military forces after a few years of intense fighting. In the nineteen-nineties the Russian Federation minimized her support for the secessionist regions in the former Soviet republics.

The second challenge to the new world order resulted from the growing strength of China which challenged the American domination in East Asia. The American political scientist Graham Allison recalled in this context the famous „Thucydides’s Trap” explaining the potential danger resulting from the emergence of a new great power (Allison 2017). One of the sources of tensions in the region is the Chinese intent to recapture Taiwan and the American commitment to protect the island. The Chinese foreign policy has been characterized by moderation but there are mounting signals of the more aggressive stand on the Taiwan issue. The growing economic and military strength of China makes the potential conflict over the hegemony in Eastern Asia one of the main challenges to the present status quo in the region. Recent sociological surveys show that the American support for Taiwan’s independence results in the greater readiness of the Taiwan population to offer armed resistance in a case of the Chinese attack on the island (Wu and others 2024). In such a situation the Chinese invasion on the island looks less likely than a prolonged diplomatic conflict between China and the United States. One of the consequences of such a conflict is the assistance offered by China to Russia in her aggressive war in Ukraine. The present American-Chinese relations have some similarities with the American-Soviet relations during the cold war. The essence of such a relationship is avoiding direct military confrontation between great powers combined with the use of military (and non-military) means to impose their will on weaker partners.

The third source of international conflicts was the more aggressive policy of the United States vis-à-vis smaller states considered to be hostile to the American interests. Such political turn took place almost immediately after the end of the cold war and after the dissolution of the USSR. Its main source was the emergence of a radical Islamism, hostile to the West, and particularly to the United States. The Iranian revolution of 1979 not only deprived the United States of a valuable ally but also resulted in the growth of hostilities directed against it in countries with Islamic majorities. At the same time, the disappearance of the Soviet Union eliminated the danger of the third world war and gave the United States a free hand in promoting its interests, even by the use of military force. The American intervention in the Persian Gulf, former Yugoslavia, Afghanistan and Iraq would not have been possible in times of the real Soviet danger (Madej 2017). After the terrorist attack of 11 September 2001, the American society, and particularly its

political elite, was more likely to accept and support president G.W. Bush's slogan of the „war on terrorism”. This led to the acceptance of the erroneous decision to invade Iraq, justified by the false accusation of Iraq for allegedly assembling weapons of mass destruction and of supporting the terrorist network, responsible for terrorist attacks against American targets in September 2001. Precisely, because of the American decision to invade Iraq, Zbigniew Brzezinski called the Bush presidency „catastrophic” (Brzezinski 2007). Attacking Iraq caused critical assessment by several American (Holmes 2007; Herspring 2008; Nye 2009), as well as Polish (Wiater 2002; Kuźniar 2006; Balcerowicz 2017) scholars. Even American diplomats who supported the attack on Iraq admit (after many years) that the plan to establish democratic and pro-American regime in Iraq failed (Kissinger 2016: 304; Zoellick 2020: 471). It became clear that in spite of their military success the United States has not been able to transform Iraq into a stable democratic state, on whose support it would be able to count in the American fight for hegemony in Asia. After twenty years, the American forces had to leave Afghanistan (in August 2021), where the anti-American fundamentalists returned to power. The defeats in the „war on terrorism” weakened the international position of the United States, creating perhaps an incentive for the Russian authorities to abandon their policy of co-operation with the West and to adopt a more aggressive stand in international relations. While this in no way justifies the aggressive policy of the Russian Federation, it helps to understand why it chose such a radical change in its foreign policy.

The fourth source of armed conflicts of the present century are the ethnic conflicts in Africa, the most important cause being the multi-ethnic composition of the population, itself a remnant of the colonial times. It is combined with lack of a democratic political culture and with the chronic weakness of government. The most important African civil wars after the end of the cold war occurred in Burundi (1993–2000), Djibouti (1991–1994), Ethiopia (since 2023), Mali (2012–2013), Central-African Republic (2004–2007 and since 2012), Rwanda (1990–1994) and South Sudan (2013–2014).

The fifth category of armed conflicts of the present century constitutes one of the consequences of the so-called Arab Spring that begun in January 2011 by the collapse of the authoritarian government of president Zin Ben-Ali in Tunisia. In the following years there were two military coups in Egypt and three civil wars: in Yemen, Libya and Syria. Other states got involved in those wars: Saudi Arabia and Iran in Yemen, France and the US in Libya, Russia, Turkey and the US in Syria. One of the consequences of the Arab Spring is the growth of a radical Islamism that leads to an intensification of armed conflicts. In October 2023, the radical Palestinian organization Hamas attacked the civilian Israeli population in the localities close to the Gaza enclave causing the death of over one thousand civilian victims and provoking a crushing Israeli military response, which during

the six month of fighting caused more than thirty thousand Palestinian deaths, mostly innocent civilian population, and huge destruction of living infrastructure. These tragic events terminated a forty years long freeze in the Israeli-Palestinian conflict – one of the most lasting conflicts of our time.

■ THE RUSSIAN CHALLENGE

In February 2007, the Russian president Vladimir Putin – speaking in Munich – openly proclaimed the readiness of the Russian Federation to conduct a more aggressive policy directed against the American domination in the world. This statement indicated a turn in the Russian foreign policy. Russia declared its willingness to defend its interests even in confrontation with the United States and its allies. Such a change was not wholly unexpected. As early as in 2004, Putin's German biographer Boris Reitschuster stated that Putin „turns Russia in the direction of the Soviet Union, that is toward an authoritarian state, ruled by a clique of politicians who do not dare to stand in a free and honest election, who lose contact with society and for whom the highest value is not the good of man but the state and its power” (Reitschuster 2005: 314). On several occasions, Putin expressed his nostalgia for Russia losing the Soviet position in world politics, and described the collapse of the USSR as a geopolitical tragedy. A former American diplomat Cliff Kupchan believed, however, that because of the state of the Russian economy Putin would conduct a moderate policy consolidating the international status quo (Kupchan 2012). Most likely, this was also the hope of the Western policy-makers – like president Barack Obama – who undertook efforts to base relations with Russia on a co-operation principle. Such an expectation turned to be wrong. Putin chose the path of rebuilding Russia's power status by military means. There is no obvious explanation of this political turn.

The historian of American diplomacy (and formerly high-ranking diplomat) Robert Zoellick interpreting the new Russian policy emphasized the dangers which resulted from the dissolution of the USSR and from the „painful transformation of Russia in a postimperial state” (Zoellick 2020: 466). Such interpretation has some value based on historical analogies. In France, the transition from the imperial to the post-imperial state was connected with sharp internal conflicts, including a military coup of May 1958 (in response to the news of the government's decision to negotiate with the Algerian National Liberation Front). The French postimperial trauma, however, expressed itself in the internal politics, while in Russia it took the form of an aggression directed against neighbors.

The key to understanding changes in Russian policy can be found in the character of the state power established in Russia after the collapse of the USSR. The abortive coup of August 1991 resulted not only in the dissolution of the USSR but also in the radical change of the Russian political system. The Communist party

which had ruled the country since 1917 not only lost power but was disbanded as well. The last decade of the 20th century was marked by the internal political chaos and the inability of president Yeltsin to deal with it. Russia was on a way to become a failed state. Juan Linz and Alfred Stepan pointed to Yeltsin's fundamental error consisting of abandoning a radical democratic reform immediately after the collapse of the August coup and the dissolution of the USSR. The consequence was the continuation of an authoritarian but a weak political regime and the mounting internal conflicts. Gradually, Russia was becoming a failed state. The century-old Russian dilemma was a combination of the state too weak economically to effectively compete with highly developed economies of the West, but powerful enough to challenge the West by demanding special rights in its relations with countries historically dependent on Russia. The complex of losing a world power status dominated in the Russian relation with the outside world (Malia 1999: 147).

The elevation to the top state position of Vladimir Putin turned out to become a breakthrough in Russian politics – the end of the gradual collapse of the state and the beginning of rebuilding the position of the Russian state as a regional power. Such a policy had from the very beginning a strong support of the Russian population, as indicated in sociological surveys conducted by independent institutions (Shestopal 2016: 379–383). In the first years of his rule Putin declared his willingness to continue the policy of a co-operation with the United States. One of the consequences was Russia's help offered to the US in its attack on Afghanistan in 2001. Russia not only declared its solidarity with the US, but also supplied a tangible logistic help.

The change in the Russian policy came after the American attack on Iraq. Russia, like many other states including America's strategic allies France and Germany, has not accepted the invasion of Iraq and saw in it an attempt to expand the American sphere of influence in Central Asia. The Russian Federation has not supported the USA, but also offered no assistance to Iraq remaining neutral in the first years of the war. It was only after the evident fiasco of the Iraqi invasion that Russia adopted a more aggressive tone in relations with the democratic West. Weakness invites difficulties.

Actions followed the Munich 2007 declaration. In August of 2008, the Russian forces invaded Georgia in response to the situation caused by the abortive attempt of the Georgian government to subdue the rebellious region of South Ossetia. Russia was close to take control of the whole country. The compromise, negotiated by France, saved the independence of Georgia, but left Russia with the dominant position in relations with the rebellious regions in the North of Georgia. The soft reaction of Western powers was most likely to be seen as an encouragement for the continuation of the aggressive policy of the Russian Federation.

The next step was taken in 2014, following the Ukrainian „revolution of dignity” which toppled a pro-Russian president Victor Yanukovich. Russia's annexation

of the Crimea and its support offered to the secessionists in the Donbass region turned out to be just a prelude to the full scale aggression starting in February 2022 and continued in the following years. Faced with the Russian aggression, the members of NATO offered Ukraine a meaningful assistance in armament and in the intelligence services. The ability of Ukraine to survive the Russian aggression depends mostly on the continuation of the support offered by the democratic nations of the Western alliance. In this way, the Russian-Ukrainian war has become a substitute for the third world war. In such a conflict, the political will plays a crucial role. Ukraine's ability to defend itself depends on the continuation of material and logistic help offered by the NATO members. In some of them, including the United States, an opposition to the continuation of such help has been voiced by influential politicians of the political Right. Because of this, the final outcome of the war depends largely on the outcomes of elections, particularly in the United States.

In his analysis of the Russian-Ukrainian war John Alderdice pointed to the importance of the psychological factor – the will to fight in defense of what is considered to be a just cause (Alderdice 2024: 102 and 103). In this respect, Ukraine is in a much stronger position than Russia, because losing the war would mean a national disaster. For Russia losing the war would not have the same dramatic meaning as for Ukraine. Such a scenario, however, would almost certainly spell catastrophe for the present Russian regime.

On the global political scene, the Russian-Ukrainian war created far reaching polarization of positions, strongly correlated with the type of political regime of a particular state concerned and with the unequal distribution of wealth and poverty. The analysis presented by the research team of „The Economist” (Economist Intelligence 2023) show not only the great diversification on the position taken by states on the issue of the Russian-Ukrainian war, but also a strong correlation between it and the economic situation of states concerned.

Of the 167 states included in this analysis, only 24 were considered „fully democratic”. None of them has supported Russia. On the opposite pole there are 59 states qualified as authoritarian. Russia belongs to this category along with such states as Belarus, Cambodia, Kazakhstan, Kyrgyzstan, North Korea, Cuba, Syria, Tajikistan, Turkmenistan, Uzbekistan, Venezuela, Vietnam – all of them support Russia. China qualifies also as an authoritarian state but it takes a more balanced position on the Ukrainian issue, what does not stop it from offering Russia a valuable assistance in arms delivery. Among the authoritarian states none openly condemned Russia for its aggression.

The majority of states that condemn Russia are democratic and wealthy. These states represent 16.1% of the population of the world but 61.2% of the world GDP. States supporting Russia or leaning toward her position represent 31.5% of the world population, but only 19.5% of the world GDP (Economist

Intelligence 2023: 31). Quite obviously, the Russian-Ukrainian conflict divides the world between the democratic and affluent North and the authoritarian (and relatively poor) South.

In this context, of a particular importance is the position of China – at present the second strongest power in the world, whose potential keep growing. China has not condemned Russia and helps Russia by arms deliveries. The war in Ukraine is in the interest of China since it has absorbed the attention and resources of the United States, restricting therefore its ability to effectively compete for the hegemony in Asia. The longer the war continues, the deeper the dependence of Russia becomes on the help offered it by China. One cannot exclude the possibility that the danger of becoming China's satellite may cause the Russian elite to reconsider its policy toward Ukraine and the West.

Regardless of its final outcome, the war in Ukraine constitutes an important turning point in world politics after the cold war. It is the first armed conflict after the cold war which might lead to the third world war. It is the first war between European states after 1945. It is also the first conflict in which NATO has been able to show its effectiveness.

It is, however, a qualitatively different conflict than the cold war. It is no longer „a struggle for the soul of mankind”, as the cold war was defined by president G.H.W. Bush (Leffler 2007). It is not an ideological war but a war for the spheres of imperial dominance. I do not share the pessimistic forecasts which stipulate that the eventual Russian success in the war against Ukraine would lead to the Russian attack on the Eastern flank of NATO, including Poland. But I do agree that strengthening of NATO (including its enlargement by admissions of Finland and Sweden) remains the most rationale response to the Russian dream of rebuilding the empire.

■ CONCLUSIONS

Armed conflicts which took place after the second world war can be divided in three main categories. The first consists of conflicts with the participation of one of the three great powers (USA, Russia and China). Their common characteristics is the attempt to defend or to expand the sphere of dominance of one of the top powers. Because of the existence of the weapons of mass destruction, the common characteristics of these conflicts is the limitation of conflicts in such a way that they would not lead to the mutual annihilation.

The second category of armed conflicts consists of wars between medium size state, fought mostly over border disputes, which are largely a remnant of the colonial past.

The third category of contemporary armed conflicts are domestic ones, mostly resulting from ethnic disputes, intensified by the end of the colonial rule, and from

the multi-national federations. A minority of the domestic conflicts have roots in ideological differences.

The geography of armed conflicts changed dramatically. Until the mid 20th century the majority of such conflicts took place in Europe. After the second world war Europe has become a peaceful region for at least a half a century. Over the last years, however, a war between European states became again one of the most meaningful events of our time. The ongoing war in Ukraine polarized the world and may become the source of future conflicts. Much depends on the way in which this war will end.

Most modern armed conflicts do not end in a clear victory, but with a compromise or some kind of freeze. This is mostly due to the fear that the escalation could lead to a global confrontation with the use of weapons of mass destruction. There is no optimistic scenario. Armed conflicts have become a part of contemporary political relations. We cannot avoid them. We have to be prepared.

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Jerzy J. Wiatr

CONTEMPORARY ARMED CONFLICTS: AN OUTLINE OF A COMPARATIVE ANALYSIS

After the second world war armed conflicts between states underwent changes caused by the effects of the invention of weapons of mass destruction and of the division of Europe between two blocs of states dominated by the two superpowers: USA and USSR. Most of the armed conflicts during the cold war period were caused either by the crisis of colonialism or by the ethnic rivalries, mostly in the new states. The Korean war was the only armed conflict between states with the direct involvement of two great powers (USA and China) and caused by the ideological division of the world. After the end of the cold war the dissolution of the Soviet Union and of Yugoslavia caused several ethnic wars, with the NATO intervention in the former Yugoslavia. A new wave of armed conflicts was caused by the Islamic radicalism in Iran and in some Arab states and by the growing strength of China as an emerging superpower. The Russian aggression against Ukraine created a new international situation with the indirect involvement of the democratic states. Future architecture of international relations depends on the outcome of the Russian-Ukrainian war.

Keywords: armed conflicts; colonialism; ethnicity; weapons of mass destruction; war

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A NARRATIVE OF THE JEWISH-PALESTINIAN CONFLICT: ISRAELI-JEWISH ACADEMIC VERSION – WHY? AND HOW?

■ INTRODUCTION

In this article I'll try to shed light on the three following questions: What have been the goals of the Zionist leaders in the conflict with Palestinians? What was the process of breaking out the conflict between Jews and Palestinians? What has been the course of the conflict over the years? The responses lie in the presented narrative based on academic literature. But I am aware that there are other narratives that tell a different perspective. The narrative is in the eyes of the beholder. But I am keeping the desire to be objective, subscribing also to my moral and humanistic values since each academic narrative is underlined by the system of beliefs and values of the academia person that writes it (Bar-Tal 2019).

I'll begin the paper with the question: What is the beginning of the conflict between the Jews and the Palestinian population? There are several possibilities to point out to this beginning: I chose the birth of the Zionistic² idea with the spring of the nations that exploded in 1848 (Shimoni 1995; Reinharz, Shapira 1996).

■ THE JEWISH-PALESTINIAN CONFLICT

The beginning of Zionism

In the first half of the nineteenth century aroused in Europe rebellious civil forces that demanded national sovereignty and fundamental rights. Jews were also affected by these ideas. Moshe Hess, Rabbi Zvi Kalisher, Rabbi Yehuda Elkalai, Mose Lilienblum and Leo Pinsker were among the first to advocate settling in Palestine

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² Zionism derived from *Zion* is a Jewish nationalist movement that emerged in the 19th century and propagated the establishment of the state for the Jewish people in their old homeland, in view of their hardship in the diaspora and longing to their country.

as a solution for Jews to the antisemitism (Schweid 1985; Almog 1996; Tessler 2009). I can state that all the conflicts always begin in the minds of individuals (usually leaders) and so the ideas to end peacefully the conflict must also appear in the minds of the individuals (mostly leaders).

In the 1882 began the first Aliyah³ to the Palestine that was at this time under the rule of the Ottoman empire (Ettinger, Bartal 1996). But it was Theodor Herzl, who infused Zionism with a new practical urgency, being profoundly shocked by the Dreyfus antisemitic affair that developed in 1894 and disappointed in emancipation of Jews in European countries. He organized in 1897 the first World Zionist Congress that propagated the Basel plan „to establish a home for the Jewish people in Palestine” (Penslar 2020). It was a plan that at that time was based on a myth of „a land without a people for people without a land”. Contrary to this myth in 1882 there were approximately 450,000 Arabs and approximately 24,000 Jews living in Palestine (Tessler 2009).

British rule over Palestine

In 1917 with the conquest of Palestine by Great Britain the Palestinian population numbered about 650,000 and the Jewish about 70,000, according to the interim report of the Mandatory to the League of Nations⁴. Most of the Zionist Jews entered Palestine during the 40 years since 1880. The importance of the year 1917 lies in the Balfour declaration issued by the British government which stated: „His Majesty’s government view with favor the establishment in Palestine of a national home for Jewish people and will use their best endeavors to facilitate the achievement of this object...”. This statement became a foundation for the future establishment of the Jewish state (Gutwein 2016).

The British Mandatory Palestine was a geopolitical entity that existed between 1920 and 1948 in the region of Palestine under the terms of the League of Nations Mandate for Palestine. During the Mandate, the area saw successive waves of Zionist Jewish immigration and the rise of nationalist movements in both the Jewish and Palestinian communities. The Palestinians wanted to defend their status as rightful inhabitants and owners of the land, and at the same time maintain its Arab and Muslim character. In contrast, the Zionistic Jews wanted to change existing conditions by purchasing land and settling on it, in an attempt to transform the territory to create the Jewish homeland (Cohen 2014). In that context, it is interesting to note the relatively early observation by Nagib Azoury, a Maronite Christian who served as an official of the Ottoman Empire in Jerusalem. In his

³ Aliya means in Hebrew „ascent” – a spiritual ascent to the Holy Land and from 1882 took a place several Zionistic aliyot. Between 1882 and 1939 there were five aliyot and the sixth (1933–1948) one was illegal.

⁴ <https://www.un.org/unispal/document/auto-insert-204267/>.

1905 book, *Le Réveil de la Nation Arabe (The Awakening of the Arab Nation)*, Azoury wrote:

Two important phenomena – of the same nature but opposed – are emerging at this moment in Asiatic Turkey. They are the awakening of the Arab Nation and the latent effort by Jews to reconstitute on a very large scale the ancient Kingdom of Israel. These two movements are destined to confront each other continually until one of them prevails over the other. The final outcome of this struggle, between two peoples that represent two contradictory principles, may shape the destiny of the whole world.

Indeed, this prophecy turned out to be right, as we see today the history of the region with its continuous violent struggle that preoccupies the international community. The Gaza and the Lebanese wars at present is the latest evidence to this very early prediction.

The period of the British Mandate varied in the policies of the British governments. It began with the appointment of a Jew, Lord Herbert Samuel, who was himself a Zionist, as the first High Commissioner. He hoped to gain Palestinian participation in mandate affairs and to protect their civil and economic rights, but he refused to stop Jewish immigration and their land purchases. Those were the key issues in Jewish expansion of immigration and extending ownership over the land (Huneidi 2001).

In 1920 and 1929 erupted riots between the Jews and the Palestinians which showed that the conflict is violent and continuous. In 1920 the outbreak of riots in Jerusalem was caused by the continued Zionist immigration to Palestine and to outlying Jewish villages in Galilee. The riots in 1929 erupted over access to the Western Wall in Jerusalem, but spread around the country to Hebron, Yaffo and Safed. The fundamental cause of the violence was the Palestinian disappointment because of unfulfilled national aspirations, fears of Jewish immigration, and their territorial expansion by buying land that uprooted Palestinian peasants (Cohen 2015; Auerbach 2021). In 1936 began a Palestinian rebellion against the British, instigated by the massive influx of Jewish immigration which lasted till 1939 and cost heavy losses to the Palestinian population. Jews were also harmed by the revolt which led to attacks on the Jewish population and violent reactions of the Jewish militia groups (Hughes 2015). In principle, Jews cooperated with the British mandate in putting down the rebellion.

In 1936 was appointed British Royal Commission of Inquiry, headed by Lord Peel, to investigate the causes of unrest in Mandatory Palestine, following a six-month-long Palestinian general strike. In 1937 the commission published a report that, for the first time, stated that the League of Nations Mandate had become unworkable and recommended partition (Tessler 2009). According to the recommendation of the committee, Palestinians, who were supposed to get a state

of about 80% of the territory to be annexed to Trans Jordan, constituted about 990,000 people (70% of the total population) and Jews, who were supposed to get 20% of this land, numbered about 400,000 (28.24% of the total population) people⁵ (*Report of the Palestine Royal Commission* 1937).

The Palestinians opposed the partition plan and condemned it unanimously. The Zionist leadership was bitterly divided over the plan (Morris 2001). In a resolution adopted at the 1937 Zionist Congress, the delegates rejected the specific partition plan. Yet the principle of partition was generally thought to have been „accepted” or „not rejected outright” by every major Jewish Zionist factions. The delegates empowered the leadership to pursue future negotiations. David Ben-Gurion and Chaim Weizmann, the leaders of the Zionists, saw it „as a stepping stone to some further expansion and the eventual takeover of the whole of Palestine” (Morris 2001).

Ben-Gurion presented as early as 1937 a very direct vision to widen the borders of the homeland⁶:

With the establishment of the Jewish state, we do not forfeit our right to return and settle in all parts of the country, and our settlement will never be limited to the limited areas of the state. (...) The possibilities of expansion will not be possible, if from the first moment the Jewish state does not direct all its efforts and steps and relations – in building, in creating power and in establishing neighborly relations – towards our expansion in the country, out of desire and agreement and cooperation with our Arab neighbors (Ben Gurion – Ben Yehuda Project – speech in 1937).

In spring 1939, the British government published a White Paper which proposed a limit to Jewish immigration from Europe, restrictions on Jewish land purchases, and a program for creating an independent state to replace the Mandate within ten years. This was seen by the Jews as betrayal of the mandatory terms, especially considering the increasing persecution of Jews in Europe during the thirties since the Nazi party started to govern Germany. Despite the disagreement, as the Second World War erupted, Jews began to cooperate with the British and even recruited a fighting brigade, except the Jewish radical military organizations which continued to oppose Britain (Liebreich 2004).

The war, in which 6 million Jews perished, was a traumatic experience and hundreds of thousands of survivors tried to come to Palestine that was closed

⁵ https://ecf.org.il/media_items/290.

⁶ David Ben-Gurion, the primary national founder of the State of Israel, was the head of the Jewish Agency Executive from 1935, and later president (the central body in the administration of the Jewish settlement in the Land of Israel), the chairman of the Zionist board (the limited executive committee of the World Zionist Organization), and the first prime minister of the State of Israel, who presented his doctrine regarding the design of the state's borders already in 1937.

by the Great Britain. The events of the war and after it were the decisive factors that forced Britain to announce their desire to terminate the Palestine Mandate and place the question of Palestine before the United Nations, the successor to the League of Nations (Louis, Stookey 1986).

1948 war

On 29 November 1947, the General Assembly of the United Nations decided to end the British Mandate in Palestine and to establish two independent states – a Jewish state and a Palestinian state. According to the plan, Jerusalem and its environs would be under international supervision. The partition plan gave the Jews, who were then 33% (about 650,000) of the total population, a state that included 56% of the territory of Mandatory Palestine (they also owned only 6% of the land of the Mandatory Palestine), while the Palestinians, who were 67% (about 1,350,000) of the population, received 43% of the territory. The partition plan was rejected by the Palestinian leadership and by most of the Palestinian population. Most of the mainstream Jewish Zionist leaders formally accepted the plan and the British government announced that the Mandate for Palestine would end at midnight on 14 May 1948⁷.

Immediately after the UN resolution, the civil war broke out between the Palestinian and Jewish communities, which began by the Palestinian attacks on Jews as the British authority began to break down. After the establishment of the Israeli state, several Arab countries intervened on behalf of the Palestinian community that was decimated by the rebellion in 1936, starting the 1948 Arab-Israeli war. Jews gained upper hand in the second part of the war, receiving Czechoslovak arms and having full mobilization. The war, which lasted until 1949, allowed Israel to expand 22% of the territory beyond the land allocated to the Jewish state by the partition plan. Jews paid very heavy price in the war in which 6,000 of them were killed, including in several massacres, about one percentage of the Jewish population. The Jewish victory in the war happened to be a disaster (in Arabic: Nakba) for the Palestinian community. During the war, approximately 750,000 Palestinians fled or were expelled, becoming refugees and about 450 Palestinian villages were destroyed. In total about 12,000 Palestinians were killed (also about 1 percent of the population) and there were also massacres in which hundreds of Palestinians were killed. The 1949 Armistice Agreements were signed separately between Israel and Egypt, Lebanon, Jordan, and Syria. They formally ended the hostilities of the 1948 Arab-Israeli war and also demarcated the Green Line, which separated Arab-controlled territory from Israel. Transjordan seized and subsequently annexed the West Bank and the kingdom of Egypt seized the Gaza

⁷ Chromeextension://efaidnbmnnnibpcajpcglclefindmkaj/https://lsa.umich.edu/content/dam/cmenas-assets/cmenas-documents/unit-of-israel-palestine/Section1_UnitedNationsPartitionPlan.pdf.

Strip. Attempts to resolve the Israeli-Arab conflict failed, because of disagreements about the borders, the Palestinian refugees' problem and the status of Jerusalem (Milstein 1997; Morris 2001; Tessler 2009; Schulze 2013).

The first period of the Israeli state – 1948–1967

About 150,000 Palestinians remained in the State of Israel and they were put under strict military rule until 1966. Under the authoritarian leadership of David Ben Gurion, Israel had a number of immense challenges: to absorb many hundreds of thousands of Jewish immigrants from all over the world and form them into a unified nation; to defend the new state against threats coming from Arabs countries, thus to build a strong army; to construct new settlements for Jews throughout the country, to build governmental, parliamentary and legal system and develop successful economy (Segev 2019).

From the establishment of the state and until the mid-1970s, the Israeli-Palestinian conflict, that in reality was an Israeli-Arab conflict, retained all the characteristics of an intractable conflict. The conflict was violent, long-lasting and required enormous resources. In addition, with socio-psychological foundations, it was considered unsolvable and revolved around aims that both sides perceived as vital to their very existence. These aims focused on questions of the right of the Jewish nation to self-determination, its return to its homeland, the establishment of the Jewish state and in addition, national-cultural-religious control of the space. When aims like these are considered existential, there is no room for compromises – not even the smallest and most insignificant concessions. Both sides constructed supporting narratives, froze with them and entrenched themselves in their positions. Thus, these worldviews led to the disregard of the needs of the other, to the negation of the identity and narrative of the opponents, and to systematic efforts to delegitimize them. Every concession was perceived as a loss for the conceding side, as in a zero-sum game.

The Palestinians related to themselves as having the right of „precedence” over the land and thus viewed the Jews who had arrived as immigrants, or even more severely as invaders and colonialists. They absolutely rejected the right of the Jews to self-determination and to an independent state, and even refused to recognize the historical connection of the Jews with their homeland. The Jews, in contrast, related to the land as a legacy promised to them by God in the Bible, as their historical-cultural homeland, and as a place of refuge considering the dangers that the Jewish nation had faced and was still facing. They did not recognize the unique national identity of the Palestinians and considered them as part of a larger Arab nation, having the rights to many states and thus lacking legitimate roots in the country, and as „tenants” on land belonging to the Jews. The perception took hold that the aim of the Arabs was the complete eradication of the Jews, as a kind of continuing version of the Holocaust. And in such an „us or them” situation Jews

in Israel believed that they had to ensure their existence even if it meant the use of violence, as even one defeat could lead to the destruction of the state (Golan 2015; Podeh 2015).

During the first two decades following the establishment of the state, expressions of hegemonic conflict culture were clearly dominant in all national institutions, in the wide range of cultural products, in school textbooks and teaching, in official texts, leaders' speeches, national ceremonies, public space, and more. One of the main sites for these expressions was the mass media – in this period radio – and the printed newspapers and magazines. On the one hand, the radio was controlled by the prime minister office and thus was promoting themes of the ethos of conflict⁸. On the other hand, as a central channel for information dissemination to society members, the media also aided in creating the ethos of conflict and implanting its societal beliefs. The hegemonic ideological narrative was instilled by indoctrination covering most political, social, cultural, and educational products during those first decades. This narrative, which served as the foundation of the conflict culture, was selective, biased and distorted. It was based for the most part on supportive information which was usually intensified, while any information which was not supportive, was concealed (Bar-Tal 2023). At this period there was not any meaningful opposition to the policies regarding the management of conflict.

In this difficult period, the political leadership of the State of Israel conducted the conflict adopting, in my view, the following basic premises which were valid until the Six-Day War in 1967. These premises were almost accepted unanimously by the Jewish public:

1. The Arab states are interested in destroying the State of Israel and are not interested in reaching a peace agreement with it.
2. Arabs cannot be trusted because of their innate tendency towards violence and their lack of trustworthiness.

⁸ *Ethos of conflict* is defined as the configuration of shared core societal beliefs that provide a particular dominant orientation to a society at present and for the future in the contexts of intractable conflict (Bar-Tal 2013). It is composed of eight major themes about issues related to the conflict, the in-group, and its adversary: (1) *societal beliefs about the justness of one's own goals*, which outline the contested goals, indicate their *crucial importance*, and provide their explanations and rationales; (2) *societal beliefs about security* stress the importance of personal safety and *national survival*, and outline the conditions for their achievement; (3) *societal beliefs of positive collective self-image* concern the ethnocentric tendency to attribute positive traits, values, and behavior to one's own society; (4) *societal beliefs of victimization* concern the self-presentation of the in-group as the victim of the conflict; (5) *societal beliefs of delegitimizing the opponent* concern beliefs that deny the adversary's humanity; (6) *societal beliefs of patriotism* generate attachment to the country and society by propagating loyalty, love, care, and sacrifice; (7) *societal beliefs of unity* refer to the importance of ignoring internal conflicts and disagreements during intractable conflicts to unite the society's forces in the face of an external threat; finally, (8) *societal beliefs of peace* refer to peace as the ultimate desire of the society.

3. Israel should not accept proposals to return the Palestinian refugees to the State of Israel, even if this is included in the draft for a peace agreement.
4. A unique situation has developed in the realm of security. There are immediate threats to the security of the State of Israel and its inhabitants.
5. A strong army must be maintained, an army that will be able to deal with the threats of the Arab states and the internal societal challenges. It will be the „nation's army” and will play an important role in social integration, as well as other societal tasks.
6. Operations initiated by Israel, retaliatory raids and even a war should be carried out to deter the enemy and defend the state.
7. In defending the homeland, all possible means should be used without considering the opinion of the international community which abandoned the Jews during the Holocaust.
8. Israeli army is acting morally according to the principle of „purity of arms”.
9. Jews from all over the world should be brought to Israel to build a strong state.
10. To address the challenges of the conflict, a united society with one identity and on security needs to be created.
11. The nation should be educated to accept the possibility of living for a long period of time in the shadow of a conflict.
12. Opportunities for military, political and economic cooperation with nations of the world should be used to develop the state and defend it.

In addition, I would like to point out that from the Jewish point of view the Holocaust does not stand alone as one grim event but is a metaphor for Jewish history itself (Stein 1978). This is of critical importance for understanding the Israeli siege mentality⁹ as it is expressed for instance in the following insightful observation that is relevant until today:

The Holocaust remains a basic trauma of Israeli society. It is impossible to exaggerate its effect on the process of nation-building (...). There is a latent hysteria in Israeli life that stems directly from this source (...). The trauma of the Holocaust leaves an indelible mark on the national psychology, the tenor and content of public life, the conduct of foreign affairs, on politics, education, literature and the arts (Elon 1971, p. 198 and 199).

Also, from 1948 till 1967, the majority of the public in Israel had come to terms with the territorial size of the State of Israel, as established at the end of the War of Independence. But still, the vision of a state with „two banks to the Jordan river”, or „West Bank to Israel” continued for a time being among a minority that

⁹ Siege mentality is defined a societal belief denoting perception of being under siege – that is, that the rest of the world has highly negative intentions towards the ingroup society (Bar-Tal, Antebi 1992).

mostly belonged to the Herut party¹⁰, Mafdal¹¹ (National Religious Party), and to a lesser extent to the Ahdut HaAvoda¹² (Labor Unity). Even the Prime Minister Ben Gurion did not relinquish the vision of expansion to the east. In 1957 he stated that „Jordan has no right to exist (...) the territory to the West of the Jordan (the West Bank) should be made an autonomous region of Israel” (Slater 1994: 185). The Israeli army did not freeze on its guard and in 1961 and 1963 prepared plans for forces that would have to govern the territories that the State of Israel would occupy in the future (Raz 2021).

Between 1948 and 1977 the conflict was mainly between states, because the Palestinians were crushed in Nakba 1948. Arab countries were sending Palestinian fedayeen¹³ into Israel to carry terror attacks to which Israel reacted punitively. Also, there were Israeli minor violent skirmishes between the armies, especially with the Syrians, Jordanians and Egyptians. But in 1956 erupted a major war between Egypt and Israel. Israel participated in a secret agreement with France and Great Britain, who wanted to depose Egyptian President Gamal Abdel Nasser and regain control of Suez Canal that the Egyptian president nationalized. Israel conquered Gaza Strip and Sinai Peninsula with relatively light losses of 172 soldiers and 817 wounded. The French and British landed in the Canal, but the heavy political pressure from both the United States and the Soviet Union forced the three countries to withdraw from all the Egyptian territories.

Only in 1959 was founded Fatah¹⁴, a Palestinian nationalist and social democratic political party, and in 1964 Yasser Arafat founded the Palestine Liberation Organization¹⁵ as the official representative of the Palestinian people that immediately won the support of most Arab League governments. Only in 1965 Fatah began to carry attacks on civil targets. Since then, Palestinians have carried out repeated terrorist attacks. By 2024 approximately 4,500 Israeli Jews

¹⁰ Herut was a major conservative nationalist political party from 1948 until it merged in 1988 with Likud party.

¹¹ The National Religious Party was representing the religious Zionist movement.

¹² The leftist party that was established in 1954, which was against the partition and favored Greater Israel. In 1968 it merged to form Israeli Labor Party.

¹³ Fedayeen is an Arabic term used to refer to various military groups willing to sacrifice themselves for a larger campaign.

¹⁴ Fatah is a Palestinian nationalist and social democratic political party. It is the largest faction of the confederated multi-party Palestine Liberation Organization and the second-largest party in the Palestinian Legislative Council.

¹⁵ The Palestine Liberation Organization is a Palestinian nationalist coalition that is internationally recognized as the official representative of the Palestinian people. Founded in 1964, it initially sought to establish an Arab state over the entire territory of the former Mandatory Palestine, advocating the elimination of the State of Israel. However, in 1993, the PLO recognized Israeli sovereignty with the Oslo I Accord, and now only seeks Arab statehood in the Palestinian territories (the West Bank and the Gaza Strip) that have been militarily occupied by Israel since the 1967 Arab-Israeli War.

have been killed in terrorist attacks since the establishment of the State of Israel in 1948 (Morris 1993).

1967 war and its consequences

The Six Day War in 1967 provided Israel with an opportunity to expand its borders, although the immediate conditions for its outbreak were initiated by Egypt that closed Straits of Tiran to Israeli vessels, ordered UN personnel withdraw from Egyptian territories and moved his army into Sinai. Israel pre-emptively attacked Egypt, Syria and Jordan, who joined the war and so, at the end of the Six-Day War, Israel found itself in control of the Sinai Peninsula, the Gaza Strip, the West Bank and the Golan Heights. The connection to the land of the Bible (West Bank) aroused almost unanimous enthusiasm and immediately ignited a settlement movement among broad sections of the public (support for Greater Israel). The previous borders were called „Auschwitz borders”¹⁶, because, as perceived, they did not provide sufficient protection for the inhabitants of the land of the Israeli state (Oren 2002; Shlaim, Roger 2012).

Immediately after the end of the 1967 war, politicians made rhetorical use of two arguments. One is security: the need for security borders and strategic depth, and the other is a national, historical-religious. The historical reasoning was presented by then Defense Minister Moshe Dayan: „We returned to the holiest in our places, in order to never part from them”. Prominent leaders in the Labor Party supported the extension of Israel and also the Jewish settlement of the occupied territories¹⁷. On 27 September, was published in the mass-circulation newspapers a statement supporting Greater Israel by 57 of the most important and best-known – then and now – of the country’s writers, intellectuals, senior officers and political activists. It has had tremendous influence on the Jewish public opinion.

The government surrendered to the demands of the Jewish settlers and prepared the constitutional infrastructure for the settlement (Kretzmer 2013). The seminal 2021 book by Kretzmer and Ronen, *The Occupation and Justice: The Supreme Court of Israel and the Occupied Territories*, concluded 500 pages of analysis with many examples in the following way:

In its decisions relating to the Occupied Territories, the Supreme Court has legitimized all controversial policies and practices of the Israeli authorities, including those incompatible with international law. (...) With few exceptions the court has not intervened in policies and practices of the authorities in the Occupied Territories.

¹⁶ <https://www.algemeiner.com/2014/01/20/the-1967-lines-are-auschwitz-borders/>.

¹⁷ The Israeli Labor Party is a social democratic and Labor Zionist political party in Israel. The party was established in 1968 by a merger of Mapai, Ahdut HaAvoda, and Rafi. Until 1977, all Israeli prime ministers were affiliated with the Labor movement. After 2000 the party lost support of the Jewish population.

Rather than subjecting the legality of such policies and practices to strict judicial scrutiny, the Court has generally placed the emphasis on issues of procedural fairness and whether the implementation of the policy or practices in specific cases meets the demands of reasonableness and proportionality. This has meant that, in practice, the most problematic policies and practices in the Occupied Territories have received explicit or implicit judicial approval (p. 489 and 490).

The occupied territories were viewed as being „liberated” and immediately were called with their ancient labels, Judea and Samaria, and the cradle of the Jewish history, religion, and culture. The word „occupied” disappeared from the official vocabulary and public discourse. On 28 June 1967, Israel annexed East Jerusalem to the State of Israel. It is important to note that as early as June 1967, Israeli Prime Minister Levi Eshkol, in his role as chairman of the Ministerial Security Committee, determined that Israel’s security border would be the Jordan River. In July 1967 labor minister Yigal Allon prepared an unofficial plan, which had a major impact on the Jewish settlement policy in the West Bank and the Gaza Strip. According to the plan, the eastern border of Israel will pass along the line of the Jordan River, therefore the Jordan Valley and the eastern slopes of the West Bank must be in Israeli territory as a defensible border. Also, according to the plan, Jews will settle in areas around Jerusalem. In addition to East Jerusalem, already in the summer of 1967 Jews settled in Gush Etzion (Bregman 2002; Zertal, Eldar 2007).

In 1972 education minister Yigal Allon decided to erase on maps the Israel’s borders along the ceasefire lines of the Six Day War that were marked with green color (Leuenberger, Schnell 2020). The importance of this move is that generations of Israelis were brought up without knowing that the Green Line separated the State of Israel from the West Bank and thought that the entire area from the Jordan River to the Mediterranean Sea belongs to the State of Israel.

1973 war

In 1973 broke another major war in the Middle East. The coalition of Egypt and Syria launched on a sacred day of Jews – Yom Kippur¹⁸ – a surprising attack on Israel. It was launched after in 1970 the president of Egypt tried to negotiate Israeli half withdrawal from Sinai. This was rejected by the Israeli Prime Minister Golda Meir. The Egyptian and Syrian forces crossed their corresponding ceasefire lines and entered Sinai and Golan Heights. The war was very vicious with heavy losses to the Israeli forces, but after a few days Israel succeeded to stop the offensive and moved to repel the enemy. On 25 October 1973 the war ended with encirclement

¹⁸ Yom Kippur is the holiest day (day of atonement) of the year in Judaism. The day’s main observances consist of full fasting and asceticism, both accompanied by extended prayer services (usually at synagogue) and sin confessions.

of the Egyptian army in Sinai, entering the Israeli army beyond the Suez Canal into Egypt and repulsing the Syrian army. Despite the results of the war, Arab countries felt psychologically vindicated by the early success. Israeli Jews were traumatized with the surprising attack and the heavy losses of the army (about 2,600 were killed, about 8,000 were wounded, and 296 were captured). This war opened the possibility of striking a peace agreement between Egypt and Israel (Schulze 2013b).

The rise of Likud to power and the influence of the Zionist religious sector

The rise of the Likud¹⁹ to power in 1977 turned the settlement project into a tool of creeping annexation of the territories. However, the ideological-practical torch was carried by the members of the religious-Zionist movement, who perceived themselves as the front runners of the project and pioneers of Zionism (Zertal, Eldar 2007). The project of Jewish settling was increased along the Green Line, on the back of the mountain, and along the main traffic routes, to cut off the West Bank and prevent a territorial sequence of Palestinian settlements.

As described above, the dogma of religious Zionism has played a crucial role in the significant changes that have taken place in the country and its society, and it still does (Avruch 1979). It gradually made its way from the margins to the political center and the leadership, as well as to political and military elites (Aran 1986; Katsman 2020). This presence everywhere makes this movement prominent and central in many areas of the society: in the army, in the Zionist institutions, in the educational system, in the media, the legal system, and especially in the government (Lustick 1988; Mendelsohn 2016; Hellinger, Hershkowitz, Susser 2018).

Peace with Egypt and the events till 1993

Sadat's visit in 1977, after Yom Kippur war in 1973, was a rare historic turning point that had been accomplished in an extremely short period of time under the leadership of Menachem Begin, the leader of Likud. Egypt had for so many years been considered the most dangerous enemy of Israel. Almost all Jewish political leadership from the left²⁰ to the right supported the peacemaking and agreed to the removal of Jewish settlements from Sinai.

But the peacemaking had at least one significant effect. It found expression in the incipient establishment and development of a meaningful Jewish peace movement, Peace Now, which succeeded in attracting tens of thousands of Israeli

¹⁹ Likud, a National Liberal Movement, a major right-wing political party in Israel. It was founded in 1973 by Menachem Begin and Ariel Sharon in an alliance with several right-wing parties. In 1977 it ascended to rule the country and with short breaks it rules Israel until today.

²⁰ In Israel the dimension of right-left solely reflects the positions towards the conflict. Rightists hold uncompromising position towards the resolution of the Israeli-Palestinian conflict and view Palestinians negatively and distrustfully, whereas leftist favor compromises and view Palestinians as partners to the peacemaking process.

Jews. The movement was established to advance the peace process with Egypt and after the signing of the peace agreement in 1979, it actively supported initiating a similar process with the Palestinians as well (Hermann 2009). In the eighties and nineties appeared a dovish camp in a way that Jewish Israeli society was more or less divided: about 35% supported the dovish view and about the same percentage declared themselves as hawks.

The War in Lebanon in 1982 against the PLO, considered the second Israeli-initiated „war by choice”, aroused unprecedented protest and opposition among part of the Jewish population (Davis 1995). This was the first sign of opposition to an initiated war, even by segments of the military echelon. The pictures of Palestinians fighting against the powerful army and the massacre of Palestinians in Sabra and Shatila²¹ made an emotional impression on part of the Israeli public.

In December 1987 erupted the first popular mostly nonviolent rebellion of the Palestinians called the first intifada that was an expression of widespread opposition of Palestinians to life under occupation (Alimi 2007). All these events considerably expanded and deepened the alternative narrative of supporting peace making.

In the late 1980s, two important events became extremely significant vis-à-vis Israeli control of the West Bank. On 31 July 1988, Hussein, the king of Jordan, announced the administrative separation of the West Bank from Jordan and the renunciation of any claim to that territory, ending the possibility that the West Bank would be returned to Jordan, as some Israeli leaders had hoped. And on 15 November 1988, the head of the Palestine Liberation Organization, Yasser Arafat, proclaimed the establishment of a Palestinian state, and recognized the State of Israel within its 1967 borders, paving the way for a division of the area into two states (Tessler 2009).

As a result of the American pressure against the wish of the Israeli prime minister from Likud, Yitzhak Shamir, in November 1991 an international peace conference assembled in Madrid, with the participation of an Israeli delegation, and delegations from Arab states and other countries. This was followed by bilateral talks between the parties, focusing on political topics. In addition, multilateral talks also began, dealing with regional subjects, including water, economic cooperation, and the refugee problem. In Washington, bilateral talks took place between an Israeli delegation and a joint Jordanian-Palestinian delegation. All these events ultimately led to indirect negotiations between Israel and the Palestine Liberation Organization (PLO), after the Likud had lost the 1992 elections and Yitzhak Rabin, representing the Labor Party, which had dovish orientation, had become prime minister (Tessler 2009).

²¹ The Sabra and Shatila massacre refers to the 16–18 September 1982 killings of between 460 and 3,500 Palestinian civilians in the city of Beirut during the Lebanese war. It was perpetrated by Christian militias in Lebanon, but supported by the Israel Defense Forces (IDF) that had surrounded Beirut's Sabra neighborhood and the adjacent Shatila refugee camp.

Oslo accords and the peace process

On 13 September 1993, Declaration of Principles (the Oslo 1 Accord) was signed between Israel and the PLO, with each side recognizing the other, but not the need to establish the Palestinian state. The accord's goals included Israeli withdrawal from the Gaza Strip and from Jericho, and the creation of the Palestinian National Authority. The PLO recognized Israel's right to exist in peace and security, obligated itself not to engage in terror or in other violent activity, and promised to seek a peaceful solution to the conflict. The mutual recognition between the State of Israel and the PLO entered into force with the signing of the Declaration of Principles which determined a framework for the administration of Palestinian autonomy in the Gaza Strip and on the West Bank (Makovsky 1996). This was also a surprise, like the visit of the Egyptian president had been 16 years earlier. But this time the reactions were different. The rightist-hawkish opposition led by the Likud party, the second largest party in the Knesset, expressed strong resistance towards the agreement, because it negated the realization of its main objective to establish a „Greater Israel” in the West Bank and the Gaza Strip (Karpin, Friedman 1999).

In 1994 Israel began to carry out the first stage of the Declaration of Principles and withdrew its forces from the Gaza Strip and from Jericho, and the Palestinian Authority was established under the auspices of Yasser Arafat, the head of the PLO. The Oslo II Accords were signed in Taba, Sinai, on 27 September 1995, giving the Palestinians independent authority over Palestinian cities on the West Bank and in Gaza, as well as 450 Palestinian villages. It was agreed that elections would be conducted in the areas controlled by Palestinian Authority. The West Bank was divided into three categories: A, B, and C²². In the end, the accords were passed by the Knesset. In spite of these significant achievements, it is important to note that the Oslo Agreements did not relate to or solve central issues that constituted the heart of the conflict: the establishment of a Palestinian state, its borders, the division of Jerusalem, the security safeguards, the question

²² The Oslo Accords signed in 1995 divided the Palestinian territory into three temporary administrative sectors, Areas A, B, and C, which would exist until a final agreement would be signed. The three areas do not have territorial contiguity but are separated from each other and the division was made on the basis of various population areas and recognition of Israeli security demands: Area A (18% of the West Bank) includes all of the Palestinian cities and their surroundings, with no Israeli settlements. It is under full civilian and security control by the Palestinian Authority. But Israeli security forces enter the area with the permission of the Palestinian Authorities to arrest Palestinians suspected of violent resistance to occupation. Area B (22% of the West Bank) includes areas of many Palestinian cities, towns and villages, with no Israeli settlements. It is under civilian Palestinian control and under Israeli-Palestinian security control. Area C (60% of the West Bank) includes all Israeli settlements (cities, towns and villages) as well as over 350,000 Palestinian residents with some over 400,000 Jewish settlers. It is under full civilian and security control of Israel, except for Palestinian citizens.

of the return of refugees and the status of the Jewish settlements in the occupied territories, among others. It was determined that discussions about these central issues would begin no later than 1996 and would end before May 1999. These discussions never took place. But the Oslo Agreements led to several changes among part of the Jewish public in Israel. The agreements contributed to the legitimization and the humanization of the Palestinians, and enabled people to see them as partners to peace talks, at least among the majority of Israeli Jews. Moreover, they aided in recognizing the unique Palestinian national identity and raised the question of the possibility of establishing Palestinian state. But, on the one hand, the agreements did not assure Israeli security as the terror attacks continued. They were carried by Hamas²³ and increased considerably after a religious Jewish settler carried a massacre in the Cave of the Patriarch in Hebron, killing 29 worshippers and wounding 125 of them. On the other hand, they worsened the economic situation of the Palestinians, because the working permits became limited, did not decrease the signs of occupation, they did not promise establishment of the Palestinian state and more important, continued the Jewish settlement project (Weinberger 2006).

Despite the strong opposition, Prime Minister Rabin promised a new beginning. On 4 May 1994, during the signing of the Cairo Agreement regarding the Gaza Strip and Jericho, he stated, and we can see his style and intentions:

We are convinced that our two peoples can live on the same patch of territory, „every man under his vine and under his fig tree”, as the Prophets foretold, and bring to this country – a land of rocks and of tombstones – the taste of milk and honey that it deserves. (...) On this day, I turn to you, the Palestinian people, and say: Our Palestinian neighbors, a century of bloodshed has forged in us a core of mutual enmity. (...) Today we are both extending a hand in peace. Today we are inaugurating a new age (from Bar-Tal 2023).

In line with the speeches the following assumptions can be detected that guided Rabin in his accord with PLO (Bar-Siman-Tov et al. 2007):

1. The Palestinian nation cannot be subdued by military means and thus, the conflict cannot be ended in this way.
2. Israeli rule over the Palestinians will do harm to the Jewish nation, and thus, it is in the Israeli interest to part ways with them by finding a solution using negotiation.

²³ Hamas, „Islamic Resistance Movement”, is a Palestinian Sunni Islamist political and military movement governing the Gaza Strip. Hamas which promotes Palestinian nationalism in an Islamic context is widely popular in Palestinian society due to its ant-Israeli stance. It did not recognize the State of Israel and objected to Oslo agreements. Hamas has carried out attacks against Israeli soldiers and civilians, including suicide bombings and indiscriminate rocket attacks.

3. Negotiations can only be conducted with the Palestine Liberation Organization headed by Yasser Arafat, as under present circumstances, the organization has abandoned the principles of „armed struggle” and the „phased doctrine”, and is ready to recognize Israel and to reach an agreement to end the conflict with the following conditions: the establishment of a Palestinian state within the 1967 borders, with East Jerusalem as its capital, and a solution to the refugee problem on the basis of the United Nations resolution 194.
4. The PLO is ready to accept Israel’s position that the political process must be gradual and conducted in stages, with the problematic issues – such as the status of Jerusalem, the refugee problem, the borders, and the Jewish settlements – to be discussed only at the time of the final-status settlement.
5. The PLO’s commitment to abstain from and prevent terrorism will enable Israel to transfer conduct of the war against Palestinian terrorism to the PLO.
6. Mutual trust can be created by an ongoing peace process.
7. The establishment of a Palestinian Authority will lead to responsible behavior by the Palestinians, as the creation of formal institutions creates a proto state which, from that moment, has something to lose, and thus it will negotiate with Israel responsibly to achieve a „fair compromise”.

To stop the erosion of support for the peace process, the Israeli heads of state decided to hold a demonstration of support for the process, which took place at the main square of Tel Aviv on 4 November 1995. At the end of the demonstration, as he was leaving the square, Prime Minister Rabin was assassinated by Yigal Amir, a religious-nationalist Jewish student who opposed the peace process policies (Karpin, Friedman 1999). In February 1996, Palestinian terror attacks struck Israeli cities with great intensity, after the substituting Prime Minister Shimon Peres decided to assassinate a renown Hamas terrorist.

In May 1996, the rightwing Likud Party won the elections, and their candidate for prime minister, Benjamin Netanyahu, put together a rightwing government. During the election campaign, Netanyahu had obligated himself to honor the agreements signed by Israel. But although he delayed the implementation of the interim agreement, in 1997, he signed the agreement to determine Israeli army deployment in Hebron²⁴. In 1998, he signed the Wye

²⁴ The Protocol Concerning the Redeployment in Hebron, also known as the Hebron Protocol or Hebron Agreement, was signed on 17 January 1997 by Israel, represented by Prime Minister Benjamin Netanyahu, and the Palestine Liberation Organization (PLO), represented by PLO Chairman Yasser Arafat, under the supervision of the U.S. Secretary of State, Warren Christopher. It concerned the partial redeployment of Israeli military forces from Hebron in accordance with the 1995 Interim Agreement on the West Bank and the Gaza Strip („Oslo II”). According to the Protocol, *Area H-1* (about 80%) would come under Palestinian control, while *Area H-2* would remain under Israeli control.

River Memorandum²⁵, which detailed steps to implement the Oslo Agreements, while maintaining reciprocity. However, as evidenced in later years, it appears that he did everything in his power to revoke, or at least to delay, the Oslo peace process because of his hawkish political orientation (Rosler, Hagagw-Baikovich, Bar-Tal 2021).

In principle, even during Netanyahu's term as a prime minister, the basic assumptions that had guided the Rabin government had not changed, at least not publicly or officially (Bar-Siman-Tov et al. 2007). This held true even though Netanyahu considered the Palestinians, under Yasser Arafat, only fulfilling their obligations in part; and he coined the slogan, „If they give, they'll receive; if they don't give, they won't receive”.

The project of Jewish settlement proceeded even during the terms of Rabin and Netanyahu. The most dramatic increase in the number of settlers began after the Likud, led by Menachem Begin, gained control of the government. Immediately after the elections in 1977, there were 38 settlements with 1,900 settlers. In 1999 there were already 183,900 settlers, in addition to Jewish residents of East Jerusalem. These settlements, which continued to expand, greatly affected the course of the conflict and relations with the Palestinians, although the government repeatedly made the misleading and propagandist statement that „the settlements are not an obstacle to peace” (Zertal, Eldar 2007).

In the elections for a prime minister in 1999, Ehud Barak, the nominee of the Labor Party, was victorious and he promised to implement peace policies and to continue the legacy of Yitzhak Rabin, who had established the meaningful peace process with the Palestinian nation. The term of Barak began with hope and ended with destruction of the peace camp and escalation of the conflict.

In 2000–2003, a profound change in public opinion took place among the Jewish community, and its effects can still be felt today. This was primarily the result of two constitutive events that took place in the space of two months: the failure of political talks at Camp David in July 2000, and the second rebellion (Intifada) that broke out two months later, in September of that year – along with the third constitutive event, the evacuation of the Gaza Strip in 2005 and its consequences. The dramatic events that escalated the conflict, based on the fake information provided to the Israeli Jewish public by most of Israeli leaders, the mass media, and official institutions, led to a loss of hope by many Jews. The fake information

²⁵ The Wye River Memorandum was an agreement negotiated between Israel and the Palestinian Authority at a summit in Wye River, Maryland, U.S., held 15–23 October 1998. The Memorandum aimed to resume the implementation of the 1995 Interim Agreement on the West Bank and the Gaza Strip (Oslo II Accord). Israel, however, had only implemented stage 1 of the further redeployment, meaning that it had withdrawn from 2% of Area C instead of the required 13%. Both parties accused each other of not fulfilling its share of responsibilities under the Wye River Memorandum, and the further implementation of the agreement remained unfinished.

provided by Ehud Barak stated that the Palestinians are not partners to peace process and that Arafat initiated the second Intifada to liberate the Palestinians by violence. The misinformation was accompanied by terrible violence of terror that validated for the public the intentions of Palestinians. In the second intifada were killed about 1,050 Israelis (about 710 civilians including 119 children) and about 4,700 Palestinians (about 2,200 civilians including 980 children). This is how the pessimism developed about any possibility of a solution and about the „real” intentions of the Palestinians. In other words, the spirit of the rightwing became dominant in Israeli Jewish society, and dovish attitudes diminished considerably, but did not disappear. Only about fifteen percent of the Israeli Jews have continued to adhere to dovish orientation even in 2024, but the conflict culture returned to take its dominant hegemonic place (Bar-Tal 2023).

The third constitutive event was termed the „disengagement plan”; and the construction of a separation wall built along a line east of the 1967 border, which enclosed most of the Jewish settlement blocs on the West Bank within Israel. These two projects were initiated by an elected prime minister Ariel Sharon from Likud party and then from Kadima party²⁶ without coordinating them with the Palestinian Authority. In contradiction to the popular perception which still exists, a realistic view indicates that Israel did not „disengage” from the Gaza Strip in 2005 and did not end the occupation, but simply changed its character. Over time, Israel created a new system of control and supervision over both the people, all the entering and exiting merchandise, and the territory, by putting siege on the Gaza Strip from the sea, air and land. The passage to Egypt in the south of the strip was closed by Egypt.

In 2006 were carried legislative elections in the Palestinian Authority and Hamas won them and the leader of Hamas was sworn as a Prime Minister and formed a government. USA and Israel were unhappy with the results and imposed sanctions. On 14 June 2007, Hamas took control of the Gaza Strip and as a result Mahmud Abbas dismissed the already formed government. Israel officially proclaimed the Gaza Strip as a „hostile territory”. This meant instituting a total blockade of the entire Gaza area (Peters 2010).

Over the years there have been several attempts to revive the peace process, despite the cycle of violence, but all of them failed. The negotiations between the Israeli Prime Minister, Ehud Olmert, and the Head of Palestinian Authority, Mahmud Abbas, continued for a few months and led to several very significant agreements. Nevertheless, they never reached completion for a variety of reasons, among which was the resignation of Olmert, who was under suspicion for crimes of corruption; thus, the negotiations ended. This was probably the most significant

²⁶ Kadima was a centrist-rightist political party in Israel. It was established in 2005 by moderates from Likud largely following the implementation of Ariel Sharon’s unilateral disengagement plan in August 2005, and was soon joined by like-minded Labor politicians.

negotiations that touched on all the issues of dispute between Palestinians and Israeli Jews (Golan 2015).

In the Israeli elections of 2009, after the resignation of Olmert, the rightwing bloc was victorious, and Benjamin Netanyahu began several terms as prime minister. For 12 years, the head of the political pyramid had been a prime minister whose worldview expressed the ethos of conflict, and the government formed in 2015 included parties that held a clearly rightwing orientation. For the first time that reference to the establishment of a Palestinian state disappeared from the documents establishing the new coalition. In line with it, he refused to negotiate with Mahmud Abbas, who objected to use of violence in the struggle for Palestinian independence but agreed to security cooperation with Israel.

During the 2000s, a widely based Israeli support for the basic themes of the ethos of conflict (especially, justness of the conflict goals, delegitimization of Palestinians, self-glorification, sense of self-victimhood) became established that blocked any progress in the peace process. In addition, a new identity was developed in the Israeli Jewish society that underlined nationalism, rights to settle West Bank, and religiosity called neo-Zionism. These forces smoothed the failure of the attempt by the United State Secretary of State John Kerry to negotiate conflict resolution in 2013–2014. In addition, they encouraged the violent encounters between Israeli and Lebanon in 2006 and between Israel and Hamas in 2008, 2012 and 2014 that all three of them were initiated by Israel.

The extreme Israeli forces also increased creeping annexation, encouraged confrontation between Jewish settlers and Palestinians and established apartheid (Dugard, Reynolds 2013). In April 2021, the widely respected Human Rights Watch based in the U.S. released a 213-page report titled *A Threshold Crossed* which found that Israeli authorities are committing the crimes against humanity of apartheid and persecution. It claims that the Israeli government perpetuates structural oppression to „maintain the domination of Jewish Israelis over Palestinians in both Israel and the Palestinian territories, where today both groups of people are about equal in size”.

Over the years, the Israeli occupation has had to develop methods of control and surveillance over the Palestinians, using the army, the police, the General Security Services, the Mossad, and the legal system, with the support of the political system, institutions, and formal and informal organizations with enormous resources from many different sources. The solidification of the occupation has involved recruitment of tens of thousands of Palestinian collaborators and informers via deviant methods, demonstrating continual control by force (or as it is sometimes called in IDF orders: „creating a sense of persecution”) and killing Palestinians considered dangerous to the lives of soldiers, policemen, or civilians. It has also entailed assassinate Palestinian leaders and the killing and arrest of children, the use of detention without trials, torture and court hearings,

prevention of entry to the West Bank and refusal of residency permits, collective punishment, home demolition, displacement, roadblocks, and closures. The occupiers confiscate land and private properties, settle even private Palestinian land, demolish houses, expel civil population from their homes and living areas, create a stable sense of insecurity and surveillance using a variety of methods, bureaucratize control, sometimes requiring more than one hundred permits for different requests, supervise population registration, and surveil many aspects of life for the occupied population. Israel has been systematically crushing the space in which the Palestinians live by coveting and taking over territories that do not belong to it through violent means of the Jewish settlers. Every act of resistance to occupation, even nonviolent, has been considered as a threat to Israel and immediately an action is being taken to suppress it (Gordon 2008; Bar-Tal, Schnell 2013; Kretzmer, Ronen 2021; *Israeli occupation of the West Bank*, Wikipedia).

Jewish settlement in the West Bank continued throughout the tenure of all Israeli governments. Thus, by the end of 2023, approximately 490,000 Jews have settled in the West Bank in approximately 127 settlements and over 121 illegal outposts, scattered throughout the entire West Bank, mainly in Area C. In addition, approximately 230,000 Jews live in neighborhoods built in East Jerusalem, which was under Jordanian control until 1967. Israel took over 60% of the West Bank territories with various arguments, such as requirement that the state lands were registered during the British rule, military seizure of territory for security, land expropriation while taking advantage of the lack of clarity in the Ottoman law, and more (Kedar 2001). It should be noted that approximately 2,750,000 Palestinians live in the West Bank, and approximately 350,000 live in East Jerusalem. It is clear today that no government intended to transfer control of the entire West Bank to Palestinian hands. Today, there is no intention to change the status of the occupied territories based on the claim that there is no negotiating partner on the Palestinian side, and many of the right-wing leaders in Israel intend to annex all or part of the West Bank (Bar-Tal 2023). While Mahmud Abbas, the president of the Palestinian Authority, expressed willingness to negotiate a two-state solution, Hamas, which subjected the Gaza Strip to its totalitarian regime, objected to negotiations, refused to recognize the State of Israel and preferred to use violent means to end the occupation.

The Israeli elections of 1 November 2022 were even more extreme: the new government combines very nationalistic, racist and messianic religious political forces. The extreme government that came to power in November 2022, consisted of ultraorthodox parties, national religious party and Likud, initiated in January 2023 a series of steps to limit the democracy in Israel. They included overhaul of the legal system of Israel, limitations on the freedom of mass media, politicization of the governmental civil service and so on. The steps instigated continuous demonstrations of Israeli pro-democratic forces that lasted about 40 weeks. This

development was unavoidable, because occupation by its nature limits democracy and the process of increasing elements of authoritarianism in the regime has been going on for two decades, especially towards the Arab minority citizens of Israel and the dovish Jewish opposition to the occupation.

But, on the 7th of October 2023, a constitutive event took place that shook the world, the Middle East, and especially Israel. On that morning a surprising attack of Hamas occurred on twenty Israeli kibbutzim and towns near the Gaza Strip by thousands of Hamas terrorists and Gaza citizens. They murdered over 1,200 people of all ages (over 800 civilians), wounded, raped, and kidnapped 253 children, women, elderly, men and soldiers, committing inhumane atrocities. Hamas launched thousands of rockets into Israel trying to hurt the civilian population.

Israel immediately began to bomb the Gaza Strip indiscriminately with its over two million residents to eradicate Hamas that can be seen as a collective punishment. On 27 October Israeli troops entered Gaza conquering most of its territory. Over 40,000²⁷ Gazans²⁸ were killed (more than 1.7% of total Gaza population) and additional 8,000 found their death under the rubbles (over 12,500 children and 8,000 women) and over 94,000 were wounded. With ground entrance Israeli military forces lost 340 soldiers and 2,227 of them were injured. About million and 700,000 residents of Gaza became refugees and most of the Gaza area was flattened because of the bombing, bombarding, and shooting. About 80% of the houses were damaged or destroyed in the north of the Gaza Strip and over 60% in all Gaza Strip. Electricity, internet and telecommunication were shut off and there is not enough water. About 90% of Palestinians in Gaza face severe hunger and dozens of thousands suffer from the spread of infectious diseases.

From 23 November there was a humanitarian respite in connection with the exchange of kidnapped prisoners for Palestinian prisoners held in Israeli prisons. Until now 110 children, women and other nationals were released by Palestinian militants (over 100 of the hostages are still left in Gaza and some declared as being dead) and Israel freed 240 prisoners from Israeli prisons, mostly minors and women. The exchanges of prisoners ended on December 4 and the war resumed and has lasted for over 370 days till 21 October, 2024.

Israel is coping now with additional two fronts. In the West Bank appeared violent resistance supporting Gazans. According to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), between 7 October 2023 and 14 October 2024, Israeli forces and Jewish settlers killed approximately 728 Palestinians, including dozens of children.

²⁷ All the numbers were taken from the reports of the United Nations Office for Coordination of Humanitarian Affairs in Gaza (OCHA). All the numbers regarding the war were collected up to 1 September 2024.

²⁸ Over 10,000 were Hamas fighters.

In the north of Israel meanwhile, Hezbollah²⁹ launches attacks a few times a day, in a bid to increase tensions and deter Israel from a ground invasion of Gaza. About 110,000 Lebanese residents of South Lebanon left their villages and moved north. Over 60,000 Israelis, from the southern kibbutzim, lost their homes or were forced to leave them because of the fighting and have become refugees. In addition to this number are added 62,000 residents of the north who also were evacuated. Eventually Israeli military forces entered south Lebanon to expel Hezbollah fighters from the border, after assassinating the leader of the Hezbollah with the top commanders of the organization and injuring thousands of regular fighters. Also the Israeli air force has begun to bomb the southern Lebanon and Beirut, killing over 1,000 civilians.

At the same time, there are violent exchanges directly with Iran. Israeli air strikes in Syria targeted in April 2024 an Iranian consulate killing senior members of the Iran's Revolutionary Guard. Iran retaliated with an attack of rockets and drones on Israel. Subsequently Israel attacked military sites in Iran. Later in October 2024 Israel assassinated in Teheran the head of the Hamas and Iran attacked Israel with rockets and drones. Israel retaliated again.

Regarding the failure of 7 October 2023, all the commanders of the Israeli security forces took responsibility for the failure to detect the signs of the coming attack. But Netanyahu refused to take any responsibility for his failures, even as he practiced a divide-and-rule strategy between the Palestinian authority and Hamas with the intention to prevent two state solution. He authorized the transfer of over a billion dollars from Qatar to Hamas on the assumption that the money will keep Hamas out of violence. He refuses to stop the war and exchange the remaining approximately 100 living kidnapped Israelis in Hamas captivity for Palestinian prisoners.

Israel found itself in a very traumatic situation. There is anguish, stress, bereavement, and grief on the one hand and a wish for revenge, anger and hatred, on the other hand. For the first time in more than 75 years as a state, the most horrific word in the dictionary, „Holocaust“, has become a reality. The state that was established in 1948 on the basis of a slogan „there will never be another Holocaust“ abandoned its citizens to their fate. The Hamas terrorists are likened to Nazis and there is generalization of this label to all Palestinians. Many Israelis demand the razing of the Gaza Strip which means to turn it into Dresden as allied forces did during War World II. The atrocities carried out by Hamas gave a second blow to the peace camp after the events of 2000. Many of the minority who supported a peace process became disappointed, disillusioned as it is called in Israel, with the action of Hamas and the reaction of the Palestinians and their

²⁹ Hezbollah is a Shiite Muslim political party and a militant group based in Lebanon, where its extensive security apparatus, political organization, and social services network have fostered its reputation as „a state within a state“. Founded in the chaos of the fifteen-year Lebanese Civil War, the Iran-backed group is driven by its opposition to Israel and its resistance to Western influence in the Middle East.

supporters around the world. Most Palestinians refrained from condemning the massacre of 7 October or even did not recognize it.

The Gaza war is a third traumatic event to shape consciousness of the Israeli Jews, but while two of them, the 1948 war and the Gaza war pose huge barriers to peacemaking, the 1973 war with Egypt enabled the peaceful conflict resolution with the archenemy at that time. The Gaza war destroyed hopes for building trust with Palestinians and advance any kind of understanding with them. It opened a wound that will be very difficult to heal. Palestinians in the Gaza Strip and the West Bank are equally traumatized as are Jews. For Palestinians, the situation is considered as a continuation of the Nakba (Disaster) of the 1948 war. Some of the families in Gaza are now refugees for the second and third time. According to their view, Israel is preparing to expel them and to build Jewish settlements, as some Israeli leaders demand.

The war started a new phase of conflict between narratives. While Israelis focus on the events of 7 October and ignore the ethnic cleansing that took place afterwards and they do not talk about ongoing brutal occupation, the Palestinians focus on the continuing atrocities committed after 7 October and the immorality of the occupation. Each side not only makes efforts to present a different picture of the events, but also tries to convince the international community of the evilness of the other group and the morality of its own group.

Nobody knows how the war will end. US President Joe Biden, after unequivocally supporting of Israel and providing military help of ammunition, weapons, and 14 billion dollars of assistance, started to press Israel for humanitarian assistance to the people of Gaza. He also proposed a plan for ending the war. But the Prime Minister of Israel Benjamin Netanyahu rejected the plan and instead strives towards a complete victory. He and his coalition have a different understanding of the situation and even during the war the government continued to advance anti-democratic steps, incite the opposition in Israel and pursue preferential policies towards the coalition's sectors, especially the ultraorthodox and Zionist religious segments. The following new assumptions were developed during the regime of Netanyahu by him and his coalition, as I see it:

1. The land of Israel is the exclusive homeland of the Jewish people. It was created there, existed for hundreds of years, and Jewish culture was established within its borders. The Jews were exiled from Israel, returned after great suffering in the diaspora in the hostile world that climaxed with the Holocaust. They built a state that ensures their survival.
2. Jews have the right to settle in every part of their homeland including the Judea, Samaria and the Gaza Strip. These settlements not only constitute a continuation of the Jewish heritage but also provide security to the country. In all these places Israel must be solely responsible for security. Two state solution is unacceptable.

3. Nevertheless, existential danger still threatens the State of Israel and the Jewish nation living in the country. The danger is perpetual, as Israel is surrounded by hostile nations and organizations, with Iran at the head, which will never accept Jewish nationhood in general and specifically, deny the presence of a Jewish state in the region.
4. The military forces of Hamas must be eliminated, and Hamas cannot rule in Gaza. All the pro-Iranian organizations like Hezbollah must be destroyed or at least considerably weakened.
5. The Jewish nation is the sole victim of the conflict.
6. The Palestinian nation does not want a peace agreement that will obligate them to compromise, and as such Palestinian leaders are not partners to a peace process.
7. Military power must be used for deterrence and defense as well as to punish violence. Israel must live by its sword to ensure its existence. However, Israel uses violence only when it has to; maintaining a high level of morality as well as acting in line with international law is a norm in the Israeli army.
8. In addition to being the sole victim of the conflict, the Jewish nation is also a permanent victim of anti-Semitic and anti-Jewish forces in the world that would like to see the eradication of the State of Israel.
9. The state and its army should not be criticized, because it provides ammunition to the Arab enemies of Israel and to anti-Semitism in various countries. In addition, it impairs morale, mobilization and the ability to stand up to the enemy.

With these premises the State of Israel is condemned to maintain the occupation and with it the conflict for years to come. These premises are shared by the majority of the Israeli Jews (about 70%) and by most of the leaders who will take the place of Netanyahu. Most of the Israeli Jews prefer today the continuation of the present occupation or the annexation of occupied territory and only about 20% prefer a two-state solution, which means establishment of the demilitarized Palestinian state.

■ CONCLUSIONS

When writing this essay, I tried to present a particular perspective from which I see the development and a course of this conflict. Nevertheless, a lot has been published on this confrontation, including a lot of disinformation, because in addition to violence, both sides are engaged in a narrative fight to convince their own side of the validity of their own goals and delegitimize the rival (Slater 2023). Moreover, there is a serious attempt to convince the international community with the same arguments (Oren, Nets-Zehngut, Bar-Tal 2015).

The Jewish population with 1948 war, 1967 war, 1982 war, and 2023 war – four wars, with two Palestinian rebellions, only extremized their view on a peaceful solution of the conflict (Maoz 2009). All Israeli governments contributed to expanding and solidification of the Jewish settlement project in the occupied territories. Until the Gaza war, the great majority of the Israeli Jews had learned to live „without the occupation”,

not acknowledging it, in denial and repression, in a kind of comfort zone. Meanwhile, brutal Palestinian occupation persists in the occupied territories and institutionalized apartheid has developed. The Gaza war spoiled the feeling of comfort. It extended considerably the feeling of victimhood among Jews that had plagued the nation even after the establishment of the state, with the Holocaust serving as a chosen trauma.

The fundamental challenges that face rivals, like Israeli Jews and Palestinians, in an intractable conflict, beyond the ones noted with the development of culture of conflict, are the inability of the rivals to look at the mirror and the inability to take the perspective of the rival.

Today it is difficult to predict the future, when the conflict will peacefully end, because Palestinians and Jews will not go anywhere else, and their violence is very costly for both sides. The intractable conflict with its escalation and institutionalization necessarily brought authoritarian regime to Israel that is seen today as an electoral democracy with all its limitations rather than liberal democracy³⁰. It is very difficult to foresee the change that would come from within the Israeli society. The two state solution is resisted by the leadership and most of the Jewish society members. A one state solution with limited civil rights for Palestinians will bring a full regime of apartheid across Israel and giving Palestinians full rights will destroy the Zionist dream of having a Jewish state. Thus, we are stuck... Ethnic cleansing of 1948 is a dream of some political forces in Israel.

Only pressure from the outside world, especially the US, can bring peace making. This situation can develop similarly to where white South Africa stood before 1990. However the position of the Western countries is difficult to predict because they are engulfed by realpolitik considerations, which take into account geopolitical conditions and interests of the states, rather than moral and humanitarian aspects. But the public may press the politicians to accept policies in line with international law, human rights, and morality. Hard to know!!!

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³⁰ <https://www.v-dem.net/data/the-v-dem-dataset/>.

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DANIEL BAR-TAL

A NARRATIVE OF THE JEWISH-PALESTINIAN CONFLICT: ISRAELI-JEWISH ACADEMIC VERSION – WHY? AND HOW?

The article tries to shed light on the following three questions: what were the goals of the Jewish Zionist leaders in the conflict with Palestinians? What was the process of breaking out the conflict between Jews and Palestinians? What was the conflict over the years? The answers come from Jewish Israelis, which I analyze based on the academic literature. The well-defined idea to settle Jews in their old homeland appeared with the emergence of Zionism. It was a revolutionary ideology since Jews left/were expelled from their country about 2000 years ago. But there was one problem that stood as a barrier. There were Palestinians living in the same place, some for centuries, who also began to develop their nationalism. This fact opened an intractable conflict between Jews and Palestinians that had lasted for over a hundred years until present time. The article points out to the most important events and processes that shaped the conflict from escalation to de-escalation and again to re-escalation.

Keywords: Israel; Israeli-Palestinian conflict; narrative; history

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THE PSYCHO-POLITICAL AND STRATEGIC CAUSES AND RAMIFICATIONS OF THE 2023–2024 ISRAELI-PALESTINIAN WAR: A CRITICAL PERSPECTIVE^{2, 3}

The Israeli-Palestinian conflict is over one hundred years old. It has been undergoing significant shifts since the 1990s. The relations between the two sides have been shifting between peace accords and several cycles of vicious violence. Since October 7th, 2023, a turning point occurred in the relationship between the two sides. The violent exchange, which started on October 7th, 2023, marks a watershed that seems to make the conflict even more intractable than it has been so far. The sudden, surprising, and unprecedented Palestinian attack on Israel caused hundreds of deaths and injuries in one day. It entailed atrocities, human rights violations, and humiliation of basic human dignity. From a strategic point of view, this was the first time that the Palestinians gained a unique strategic success by surprising the Israeli intelligence, landing a blow to the strongest army in the region, occupying Israeli territories for hours, and causing an unprecedented number of casualties that left most if not all Israelis in shock, grief, rage, and humiliation. The besieged Palestinians of Gaza, especially the hegemonic power Hamas, managed to establish a military might that posed a strategic threat on Israel. This reality, which was created with the indirect help of the Israeli government, especially the government of Benjamin Netanyahu, has led to Israel's subsequent ruthless war in the Gaza Strip. The Israeli longest war has led to the killing of tens of thousands, most of whom are innocent civilians, and the devastation of hundreds of thousands of residential buildings, leaving their inhabitants without shelter. The Israeli brutal

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² It is important to note that this article was submitted for publication while the war was still ongoing in October 2024.

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tactics in the Gaza Strip are also shocking, painful, infuriating, and exasperating. The conduct of the Israeli security forces is in magnitude and scale not seen before. As a result, this war is expected to have a long-standing psycho-political impact on both sides' future behavior and considerations, not that previous painful events have been missing between the two sides.

When going beyond the human suffering, to the extent that is possible, aiming to think about the strategic dimensions of this war, especially its causes, reasoning, goals, and implications, one is obliged first to consider when and how it began and whether it is possible to disconnect it from a more profound development on both sides in the last couple of decades. That said, many questions come to mind when seeking to explain this war and provide some logic to its timing, causes, reasonings, and implications. Although it is hard to answer many questions about the October 7th war, it is possible to tackle some of them, such as the one, why did the Palestinians attack Israel at a time when Israel is ruled by the most extreme nationalistic government in its history, being aware of the disproportionate balance of power and a harsh retaliation that could be expected? Another set of questions that come to mind are: What are the goals of Hamas and its allies? Why did the Israeli army fail to prevent the attack despite the existence of sufficient intelligence about the intentions and training of Hamas soldiers? Why did Israel retaliate in the way it did, and what are the objectives the government is seeking to achieve? What is this war's strategic meaning, and what are its possible ramifications for the two sides and the region?

This article aims to answer some of these questions by providing a psycho-political and strategic analysis of the timing, causes, and reasonings behind this war, while locating it in its regional and international context. For that purpose, the following analysis goes beyond simple framing of current events, arguing that wars are always an integral component of a system composed of a balance of power between multiple players (Waltz 1979; Wagner 2007). Accordingly, wars are never only local and motivated by the will of a particular player, even when players have a central role in their instigation (Gilpin 1981; Walt 1987; Dierauer 2013; Mann 2023). As we shall demonstrate, they result from polarity in a regional and international system of power in which players seek to either maintain the status quo or change it to their advantage (Mearsheimer 2001). That given, when seeking an explanation for a particular war, it is necessary to bring together all its causes and look at how local, regional, and international factors play in a systemic power structure rather than just agent-based structure.

Notwithstanding the causes, war entails a hierarchy of suffering, according to which the suffering of one's side is always more valued and counted than the sufferings of others. Therefore, we must consider the psycho-social dimensions of wars to understand them better (Payne 2015). The hierarchy of suffering has strategic ramifications, especially when we consider the immediate relationship between suffering

and humiliation, and the urge of human beings to retaliate or take revenge (Zabad 2019). The politics of feelings is a pivotal factor in why war continues to characterize human societies and those that have experienced enlightenment, modernization, and cultural elevation (Nussbaum 2003). The brutality and devastation of the October 7th war challenge the argument that the level of human damage resulting from wars has been markedly reduced in modern societies compared to pre-modern societies (Pinker 2013). The enduring amount of human suffering necessitates thinking about the causes, reasoning, and ramifications of wars (Mann 2023).

The following analysis demonstrates that it is the profound interrelationship between internal developments on both sides of the conflict on the one hand and regional and international polarization on the other that provides the reasoning behind the tragic events of October 7th, 2023. It is the rise of messianic nationalism in Israel and its occupation of the highest ranks in government and partially the security forces and simultaneously the upsurge of fundamental religious forces, especially Hamas and Islamic Jihad, in Palestinian society, that took over the Gaza Strip and launched a liberation struggle against Israel that constitute the local deep causes of the October 7th war. These internal developments have led to new attrition wars between the two sides, sidelining moderate forces that could have facilitated a more peaceful communication between the two sides (Ben-Ami 2022). Although the impact of the sides on the conflict is incomparable, it is the antagonistic developments within them that have led to the October 7th explosion. These internal developments are negatively dialectical, especially given the fact that Israel was an important active player behind the rising power of Hamas, aiming to weaken the Palestinian Authority (PA) as an officially recognized representative of the Palestinian cause and thereby to avoid negotiations based on former peace agreements with it. At the regional and international level, one must consider the efforts made by the subsequent US administrations and its allies in Europe to promote normalization of relations between what they have defined as moderate Arab states and Israel, thereby accepting the Israeli strategy of sidelining the Palestinians, sustaining the occupation of the West Bank and the siege of Gaza, and disregarding their aspirations for liberation and statehood.

In other words, the following analysis shows that contextualizing historically and strategically the Hamas attack of October 7th is indispensable to understand where it came from and why. Unlike some viewpoints, mainly in Israel, which claim that contextualizing the Palestinian attack is a form of relativization or justification⁴, the following analysis shows that it is another cycle of violence, albeit more brutal, that has been caused as a result of long-standing causes. Contextualizing this war, going

⁴ Eva Illouz has argued that the contextualization made by Judith Butler of the October 7th events may sound like justifying them. See: https://www.lemonde.fr/en/opinion/article/2024/03/16/eva-illouz-judith-butler-s-remarks-on-hamas-remind-us-that-intellectuals-too-can-indulge-in-deception_6624620_23.html.

beyond the official discourse of the parties involved enables us to avoid the trap of the propaganda war and provide comprehensive answers to part of the questions raised above. The contextualization of grand events in the psyche and memory of the two sides is of great epistemological and ethical importance (Stocking 1993), allowing us to better understand the players' behavior and strategic goals without belittling the tremendous human suffering and pain. Contextualization means path-dependent analysis and process tracking (Goertz, Mahoney 2012), following what has been recommended by many philosophers of social science. Therefore, we seek to meticulously trace the steps taken by all sides, deconstructing their initial intentions, behavior and what they thought they would achieve as a result. Furthermore, contextualizing the October 7th war condition our ability to better understand the causes, reasoning and intended strategic and regional goals of the sides (Hesselgrave, Rommen 2013). It helps in providing a partial explanation of the reasons behind its breakout, its brutality and ruthlessness, the falling astray of many Israeli misconceptions and prejudices regarding the daring and capacity of the Palestinians in Gaza, and the black holes in the Israeli defense strategy that allowed the fighting to last so long. Looking at the broader context of the October 7th war also helps us clarify, why the unfolding reality's severity has a deep regional foundation and therefore necessitates a different pattern of international intervention if we are to avoid future cycles of violence (Tannam 2014; Spitka 2016; Huber 2021).

Furthermore, the following analysis demonstrates that the brutality of this war has to do with deep psycho-social processes taking place in Israeli and Palestinian societies and therefore necessitates impartial and fair international brokers to shift the course of history and give both peoples some hope for a better future (Mihaylova, Ezekiel 2023). The human suffering and pain this conflict is causing will unfortunately continue unless the structured bias in the involvement of external players, especially the US and its allies, changes. This means that they will morally and practically cease the long-standing double standard politics they practice and ethically and practically balance the asymmetry of power between the two sides of the conflict, not only to bring them to the negotiating table, but also to agree on the principles on which the institutional solution is to be promoted. Confirming the use of excessive violence by the powerful side to determine the wished-for solution one-sidedly is not and cannot be the way to deal with the roots of the conflict and deconstruct the causes of its intractability.

■ THE BEGINNINGS AND THE PROLONGED NAKBA

Making the argument that timing is an important factor in understanding the October 7th, 2023 Israeli-Palestinian war challenges attempts to decontextualize it and frame it as if it were the beginning of the conflict between the two sides. This

war, while unprecedented and initiated by radical Palestinians, is not the conflict's inception or a sudden eruption. It is another phase in the national clash that started when Zionist Jews, mainly from Europe, began immigrating to Palestine, seeking to establish a national home in a land already inhabited by native Palestinians (Beit Hallahmi 1993; Morris 2008; Tessler 2009; Masalha 2018; Khalidi 2020). The meeting between immigrant Jews and indigenous Palestinians was conflictual from the beginning (Gorny 1983; Bernstein 2000; Segev 2001). The Jewish immigrants did not come to the land with good faith and have so far continued expanding their "lebensraum" in territories inhabited by Palestinians (Schoenman 1988). Although Jews have had justifications for their immigration to Palestine and the superpowers of the time have had strategic reasons for supporting this historical transformation (Halpern 1987; Gendzier 2016), from the standpoint of the innocent Palestinians, they were the victims of a foreign colonial project that compromised their right to a state of their own in their homeland (Sayegh 1965; Said 1980; Muslih 1988; Karmi 2007). This conviction was backed by the fact that the British mandatory government provided support and backing to the Zionist institutions and did everything possible to suppress Palestinians' ability to build their institutions while opposing their plans to organize and train their military power to defend themselves (Jung 2004; Bunton 2007). The Palestinians did not have the diplomatic wisdom necessary in the early decades of the twentieth century to face the growing challenge with political means. They engaged in an armed conflict with the well-equipped Israeli army units. This military engagement has led to the Palestinian Nakba, in which hundreds of thousands of Palestinians became refugees either in the West Bank and Gaza or in neighboring Arab states (Pappe 2006; Masalha 2012).

The continuous efforts made by the Palestinians to undo, at least partially, the consequences of the 1948–1949 Nakba and the expansionist settler policies of the Israeli state keep the flames of war burning. For the Palestinians, the Nakba is a tragic event that is unfolding since 1948–1949 (Sa'di, Abu-Lughod 2007). The fact that most Palestinian refugees still reside in camps around the state of Israel, whether on Palestinian territory in the West Bank (occupied by the Jordanian Army in 1948 until 1967), the Gaza Strip (occupied by the Egyptian army in the same years), or in neighboring Arab countries, such as Lebanon and Syria, feeds their aspirations for liberation and statehood (Makdisi 2008). Therefore, for them, the Nakba, manifested in their expulsion from their land in 1948, is ongoing (Sa'di, Abu-Lughod 2007; Allan 2021). They remain occupied, controlled, and oppressed, with the help of the US and its allies, who veto every Palestinian effort to gain liberation and independence, whether by military or peaceful means.

Contrary to Palestinian national aspirations for self-determination, Israel, with the full support of Western powers, was able to gain independence and use its military power to expand into a settler colonial project (Masalha 2000). In 1967, the IDF's „Iron Wall” strategic policy led to the occupation of the West Bank and

the Gaza Strip, resulting in a second wave of expulsion of Palestinians from their homes and placing hundreds of thousands – 1948 refugees and local inhabitants – under Israeli military occupation until today (Brenner 1984, Bilski Ben-Hur 1993; Shafir 2017; Khalidi 2020; Ben-Joseph 2024). Palestinians have been experiencing a continuous Israeli engineering of their demographic and geographic landscape and therefore perceive this situation as a continuation of the Nakba (Samman 2013; Allan 2021). The Israeli settler colonial policies since 1967 have confirmed their suspicions regarding the Jewish state's real intentions, namely putting a hand on the entire territory between the Jordan River and the Mediterranean Sea and looking for an opportunity to fully expel them from the entire area (Weizman 2007, 2016; Zureik 2016; Shafir 2017). Many Palestinians believe that their opposition to the partition plan of 1947 was justified, as it is impossible to live with the expansionist nature of colonial Zionism (Khalidi 2007; Safty 2009). The construction of hundreds of Jewish settlements in densely populated Palestinian areas in the West Bank, aiming at Judaizing the territory, provides daily evidence of their right to resist the takeover of their homeland (Allan 2021).

The literature on war shows that it is challenging to endure injustice without resisting it (Finlay 2015; Mann 2023). Resistance can be an attempt to restore lost rights and resources, but it can also seek revenge (Waldron 2010; Zabad 2019). Palestinians, who have been expelled from their homeland, living as refugees and poorly treated by inefficient authoritarian Arab regimes, have become determined to resist the injustice done to them (Sayigh 2004). They gradually realized that they were the only ones who could liberate their homeland and change the power balance with Israel (Said 1980). The Israeli occupation has led to a new consciousness among young Palestinian leaders, who sought new strategies to keep their aspirations for liberation and statehood alive (Sayigh 1979, 2004). Different resistance organizations have emerged, part of which, such as the Fatah movement, have abandoned armed struggle and chosen diplomatic means instead, and other parts, such as Hamas and Islamic Jihad, who continued to oppose recognizing the right of the Israeli state as Jewish state to exist and utilize military strategy to struggle for liberation and independence.

A major rationalizing argument behind the Palestinian struggle for liberation and statehood is not only the suffering and misery of refugees and other Palestinians under occupation. It is also the injustice embedded in the right of the Zionist movement to have claimed a homeland the Jewish people arguably lost two thousand years ago and have the right to it, while the right of the Palestinians to be entitled to their homeland that they lost seventy-five years ago is not recognized. This injustice, which is not a mere ethical argument, as a result of the Israeli uninterrupted policies of territorial expansion and settlement in the Palestinian territories occupied in 1967, in contradiction to article 49 of the Geneva Convention and considered illegal by all international organizations and Israel's allies, is

intolerable for most of Palestinians and keeps the flame of conflict alive. This is true no matter whether the Palestinian aspiration for liberation and statehood is carried out under the banner of secular nationalism, willing to compromise for a mini-Palestinian state in the West Bank and the Gaza Strip, or under an Islamic banner, considering the entire land of Palestine holy that cannot be compromised.

Most Israeli governments have continued to promote strategic plans that involve building infrastructures, roads, electricity, water supply systems, and settlements in the West Bank and in the Gaza Strip. The objective has been to gain greater control and tighten its grip over the entire territory of historic Palestine (Gordon 2008; Weizman 2016; Shafir 2017). To enhance the domination and control of these territories, Israeli governments have sought to deepen the divisions between different Palestinian communities, aiming to abolish a common Palestinian identity, sentiment, and aspiration (Lentin 2008). This has been true for all five main components of Palestinian communities: citizens of Israel (approximately 1.7 million), residents of the West Bank (around 3 million), residents of the Gaza Strip (about 2.2 million), people living in surrounding Arab countries, particularly in Lebanon (around 1 million), and those residing in other Arab and Western countries (around 3 million).

Israel has devised advanced military, economic, and diplomatic strategies to portray itself as the victim and to reduce the Palestinian issue to a conflict between a liberal, progressive Western state and terrorist movements that must be defeated. Palestinian attempts to gain recognition as a people entitled to liberation, independence, and the resolution of the refugee problem have been mostly met with firm Israeli objections or manipulations aimed at dissolving peaceful agreements, also when such agreements were signed (Kimmerling 2003; Hussein 2015; Raz 2024).

This brief overview of the conflict's roots does not provide us with all the details, but it does demonstrate that the brutal war that erupted on October 7th, 2023 is a continuation of a conflict that began decades ago. It also shows that the collaboration between Israel and the current world superpower, along with its allies, is a repetition of the pattern that Palestinians have had to face since the beginning of the conflict. The fact that the US, the UK and Germany have been supplying Israel with weapons to conduct its operations in the Gaza Strip is a reminder to Palestinians of what has happened since 1948 and before, and is, therefore, relevant in understanding the sentiments driving the current situation, even when we fully agree that not all means are legitimate in the struggle for liberation and statehood.

■ THE MOMENT OF APPEASEMENT AND ITS SYSTEMATIC IMPAIRMENT

Israeli-Palestinian relations underwent tremendous transformations. These included partial appeasement, which led to the signing of the Oslo Accord in 1993 and the establishing of the Palestinian Authority (PA) in the Gaza Strip and parts

of the West Bank. Although these agreements led to de-escalation and some co-operation between the two sides, the peace process has been impaired by spoilers on both sides (Ben-Ami 2022). The Israeli government faced strong internal opposition that led to the assassination of the main broker of the peace process, namely Prime Minister Yitzhak Rabin on 5 November 1995. On the Palestinian side, Hamas and Islamic Jihad challenged the Fatah movement, which dominated the PA (Shanzer 2008). They utilized armed clashes and conducted terrorist attacks in Israeli civilian areas to sabotage the PA's willingness to accept compromising part of Palestine for the sake of national independence on parts of it (Brown 2003). These brutal armed operations, which culminated into the second Palestinian intifada in the summer of 2000 and terrorized the Israeli civilian population, have led to nationalist radicalization in Israeli society and brought the Likud party under the leadership of Ariel Sharon back to power in 2001. Sharon, who opposed the Oslo appeasement process, had to accept the diplomatic status quo. Nonetheless, he and the Chief of Staff of the Israeli army at the time, Shaul Mofaz, began initiating crucial moves that aimed at promoting the divide-and-conquer strategy of the Israeli political and military establishment at the time (Kimmerling 2003).

Sharon's strategy was based on deepening the divisions between the Palestinians, mainly those in the West Bank and those in Gaza. He began discrediting Arafat's leadership, accusing him of supporting terrorist attacks in Israeli cities. In 2002–2003, he led a destructive military operation called „Defensive Shield” in the West Bank, which intended to weaken the PA and its leadership. He placed Arafat under siege and although there is no clear-cut evidence, he has been suspected to have encouraged ending Arafat's life in a very mysterious form.

In 2005, Sharon decided to unilaterally withdraw from Gaza and evacuate all the Israeli settlements there. His plan was introduced as an attempt to show Israel's willingness to compromise with the Palestinians. At the time, Arafat's successor, Mahmoud Abbas (Abu Mazen), and his leadership were unable to prevent terror attacks on Israeli cities and towns. Although Sharon faced strong opposition from within his political party, the Likud, when promoting the withdrawal plan, and even though he was accused of betraying national values, he was convinced that it would serve best Israeli national security strategy (Landau 2014). His difficulty in gaining a majority to support his plan within his party led him to form a new party called Kadima and start preparing for elections to regain the support of the Israeli public. On 4 January 2006, he suffered a hemorrhagic brain stroke that left him in a coma until he died in 2014. His deputy, Ehud Olmert, replaced him as the head of the Kadima party and won the Israeli elections on 28 March 2006 against Benjamin Netanyahu's Likud and Amir Peretz's Labor.

After Israel withdrew from the Gaza Strip in the summer of 2005, the US administration urged the Israeli government to hold elections in the Palestinian

territories. The reason was that the elected leadership of the Palestinian Authority, which had been in power since 1996, had lost the people's trust and needed to renew it through new elections. The Olmert government agreed to allow Hamas to participate in the elections on a list called Change and Reform. One of the hidden reasons for allowing Hamas to participate was to pressure them into accepting the Oslo Accords and joining the PLO, which did not happen (Charrett 2019). Hamas ended up winning a majority in the parliamentary elections but faced obstacles in forming a government due to its refusal to recognize the commitments made by the PA towards Israel. Israel and the US put pressure on the Palestinian Authority president, causing a delay in the transfer of power to the newly elected majority (Brenner 2017). These obstacles led Hamas to take control of the Gaza Strip, ousting PA officials from their offices (Hilal 2007; Lybarger 2007). This violent strategy has resulted in an ongoing division among Palestinians, allowing the Israeli government to exploit internal Palestinian divisions and to maintain the status quo (Schanzer 2008; Singh 2021).

The unsuccessful negotiations between the Olmert government and the PA from 2006 to 2009 provided more proof to an increasing number of Israelis that they were not responsible for the inability to reach a fair agreement with the Palestinians (Mitchell, Sachar 2016). Conservative nationalists, including the settler movement and many Israelis who support peace, turned their back on the Palestinian issue, leaving the Palestinians to suffer under oppressive conditions (Del Sarto 2017). Most Israelis' stance indirectly supported a military policy that sought to destroy any Palestinian resistance to Israeli control. As a result, surveillance and sudden military operations to target militant organizations or assassinate their leaders, known in Israeli military jargon as „mowing the lawn”, have become a prevalent concept among security forces. This policy aimed to deter Palestinians from undertaking resistance actions and to prevent pressure on the political leadership while continuing negotiations with the PA. Although the negotiations were ineffective, they convinced most Israelis that they were just and reasonable and that the Palestinians were entirely to blame for their grim reality under direct occupation in the West Bank and the siege in Gaza (Bar-Tal 2023).

After his return to power as Prime Minister of Israel in 2009, Benjamin Netanyahu made a significant change to the country's diplomatic efforts. As a result, all the efforts made between 2006 and 2009 by then Prime Minister Ehud Olmert and PA President Mahmud Abbas failed. Netanyahu exploited the differences between the PA in the West Bank and Hamas in the Gaza Strip, arguing that since the PA does not represent all Palestinians and Hamas does not recognize Israel, it makes no sense to negotiate with the Palestinians. To support this theory, Netanyahu encouraged the policy of nurturing Hamas by allowing large amounts of cash from Qatar to flow into Gaza to pay the salaries of the security forces and the government administration

(Bar-Joseph 2024; Raz 2024)⁵. Prior to the Hamas attack on October 7th, the Israeli government used the excuse of either tempting Hamas to seek pragmatic ways to survive and thereby moderate its enmity with Israel or provide a reason not to negotiate with the PA, as they could not guarantee that all Palestinians would accept and respect agreements reached with Israel. One of the key components of Netanyahu's policy was to bolster Hamas' control over Gaza, which absolves Israel of responsibility for the territory while simultaneously tightening the siege that has been in place since 2007. The siege, along with the funds provided by Qatar, enabled Hamas and other resistance groups to build their military capabilities, including developing missile technology that allows them to launch attacks on Israeli towns in the south during times of conflict. Netanyahu, with the backing of radical nationalist groups in Israeli society, utilized the Hamas and Islamic Jihad attacks to sideline all Palestinians. He has argued that the common perception that resolving the conflict with the Palestinians is a precondition for normalizing Israel's relations with what he coined as moderate Arab states should be turned upside down. According to him, peace with „moderate Arab states” is possible and is the right way to reach solution to the conflict with the Palestinians. The Abraham Accords, promoted under the auspices of the Trump Administration, were a clear result of this strategy.

To reach this point, the Israeli army has engaged in several military clashes with Hamas. The clashes of 2006, 2008, 2012, 2014, and 2021 gradually made Hamas the most prominent Palestinian player in the conflict, thereby marginalizing the PA. Netanyahu's strategy has shifted the world's attention towards the state of war rather than the peace process between Israelis and Palestinians. This shift was a part of Netanyahu's strategy to maintain control over Gaza and ensure that life goes on there without having to pay a heavy price on the economic-military or diplomatic-international levels. It has fed the mutual suspicion between the PA and Hamas, blocking all efforts to form a unity government that could represent the entire Palestinian people in the struggle for liberation and independence (Singh 2021). Beyond the ideological differences between the two movements, the PA, entirely dependent on the Western support, demanded that Hamas fully recognize the legal commitments made toward Israel and submit to a diplomatic track that would void its military capability. This demand, imposed by Israel with American support, made reconciliation between them impossible (Baconi 2018). As a result, the commitments towards and loyalty to regional and international camps occupied the Palestinian agenda (Khalidi 2013). The PA has been closely affiliated with the American coalition and what has become known as the „moderate” Arab states, such as Egypt and Saudi Arabia. At the same time, Hamas was backed by the „resistance” camp of Iran and Syria, indirectly supported by Turkey and Qatar. Although this constellation made the

⁵ Tal Scheider, *For Years, Netanyahu Propped up Hamas: Now it's Blown up in Our Faces*, „Times of Israel”, 8.10.2023, <https://www.timesofisrael.com/for-years-netanyahu-propped-up-hamas-now-its-blown-up-in-our-faces/>.

Palestinians an important issue in the regional power games, their policies became wholly dependent on foreign powers' interests and political will. The balances of power within the regional system became a crucial factor determining the behavior of the Palestinian political actors, especially the PA, Hamas and Islamic Jihad. The encounter between the latter and Israel has become determined by external regional changes not less than from internal dynamics within each of them.

■ SIDELINING THE PALESTINIANS AND THE OCTOBER 7TH WAR

The complex situation in the region, particularly in Palestine, helps us understand the cause and motive behind the attack on Israel on October 7th. Israel's policies in the region are deeply connected to this attack, as stated by Prime Minister Netanyahu himself on multiple occasions. He admitted to undermining the Oslo Accords and opposing the establishment of a Palestinian state⁶. Netanyahu's diplomatic strategy has been turning negotiations on the terms of the negotiations as the primary engagement with the Palestinians. Simultaneously, he has been working to sideline the Palestinians and establish relationships with the Arab states. As a result, the Israeli strategy, with the rise of nationalist right-wing movements in Israel, has shifted from managing the conflict to shrinking it⁷ (Raz 2024). This change reflects a growing belief that Israel does not need to wait for the Palestinians to agree to its conditions for peace. Instead, it can bypass them to achieve normalization and peace with the „moderate” Arab states (Shindler 2015). To justify the normalization of Israel's relations with Arab states, Netanyahu employed a strategy of imposing conditions that he knows the Palestinians cannot accept, while simultaneously accusing them of obstructing peace in the Middle East.

However, this strategy is not solely based on strategic insight but is also rooted in political interests related to extensive shifts in Israeli Jewish society. To fully understand this strategy, it is important to consider both the internal socio-political changes taking place in Israeli Jewish society, and the rapidly shifting regional conditions resulting from the instability in many republican Arab states during the Arab Spring, the rising regional power of Iran, and the fears of Arab monarchies for their security and stability. We will discuss each factor separately before demonstrating how they have influenced each other.

- I. The internal social shifts in Israel, particularly the rise of conservative nationalist segments of society, have been ongoing for a long time (Shindler 2015). However, they became more evident after the turn of the millennium when the conservative

⁶ Kirti Pandey, *Netanyahu on Oslo Accords: I'm Proud I Blocked a Palestinian State*, „Times”, 17.10.2023, <https://www.timesnownews.com/world/netanyahu-on-oslo-accords-im-proud-i-blocked-a-palestinian-state-looking-at-gaza-article-106066583>.

⁷ The Israeli official stand is that the conflict should be narrowed to economic and administrative issues rather than about national aspirations, territorial control and mutual security guarantees.

neo-Zionist forces, along with nationalist-religious segments, such as the settlers in the West Bank, started seeking control after the second Palestinian Intifada and the withdrawal from Gaza (Del Sarto 2017). For space reasons, we will discuss two central changes in Israeli society through two related phenomena. The first is what Israeli scholars refer to as the „religionization” of society and the theocratization of the Israeli army (Levy 2013; Peled, Herman-Peled 2018). There has been a noticeable increase in religious, nationalistic, and hawkish individuals in public institutions, such as the media, the civil service, and the security forces. This rise in numbers has resulted in the promotion of national-religious policies in all aspects of life, including the expansion of settlements in the occupied West Bank and an uncompromising stance towards the Palestinians. This shift in ideology is the reason behind the Likud party’s dominance in the Israeli political system. Without the Likud, no governing coalition could have been formed between 2009 and 2019. The party has maintained its dominance since the elections in November 2021. It is expected to continue until the next election, which is planned to take place in October 2026.

The second significant shift in this context is related to the increasing influence of nationalist social and political forces, which has resulted in the weakening of public institutions such as the civil service, the judicial authority, academia, and the media system (Hazan et al. 2021). This process cannot be detailed in full. However, it is worth noting that Netanyahu has attempted to control various central media outlets, including the public service, the viral news website Walla, the popular daily „Yediot Aharonot”, and the daily „Yisrael Hayom”. These efforts have led to Netanyahu’s indictment in three different criminal cases. Another manifestation of this process is the judicial reform introduced by Netanyahu’s 6th government in January 2023⁸. The reform aims to undermine the horizontal accountability prevalent in Israel’s constitutional tradition. This effort has led to extensive opposition, with hundreds of thousands of people taking to the streets to protest the weakening of the judiciary and establishing an authoritarian democracy.

The following two processes are connected. They are the root causes of political instability in Israel. The same processes are also behind the delegitimization of anyone, including former prime ministers, ministers of defense, chiefs of staff, and many other officials, if they support policies that are contrary to the policies of dominant nationalistic leadership. This is especially true if it concerns expressing views that speak of reconciliation with the Palestinians. The internal split within Israel was one of the motivating factors behind the timing of the October 7th attack⁹.

⁸ For more details on the reform see: <https://en.idi.org.il/tags-en/47383>.

⁹ Paul Adrian Raymond, *Fighting Hamas Puts Israeli Protesters on Ice, but Political Divide Remains*, „Al-Jazeera”, 9.10.2023, <https://www.aljazeera.com/features/2023/10/9/fighting-hamas-puts-israeli-protests-on-ice-but-political-divide-remains>.

II. The instability in many Arab states during the Arab Spring, particularly in Egypt and Syria, caused significant regional shifts (Brownlee, Masoud, Reynolds 2015). This period saw public upheavals in many autocratic Arab republics, resulting in a battle between the primarily secular elites and those affiliated with the security services and opposition religious movements, specifically the Muslim Brotherhood (*ibidem*). The resulting instability in several states, particularly Libya and Syria, was exploited by radical Islamist movements, such as Al-Qaeda and the Islamic State (ISIS/Daesh), to launch attacks and wage wars against the regimes. Between 2010 and 2020, a significant regional shift allowed countries like Turkey, Iran, and Israel to promote their interests and gain more power in the region. The growing influence of Iran and its nuclear program caused concern for many Arab regimes, particularly those that had managed to avoid public protests and instability, such as Bahrain, the United Arab Emirates, and Saudi Arabia. Additionally, in many Arab Sunni states, there are Shia minorities that show loyalty to Iran, making them important players in the regional power struggle. The instability in several Arab states, including Egypt, Tunisia, Libya, Yemen, and Syria, made them vulnerable to social forces that sought to overthrow the regimes in the name of democratization. This process is closely tied to the American strategy of promoting democracy in the Arab region (Diamond 2008). This strategy, initially supported by the George W. Bush administration and later by the Barack Obama administration, led to significant tensions with moderate Sunni states, including Saudi Arabia. The emergence of fundamentalist Sunni groups in the region transformed it into a battleground between pro-American and anti-American forces. Iran was at the forefront of radicalization in this regional dynamic.

Israeli Prime Minister Benjamin Netanyahu was particularly effective in persuading the Trump administration to withdraw from the nuclear agreement with Iran. At the same time, Netanyahu emphasized the emerging areas of interest with Arab monarchies, who were concerned about their stability and sought new coalitions to counter the rising influence of Iran in the region. This dynamic was evidenced by the Abraham accords with the UAE and Bahrain, a normalization agreement with Sudan in October 2020, and Morocco in December of the same year.

The dialectical relationship between the internal and external processes discussed above has strengthened Israel's belief that its strategy towards the Palestinians is correct. Netanyahu believes that instead of seeking a resolution of the conflict with the Palestinians as a precondition for normalizing relations with Arab states, it should be the opposite. Israel should pursue normalization with moderate Arab states to allow for a genuine treatment of the conflict with the Palestinians. This change in priorities is a rational move, as it takes advantage of the rising tensions between Iran and neighboring pro-American Arab states to shift the balance of power in the region. The Trump administration adopted

this new regional policy, which was heavily influenced by the strategic alliance between Israeli conservatives and the Evangelical establishment in the US (Del Sarto 2017).

Netanyahu's success in normalizing relations with several Arab states has led to Netanyahu's and Trump's unwillingness to accept any compromise with the Palestinians. The Trump peace plan, which echoes the rhetoric of the settler movement, aims to maintain Israel's historical policies of territorial expansion and settlements in the Occupied Palestinian Territories. The plan shares the neo-Zionist belief that the West Bank is not only an integral part of the Jewish homeland but also a strategic area for Israel's security. This view stems from Israel's experience with what has been coined as the establishment of „Hamastan” in Gaza after the Israeli withdrawal in 2005. The plan also includes significant changes, such as the relocation of the American embassy to Jerusalem and the recognition of Israeli annexation of the occupied Syrian Golan Heights.

In summary, the Abraham peace accords, which emerged during the Trump administration, have assisted in sidelining the Palestinian cause. Netanyahu, in full coordination and cooperation with the Trump administration, has imposed extreme conditions on the Palestinians, making it almost impossible for them to receive any redress for their grievances. This did not change much under the Biden administration, which continued to promote normalization between Israel and the Arab states, particularly Saudi Arabia, following Netanyahu's strategy. Although the Saudis have stated that the Palestinians must be integrated into any appeasement process between the kingdom and Israel, they were only referring to the PA and not to all Palestinians. The Israeli government does not seem interested in engaging in a peace process that could jeopardize its stability. In May 2021, Israel intensified its crackdown on Gaza and, with the support of the US, claimed the right to defend itself. This argument ignored the Palestinians' right to defend themselves and only added to their feeling of neglect. In a world where might is right, the Palestinians, particularly those in Gaza, felt abandoned. As a result, Hamas leaders started planning the attack on Israel that occurred on October 7th, 2023.

■ THE OCTOBER 7TH HAMAS INVASION AND THE ISRAELI REVENGEFUL WAR

It is this local, regional, and international picture that provides the context for the October 7th Hamas attack on Israel and the Israeli brutal and revengeful war against Gazans. That said, the following analysis explores the reasons and strategic goals behind the brutal Palestinian attack and its ramifications for the centrality of the Palestinian issue. It also explores the reasoning behind the Israeli war, its declared

and hidden goals, and its implications for the future. After clarifying these points, we conclude with a few insights regarding future scenarios and a few recommendations.

While the context provides the rationale for war, it should not be mixed with the causes that explain its timing and characteristics (Falleti, Lynch 2009). It certainly cannot explain the cruelty inflicted by both sides and the disproportionate damage and human suffering it causes. A combination of strategic and psychological theories is necessary to address these aspects (Payne 2015). The tragic events require a realistic understanding of both sides' planned steps and calculated measures to achieve their goals, making realist theory necessary (Waltz 1979, Walt 1987). However, a simple, realistic understanding is not sufficient. The cold-mindedness of realism must be combined with understanding the psychology of maltreatment, fear, shock, and awe. Political philosophers, from Aristotle to Martha Nussbaum (2003), have recognized that human conduct is loaded with emotions and pathos. Every human action entails acting upon something or someone and being affected by it (Rorty 1984). Human interactions involve multiple aspects, including rational, psychological, and ethical factors. If we seek a comprehensive understanding of the motivations, meaning, and implications of such interactions, whether they are calculated behaviors, emotional ones, or a combination of the two, these aspects are important. In conflict settings and wars, the two processes of acting and being acted upon are essential features of the human condition. Understanding this can provide a constructive perspective to better explain the Israeli-Palestinian conflict and ways to heal the wounds it has caused.

The Palestinians

Hamas' attack on October 7th is called the „Al-Aqsa Flood”. This naming has immediate religious connotations, given that Hamas and Islamic Jihad are religious movements. However, this attack had a strategic purpose and political goals. These were clarified in the official documents issued by Hamas on 21 January 2024. According to Hamas, the operation against Israel is a response to Israel's long-standing colonization of Palestine, which can be justified based on seven factors¹⁰. These factors include Israel's plans to Judaize the Al-Aqsa Mosque, the annexation plans of the Israeli government, the thousands of Palestinian detainees in Israeli jails, the blockade on Gaza, the expansion of Jewish settlements in the West Bank, seven million Palestinian refugees living in extreme conditions in refugee camps, and the prevention of establishing a Palestinian state by the superpowers.

Despite the circumstances, the operation was meticulously planned using advanced rational and strategic calculations. From a military standpoint, Hamas

¹⁰ The Hamas document is titled *This is our Story: Why the Al-Aqsa Flood*, <https://www.aljazeera.net/news/2024/1/21/%D9%84%D9%85%D8%A7%D8%B0%D8%A7-%D8%B7%D9%88%D9%81%D8%A7%D9%86-%D8%A7%D9%84%D8%A3%D9%82%D8%B5%D9%89-%D9%88%D8%AB%D9%8A%D9%82%D8%A9-%D9%84%D8%AD%D9%85%D8%A7%D8%B3-%D8%AA%D8%B1%D9%88%D9%8A>.

managed to strike the most powerful regional force at the heart of its strategic doctrine, which includes early warning, deterrence, and quick, short, and decisive warfare on enemy's territory (Eilam 2018; Rodman 2024). The fact that they were able to neutralize all Israeli surveillance mechanisms, subdue all security forces, and launch a coordinated air, sea, and land attack reflects a military capability gained through training for years under the watchful eye of Israeli intelligence.

The planners of the attack were aware of the power imbalance between their abilities and the Israeli army's capabilities. Therefore, they chose October 7th as the attack date for four interrelated reasons. The first reason was symbolic. It had to do with the sudden and surprising attack of the Egyptian and Syrian armies on Israel on 6 October 1973 and their ability to quickly change the balance of strategic power between the two sides. The second reason was tactical. The attack was planned on the Israeli holiday and was kept secret until the last moment. The Hamas leadership based their plan on well-studied intelligence, considering that the Israelis would not be on high alert during one of the central Jewish holidays. They had information that there would not be many soldiers on the border with Gaza, and those who were there would not be ready for a sudden and heavy attack from outside. This was a decisive factor in carrying out the operation on that day. According to the Israeli army's information, the Hamas leadership was entirely correct. The Israeli government and army leadership believed that Hamas and its allies were deterred and had no intention of engaging in a new war (Raz 2024). Therefore, the number of soldiers was too small to face thousands of Palestinians, some of whom were highly trained and determined to break the siege, occupy Israeli territory, and kidnap as many Israelis as possible. Thirdly, the timing of the October 7th attack was strategically planned to take advantage of the internal division in Israel over judicial reform. Many pilots in the Air Force, as well as officers in other elite army units, had threatened to suspend their voluntary service, which prompted the defense minister to publicly warn of the dangers to Israel's national security. These threats created a sense of vulnerability and unpreparedness in Israel's special elite army units. Additionally, there were rumors of a possible breakthrough in the normalization of relations between Israel and Saudi Arabia. In the lead-up to October, the media in Israel were discussing a possible breakthrough in the US-sponsored Israeli-Saudi normalization negotiations. However, if this normalization were to occur, it would deal a heavy blow to the Palestinians, especially since Saudi Arabia holds significant symbolic weight as the guardian of the holiest sites in Islam and a leading Arab country in the Persian Gulf. This factor played a crucial role in the efforts to sabotage the normalization process between Israel and Saudi Arabia, playing a role in determining the timing of the attack. This fourth reason emphasized the centrality of regional and international factors in determining the eruption of wars.

Hamas and its allies were not only able to surprise the Israeli army, but they also surprised themselves. Initially, they did not expect their operation to be as

successful as it was and have not anticipated that their operation would break the Israeli security myth so quickly¹¹. Secondly, they were taken aback by the fact that many Palestinian civilians participated in the attack, causing damage and unnecessary civilian casualties, as well as kidnapping civilians that became difficult to hide and sustain for an extended period in order to be exchanged with Palestinian prisoners jailed by Israel in a future deal. The fact that hundreds of civilians were involved in the attack, part of which conducted atrocities, overshadowed the military success of the operation. The kidnapping of women, the elderly, and children played a decisive role not only in how the Israeli response took place but also in the response of many Muslim countries that condemned the violation of Islamic principles in war. Thirdly, they were taken aback by the fact that Israel had been allowed to invade Gaza without any hindrance. Even when it became evident that Israel's actions violated international humanitarian law, the official support for its right to self-defense, also when it has become overflowed and exploited as a form of impunity, remained unchanged. Fourthly, they were surprised that their allies, particularly those from Lebanon, shied away from a total war with Israel, which could have drastically changed the balance of power and altered the situation.

The involvement of Hezbollah in the war on the northern border which until mid-September 2024 remained bound to limited mutual engagements, allowed the Israeli army to occupy Gaza without fearing for another front in the north. Hamas and its allies misjudged the reactions of the world's superpowers to Israel's systematically and brutally conducting massive killings by bombing and bombarding densely populated areas with tons of explosives from the air and the ground. They may have expected the Israeli retaliation to be severe, causing regional instability and leading to a significant international intervention. Otherwise, it is plausible to assume that the Hamas leaders and their allies believed that the price all Palestinians would pay is worth the risk and better than the humiliating and undignified reality in which they have lived under arrogant Israeli control for years.

Based on interviews given by Hamas leaders, the recent attack was a long-planned operation, with daily trainings conducted in front of the Israeli intelligence forces¹². Hamas and its allies demonstrated the capacity to carry out a broad-scale attack. They successfully faced one of the world's most sophisticated and well-equipped armies, overcoming fences built with the best technology. This operation displayed sophistication and the ability to wage war, with humble air forces, land troops, and marines coordinating their attack to surprise and destabilize the other side's ability to respond. These tactics were successful, leading to the humiliation of the Israeli army. The goal was to retaliate and defeat the Israeli arrogant sense

¹¹ Interview with Saleh Al-Aroui before his assassination in Beirut, <https://www.presstv.ir/Detail/2023/12/18/716613/interview-with-Saleh-al-Aroui>.

¹² Ibidem.

of human and technological superiority, leading to a change in the strategic local and regional military and political formula.

The Israelis

Regarding the Israeli side, numerous questions need answering, which may not all be covered in this context. Nevertheless, the questions about why the Israeli security forces were caught off-guard and defeated, why it took them many hours to respond, what the objectives of the Israeli war are, and how future relations between the two sides would develop after such a traumatic engagement can be briefly answered.

Many Israeli analysts argue that the surprise and breakdown of the Israeli defensive mechanisms on October 7th resulted from a combination of arrogance and a deep conviction in Israeli superiority (Bar-Joseph 2024; Goodman 2024; Raz 2024). As the historian Uri Bar-Joseph argued, there was a significant measure of indifference in the Israeli security forces, rooted in two interconnected factors¹³. The first factor relates to information collection methods about the opposing side, which proved inadequate in providing a complete picture of Hamas' intentions and plans. The second factor relates to the government's dominant political perspective, which viewed Hamas as a partner in sabotaging any peace process with the PA based on the initiative of the Arab League. As a result, despite the information available to the Israeli army intelligence and the National Security Service (Shabak), they were unable to decipher Hamas' plans, misread its intentions, and underestimated its capabilities. They believed that they would have enough time to react and „ring the bell” if Hamas and its allies decided to attack. The army thought that even if they did not manage to know of an attack in advance, they had enough power to defend the border and the settlements close to it until reinforcements arrived. However, this assumption also proved to be false.

The army did not come as fast as expected and faced significant difficulties in responding to the Palestinian forces that had infiltrated deep into many settlements and towns, making it challenging to locate them and directly fight them in densely populated areas, such as in Sderot¹⁴. The delay in a massive and organized response, even though many individuals volunteered to fight and protect the civilians, gave the invading forces time to occupy Israeli territory for the first time since 1948, killing hundreds, injuring thousands, and traumatizing an enormous number of civilians. The chief of staff, Herzi Halevi, has repeatedly admitted that the army did not do its job on

¹³ Uri Bar-Joseph, *The Indifference that led to War is not Rooted in an Intelligence Failure Only*, „Haaretz”, 1.11.2023.

¹⁴ The IDF conducted one of its first internal investigations regarding what happened in kibbutz Bei'ri, in which its various failures were documented. To see all internal investigations see: <https://www.idf.il/%D7%90%D7%AA%D7%A8%D7%99-%D7%99%D7%97%D7%99%D7%93%D7%95%D7%AA/7-10-%D7%94%D7%AA%D7%97%D7%A7%D7%99%D7%A8%D7%99%D7%9D-%D7%94%D7%9E%D7%91%D7%A6%D7%A2%D7%99%D7%99%D7%9D/>.

October 7th¹⁵. Halevi's statements could be attributed to a rooted belief in the invincibility and technological superiority of the army (Sariel 2021; Heilbrunn 2024)¹⁶. The Israeli army was also influenced by the dispute over judicial reform, causing most units to be ill-prepared for a quick action during the combat on October 7th¹⁷.

The attack led by Hamas caused chaos and terror among most Israelis, as it was broadcast live, making it personal for everyone, regardless of where they lived in Israel. Israelis suddenly realized that they could be vulnerable to a sudden, sophisticated attack and subjected to acts of revenge and humiliation. If such a frightening possibility became a reality within a few hours by what Israelis considered to be under-equipped and poorly trained Palestinians, it could become even worse with better-trained forces like the Radwan (commandos) of Hezbollah on the northern border. This realization established a considerable gap between the image of security created by Israeli security forces and the reality on the ground. Many civilians and soldiers were neglected during the attack, and the government's decision to evacuate all residents of the area, as well as many settlements near the northern border, created a deep sense of insecurity. The displacement of Israelis by their own government in such security situations, not being able to allow them back for over a year after the beginning of the war, was unprecedented and unforgivable from the standpoint of these citizens. It became an alarming example for all Israelis of what could happen to people living near the borders (Bar-Joseph 2024; Goodman 2024; Shavit 2024). The Israeli disappointment in the security forces was as high as their expectations as a result of their unfortunate response on October 7th, especially given the fact that the army intelligence had a clear picture of the planned attack and all details necessary about it except for its exact timing¹⁸. Notwithstanding, the timing has been provided several times by many observant female soldiers located near the border and equipped with the proper technology to track unusual movement near it. They were silenced by their officers, resulting in their deaths during the attack¹⁹.

¹⁵ Emanuel Fabian and Amy Spiro, *IDF chief admits failures and promises investigation; vows to „dismantle” Hamas*, „Times of Israel”, 12.10.2023, <https://www.timesofisrael.com/idf-chief-admits-failures-and-promises-investigation-vows-to-dismantle-hamas/>.

¹⁶ The almost blind reliance on the ability of technological machines to replace human being in collecting intelligence and defending the borders has been heavily criticized by many veteran army officers.

¹⁷ TOI Staff, *IDF had no Plan for Responding to a Hamas Attack of October 7's magnitude – NY Times*, „Times of Israel”, 30.12.2023, <https://www.timesofisrael.com/idf-had-no-plan-for-a-hamas-attack-of-october-7s-magnitude-ny-times-reports/>.

¹⁸ Ronen Bergman and Adam Goldman, *Israel Knew Hamas's Attack Plan More than a Year Ago*, „The New York Times”, 30.11.2023, <https://www.nytimes.com/2023/11/30/world/middleeast/israel-hamas-attack-intelligence.html>.

¹⁹ Jamie Dettmer, *Our Warnings on Hamas Were Ignored, Israel's Women Border Troops Say*, „Politico”, <https://www.politico.eu/article/israel-border-troops-women-hamas-warnings-war-october-7-benjamin-netanyahu/>.

The strategic defeat of Israel, the humiliation of its army, and the abuses of civilian dignity made the Israeli response indispensable (Raz 2024; Shavit 2024). Too many Israelis were hurt, and the state sovereignty was violated. Given the combination of the two and the fact that Israel is led by the most nationalist government in its history and by the most experienced prime minister, whose worldview revolves around the arrogant manifestation of power, the retaliation was a question of time. Although Israel, as we have explained earlier, is neither innocent when it comes to the Palestinians nor is the underdog in the conflict with them, the Palestinian attack reminded the Israelis of the Jewish past in exile (Goodman 2024). The inefficiency of the government and the dysfunctionality of the army twisted the feelings of most Israelis from being confident and completely trusting in their capabilities to fear, shock, and awe (Bar-Joseph 2024; Shavit 2024).

After the attack, officials portrayed Israel as the victim and attempted to create an image of it as an innocent oasis of peace, attacked by „human animals” and savages²⁰. This perception obscured the fact that Israel is the colonial power that has been leading a brutal policy of oppression and systematic repression of the Palestinian aspirations for liberation and statehood for decades. Framing the October 7th attack as a sudden aggression, disconnected from former military engagements and torn apart from the long-standing conflict reflected the shock and awe in the Israeli political and military establishment. The attack was also framed as a war between good and evil and between the liberal West and the Islamic fundamentalism²¹. Its scale motivated the empathy and support Israel immediately won from its Western allies, especially the US, UK, Germany, and France.

The Israeli shock and humiliation facilitated its way to respond brutally, viciously, and inhumanely with a free hand. As a result, Israel has been accused of conducting genocide and causing intentional unnecessary destruction all over the Gaza Strip. It also led to accusing its army of conducting war crimes and breaking international humanitarian law. The evidence has been the massive killing and devastation. Until mid-September 2024 over 42,200 were killed, 16,795 of whom are children, 11,378 are women, around 95,337 have been injured and over 10,000 remained missing under the rubbles²². The massive Israeli air strikes have made it impossible to differentiate between combatants and innocent civilians. They have led to the destruction of tens of thousands of buildings and houses. The devastating Israeli war has also led to the displacement of most Palestinians from their homes

²⁰ TOI Staff, *Likening Hamas „Savages” to IS, Netanyahu Vows Victory in War for „Our Existence”*, „Times of Israel”, 9.10.2023, <https://www.timesofisrael.com/likening-hamas-to-isis-netanyahu-vows-victory-in-war-for-our-existence/>.

²¹ Benjamin Netanyahu’s speech in the American Congress on 25 July 2024 illustrates best this common perception, <https://www.timesofisrael.com/were-protecting-you-full-text-of-netanyahus-address-to-congress/>.

²² These data change constantly since the war continues as to early October 2024. For a reliable source see: [https://www.thelancet.com/journals/lancet/article/PIIS0140-6736\(24\)01169-3/fulltext](https://www.thelancet.com/journals/lancet/article/PIIS0140-6736(24)01169-3/fulltext).

to which they cannot return, creating a new Palestinian Nakba with over 1.8 million refugees, a large part of whom have suffered from starvation and famine.

The Israeli brutality expressed the urge to take revenge and purposeless collective punishment, while also serving far-reaching strategic goals. The Israeli government has defined several main goals for the war, mainly dismantling Hamas' military and governmental capabilities, preventing the Gaza Strip from endangering Israeli security in the future and the return of the hostages. Almost a year after the beginning of the war, and despite the Israeli military upper hand, it has not achieved its declared war goals. It does not seem to be able to achieve what has been repeatedly defined as „total victory” by Prime Minister Benjamin Netanyahu²³. This is especially true given the fact that Hezbollah has opened another front in the northern border of Israel, leading the government to evacuate over sixty thousand citizens from their homes. In September 2024 the government added the safe return of the evacuated inhabitants of the northern borders to their homes to the main goals of the war, thereby opening another front before achieving any of the war goals in Gaza.

The Causes of Brutality

A key factor that led to the brutal, and to large extent immoral Israeli response was strategic-psychological (Raz 2024). The fact that the entire Israeli security forces and they are many, having the best technology available, were taken by surprise, led to the breakdown of the Israeli's internal conviction as superior and undefeatable and humiliated their honor. This is especially true given the fact that the Israelis have built the most sophisticated fences possible, having the technology that allows them to oversee every movement and gesture in Gaza, and have engaged in several cycles of violence against the Palestinian resistance movement to guarantee their deterrence (Heilbrunn 2024). Neither of these means and policies has stood the reality of a sudden attack by thousands of well-trained Palestinians who utilized relatively primitive technology to manipulate the entire Israeli security system. As a result, and beyond the suffering and pain caused to many citizens, the patriotic code of the security personnel was disgraced (Levi-Belz et al. 2024). This sense of betrayal of the code of duty made vengeance necessary to compensate, regain honor, and reacquire the confidence of the Israeli public. This is done in light of the world's initial empathy with Israelis, who paid the price for the politics of arrogance and neglect of their leadership. The Israeli security forces exploited the circumstances to „teach the Palestinians a lesson” and take revenge not only on Hamas' people but on all Palestinians living in the Gaza

²³ Amos Harel, *After Six Months, Few of the Israel – Gaza War's Goals Have Been Achieved*, „Haaretz”, 5.04.2024, <https://www.haaretz.com/israel-news/2024-04-05/ty-article/.premium/after-six-months-few-of-the-israel-gaza-wars-goals-have-been-achieved/0000018e-aa80-d029-a78f-faa25a8a0000>.

Strip. Many Israeli leaders spoke of the affinity between the brutal and intentional killing and destruction and the aspiration to deter other enemies, especially Iranian-sponsored movements, such as Hezbollah in Lebanon. To justify revenge, many Israeli leaders have argued that it is necessary to speak a language that the Palestinians best understand (Harari 2024). This orientalist tribal claim has been rooted in the Israeli colonial mind for years. It is utilized every time the arrogant Israeli self-perception is broken by a Palestinian resistance operation (Thrall 2017). Therefore, when looking at the scale of violence against civilians and the devastation of almost all human facilities, one can argue that the Israeli government is seeking to topple not only Hamas, but also the idea of a Palestinian national problem. Politicide (Kimmerling 2003) has returned, this time on the wings of the F-16s and the wheels of panzers in Gaza and later in Lebanon. As most of the Knesset (99 out of 120) clarified in its decision of February 21st 2024²⁴, this war is not only a response to the October 7 attack. It is also political, aiming to kill the Palestinian dream of liberation and independence, as the brutal invasions into cities in the West Bank demonstrate²⁵.

The second factor behind Israel's brutal war is cultural. It is the long-standing colonial mentality that is evident in the disrespect for Palestinian lives and the failure to recognize their right to liberation and statehood (Harari 2024). This attitude has been evident in the mainstream Israeli discourse, which has referred to Palestinians as „human animals” who are responsible for their own suffering and have themselves to blame for what is happening to them. This disregard for Palestinian lives is not new. Israel has always treated Palestinians as inferior (Bar-Tal, Teichman 2007). This policy has been declared publicly, framing all Palestinians as responsible for the actions of Hamas and other resistance groups. This framing has made Israel's retaliation against all Palestinians seem legitimate to most Israelis, including many who supported the peace process before October 7th and has prevented sufficient criticism to stop the war²⁶.

The Israeli president, the minister of defense, several prominent politicians, army officers, and ordinary citizens have accused all Palestinians of being responsible for the attack and the atrocities conducted against Israeli civilians on October 7th. The International Court of Justice documented these accusations after South Africa accused Israel of violating the UN Genocide Convention. Whereas many Israelis, including the president, have named all Palestinians as „human

²⁴ Tovah Lazaroff, *Israel's Knesset Votes against Unilateral Recognition of Palestinian State*, „The Jerusalem Post”, 21.02.2024, <https://www.jpost.com/breaking-news/article-788123>.

²⁵ See Amnesty International's report on this brutality: *Israel/OPT: Palestinians face drastic escalation in unlawful killings, displacement as Israel launches West Bank military operation*, <https://www.amnesty.org/en/latest/news/2024/08/israel-opt-palestinians-face-drastic-escalation-in-unlawful-killings-displacement-as-israel-launches-west-bank-military-operation/>.

²⁶ Many surveys show that Israeli public opinion has become radicalized as a result of the atrocities conducted by Palestinians on October 7th, <https://en.idi.org.il/articles/52496>.

animals”, „Amalek”, „savages”, „monsters”, and „Satan” and wished them painful deaths, the Israeli media has refrained from showing the devastation in Gaza and censored any use of wording utilized in the world to criticize the inhumane conduct of the Israeli army²⁷. Despite the existence of a small minority and various channels of communication, such as „Haaretz”, +972, Sicha Mekomit, and several human rights organizations that report on the war in Gaza, they hold little influence in shaping the minds and emotions of the Israeli public (Tiripelli 2016). When the public is exposed to graphic footage from Gaza, their primary reaction tends to be either that the people of Gaza have brought the violence upon themselves or that the footage is fake news and rooted in anti-Semitic propaganda²⁸.

It seems that Israel’s strategy in the October 7th war is two-fold. Firstly, the Israeli government aims to prevent Palestinians from having any options for self-defense. Secondly, it aims to undermine the Palestinians’ dream of having self-government, which could lead to their right to self-determination in the future. The massive killing, devastation, and destruction in Gaza reflect an undeclared attempt to revert the region to what it was like fifty years ago so that Palestinians must start their struggle against occupation all over again. This means that Israel is not looking to end its occupation, but rather to make it easier to deal with its costs in the future, especially given the pressure to reestablish Jewish settlements on the shore of the Strip.

The Israeli war on Hamas is framed as a total war against a splinter group of a broader radical Islamic jihadist movement, equating it with Daesh (ISIS). This approach aims to justify the massive killing in Gaza (Levy 2024) and to leave the door open for a long-standing Israeli military intervention there, similar to the American war on terror, without losing the official support Israel receives from Western countries. However, this approach has not been successful in the international media, leading to a significant public pressure from Israel’s allies. Although the official positions of the US, the UK, Germany, France, and several other European countries have not seriously changed, Israel has been accused of targeting densely populated areas with intense air strikes, leading to the killing of thousands of innocent civilians, destroying their homes, and leaving public institutions and infrastructure dysfunctional. Despite these accusations, Israel claims that it does everything possible to avoid harming civilians, and this claim is met with partial consent. When Israeli officials are faced with criticism of their military operations, they often make references to the colonial history of European states, arguing that they have not done any better. Israeli officials make the same

²⁷ B. Michael, *The Updated War Lexicon*, „Haaretz”, 23.01.2024, <https://www.haaretz.co.il/opinions/2024-01-23/ty-article-opinion/.premium/0000018d-3037-daf5-a1bf-b4777e550000>.

²⁸ Laura Silver and Maria Smerkovich, *Israeli Views of the Israel-Hamas War*, Pew Research Center, 30.05.2024, <https://www.pewresearch.org/global/2024/05/30/israeli-views-of-the-israel-hamas-war/>.

claim made by the US after 9/11, 2001, and the attack on the World Trade Center that self-defense is not only necessary but also obligatory when confronting what the Western world considers to be an existential threat, namely fundamentalist Islam. Israel is positioning itself as a defender of the Western world, waging war in their name, and is using the just war doctrine, which was developed in the West, to justify its actions (Walzer 1977; Brooks 2013). Western states have officially supported Israel's right to self-defense, a position that the Israeli nationalist government has exploited in its efforts to carry out what one of its ministers has called a second Palestinian Nakba. However, in practical terms and the context of the current war, as it was before 1948, the Palestinians are not granted, as if not deserving, the right to defend themselves.

The third factor behind Israel's brutal war is strategic. Various strategic factors drive Israel's brutal military strategy in Gaza at the local, regional, and international levels. At the local level, the Israeli security forces operate under the urgent need to regain the confidence of the Israeli public, who fear that they would not be defended if attacked. The ease with which civilian settlements were invaded and the government's decision to evacuate thousands of Israelis from the southern and northern borders have led to a psychological factor where returning the confidence of the Israeli public is crucial. It is widely accepted in the Israeli military elite that this can be achieved by demonstrating the Israeli army's superiority and ability to inflict significant damage on Palestinian civilians, accused of showing empathy with the October 7th attack.

At the regional level, most Israeli governments have been striving to establish themselves as a powerful regional player that cannot be defeated and is, therefore, a valuable ally in the battle for power and leadership. This strategic framing has been used to promote the recent normalization of relations with the Arab countries. However, when negotiations to normalize relations with Saudi Arabia were at their peak, the attack by Hamas and its Palestinian allies, the Israeli military's inadequate response, and the government's inability to take control of the situation created an impression that Israel was not a reliable partner. This gap between the image projected by Israel and the reality on the ground has made it necessary for the Israeli leadership to demonstrate the country's military might and strength, especially since Hamas and its allies are backed by Iran, which Israel considers to be its major enemy in the region. This Israeli effort, despite some critical statements and slight differences, is fully backed by the American administration that has been fully drawn into the war by providing endless military and logistical help to the Israeli army, estimated to be around 6.5 billion dollars, to rebuild its deterring image and strategic reliability.

At the international level, Israel is required to prove that it is a dependable ally that can not only defend itself and cause harm to its enemies but also assist in promoting Western interests in the region. This is particularly true

regarding American interests in ensuring the security of Arab states that cannot face Iran alone. Nevertheless, the Israeli government's misconduct and security forces' failure could undermine its position as a trustworthy ally. The war on Gaza's brutality is an attempt to exert pressure on Western allies to uphold their commitments to Israel's security. Otherwise, Israel may resort to other methods to achieve its goals. However, these tactics have sparked public outrage in most Western countries, and governments remain loyal to their commitments while urging Israel to ease its hand on civilians and concentrate on defeating Hamas. As a result, the Israeli government has managed to hold Western powers hostage to its brutal measures.

■ CONCLUDING REMARKS

The war in Gaza has captured global attention due to its shocking atrocities, war crimes, and violations of international humanitarian law. It has sparked unprecedented widespread protests in many cities worldwide, having regional and international repercussions and causing regional instability. The Palestinian attack, which took place unexpectedly, surprised Israel, the region, and the world. The surprise was not only in the timing but also due to the effectiveness of the Palestinian invaders and the ineffectiveness of the Israeli defense forces and technologies. The invaders' success in occupying Israeli army installations and civilian settlements, causing atrocities to take place, has prompted many world leaders to visit Israel to express their support and empathy.

The Israeli shock, humiliation, and shame have led to a deplorable response. The high number of Palestinian casualties and devastation and, as a result, the starvation of hundreds of thousands of fleeing Palestinians have drawn massive public criticism in many countries of the world. Israel's brutal and inhumane response, which has caused intense human suffering without achieving the declared goals of the war, has led to a shift in world opinion, causing many countries, including the US, the UK and Germany, to feel uneasy. Although these countries have not changed their official policy towards the war, providing Israel with sophisticated weapons and lethal ammunition even in the face of criticism, they publicly express concern and pressure the Israeli government to minimize civilian casualties and provide enough aid to avoid starvation and famine. This pressure, which comes rather too late and seems to be mainly practiced for internal political reasons, does not reflect a sudden discovery of human morality, and may leave no choice, but to impose changes in the Israeli determination not to allow the possibility for normal life anymore in the Gaza Strip.

The scale of human loss, devastation, and starvation is unprecedented. This grim reality will most likely lead to further violence, at least by some of those who have lost their families and, as a result, lost hope for a better life. Even though

Istishhad (martyr death) is not necessarily a proactive act of seeking death and does not mean belittling the value of life, as Israeli and Western propaganda assert, given the vast numbers of people who lost their houses and families, the willingness to make sacrifices in the search for justice through revenge, may become a common phenomenon in the future. This is a real possibility because the dismantling of Hamas' military capabilities does not mean the repression of the Palestinian people's ability to resist and retaliate. The Gaza war has established the psychological and political motivation for carrying on the struggle for liberation and independence, convincing every Palestinian that Israel is determined to keep oppressing their aspirations and violating their national and individual rights. The combination of emotional grief and mourning, psychological entrapment, and deep belief in their just struggle are expected to keep motivating Palestinians to resist what they have endured for decades. Therefore, if not given a glimpse of hope for a better future (Bloch 1974; Shade 2001; Mihaylova, Ezekiel 2023), the willingness of an increasing number of Palestinians to take revenge will soar.

Meanwhile, the radical nationalist Israeli government is intentionally prolonging the war, endangering its own hostage civilians, for reasons that are not necessarily strategic. The Israeli army has not managed to fully dismantle Hamas' ability to fight or free the hostages for more than a year. By seeking an exchange deal that allows an honorable exit from the indecisive situation, the Israeli government indirectly admits that Hamas is a partner with whom to negotiate. This reality unfolds amid widespread public rage and increasing condemnation and boycott of Israel in many countries in the world. The Israeli government continues to act based on the long-standing and ineffective belief that military might is the only way to facilitate the freeing of the hostages without having to pay the necessary political price for it. The unfortunate result of such a failed strategy could be the tragic death of all the hostages, a price that the current Israeli government seems to be willing to pay, as its behavior and the announcements made by some of its members demonstrate. Opening another active front in the north with Hezbollah in late September 2024 demonstrates that the Prime Minister is not in a rush to strike a deal to free the Israeli hostages, since for him ending the war in Gaza means submitting to the deterrence strategy established by Iran in the region.

The October 7th war in Gaza has a significant impact on the Israeli-Palestinian conflict and the balance of power in the region. No matter how much harm remains to be caused and how many lives are still to be lost, Israeli strategists have learned that they have a weak enemy they can defeat in battle but cannot effectively overcome in war despite their superior military and technological power. Israel's economic, military, and technological superiority has become its Achilles' heel in its conflict with the Palestinians. Israel is too strong to be able to use its capabilities against them and to further justify its endless and merciless control of millions of them while the world is constantly watching. Therefore, Israelis will

learn the hard way that there are around seven million Palestinians between the Jordan River and the Mediterranean Sea who intend to remain and defend their right to a dignified life in their homeland. Israel's military and technological upper hand has proven to be ineffective against sudden attacks by Palestinians who face the daily aggression of the Israeli army and seek revenge (Azoulay, Ophir 2012; Natanel 2016). Even though the Palestinians do not pose an existential threat, they have the potential to cause harm and disrupt the normal way of life for many Israelis. The Palestinian situation also presents a moral dilemma for many Israelis. Israel's technological and economic advantage makes it appear unjust compared to the misery of Palestinians who have to endure its aggressive and well-equipped military might. Furthermore, an increasing number of Israelis are realizing that no matter how many peace agreements their government signs with the Arab states, their real challenge is with the Palestinians²⁹. Israel needs Palestinian recognition if it seeks to legitimize its claim to the land both people consider their home (Jamal 2017a).

Therefore, it is important to acknowledge that any attempt to sideline the Palestinians or ignore their national rights will only lead to more violence and prevent Israelis from feeling secure, since Palestinians don't seem to be willing to give up their struggle for liberation and independence. Peace and reconciliation seem to be the only just path to guarantee security. Therefore, they better be an integral part of Israel's strategy to resolve its conflict with the indigenous Palestinians.

Given the fact that the conflict did not start on October 7th, any attempt to reduce it to a conflict between a righteous state and a terrorist organization, ignoring Israeli settler colonial policies in the areas occupied by the state in 1967, will not dismantle Palestinian insistence to struggle for their national rights. Misrecognition and violence only cause further human suffering and harm innocent lives on both sides. While it is true that the Palestinians must take responsibility for their actions, it is vital to acknowledge that Israel's upper hand and its ability to disrupt any peaceful solution make it more responsible for the unfolding tragic reality. Without taking into consideration that all inhabitants of Israel/Palestine have the unalienable right to security, prosperity, and happiness, this bloody conflict is not resolvable.

The resolution of the conflict should follow a fundamental principle that both sides agree upon, but the lack of trust between them has made it difficult (Jamal 2017b). The conflict is not just between the two sides, but also involves the regional and international community. The perception to integrate the entire Arab region in the appeasement and reconciliation process with Israel is sensible, but

²⁹ For more details on Israeli public opinion from a trusted source see: <https://en.idi.org.il/articles/55018>.

only if the Palestinian right to self-determination and national dignity is taken into consideration. Therefore, it is important to promote a long confidence-building process involving international intervention and pressure. However, for such a process to work, it must be ethical (Walzer 2004; Waldron 2010; Finlay 2015). This cannot be achieved as long as Israel's leading Western allies, which speak the language of human rights and morality, continue to apply them selectively and manipulatively, denying the Palestinians the fundamental right to have rights. It also cannot be realized if moral agents in world politics, including several European states and many human rights organizations continue to either sit on the fence or lead a policy of one-sidedness, according to which only the victims of one side count, such as in the case of the hostages (Weizman 2012). This one-sidedness is demonstrated in the way powerful Western countries have been acting in the conflict and is a significant cause behind the despair of many Palestinians and the arrogance of radical nationalist Israelis. It is this one-sidedness that provides the enemies of peace, especially those that have the power to push others into the hill of war, with the reasoning and justifications they need to advance their inhumane behavior. Therefore, all parties involved must act fairly and justly to achieve peace. It is difficult to have hope, given the grim reality in Palestine/Israel. However, hope can be fostered and wisely created in people's hearts and minds if we are to facilitate their ability to forgive (Lysaker, 2023). There is a clear need to assist people to avoid desperate actions and instead work towards peaceful solutions. Public protests around the world against the war grant Palestinians hope that somebody hears their cries. These protests do not and should not be exclusively perceived as being anti-Israeli, but rather as a way to show empathy towards all innocent victims of the conflict. This urge was behind the empathy that Israelis received after October 7th, but unfortunately, it was wasted by the behavior of the nationalist government. The same empathy is now being extended to hundreds of thousands of fleeing and starving Palestinians. It is essential for those seeking ethical human coexistence to direct public empathy toward creating hope for a better future for all. For this to happen, both sides must be encouraged to give peace a chance.

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Amal Jamal

THE PSYCHO-POLITICAL AND STRATEGIC CAUSES AND RAMIFICATIONS OF THE 2023–2024 ISRAELI-PALESTINIAN WAR: A CRITICAL PERSPECTIVE

The following analysis of the Israeli-Palestinian war, which erupted on October 7th, 2023, contributes to explaining its causes, reasoning, consequences, and the necessary measures to end human suffering caused by it. It is argued that to understand its eruption, unfolding, and ramifications, we must look at the broader interplay between local, regional, and international factors. This integrative approach means that it is crucial to explore the context that has fed its flames and determined its timing and brutality. This means that it is not possible to disconnect this war from profound developments in Israeli and Palestinian societies in the last couple of decades. It also means that although this war was instigated by a particular player, it is an integral component of a system composed of a balance of power between multiple players. Therefore, it resulted from polarity in a regional and international system of power in which players have sought to either maintain the status quo or change it to their advantage. Such an understanding enables us to highlight its strategic meaning and emphasize the moral measures that international players must take to avoid further Israeli-Palestinian wars in the future.

Keywords: Israeli-Palestinian Conflict; October 7th War; War Crimes; Hope; Peace; International Intervention

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THE WAR IN UKRAINE AMONG CONTEMPORARY ARMED CONFLICTS

■ INTRODUCTION²

Among about four dozen contemporary wars, the armed conflict in Ukraine since 2014 stands out as an exceptional event. It involves in its second stage four nuclear powers – one as a direct belligerent and three as providers of many-sided assistance to the second belligerent, with the presence of military personnel of all four nuclear powers on the territory of Ukraine. The war has been the biggest, bloodiest and longest war in Europe since 1945. It has also produced a strong impact on Europe and the broader international community.

According to two measures (at least), the war in Ukraine has been exceeded by a number of other wars since 1945, namely those occurring in Asia and Africa. In terms of mortality, it has been exceeded by the wars in Korea, Vietnam, Algeria, Sudan, Rwanda, Burundi and Iraq. In terms of duration, it is unlikely to be longer than the wars in Vietnam, Algeria, Sudan and Afghanistan. Among all these armed conflicts, the war in Ukraine may be sharply distinguished by the reverse ratio between military and civilian mortality.

In the European framework, the central trigger of the first stage of the war in Ukraine was similar to what caused the armed conflicts and outright wars occurring between 1974 and 1999 on Cyprus, in Moldova, Georgia, the Russian Federation, Azerbaijan as well as on the territory of the SFRY. Among the former, the first stage of the war in Ukraine most resembled the war in Croatia (1991–1995). The war in Croatia, which started prior to its international recognition, and the war in Ukraine 22 years after its recognition as an independent state, display a number of similarities that were not accidental. The interstate armed

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conflict in Ukraine has had several similarities with the war in the Federal Republic of Yugoslavia (1999) which ended up with forceful separation of Kosovo from Serbia.

■ THE SIMILARITIES

The wars in Croatia and Ukraine involved two adversary pairs of neighboring and partly overlapping Slavic nations. These wars unfolded in the territories of two defunct „socialist federations” – the SFRY and the USSR. The causes of both wars were closely related to the almost simultaneous breakdowns of these two federations in 1991 and the demise of their communist regimes that had preceded and caused the breakdowns.

The institutional structure of the SFRY was modeled after and closely resembled the structure of the older „socialist federation”, the USSR. Shared features of the two included the division of each federation into full-fledged republics and autonomies. Most or all of these federal units were ethnically designated. At the foundation of the two federations the minorities of the biggest ethnic group (Serbs and Russians) were not accorded autonomy within other republics. In both cases, wars followed the declarations of „sovereignty” and „autonomy” and referenda organized by some members of the Serbian community in southwest Croatia and some members of the Russian and Russian-speaking community living in Eastern Ukraine. In each case, the central governments refused to negotiate with the insurgents and decided to suppress them militarily. The armed conflicts in Croatia and Ukraine developed into partly different combinations of civil and interstate wars. The civil war component referred to an armed conflict between the ultranationalist regime in the former second-most populous republic on one hand, and part of the biggest national minority closely related to the largest ethnic group in the former federation, on the other. Each war was fought exclusively or predominantly on the territory of the former second-most populous republic, which suffered the most. In both wars, there were gross violations of international humanitarian law and international sanctions were applied.

The causes of each war were tangibly related to profound geopolitical changes underway in Europe about 35 years ago. These changes entailed the slackening and termination of the Cold War between two military-political blocs and the wave of liberal-democratic transformation of political systems in Eastern Europe. Over the span of three years, about 30 different state entities declared their sovereignty in the area of three „socialist federations” (Yugoslavia, Soviet Union, Czechoslovakia). Of these, 23 entities survived and soon gained universal recognition as sovereign states, including Croatia and Ukraine.

■ THE SPECIFICITY OF THE WAR IN UKRAINE

Ancestors of today's Russians and Ukrainians shared in the distant past close to 400 years of common history in Kievan Rus. In the XIII century this large state formation was destroyed by the invasion of the Tatars-Mongols. The subsequent centuries-long domination by Lithuanian and Polish feudal rulers over the ancestors of today's Ukrainians contributed greatly to their cultural and language distancing from the Russians. In 1648, the Cossack ancestors of some of today's Ukrainians rebelled against Polish feudal rule, in 1654 begged for protection and voluntarily submitted themselves to the Moscow Tsardom. For two and a half centuries, until 1917 they remained as part of the Russian empire, named Ruthenia and later Malorossiia. In 1918, an independent state was proclaimed as the Ukrainian People's Republic. The new political term Ukraine remained under the Bolsheviks and in 1922 Soviet Ukraine became a constituent republic of the Soviet Union. In several decades, the territory of Soviet Ukraine was more than doubled by Moscow from the size of the Cossack Hetmanate when it joined the Moscow Tsardom. This was accomplished in several successive stages in 1920–1922, 1939–1940, 1945–1947 and 1954 by including into it arbitrarily the lands of Novorossiia, with millions of Russian and Russian-speaking people in the East and South, as well as annexed parts of Poland, Czechoslovakia, Romania and part of Moldova in the West. In all of these cases, this was done without their population's consent. Thus a territorially large multiethnic and multicultural Soviet republic was created by Moscow, in some cases in violation of international law (notably the Molotov-Ribbentrop pact) or Soviet laws. In 1991, all these territorial gains became parts of independent Ukraine within its internationally recognized borders although Kyiv prior to it violated the federal law on dissolution of the Soviet Union when it did not allow holding a referendum on the status of Crimea separate from the all-Ukrainian referendum. From 1945 for more than four and a half decades Ukraine enjoyed Moscow's symbolic gift – the status of a UN founding member although it had been a constituting part of another UN founding member (USSR). When at Moscow's initiative the Soviet Union was unconstitutionally dissolved and Ukraine attained independence it did not have to apply for UN membership which from then on it deserved.

Divergent political and economic developments in the two independent states exposed a number of different interests and of problems unresolved at the time of separation. These issues, in somewhat different combinations during the two stages of the war contributed to three groups of conflictual relations: (1) between the Russian Federation and Ukraine, (2) inside Ukraine and (3) between the Russian Federation and the West, primarily USA.

The position of the large Russian minority became a growing political problem with the rise of Ukrainian ultranationalism and of the officially promoted cult of Stepan Bandera. Combined with divergent attitudes in Western and Eastern

parts of the country concerning Ukraine's relations with Russia, EU and NATO, language-related issues contributed tangibly to political explosions in Ukraine in February/March 2014. These explosions however were provoked by external factors, primarily by the West.

Since 1991, two processes have altered the geopolitical map of Europe. These were the Eastward expansion of the USA – dominated NATO along with the closely intertwined enlargement of the European Union. The first stage of these two processes in 1990–1991 – the absorption of Eastern Germany into both organizations – had no impact on the internal crisis in Yugoslavia, including the conflict in Croatia. By 2004, however, the process of NATO expansion had already reached the borders of both Ukraine and Russia, thereby adding a very real extra-regional component to the conflict in and about Ukraine.

For over two decades, one of the USA's geostrategic goals has been by fostering „color revolutions” to bring about regime changes in the post-Soviet space, including Ukraine and also Russia. By using Ukraine as a tool, the USA has endeavored to harm and weaken Russia. Under USA pressure and notwithstanding German and French objections, at the NATO summit held in Bucharest in April 2008 Ukraine was promised membership in the alliance, yet without stating a date. Openly and strongly opposed by Russia, this decision unleashed a chain of events, 6 years later leading to a war in Ukraine. The European Union and its policy of Eastern neighborhood notably contributed to these developments. The prospect of concluding a controversial association agreement with the EU deepened the internal political conflict in Ukraine. The Ukrainian government's decision to postpone its conclusion motivated mass protests in Kyiv. These organized protests deteriorated into violence, and occupation of some governmental buildings by armed mobs. On 21 February 2014 this turmoil was skillfully exploited to stage a US-guided coup d'état in Kyiv. The new regime came to power in violation of the Ukrainian constitution and of an agreement cosigned by three foreign ministers of EU member states including that of Poland.

The combination of membership in NATO promised to Ukraine and of the new regime in Kyiv fully dependent on the USA foretold that Russia would certainly lose its old naval base in Sevastopol, for which it had paid a high rent since 1992. Moreover, as a NATO naval and air base, Sevastopol would pose a direct threat to Russia and to its geopolitical position in the Black Sea and Mediterranean area. To thwart this prospect, lightly armed detachments of Russian marines, already legally stationed on Crimea, were ordered to move in unmarked uniforms to take control of the entire peninsula. This clear act of aggression was similar in its objective to the USA and NATO aggression against the Federal Republic of Yugoslavia in 1999 – the forceful separation of a part of territory of a sovereign European state. Serbia however offered stiff resistance and the NATO three-months-plus long bombing campaign caused about two thousand mortal casualties and a huge economic damage. On the other hand the Russian marines in Crimea did not face any resistance, on Kyiv's strict orders, from the about 22,000

Ukrainian troops or inflict any casualties or damage. The Ukrainian officialdom simply vacated Crimea. This expeditious takeover was soon followed by a successful referendum accompanied by international observers on approving Crimea's legal separation from Ukraine and it rejoining Russia. Moscow thus took back Nikita Khrushchev's present of Crimean Province to Ukraine on the occasion of the 300th anniversary of its unification with Russia and Sevastopol, which Kyiv subsequently unilaterally annexed.

■ THE FIRST STAGE OF THE WAR IN UKRAINE

Closely related to the dramatic developments in Kyiv, there were uprisings in several Ukrainian cities and proclamations of „sovereignty” and „autonomy” in Lugansk and Donetsk. These uprisings largely featured protests against new regime and the discriminatory law adopted depriving Russian the status of the second official language in provinces with strong majorities of Russian and Russian-speaking population. The regime in Kyiv responded on 13 April 2014 by branding the protesters „terrorists”, declaring a „wide anti-terrorist operation” and entrusting the Ukrainian Army to carry it out. This military operation launched the first stage of the war in Ukraine. In its attacks on the Donbas autonomists, the Ukrainian Army employed bombers, tanks, armored vehicles and artillery while battalions of Ukrainian ultranationalist volunteers with neo-Nazi leanings and financed by Ukrainian oligarchs used artillery and light weapons. On the defending side, there were about 35,000 members of the territorial people's militias of the Donetsk and Lugansk People's Republics as well as Russian and other (including Serbian) volunteers. Like Serbia did to help the Republic of Serbian Kraina in Croatia, but much more extensively the Russian Federation offered many-sided support to the two besieged republics, encompassing financial, material, humanitarian and military assistance. Russian professional military personnel were integrated into the local militias and did not operate as separate and regular units of the Russian Army. At the same time, the US and British armed forces offered very sizable material and other military assistance to the Ukrainian Army, involving thousands of advisors and instructors. In numbers, they were comparable to the Russian military personnel on the other side of the frontline.

By February 2022, this armed conflict in Donbas caused 14,000 to 20,000 deaths. Two armistice agreements did not halt the Ukrainian shelling of Ukrainian territory, which was responsible for thousands casualties among the civilian population of the two self-proclaimed republics. These attacks continued for more than 9 years, accompanied by gross violations of international humanitarian law.

On 15 February 2015, Petro Poroshenko, President of Ukraine signed the Minsk 2 agreement. It was co-signed by the leaders of Germany, France and Russia and unanimously adopted as a resolution by the UN Security Council, thereby becoming part of international law. The Minsk 2 agreement provided the basis for peaceful

resolution of the conflict in Donbas³. Nonetheless, Petro Poroshenko and his successor Volodymyr Zelensky refused to implement most of Ukraine's 12 obligations, including the key provisions under which Ukraine was to grant constitutionally guaranteed autonomy to the Russian and Russian-speaking population in Donbas. In addition, Zelenski reneged on his pre-election promise that saw him win the election in 2019 and did not stop the war (see also: Minakov 2024). Having already lost Crimea the Kyiv regime rejected the prospect of having autonomous predominantly Russian-speaking units within federalized Ukraine. This arrangement as a price for peace would have been similar to the Dayton solution for Bosnia and Herzegovina with the Republic of Srpska as its part. This rejection was a fatal blunder with disastrous consequences for Ukraine.

■ THE SECOND STAGE OF THE WAR IN UKRAINE

On 24 March 2021, Zelensky blatantly violated the Minsk 2 agreement and international law by ordering the Ukrainian Army to liberate the territories of the two republics and Crimea⁴. The bulk of the Ukrainian Army was then relocated to their vicinity, clearly visible by Russian satellites. Instead of a peaceful resolution of the conflict, Zelensky, thus decided on full-scale military suppression of the Donbas autonomists and on reconquering Crimea⁵. He and his American patrons were surely well aware that it would provoke a strong reaction from Russia. On 16 February 2022, upon his order the Ukrainian Army initiated the second and much more violent stage of the war. From that date on, the intensity of Ukrainian shelling of Donetsk started to grow from several tens to 1,500 explosions daily.

Combined with movements of Ukrainian troops this wave of fire strongly indicated that a massive land attack was coming soon as part of implementation of the March 2021 order. It was very similar to the beginning of the Georgian offensive against the self-proclaimed Republic of Southern Ossetia on 7 August 2008. This strong Ukrainian escalation was no doubt coordinated with the US President Joe Biden, who publicly predicted that Russia would invade Ukraine on 16 February 2022 (Ward, Forgey 2022).

The stepping up of the level of violence ordered by Zelensky successfully provoked in several days a predictable Russian response. On the political and legal levels, this entailed the Russian Federation's recognition of the two republics as independent states, signing with them two agreements on friendship, cooperation

³ The full text of this agreement is available at OSCE (Organization for Security and Cooperation in Europe) ,<https://www.osce.org/cio/140156> (access 1.09.2024).

⁴ The Decree No. 117/2021 of 24 March 2021, available here: <https://www.president.gov.ua/documents/1172021-37533> (access 1.09.2024).

⁵ <https://ppu.gov.ua/en/press-center/today-president-of-ukraine-volodymyr-zelenskyy-signed-decree-117-2021-of-march-24-2021-on-the-strategy-of-de-occupation-and-reintegration-of-the-temporarily-occupied-territory-of-the-autonomous-republ/>.

and mutual assistance, accepting their pleas for assistance and protection in line with Art. 51 of the UN Charter and invoking the Responsibility to Protect. In the latter the Russian Federation used a very similar justification as did NATO in 1999 for its aggression against the Federal Republic of Yugoslavia. On the military level, Putin was faced with the real prospect of Ukraine quashing the two client, Russian-speaking parastates. This would have submitted their Russian and Russian-speaking majority population to retribution by the Ukrainian ultranationalist regime, causing it, like it happened in Croatia to flee en masse across the border. Putin later explained that moral duty is higher than legality. He could not, also for domestic reasons, afford a humiliating political defeat similar to that suffered by Slobodan Milosevic in Croatia in August 1995. Unlike in August 2008 in Georgia, he did not wait for an all-out Ukrainian ground attack. Putin could fully expect that stronger Western sanctions than were currently in place would follow, even if Russia's response to the Ukrainian offensive were only moderate.

Probably on the basis of a faulty assessment of both Ukraine's capacity and determination to resist and of the West's probable response, he precipitously and knowingly in violation of international law ordered a „special military operation”. It involved an invasion of Ukraine on 24 February 2022, by a limited contingent of Russian land forces. This move was combined with extensive destruction of the Ukrainian air force, the air defense system, and other military infrastructure. Ignoring an axiom of military science, an invading force of some 90,000 Russian land troops was sent against the Ukrainian Army thrice superior in numbers. This Russian force was also grossly insufficient and logistically and otherwise unprepared to accomplish the officially declared task of „demilitarizing” and „denazifying” entire Ukraine. In spite of its shortcomings, this force managed to swiftly occupy additional 15% or so of the Ukrainian territory (some as an operational diversion and only temporarily) and effectively protected the two attacked republics. It additionally established and secured a land bridge between Crimea and Donbas, made the Sea of Azov part of Russia's internal waters, took control of the largest European nuclear power station at Zaporizhzhia and deprived Ukraine of its stocks of plutonium and uranium. These stocks would have been sufficient to make Ukraine the world's fourth-strongest nuclear power. The latter was an effective response to Zelensky earlier declaration that Ukraine was intending to again acquire nuclear weapons („Al Jazeera” 2021). Preventing this dangerous prospect certainly served as an additional and important incentive for Putin's decision.

For the US, by far the most frequent violator of international law, provoking Russia into an act of aggression fitted nicely with its strategic goal. Russia's invasion of Ukraine provided a perfect occasion for demonizing and isolating it internationally and for uniting the West under USA's guidance on imposing on Russia an unprecedented array of drastic economic and other sanctions. These punitive measures were expected to quickly ruin the Russian economy, hopefully bring down Vladimir Putin's regime,

defeat Russia militarily without losing American lives, and cause the fragmentation of Russia into several states (as elaborated earlier publicly by Zbigniew Brzezinski and the RAND Corporation). However, these hopes have not materialized. Moreover, the effects of the Western sanctions proved to be much more harmful to the EU economies than to the Russian economy while in no way helping Ukraine.

■ THE TWO WARS COMPARED

Still officially undeclared by Russia, the war in Ukraine has already lasted twice longer than the war in Croatia, and is still ongoing. There are also other important differences caused by the mismatch between Croatia and Ukraine in the size of their population and territory (approximately 1:10), and by the different configuration and extent of the theaters of war. Furthermore, there are large differences in the size and structure of the armed forces involved, in the disparities between Serbia's and Russia's military capabilities compared to the respective capabilities of Croatia and Ukraine. The war in Ukraine in its second stage has been different from the war in Croatia due i.a. to a massive use of several weapons systems (notably drones and missiles).

There are also huge differences in the direct involvement of international organizations and other external actors in the two wars. In the fall of 1991, the European Economic Community (EEC) sent the first mission to Croatia of white-clad and unarmed observers who, as impartial intermediaries, tried unsuccessfully to stop the armed clashes between the Croatian police and Serbian insurgents. The United Nations established UNPROFOR (UN Protection Force) in February 1992, operating from Zagreb. It was followed by UNCRO (UN Confidence Restoration Operation in Croatia) in 1995–1998, UNTAES (UN Transitional Administration in Eastern Croatia) in 1996–1998, and UNMOP (UN Mission of Observers in Prevlaka) in 1996–1997. For several years, the UN-supported International Conference on Former Yugoslavia was active operating from Geneva. In comparison, there have been no UN or EU peacekeeping or observer missions in Ukraine. The UN General assembly has adopted a number of resolutions related to the war in Ukraine. In several resolutions it deplored and condemned Russia's invasion with huge majorities for and only five votes against. The UN Secretary General António Guterres facilitated the conclusion of an agreement on grain exports from the two warring states. The OSCE had no observer missions in Croatia, but deployed two such missions in Ukraine, notably the sizable OSCE Special Monitoring Mission from 2015 until March 2022. In addition, the OSCE played an active role in facilitating the Minsk 1⁶ and Minsk 2 ceasefire agreements.

⁶ The Minsk 1 Agreement consisted of two documents, both available at the OSCE website: the Minsk Protocol from 5 September 2014 (<https://www.osce.org/home/123257>) and the Minsk Memorandum from 19 September 2014 (<https://www.osce.org/home/123806>) (access 1.09.2024).

Extra-regional states were not openly involved in the war in Croatia. In 1991–1992, the Croatian forces included 456 foreign fighters (British, French, German, et al.), accompanied by about 2,000 private American military instructors. On the other hand, Ukraine has received huge support from several dozen foreign states, in particular the US, as well as other NATO and EU members in the form of heavy arms, ammunition, training, intelligence, economic and humanitarian assistance. According to the Russian Ministry of Defense, since 2022, 13,387 foreign fighters, mercenaries and volunteers, joined the Ukrainian Army of whom 5,962 lost their lives. Polish citizens have been most numerous in both categories – 2,960 enlisted and 1,497 dead. They were followed by Americans and others. This strong external involvement transformed the local war into an extra-regional armed conflict between Russia and the US-led collective West, with Ukraine sacrificing its soldiers and itself as the West's expendable proxy.

The war in Croatia and its outcome were closely linked with the war in neighboring Bosnia and Herzegovina, while there has been no similar regional linkage of the war in Ukraine. The war in Ukraine has also produced by far a bigger international political and economic impact on other countries, not only in Europe, than the war in Croatia.

Most importantly, there have been enormous differences between the two wars in the number of dead (at least 1:25), number of refugees and displaced persons (approximately 1:25), and extent of destruction and amount of economic damage (at least 1:20). The war has inflicted a considerably greater damage on Ukraine as a state and on the Ukrainian society than the war did on Croatia. Since 2014, the population under Kyiv's control has so far been reduced by at least one-third and the territory by close to one-fifth. It has been estimated by some Western experts that the Ukrainian Army, National Guard and volunteers have suffered well over 400,000 deaths. Ukraine has also lost a good deal of its industrial capacity, agriculture, energy generation and critical infrastructure. Continuing the war suits the USA's geostrategic, chiefly anti-Russian goals, whereas Ukraine is paying a horrible price for it. The dragging on war of attrition is sapping Ukraine's ability to sustain itself, at least in its already rump shape.

The first phases of the war in Ukraine and the war in Croatia revealed substantial similarities in terms of causes and devastating consequences. On the other hand the second phase of the war in Ukraine strongly differs by being predominantly an interstate war and the first interstate armed conflict in Europe caused by NATO enlargement. As a result, the war in Ukraine stands out for its scale of devastating consequences, violations of international humanitarian law, international impact, and by the degree of great powers involvement.

At the beginning of the second phase of the war in Ukraine, the Russian Army pre-empted the anticipated Ukrainian version of an offensive akin to the Croatian operations „Flash” and „Storm”. It not only prevented the possibility of Volodymyr Zelensky

triumphant entrance in Donetsk like Franjo Tudjman's entrance in Knin. The Russian Federation also officially annexed four Ukrainian provinces with Russian and Russian-speaking majorities in their populations and the Russian Army occupied a good share of them. In 2014 and 2022 Moscow thus took back by force a considerable part of former Novorossiya given to the Soviet Ukraine in 1920 and 1954. Unlike in Croatia, but like in Kosovo (1999, 2008) the war in Ukraine has extended the list of the more than three dozen new or de facto changed borders between European states since 1945.

■ RESPONSIBILITY FOR THE WAR IN UKRAINE

In a speech delivered at the UN General Assembly, US President Joe Biden attributed full responsibility for the war in Ukraine to Russia. Yet, in fact, many countries are directly responsible or co-responsible for its outbreak and continuation, including notably the USA led by Joe Biden.

Firstly, the war was initiated by the Ukrainian Army in April 2014 according to orders by the Ukrainian interim Presidency, when in February Russia against international law forcefully occupied Crimea. Under two subsequent Presidents Poroshenko and Zelensky, Ukraine violated two armistice agreements and sabotaged realization of the Minsk 2 agreement on peaceful resolution of the Donbas conflict. President Zelenski failed to fulfill his pre-election pledge to end the war, a pledge that had seen him win the election in 2019. On 24 March 2021, he ordered the Ukrainian Army to attack Donbas and Crimea in direct violation of both the Minsk 2 agreement and of international law. The Ukrainian leadership's orders to steeply increase the artillery shelling of Donetsk from 16 February 2022 on, together with the movement of Ukrainian troops provoked an invasion by the Russian army. This led to the armed conflict transforming from an internal to largely an interstate war. In April 2022, President Zelensky reneged on an initialed agreement with the Russian Federation on peacefully resolving the conflict forged with assistance from the leaders of Israel and Turkey as intermediaries. Though Zelensky can not be blamed for failure, it is more complex⁷. Ukraine is responsible for the casualties and damage caused by its forces in Ukraine and in the Russian Federation.

On the other hand, the Russian Federation has grossly violated the UN Charter, the Helsinki principles and a dozen international treaties and agreements by which it

⁷ „Even if Russia and Ukraine had overcome their disagreements, the framework they negotiated in Istanbul would have required buy-in from the United States and its allies. And those Western powers would have needed to take a political risk by engaging in negotiations with Russia and Ukraine and to put their credibility on the line by guaranteeing Ukraine's security. At the time, and in the intervening two years, the willingness either to undertake high-stakes diplomacy or to truly commit to come to Ukraine's defence in the future has been notably absent in Washington and European capitals” – <https://www.intellinews.com/fresh-evidence-suggests-that-the-april-2022-istanbul-peace-deal-to-end-the-war-in-ukraine-was-stillborn-321468/>.

guaranteed Ukraine's security and sovereignty within its internationally recognized borders. In February 2014, it committed an act of aggression by occupying and annexing Crimea. On 24 February 2022, it committed a second act of aggression by invading, partly occupying and officially annexing four Ukrainian provinces. The Russian Federation is responsible for the casualties and huge damage the Russian armed forces have caused on Ukrainian territory.

The leading NATO members are co-responsible for the outbreak and continuation of the interstate conflict and war in and over Ukraine. This primarily applies to the USA, which knowingly unleashed a chain reaction in the conflictual relations between NATO and Russia. The USA used NATO to embroil EU in this conflict, even though that contradicts objective economic and other interests of many EU members, notably of Germany. This chain reaction led to the political conflict deteriorating into a war in which the USA is using Ukraine primarily as a tool to harm and weaken Russia. Germany and France under the Minsk 2 agreement and with subsequent policies for seven years supported Ukraine's policy opposing Russia's aims in the Donbas conflict. As leaders in the European Union's common foreign policy, they encouraged and supported Ukraine's active preparations for a war with Russia. The Western powers became co-responsible for the transformation of a relatively limited internal war in Ukraine into a wider, much more lethal, bloody and destructive, predominantly interstate war. In April 2022, the USA and Great Britain prevented the conclusion of an initialed Russian-Ukrainian agreement on resolving the conflict⁸. The members of NATO and EU by politically encouraging and by providing arms and funds to Ukraine have been enabling the continuation of this war. Without this interference, the war in Ukraine would have been already over and very probably on better terms for Ukraine than there will actually be.

■ CONCLUSIONS

The NATO and EU members will certainly fail to achieve their main declared goal – Ukraine's victory and hence Russia's military and political defeat. This applies chiefly to the leader of the West. After that in Afghanistan, the USA will suffer one more political defeat. On the other hand, the USA has this time been rather successful in realizing several related goals. The USA has solidified its hegemony in the Western camp and in most of Europe, reactivated NATO, attracted to it two new members Finland and Sweden, bolstered their dominant role in the alliance, subordinated even further and simultaneously economically and politically weakened the European Union, for quite some time poisoned Germany's and the

⁸ See more on broken down negotiations: <https://www.intellinews.com/fresh-evidence-suggests-that-the-april-2022-istanbul-peace-deal-to-end-the-war-in-ukraine-was-stillborn-321468/>.

EU's relations with Russia and inflicted a very considerable economic and political damage on Russia.

A decade since the Donbas conflict began and the annexation of Crimea followed, Ukraine is today much farther away from accomplishing its cardinal strategic goals – to reestablish its government's control and the country's sovereignty on the entire internationally recognized territory – than it was in February 2022, let alone in February 2014. Moreover, another desired goal remains unattained. It was stated in Zelensky decree as a condition for lifting the prohibition on any negotiations with the Russian Federation – to remove Putin from the position of President. However, with his mandate already expired in May 2024 Zelensky himself will certainly be out of his presidential office much sooner than Putin will be from his. On the other hand, the Russian Federation has achieved some of its strategic goals, albeit not the two declared principal ones – Ukraine's permanent „neutralization” and „demilitarization”. Due to the two sides' mutually excluding objectives, the final outcome of the war in Ukraine will not be decided around a diplomatic table as a compromise. Like what happened in Croatia in 1995, in Serbia in 1999, in Georgia in 2008 and in Azerbaijan in 2023 it will be decided on the battlefield. However these outcomes will be very different. The war of attrition in Ukraine imposed by Russia, will probably result in a collapse of the Ukrainian army. Possibly like at the end of the war over Kosovo an agreement would be signed by military representatives of the two warring sides perhaps somewhere in Belarus in 2025. A ceasefire would be implemented with the withdrawal of Ukrainian forces behind the lines stipulated in the agreement. Probable outcome of the war in Ukraine would be similar to those in Serbia and Georgia – a loss of a considerable part of state territory and de facto the establishment of a new internationally universally unrecognized interstate borders. It is conceivable that after the war Ukraine will be again an ethnically and culturally more homogeneous landlocked country on about a half of its pre-2014 territory. As a permanently neutral state enjoying good relations with all its neighbors and wider, Ukraine could play a positive role as a buffer between the Russian Federation and NATO member states thus contributing to European security.

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ANTON BEBLER

THE WAR IN UKRAINE AMONG CONTEMPORARY ARMED CONFLICTS

The war in Ukraine is the biggest, bloodiest and longest war in Europe since 1945. Its initial stage holds similarities with several other armed conflicts and wars in the last 50 years on Cyprus and in the territories of the former Soviet Union and the Socialist Federal Republic of Yugoslavia (SFRY). Among the cases in ex-Yugoslavia the greatest similarity is seen with the war in Croatia (1991–1995). These conflicts stemmed from almost simultaneous breakdowns of two multinational „socialist federations” and their communist regimes. The dissimilarity of the second stage of the war in Ukraine and the war in Croatia is primarily due to the processes of NATO and EU enlargement coupled with the USA's policy of using NATO enlargement and Ukraine as tools to harm and weaken Russia. The conflict about Ukraine developed into an indirect war between Russia and the US-led West, where Ukraine is the West's proxy and the main victim. The final outcome of the war in Ukraine will be decided on the battlefield and not around a diplomatic table. Still, it will be very different from that in Croatia. Responsibility for the war in Ukraine and its consequences must be shared between the two direct belligerents, the co-responsible USA and other NATO members.

Keywords: Ukraine; Russia; Croatia; USA; NATO; internal war; inter-state war

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PRESENT AND FUTURE GEOPOLITICAL ROLE OF RUSSIA IN PUBLIC OPINION AND MEDIA DISCOURSE

■ INTRODUCTION

Global transformations of the political realm, and attempts to reshape the global world order as well as transit of local conflicts to the international ones and hybrid mode of current conflicts – all listed above make actual and pivotal academic research of problems related to design and legitimization of conflicts of different levels and character.

Modern military conflicts are increasingly acquiring a quasi-permanent nature, with the growing role of the media component, providing both support from the population and the sympathy of those participants in international relations who are not active parties to the conflict. The hybrid nature of wars turns them into ordinary everyday life activities, deprives them of the status of an exceptional, epoch-making event, and demonstrates almost unlimited space for representative manipulation of the real situation developing „on the ground” (Taki 2024).

To understand the prospects and dynamics of conflict interactions, especially in crisis conditions of global uncertainty, it seems productive to study issues related to constructing an image of the future. The mentioned uncertainty results from the numerous uncontrolled information streams, which shape the images of the surrounding world in the context of different civilisational paradigms. Due to these facts individuals feel an additional need in self-identification and in gaining the sense of belonging to various communities and in determining their place both at the local and global levels. As Aleksandr Neklessa noticed an active representation of the future involves a struggle for dominance in the process of choosing, editing and approving the preferred version of civilization (Neklessa 2019: 152).

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The war acts of Russia in Ukraine, which are called in the Russian public discourse and officially named by the Russian government the „Special Military Operation” (SVO), became a divisive issue for the Russian society and political elites. This led to several socio-political consequences, which should be conceptualized. Protests against the SVO began but were promptly neutralized by the series of arrests and criminal prosecution, introducing several legislative acts that imposed barriers and curbs on mass media activities, which, of course, transformed the information space.

Around 300 media outlets were closed and blocked in Russia since the SVO started². Also the Russian media have been significantly affected by adopting in 2022 amendments to the Criminal and Criminal Procedure Codes of the Russian Federation against spreading and distributing „fake news”. These amendments have imposed restraints on media by introducing administrative and criminal liability for the dissemination of deliberately false information about the use of the Russian Federation Armed Forces, as well as for public actions aimed at discrediting the Russian Army³. According to the data provided by the Judicial Department at the Supreme Court of the Russian Federation in 2023 65 people (in 2022 there were 14 such court verdicts) were condemned for spreading „fake news” about the Russian Army (Article 207 of the Criminal Code of the Russian Federation) and for discrediting the Russian Army (Article 280.3 of the Criminal Code of the Russian Federation) were condemned 50 people in 2023 and only 3 people in 2022⁴. The number of people convicted of anti-terrorism articles was 730 people, most of them were prosecuted for public justification of terrorism in the media. In other words people were condemned for the SVO media covering if their opinion did not comply with the official position of the Russian authorities⁵. The number of materials with „fakes” about the Russian Armed Forces that were deleted or blocked last year fell by almost half compared to 2022: 73.5 thousand in 2023 versus 129.4 thousand in 2022, when the amendments about „fake” news and discrediting of the Russian Army were adopted⁶.

² UNIVERSAL SERVICE for checking access restrictions to sites and (or) pages of Internet sites // Federal Service for Supervision of Communication, Information and Technologies and Mass Communications, <https://blocklist.rkn.gov.ru/> (access 20.02.20240).

³ Federal Law of March 4, 2022 No. 32-FZ On Amendments to the Criminal Code of the Russian Federation and Articles 31 and 151 of the Criminal Procedure Code of the Russian Federation.

⁴ Punishment ranges from 3 to 15 years. Judicial statistics data//JUDICIAL DEPARTMENT under the Supreme Court of the Russian Federation, <http://www.cdep.ru/index.php?id=79&item=8690> (access 20.02.2024).

⁵ Within the framework of this article, for example, there is a trial of play-writer Svetlana Petriychuk and director Evgenia Berkovich, who voiced their anti-war position, and are now under investigation for the play *Finist the Clear Falcon*.

⁶ Roskomnadzor blocked more than 670 thousand prohibited materials in 2023. Interfax 26.01.2024, <https://www.interfax.ru/russia/942025> (access 20.02.2024).

The statistics mentioned above are needed to demonstrate that the media space in Russia has significantly collapsed and there is no room for any disputes about the Russian military actions coverage in the media, only the official voice of the Russian authorities has the place.

However it will be a simplification to explain the high level of the SVO support by the Russian citizens only by the repression pressure. The SVO's mass support was recorded by different think tanks including those which are known as disloyal towards actual Russian authorities. This fact may bear testimony to the high level of the Russian society consolidation on the SVO support issue.

This may be explained by not only the peculiarities of the information field, where opinions opposite to the position of the Russian authorities are actually illegal today, but also by the general socio-cultural situation in the country.

There are no doubts that the unity of the nation is built on the basis of consent and consolidation of society regarding the general rules and directions of the socio-political process, which actualizes the consideration of the Russians' ideas about the geopolitical future of Russia, as well as the dominant foundations of the socio-political consolidation that we observe in the Russian society.

The theoretical and methodological basis of the study became the concept of the image of the future offered by the futurist Fred Polak, who substantiates the objectivity and necessity of assessing the present to form an image of the future, which is determined by the existing value system in society and those moral guidelines that are postulated as the highest ideals (Polak 1973) and John Urry, who emphasizes that the future is a social phenomenon, and changes in the „structures of feeling” – meanings and values, in the form in which they are experienced and felt by society, have a serious impact on the future (Urry 2016: 26).

This has determined our interest not only in political and public discourse, but also in public opinion about the future of Russia.

The empirical base is built on data obtained during the implementation of two research projects:

- 1) data of the annual monitoring survey *How are you, Russia?*, conducted by the Institute of Socio-Political Research – Branch of the Federal Center of Theoretical and Applied Sociology of the Russian Academy of Sciences (ISPR FCTAS RAS) since 1992⁷. The sample size varied from 1,312 to 1,866 respondents in different years of the study. In April 2024 the sample size of the survey was of 1,600 respondents. The research is based on a proportional

⁷ Annual monitoring survey *How are you, Russia?*, conducted by the Institute of Socio-Political Research – Branch of the Federal Center of Theoretical and Applied Sociology of the Russian Academy of Sciences with the participation of the author of the article, Nataliya Velikaya. Head of the project is Victor Levashov, PhD in sociology, Director of the Institute of Socio-Political Research.

quota all-Russian sample with interdependent characteristics of the general population as gender, age, education, place of residence. The toolkit includes a set of indicators measuring the dynamics of social and political views of Russian citizens over 30 years, including dominating values, level in trust to different political institutions, relationships with different countries, goals of the Russian state.

- 2) content and discourse analysis data collected by discourse analysis of articles issued from July, 2013 to July, 2014 and from July, 2022 to July, 2023. The general sample includes 521 articles in the following periodicals: „Moskovskiy komsomolets”, „Rossiyskaya gazeta”, „Komsomolskaya pravda” and „Novaya gazeta”, which also have electronic versions on the Internet. The total sample was 174 articles: 87 for the first period and 87 for the second period. The method of selecting units of analysis was systematic; every third article was analyzed, all mentioned quotes in the text of this research paper are taken from the analyzed articles. Research methods include quantitative and qualitative content analysis of texts, elements of critical discourse analysis by Theo Leeuwen (Kress, Leeuwen 1996). The selected methods allowed to identify the dominating topics of the publications and particular discourse practices of the media.

■ SPECIAL FEATURES OF THE ALL-RUSSIAN IDENTITY DESIGN AND NEO-IMPERIAL SENTIMENTS

When the USSR collapsed, all the newly made on the ex-Soviet territory states faced the challenge to create and support their national identities. The rapid growth of ethnonationalism on the ruins of the communist ideology in the former republics of the Soviet Union has developed against the background of a certain inertia of these processes in the RSFSR (Russian Soviet Federative Socialist Republic), and then in the Russian Federation.

Monoethnic states have built their national identity on their ethnic and religious identity, they also used „negative identification” techniques to exclude all Russian and Soviet items from their socio-cultural space. Following these policies there occurred conflicts in the end of 80s and early 90s, which led to mass exodus of the Russian and Russian-speaking population from a number of national republics.

Russia differs from national republics as it is a multinational state populated with multireligious citizens. Owing to this the country faced the urgent task to preserve the unity of the nation and integrity of its territory, a single cultural space and identity, and the construction and reproduction of an all-Russian civic identity.

The main subject of such construction in the absence of significant institutions of civil society became the task of the political elite and intellectuals close to

authorities, who, however, failed to formulate a clear and attractive project for the „Russia of the Future”.

The protracted process of redefining national identity in Russia, the search for new meanings and guidelines in a changing world contributed to the formation of prerequisites and conditions for the construction of a contradictory, „patchwork” (fragmented) national identity, which was based on resentment of the idealization and glorification of the historical past of the Russian people. Since the group identities of this type contain negative self-identifications and are built on the fixation of imaginary internal and external enemies and feelings of resentment for „historical injustice”, the public consciousness constantly generates a feeling of crisis and anxiety.

It should be noted that there were two dominating concepts of the ideological discourse: adaptation to the Western world terms to build a political and economic system according to Western liberal economics and democracy terminology or the second concept, which speculated on the opposition to the Western world and claimed the construction of a new center (Pole) of the world order based on their own, different from the Western civilizational identity.

During the first decade of the XXI century the major state aim was to modernize the economic and political system. This idea was declared numerous times, particularly when Dmitry Medvedev was appointed to the Russian President position. However later the focus of the state policy shifted to the search of justification of the idea of „Russia’s own way”, while it was distancing from Western influence. This idea was most fully expressed in the concept of „Russia-island” developed by Vadim Tsymburskiy and his followers (Tsymburskiy 1997; Mezhuiev 2012).

What a „special, third way” should look like was very clearly presented by Alexandr Dugin in his book *The Fundamentals of Geopolitics. The Geopolitical Future of Russia*, published in 1997: to defend the independence of Greater Eurasia, Russia-Eurasia must assemble a global counterweight to America, the so-called New Empire. At the same time, the „neo-Eurasian Russian Empire” will exist as a political entity without obvious land borders and limits, and without a clear sphere of influence (Dugin 1997). Dugin’s geopolitical works and his appeals to Russian Eurasianism increased the popularity of patriotism and a new version of *pochvennichestvo* in the 1990s, which gained popularity among the current political elite, including Vladimir Putin. This, by the way, allowed (Carlson Tucker)⁸, which he took from Dugin, to call it Putin’s brain.

⁸ The Tucker Carlson Encounter: Aleksandr Dugin Encounter/ Published April 29, 2024 (21 mins) Tucker Carlson Network, <https://tuckercarlson.com/the-tucker-carlson-encounter-aleksandr-dugin/> (access 01.05.2024)

Also in the course of ideological searches and discussions, neo-Eurasianism, the Russian idea and other conservative ideas developed into the neoconservatism which is considered now as dominant political trend and as a specific ideology.

Claiming to be an extensive explanatory doctrine in the field of geopolitics, neoconservatism is expressed by the concept of the „Russian world”, which postulates the uniqueness of the Russian civilization, justifies the revival and preservation of a national identity as a strategy for resisting Western influence and culture. The Russian neoconservatives, who are considered anti-globalists, have actively advocated and are in favor of promoting traditional Orthodox values and limiting the expansion of „liberal” ideology, which included representatives of the Russian Orthodox church in the zone of ideological discussions as well. Moreover, the definition of a Russian national identity through the Orthodox faith is a leitmotif in all the „ideological” documents of the Russian Orthodox Church and the speeches of the hierarchs of the Church. Some researchers see in these texts signs of the transition of the Russian Orthodox Church to the positions of nationalism and statehood (Verhovskiy 2011: 12).

In general terms, we can say that the concept of the „Russian world” includes identification components that appeal to the Russian culture, which is seen as an instrument of soft power (Dugin 1997; Shchedrovitsky 2000). At the same time, it was assumed that the „Russian world” should include those territories that were previously part of the Soviet Union or were in its zone of influence.

However the „Russian world” as a soft power has demonstrated poor performance, which pushed politicians to use the Russian idea as „a pressing tool in international relations” (Vasiliev 2021), also the Russian idea was used to articulate and protect an idea of irredentism, which clearly manifested itself during the SVO in Ukraine.

It should be highlighted that the current government legitimizes military actions in terms of civilizational divisions, contrasting Russia with Western civilization, on the one hand, and in terms of the messianic role of Russia, on the other.

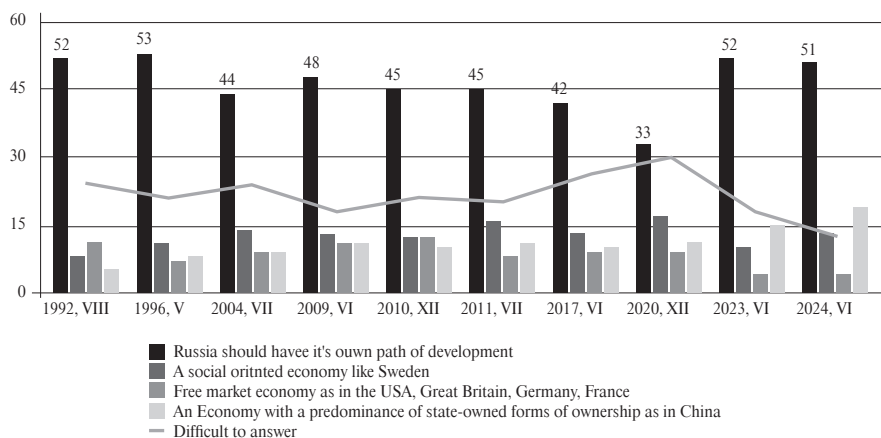
It is no coincidence that in a number of his speeches, Vladimir Putin mentioned not only the course towards sovereignty, but also the need to preserve the Russian identity and traditional spiritual and moral values. Specifically, in his annual address to the Federal Assembly in 2021, Putin said that „as always during challenging times, our traditional religions stepped up to provide spiritual support to our society (...). Today, family, friendship, mutual assistance, graciousness and unity have come to the fore as well. Spiritual and moral values, which are already being forgotten in some countries, have, on the contrary, made us stronger. And we will always uphold and defend these values”⁹.

⁹ V. Putin, 2021, Presidential Address to the Federal Assembly, Kremlin.ru, 21 April (online), <http://en.kremlin.ru/events/president/news/65418> (access 20.04.2024).

The opposition of Russia to the West was vividly articulated by Sergey Karaganov¹⁰, who is one of the ideologists and spokesmen of the „Russian world”: „One of the aims of Russia is to stop kicking and screaming from the West. We must look at them with a sufficient level of arrogance. They are experiencing a civilizational crisis. We can even look at them with sympathy, without reacting to any rubbish that they pour out” (Karaganov 2020).

The increasing distance between Russia and the Western countries is validated by the data of the all-Russian surveys, according to which the majority of Russian citizens (65%) are close to support the idea that Russia is rather a special Eurasian civilization, and in the future the center of its interests will shift to the East. In 2007 the number of people who supported the idea of Russia as a part of the Eurasian civilization was 45%, and in 2008 – 42%. The number of people who consider Russia as a part of Europe and believe that the Russian and European future will be allied in the XXI century has fallen to 20%.

According to the monitoring data by ISPR FCTAS RAS after 30 years of the USSR collapse the number of people who believe that Russia should have its own path of development returned to the indicators of the 90s, reaching 52% in 2023 (in 2020, this figure was at 33%) (*How are you, Russia?* 2023: 57).



Graph 1. Respondents' opinion on which type of economic development is most acceptable for Russia (RF, % of the number of respondents)

Source: Center for Social and Socio-Political Studies of ISPR FCTAS RAS; *Sociological monitoring How are you, Russia (1992–2024)*.

The development of the situation allows a number of Russian researchers to argue that the elites and the population of Russia have „turned away” from the

¹⁰ Sergey Karaganov is the Chairman of the Editorial Board of the magazine „Russia in Global Affairs”, Dean and Scientific Director of the Faculty of World Economy and International Affairs at Moscow's Higher School of Economics.

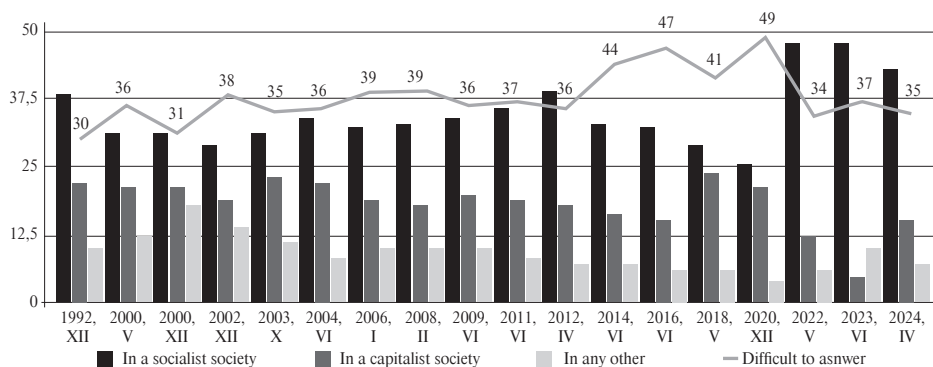
European perspective and reoriented to Asia, that the core of the newfound Russian identity should be precisely the detachment from Europe (Miller, Luk'janov 2016).

It was also determined by a negative attitude of Russians towards many of the social consequences of the radical neoliberal reforms that occurred in the 90s. Respondents believe that the major beneficiary party of those reforms are different groups associated with the family of ex-president Boris Yeltsin.

At the same time, in recent years the political elite has been actively exploiting nostalgic sentiments, constructing a delusive political image that is increasingly mutating towards a Soviet dystopia. There are even intensive attempts to rehabilitate the darkest pages of the Soviet past. On the one hand the authorities have sponsored reconditioning of monuments to Iosif Stalin¹¹, on the other they have imposed additional restrictions on the work of organizations, which were engaged in preserving the memory of the repressed people during the Soviet era. These actions have led to an increase of a number of people, who have a fellow feeling for the Soviet leaders. An illustrative fact is that of the dynamics of attitude change towards Stalin. The number of people who demonstrate a philo-Stalin attitude has grown from 15% in 1995 to 40% in 2022 (*How are you, Russia?* 2022).

The mentioned resentment, associated with the glorification and mythologization of the socialist era and criticism of democratic and market reforms results in an increase in the number of people who consider socialism as an optimal model of the political structure.

In the last three years, almost half of the respondents (48%) expressed a desire to live under socialism (Graph 2), which they semantically associated with stability, peace and social security.



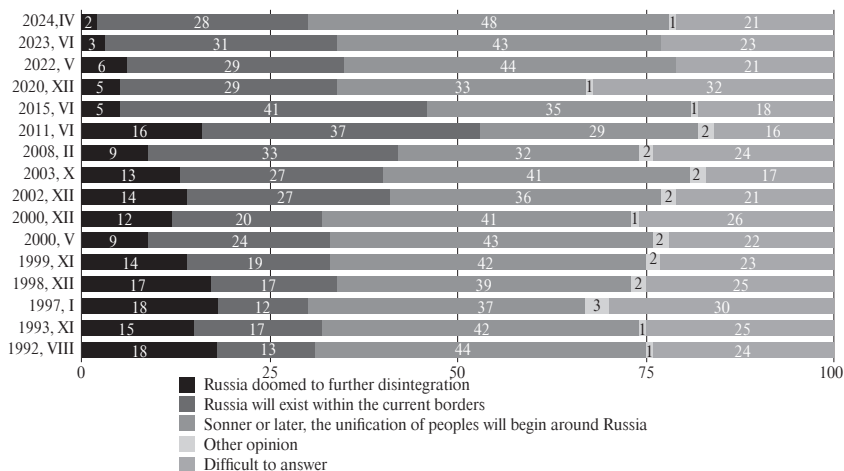
Graph 2. Respondents' opinion about the type of society they would prefer to live in (RF, % of the number of respondents)

Source: Center for Social and Socio-Political Studies of ISPR FCTAS RAS. *Sociological monitoring How are you, Russia? (1992–2024).*

¹¹ In 2022 and 2023 monuments to Stalin were made and established in Volgograd, Velikiye Luki, and Naberezhnye Chelny.

The future of Russia in the context of the SVO seems quite optimistic, which is associated with the expansion of the zone of the Russian influence, with the emerging sense of a pride in the power, which, according to fellow sociologists, „symbolically compensates for the everyday feeling of constant humiliation” with declarations of belonging to the victorious country. At the same time, the peaks of identification of Russians with Russia as a „Great Power” occur (with a shift per year) during military campaigns, moments of a sharp increase in propaganda, arousing sentiments of revenge and domination in the post-Soviet space: the second Chechen war (2000), the war with Georgia (2008), Annexation of Crimea expressed by the maxim „Crimea is ours” (2015) and the Special military operation in Ukraine (Gudkov 2023).

According to monitoring data over 30 years the number of citizens who believe that Russia is doomed to further collapse has decreased by approximately 3 times (from 18% in 1992 to 6% in 2022). At the same time the SVO and the intensification of the discourse of „Soviet resentment” significantly increased the number of respondents (by 11% compared to 2021) who believe that a process of unification of peoples will begin around Russia (Graph 3).



Graph 3. Respondents' opinion about the future that awaits Russia (RF, % of the number of respondents)

Source: Center for Social and Socio-Political Studies of ISPR FCTAS RAS. Sociological monitoring How are you, Russia? (1992–2024).

A dream of the great Russia gathering lands unites ordinary people, the intellectuals, and representatives of the political elite. Aleksandr Dugin, one of the ideologists of modern Eurasianism, writing about the urgent need to „recreate a common homeland of Great Russia at its new historical stage”, described the

future possible merger of a number of former republics of the Soviet Union: „The Eurasian Union is serious. This is the most serious thing that Putin has outlined in all his presidential terms (...). This is a kind of strategic guideline, this is the future, a description of the horizon of who we are and who we want to be. The concept of Eurasia and the Eurasian Union is not only strategic, not only spiritual or economic, but also political in the highest sense. Consciousness of a single integration space, a new policy” (Dugin 2012). And although today the Eurasian Union project does not show great success either in the economic or political space, it is still considered by the Russian political elite as promising.

■ FUTURE OF THE RUSSIAN STATE IN MEDIA DISCOURSE

As is often the case in times of crisis social mythology becomes the most important source for the shaping of a new identity (Ivanov 2021: 373), especially if it is voiced by prominent people and circulated in the media, which are considered by the current authorities as the most important tool for legitimizing the political regime and the policies it pursues, which determine both the content and discursive strategies when presenting information. For this research we have chosen the publications issued when the Crimea was annexed in 2014 and during the first year of the special military operation (SVO) that began in 2022.

An analysis of thematic clusters presented in the corpus of texts from two time periods shows that the construction of the image of the future Russia is formed on the basis of two groups of factors – internal (national, regional) and international, external (Velikaya, Zaytseva, Irsetskaya 2023).

Internal factors are mainly described through the successful implementation of social policies and the preservation of the country’s human capital, adherence to traditions and reproduction of culture, through increasing economic potential and maintaining environmental sustainability.

External factors are designated either as a confrontation between Russia and other international and political actors, or as messianism or leadership of Russia in a globalizing world, which makes sense to dwell on in more detail.

Both long-term and short-term optimistic models of the future of Russia were constructed within the framework of several discourses, of which the most significant for understanding the problems of the articles in the analysis below, are the following:

- 1) The **„Renaissance of Russia”** discourse was detected in $\frac{1}{3}$ of sample articles¹². In terms of content, this discourse is represented by the following semantic constructs: Russia is a country-civilization with a unique Eurasian or all-Russian

¹² Note. One article may contain several discourse frames.

identity. The restoration of the country's greatness should be built on the basis of traditional values, high spirituality and the uniqueness of the all-Russian or Eurasian identity, the special role of Russia in the formation of a multipolar world order and the construction of the Eurasian community is emphasized.

Within the framework of this discourse, the image of the future Russia in 2013–2014 was mainly constructed on the idea of preserving historical heritage and historical memory of past victories, on rethinking the historical experience of socialism, which was filled with exclusively positive connotations, even the most pompous: „Look at the USSR Coat of Arms! It shows how The Sun rises above the Earth. I am sure that despite all the problems, horrors, disasters, this Sun will rise and illuminate the future of all humanity”¹³. The appeal to nostalgic sentiments and the Soviet resentment continued in 2022–2023, accompanied by a demand for the restoration of at least the unity of the three Slavic peoples: „Thirty years of chaos is too much, it's time for three Slavic parts of the Russian Empire: Russia, Malorossia [poetical and historical term to describe some territories of the modern Ukraine] and Belorussia to merge into one state before the «global community» eats us away one by one”¹⁴.

- 2) The second discourse type may be conditionally called the „**besieged fortress**” discourse. This discourse makes readers to focus on a complex geopolitical situation, on the need to protect their identity and the country's integrity in the face of threats of modernity: „We always know and today we are reassured that Russia's sovereign, independent and safe future depends only on us, on our strength and will”¹⁵.

Most articles on international topics that build the geopolitical future of Russia describe it both in terms of risks and threats, and in terms of opportunities and perspectives. Regarding partner and antagonist countries, the situation in 2013–2014 looks contradictory: some actors are indicated simultaneously as both promising partners and hostile countries (USA, European countries, Ukraine, Japan, Canada, Georgia). By 2022–2023 BRICS countries, Belarus and Iran are usually considered as partners, while the US, EU countries and UK are described as enemies and antagonistic countries.

¹³ The USSR was killed in its prime// „Moskovskiy komsomolets” (website) 28.12.2022, <https://www.mk.ru/politics/2022/12/28/sssr-ubili-v-samom-rascvete-sil.html> (access 20.02.2024).

¹⁴ The luxury of fighting out of compassion// „Moskovskiy komsomolets” (website) 10.10.2022, <https://www.mk.ru/social/2022/10/10/roskosh-voevat-iz-sostradaniya.html> (access 20.02.2024).

¹⁵ Together we will overcome all difficulties and keep our country great and independent: Vladimir Putin delivered a New Year's greeting// „Rossiyskaya gazeta” (website) 31.12.2022, <https://rg.ru/2022/12/31/vmeste-my-preodoleem-vse-trudnosti-i-sohranim-nashu-stranu-velikoj-i-nezavisimoj-vladimir-putin-vystupil-s-novogodnim-obrashcheniem-glavnoe.html>. (access 20.02.2024).

Also we have to stress the point that the particular attention was devoted to the Ukrainian future in 2012–2014, the hope was voiced that this country would remain in Russia's zone of influence: „Russia is the master of diplomacy and skillfully uses carrots and sticks methods. But it's impossible to draw an attractive image of the future. Even for ourselves, let alone for our neighbors”¹⁶.

In a significant set of publications, issued in 2022–2023 and in which the future of Russia was described somehow, that were related to the SVO (10 out of 87 articles show explicit context, 25 out of 87 demonstrate latent context). Russia in these materials appears as the party of the conflict that is surrounded by enemies and resists aggression from different directions. „It is a war being waged against Russia, a war on a very broad front, the military confrontation in the SVO is only a part of this war. In addition to this, there is a colossal economic war – there have never been so many sanctions introduced against any country in the world in history. There is the war... the informational, psychological war against the fundamental frameworks of the Russian culture”¹⁷.

The SVO is positioned and promoted through historical necessity and as necessary measure: „We mustn't allow the renaissance of the ideology, which caused millions of human deaths around the world”¹⁸.

- 3) The „war discourse”. It is semantically realized through the thesis of irreconcilable ideologies and value differences that lead not only to a war of meanings, but also to a war on the battlefield. The key words of the news agenda with certain semantic connotations aimed at creating oppositions „friend – foe”, „ours – enemies” were: „terrorism of Bandera's supporters”, „real consolidation of the Russian society”, „Western pressure”, „friends of Russia”, „the isolation of Russia has failed”, „Russophobia”, „our cause is just”, „counterthrust”, „liberation”, „foreign mercenaries”, „victory”, „enemy losses”, „collective West”, „aggression of NATO”, „nazi henchmen”, etc.

The discursive strategies of this cluster are dominated by an aggressive strategy of discrediting the Ukrainian side of the conflict, presented more than emotionally and aimed at forming an associative series with the Great Patriotic War (a part of the WWII, this historical term is usually used in the Soviet and Russian sources instead of the name Second World War): „the butcherly tactics of the Ukrainian

¹⁶ Fëdor Luk'janov: Russia skillfully uses carrots and sticks method// „Rossiyskaya gazeta” (website) 03.12.2013, <https://rg.ru/2013/12/04/vibor.html> (access 20.02.2024).

¹⁷ Preserve the memory of great feats: the head of Yakutia region told how a unique historical exhibition was created in Patriot Park// „Komsomolskaya pravda” (website) 20.08.022, <https://www.kp.ru/daily/27434.5/4635365/> (access 20.02.2024).

¹⁸ Preserve the memory of great feats: the head of Yakutia region told how a unique historical exhibition was created in Patriot Park// „Komsomolskaya pravda” (website) 20.08.022, <https://www.kp.ru/daily/27434.5/4635365/> (access 20.02.2024).

Nazis”, „cruel reprisal raid”, „unacceptable threats to the security of Russia”, „protecting the people of Donbass from the genocide of the Kyiv regime”, „soldiers of the Ukrainian Armed Forces and nazi battalions are hiding behind the civilian population as a human shield”, „we are protecting the people of Donbass over whom mocked”, „untrained lads and released prisoners”, „grinding the enemy and saving their people”, „Ukrainian Nazis who played too long into the cult of the Third Reich”. Some articles emphasize the role of the Western countries in the conflict, as it was in an interview with Boris Rozhin¹⁹, who argued that „the people who started the war in Ukraine have not changed their goals since the Obama era. Their aim is to destroy Russia as an actor of international politics. It is not Ukraine, but the United States, Britain and other NATO members who are waging war against us now. The Ukrainian army is their proxy army (like Hezbollah for Iran). Our enemies are the USA and Britain”²⁰.

The classic discursive strategy of constructing the image of the enemy and dehumanizing the enemy is also implemented when Ukrainians are described. They are often presented as devoid of subjectivity and humanity: „Ukrainians today are... they are just figures in a large computer game on tablets at NATO headquarters. These headquarters are the places where the war against Russians is held”²¹. This rhetoric helps to design and maintain the image of the enemy as a subject who doesn't merit sympathy.

The participation of the Western countries in the conflict is described as a threat to the Russian state sovereignty and integrity. The words used to support this idea are: „terrorist attack”, „murder”, „cooperation with foreign states”, „aggression against Russia”, „refuse to negotiate with Russia”, „eight years of genocide of Donbass people”, „The West is trying to split our society”, „sanctions”, „espionage”, „recruited by the SBU (Security Service of Ukraine)”, „Bandera's ideology”, „Ukrainian fascists”, „sabotage”, etc. (Velikaya, Zaytseva 2023).

- 4) The forth type of discourse is „**justice discourse**” (the fourth part of the analyzed articles) and it is focused on designing the image of Russia as a victim country in relation to which partners did not fulfil their obligations, and on the other hand as a country restoring global justice mainly in the context of shaping a new multipolar system. In this system the main task for Russia is to preserve its values and shape a multipolar system of relations between states. The current socio-political conditions

¹⁹ Boris Rozhkin is one of the popular patriotic bloggers from Sevastopol (Crimea), an expert at the Center for Military-Political Journalism.

²⁰ Who is interested in aggravating conflicts in countries near the borders of Russia: The political scientist gave a clear answer. „Komsomolskaya pravda”. Tolstushka. 28.09.2022, <https://www.kp.ru/daily/27451.3/4653679/> (access 20.02.2024).

²¹ Russia crushed the Ukrainian military machine back in May, since the summer the West has been fighting with us: how long will the special operation last? „Komsomolskaya pravda” 25.08.2022, <https://www.kp.ru/daily/27436/4637517/> (access 20.02.2024).

are considered as unfair and offensive for Russia: „Russia ought to be lifted from its knees!”²² [idiomatic phrase, which means that the country's greatness should be restored]. The conflict with Ukraine is also analyzed in this vein, which is seen primarily as the restoration of justice for the inhabitants of its eastern territories. In the articles studied, a special role in building a just future is given to the Russian military acts in Ukraine called by the authorities the SVO: „We are going into battle for the right of our mother tongue”, „Yes, we are going into battle for such a small thing. But behind this little detail lies the very history and very future of Russia”²³.

To sum up we should stress out that in 2013–2014 the publications' content reflected a latent stage of Russia – Western countries confrontation. These countries were described either as supporters of Russia, or as antagonists and rivals. In contrast to this latent period in 2022–2023 these countries were described as hostile countries and Russian enemies. The beginning of the special military operation is presented as a way out of the historical trap in which Russia found itself, having lost its leadership position in the international sphere. The future victory after the SVO is considered to be a guarantee for a multipolar world, in which Russia will have a leading position and save its status of a powerful country with traditional values and an efficient economy built on import substitution, their own production capacity and investment potential.

The cloud of semantic tags is dominated by the words integration and consolidation, mainly around the president of the country, to preserve the unity of a multinational and multi religious state. However the absence of changes in the semantic elements used to describe the future partly confirms the preservation of the chosen vector of the country's strategic development, which is the preservation of the country's sovereignty based on the reproduction of traditional values, a focus on technological development, as well as the formation of a multipolar system of world order, where Russia plays a leading role.

■ THE PLACE AND ROLE OF RUSSIA IN THE INTERNATIONAL ARENA

Analyzing the prospects for possible conflicts in the public opinion of Russian peoples, it is necessary to put a special focus on assessments of the role of Western countries in international political processes. The dominant frames of a public

²² Yevgeny Yevtushenko in Vladimir: „How can you rejoice at the quarrel between two nuclear powers?” // „Komsomolskaya pravda” (website) 20.05.2014, <http://www.kp.ru/daily/26232/3115032/> (access 20.02.2024).

²³ Words in camouflage: Ural poets presented a collection of poems about the Northern Military District // „Rossiyskaya gazeta” (website) 19.06.2023, <https://rg.ru/2023/06/19/reg-urfo/slova-v-kamufliazhe-uralskie-poety-predstavili-sbornik-stihov-pro-svo.html> (access 20. 02. 2024).

political discourse, replicated by the domestic Russian media, were for the most part aggressive in nature, associated with the construction of the image of the enemy embodied in the European countries and the United States (Zonova, Giannotti 2020).

Leading spokesmen – experts on foreign policy issues, as a rule, do not hesitate to demonstrate negative emotions and voice harsh assessments of Western countries, which are considered and presented as enemies.

In the framework of our study of media discourses reflecting the role of Russia during the SVO, the dominant semantic accents can be reduced to three theses: Russia is a provider of freedom and peace, Russians are a liberating nation, Russia is a victorious country.

It is possible to agree with those researchers who record against this background the actualization of national identity, when the understanding of one's belonging to the country, which was present on the periphery of consciousness, moves to the center of attitudes that shape people's worldview. The main reason for this was the growing feeling of hostility from the surrounding world (Pushkareva 2023).

Due to economic sanctions imposed on Russia, to a risk of the second mobilization of Russian men to serve in the Russian Army and over-long-running military actions in Ukraine the number of Russian citizens, who feel anxiety and threat to be attacked by enemy troops has grown from 31% to 41%²⁴.

Most Russians share the opinion expressed by one of the ideologists of the Russian world: „We have always been disliked, primarily because we are big and strong. Now it has increased many times due to the fact that we have knocked the foundation out from under their domination. A powerful feeling of vulnerability. For ten or fifteen years in a row, the West felt like a winner. And then once – and everything fell down. I even understand them to some extent. But why should we seek their love? Let's love ourselves” (Karaganov 2020).

The number of negative connotations regarding the actions of the Western countries is increasing. According to our respondents, developed (Western) countries in relations with Russia, first of all, want to „get rid of a potential strong military enemy, a rival in world politics” and „undermine the stability of the political regime” (Table 1).

²⁴ Russia as a Great State. Russian Public Opinion Research Center (WCIOM), <https://wciom.ru/analytical-reviews/analiticheskii-obzor/rossija-velikaja-derzhava> (access 20.02.2024).

Table 1. Respondents' opinion about the goals pursued by developed countries in their relations with Russia (Russia, % of the number of respondents)

Response options	2005, IX	2014, XII	2020, V
Get rid of a potentially strong military enemy, a rival in world politics	47	52	59
Undermine the stability of the political regime in Russia			51
Enrich themselves and save their economy on the Russia's expense	52	34	42
Dictate Russia the culture and values of a consumer society		22	28
Protect themselves from the consequences of the crisis in Russia	32	10	11
Bring Russia onto the path followed by developed countries, transform it into an economically prosperous state	11	4	3
Help Russia become an equal partner, one of the centers of world politics	7	5	2
No option is suitable/ Not ready to answer	16	20	9

Note: the sum of responses exceeds 100%, as respondents could mark several positions.

Source: Center for Social and Socio-Political Studies of ISPR FCTAS RAS, *Sociological monitoring How are you, Russia? (1992–2024)*.

Moreover there are widespread fears among Russians that the West is only interested in Russian natural resources and wants to enrich themselves at Russia's expense. In 2020 42% of respondents shared this opinion.

These threats are justified from the point of view of Russian citizens, the growth of government investments in the further development of the military-industrial complex of the Russian Federation. Russia cannot be weak politically and in terms of providing weapons, since the topic of ownership of natural resources is becoming one of the most important today.

The growth of negative assessments of the policies of Western countries was also affected by the sanctions policy, the tightening of which was caused by the implementation of the SVO. Our respondents understand that sanctions will inevitably lead to a deterioration in the level and quality of life, see in their tightening the possibility of a new „Cold War” and increased confrontation in the world (See Table 2).

Table 2. Respondents' opinion on what effect the sanctions announced by the United States and Europe will have on life in our country (Russia, % of the number of respondents)

Response options	2014, XII	2018, V	2022, V
Force politicians and businesses to develop domestic industry and agriculture	42	45	40
Lead to a new Cold War and confrontation in the world	18	31	34
The development of the domestic economy and cooperation between Russia and the world community are hampered	16	20	30
Strip away the illusions and force the Russian politicians to work for the greater good of the country	23	20	28
Drop the level and quality of life for me and my family members	18	18	25
Overall they are useful to our country	20	13	22
Sour relations between Russia and Ukraine	15	15	20
Improve stability of the political regime in Russia			10
Allow to escape from the constrained culture and values of consumer society	14	14	
No option is suitable/ Not ready to answer	13	11	7

Note: the sum of responses exceeds 100%, as respondents could mark several positions.

Source: Center for Social and Socio-Political Studies of ISPR FCTAS RAS, *Sociological monitoring How are you, Russia? (1992–2024)*.

At the same time, both the subjective feeling of a deterioration in the quality of life and the objective indicators of a decrease in income levels have virtually no effect on loyalty to the authorities.

We will not dwell in detail on the methodological pitfalls that do not allow us to talk about the possibility of obtaining objective sociological data in conditions of crises and military operations, accompanied by repressive actions of the political regime against freedom of speech, among other things.

However, even with limited opportunities to express their opinions, Russian people are showing fatigue with current policies. In all age groups, except the oldest, the number of those who are for peace negotiations is higher than those in favor of continuing military actions (See Graph 4).



Graph 4. Distribution of the respondents' answers to the question: „Do you think we should continue hostilities or start peace negotiations?” (% of respondents in each age group)

Source: Levada-Centre, *Conflict with Ukraine: mass estimates of March 2024*, 04.04.2024.

The analysis of answers to open questions (when the answers are recorded from the words of the respondents and then combined into semantic groups) demonstrates that among those who support the continuation of military actions, 40% of respondents explain their opinion by saying that „it is necessary to go to the end”, „finish what we have started”, 17% – „it is necessary to destroy fascism”. The opinion that „peaceful negotiations are useless”, „will lead to nothing” and „it is necessary to protect and secure Russia” is expressed only by 15% and 14% of respondents²⁵.

Among supporters of peace negotiations, half of respondents (49%) explain their position by saying that there are already „many victims”, „many people are dying”. Among the reasons for the opinion about the need to move to peace negotiations, 15% of respondents named „tired from war”, another 14% would like „there would be no war”.

As for Russia's international policy, according to monitoring data, our citizens are very consistent and committed to interacting with the outside world, believing that our country should more actively develop relations with all countries.

²⁵ *Conflict with Ukraine: mass estimates of March 2024* / Levada Center (recognized as foreign agent in RF), <https://www.levada.ru/2024/04/04/konflikt-s-ukrainoj-massovye-otsenki-marta-2024-goda/> (access 20.04.2024).

Table 3. Respondents' opinion on how Russia should build its relations with the outside world based on its national interests (Russia, % of the number of respondents)

	2004, VII	2008, XI	2010, XII	2014, XII	2016, XII	2020, XII	2022, V	2023, VI	2024, IV
Russia has to develop actively relations with the rest of the world	52	49	47	49	49	44	49	54	45
Russia should reduce its activity on the international stage and focus on its internal problems	26	26	28	24	32	25	30	26	29
Relations between Russia and the rest of the world should remain as they are now	12	14	13	13	10	14	11	9	15
No option is suitable / Not ready to answer	10	10	12	14	9	17	10	11	11

Source: Center for Social and Socio-Political Studies of ISPR FCTAS RAS, Sociological monitoring How are you, Russia? (1992–2024).

Not only the media discourse, but also the political discourse is aggressive in today's Russia. The modern political language, saturated with stereotypes of the past and the fluids of hostility, is „(...) essentially a language of hatred, open militarism and triumphalism, which affects the social behavior and assessments of the current situation of significant sections of the population” (Velikaya, Tartygasheva 2023: 288).

Deputy Chairman of the Russian Security Council and the former Russian President Dmitry Medvedev explained the harshness of his statements in the telegram channel with hatred of Russia's enemies: „I hate them. They are bastards and degenerates. They want death for us, Russia”, Medvedev wrote: „And while I'm alive, I will do everything to make them disappear”. By the way, this statement was widely circulated in the Russian media.

In order to maintain the feeling of a besieged fortress among the population, it is necessary that people know exactly who their enemies are. For decades, Russian propaganda has sculpted the image of an enemy not only of Ukraine, which it is now fighting against, but also of the West and even of a large number of its own citizens: „Against us today is part of a dying world. This is a bunch of crazy Nazi drug addicts, a people drugged and intimidated by them, and a large pack

of barking dogs from the Western kennel. With them is a motley pack of grunting pigs and narrow-minded ordinary people from the collapsed Western empire with saliva running down their chins, because they are degenerates. They have no faith, no ideals, the only thing they have is made up by them obscene habits and the standards of double-thinking they installed by force and denial of gifted to normal people moral. Since resisting against them we have received a rule of sacral moral”²⁶.

Content analysis data show that in 2022–2023 among partners there were listed India, China, Belarus, Brazil, Iran, etc. The rival or hostile countries are the USA, EU countries, Vietnam, Estonia, South-Eastern Europe, Great Britain. The expressions „collective West”, „Anglo-Saxons”, „NATO” are widely used and exclusively with negative connotations.

■ CONCLUSIONS

Dominant in public opinion elements of the future of Russia are shaped by the established image of the country, which can be described as a „besieged fortress” in opposition to the opposition of the rest of the world. These elements are supported by a neoconservative consensus, which was made common in the Russian society. In the core of this consensus (Melville 2017) there are ideological concepts of the Russian world and its „special way” supported and shared by the political and bureaucratic Russian elites.

War narratives are reproduced by the propaganda methods and using representatives of the Russian Orthodox Church and key figures of the Russian culture as spokesmen of these narratives help to promote and maintain the high level of anxiety in the Russian society and also plays in favor of building social consolidation. According to our monitoring, the structure of anxiety in mass consciousness shows its qualitative restructuring compared to previous periods (*How are you, Russia?* 2023: 9 and 10). Anxieties related to the problems of conducting a military defense in Ukraine, the threat of a nuclear war and the fear of the future rose to the top positions in the rating of troubling problems.

In this context Russian citizens understand actions of the state foreign policy as the least-evil solution and a response to the aggressive politics of other countries, which try to exclude Russia from the club of the leading and prosperous countries. Multiple external threats justify not only the increase of state continuous expenses on the military industrial sector improvements, but also they justify the clampdown methods against the political opposition.

²⁶ Publication written by Dmitry Medvedev in his Telegram account 4.11.2022, https://t.me/medvedev_telegram/206 (access 20.02.2024).

In this regard, in political, media and scientific discourses, one of the most popular concepts has become the concept of consolidation, which involves the integration of society and government in unfavorable times of external pressure, loyalty to power and unity in the name of victory and preservation of sovereignty and, what must be emphasized, cultural identity. The cultural uniqueness of the Russian civilization is described in terms of spiritual values, spiritual bonds, which implies traditionalism, patriotism. The appeal to a „special way” concept results in the legitimization of a „state-centric” model of relations between the state and civil society, where a personal individual interest is subordinated to the collective good formulated hierarchically „from top to bottom”. In the absence of significant civil society institutions and additional pressure on them during the period of the Special Military Operation (SVO), it is impossible to appeal to alternative development models. If in the political sphere the course towards traditionalism leads to the strengthening of an authoritarian regime, in social relations it leads to violation and revocation of human and civil rights, and in the cultural sphere it causes a reduction of artistic freedom and freedom of expression, then in international politics neoconservatism stimulates isolationism on the one hand, and territorial expansion on the other.

At the same time, the current public discourse practically does not include the image of Russia as a „civil” nation which is multinational, multireligious, united by common civic values and interests, bound by solidarity practices. This image has given way to a statist Russia, where the society is called upon only to support authorities. It is clear that transformations and fluctuations of the political regime influence both the public opinion and the agenda of the media, which try to avoid covering sensitive and dangerous topics. Such silent zones and unwillingness to discuss actual and political problems lead to stagnation and freezing of the political regime.

The identified and described above discourses of the image of the future Russia are built on different sociocultural, ideological, institutional and organizational foundations, but the leading role belongs to ideological attitudes associated with ideas about the place of Russia in the new system of world order and the opposition of Russia to the countries of the „collective West”²⁷.

The construction of a national identity based on Russia’s „special way” and the expansion of the Russian world has turned into a global rivalry with the West, which is clearly reflected in the narratives describing the current conflict in Ukraine.

The use of enemy images and negative identification mechanisms in the public discourse may result in the temporary and short-term nature of socio-political consolidation.

²⁷ The collective West is a persistent propaganda expression used in political and public discourses when constructing the image of the enemy.

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Nataliya Velikaya

PRESENT AND FUTURE GEOPOLITICAL ROLE OF RUSSIA IN PUBLIC OPINION AND MEDIA DISCOURSE

The problems of constructing a new national identity and preserving Russia's influence in the post-Soviet space have become now particularly relevant in the framework of the global confrontation with the West and special military operation in Ukraine. The purpose of the article is to analyze public opinion and political discourse regarding the geopolitical future of Russia in the context of modern conflicts of a regional and international nature.

The empirical basis of the article is the results of the sociological monitoring *How are you, Russia* (1992–2024) and the data of content analysis of mass media during 2014 and 2022. The sociological monitoring survey allowed to study the dynamics of citizens' perceptions of the geopolitical future of the Russian Federation and to trace the connection of the main trends with the indicators of consolidation of society included in the toolkit. The mass media discourse showed the strengthening of neo-imperial topics and allusions.

The preservation of the integrity of the Russian Federation and its sovereignty in the long term does not cause doubts among population, even in the conditions of a crisis and an uncertain future associated with the formation of a multipolar world. Optimistic scenarios are considered, emphasizing the strengthening of Russia's role in the new world order, and pessimistic ones, reflecting isolation models of development.

Russia's powerful progressive development in the future is associated with arguments and ideologems about Russia's special path, the uniqueness of Russian civilization, which became one of the main topics in the Russian political discourse.

Keywords: future; special military operation; territorial and cultural integrity; threats and risks

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CHINA VS THE UNITED STATES: STRUGGLE FOR HEGEMONY OR *THUCIDYDES'S TRAP*

As the liberal international order, marked by the ideological and strategic dominance of the West, particularly the United States, fades into decline, we are stepping into a new phase of international relations that is shaping up to be defined by *multipolar power politics*². Among the relationships between various emerging global poles, one stands out as notably more crucial than the rest: the dynamic between the two current superpowers, the United States and China. However, unlike the bipolar tension of the Cold War era in the latter half of the twentieth century, this time around, these two giants will not solely dominate the global stage. Several other political centers of gravity will emerge, refusing to be overshadowed – similar to two towering eight-thousanders rising prominently above other surrounding mountain peaks, „merely” four or five thousand meters in height. In the realm of real international relations, going back centuries or even millennia, such conditions inevitably set the stage for a contest for supremacy. Even if the present circumstances do not pose an immediate threat to their security or development, the nature of global politics means that such threats could emerge (and inevitably will emerge) as the struggle for dominance unfolds. The atavistic instincts of these powers drive them towards costly actions that not only pose risks to the global security but also hinder their own developmental capabilities. History has shown us that such dynamics often lead to conflicts with dramatic escalations and severe consequences, affecting not just the parties involved but the wider international community as well.

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² I have discussed this more broadly in Polish in my book R. Kuźniar, *Zmierzch liberalnego porządku międzynarodowego* [*Decline of the Liberal International Order*], Wydawnictwo Naukowe Scholar, Warszawa 2022.

■ THE „TRAP” LOGIC

Such a conflict is typically referred to as a *hegemonic war*, because what is at stake is maintaining, or acquiring, the status of „hegemon” (whatever that entails) in the international sphere. The preceding rivalry (confrontation), in turn, is termed a *hegemonic conflict*³. The transition from a relatively peaceful competition to confrontations involving armed force is a highly intense period not only for the superpowers entangled in such a relationship but also for other nations forced to choose sides, and finally for observers – scholars and commentators of international affairs. An intellectual framework for the Sino-American hegemonic rivalry was proposed relatively early on by the renowned American analyst and scholar Graham Allison, summed up in his influential 2017 book *Destined for War: Can America and China Escape Thucydides’s Trap*⁴. As one might guess, the starting point for his argument is the Peloponnesian War between Athens and its allies on one side, and the Spartan-led Peloponnesian League on the other. The war, lasting twenty-seven years with some interruptions, brought much destruction across Hellas, initiated the decline of Athenian greatness, and accelerated the rise of the Roman Empire’s domination over Greece at the time. Many authors have found this concept to be a useful interpretive key for the US-China confrontation, and even more commentators have adopted this term, leading Thucydides’s Trap to become almost as popular a concept in the lexicon of international relations analysis as „the end of history” or „the clash of civilizations”.

As is well-known, the latter concepts have often been utilized without a deep understanding of Fukuyama’s or Huntington’s texts and intentions. This seems to be the case with Thucydides’s Trap as well, although some of the blame for its sometimes misguided use falls to the author himself. Firstly, let’s consider how Allison’s trap concept is anchored in the history of the Peloponnesian War. He views this war as an archetype for numerous subsequent hegemonic relations and conflicts, ranging from the fifteenth-century Spanish-Portuguese rivalry to the modern relationship between China and the United States. This means, firstly, that he views the war between Athens and the Spartan coalition as a hegemonic conflict, a conflict for primacy, the ability to impose one’s own rules of the game within the conflict zone (Hellas), particularly in terms of how the hegemon interacts with other states within that zone. Allison acknowledges Athens’ motives as „a steeple of civilization” at that time, aiming to secure respect and adjust the existing order to

³ Here conflict is understood in its basic meaning of a conflict of interests, stances, and expectations.

⁴ Allison began promoting the concept of Thucydides’s Trap in articles beginning in 2012, starting with G. Allison, *Thucydides’s trap has been sprung in the Pacific*, „Financial Times”, 21 August 2012. His book is *Destined For War: Can America and China Escape Thucydides’s Trap?* Houghton Mifflin Harcourt, 2017.

account for the new power dynamics. He notes, „How could Athenians not believe that their interests deserved more weight? How could Athenians not expect that they should have greater influence in resolving differences?”⁵.

However, secondly, Allison aptly observes, citing Thucydides, that the main reason for the Spartans' decision to go to war was „the rise of Athens and the fear that this instilled in Sparta”⁶. As Thucydides himself wrote: „The Spartans voted that war should be declared because they were afraid of the further growth of Athenian power, seeing, as they did, that already the greater part of Greece was under the control of Athens”⁷. For the Spartans and their Peloponnesian allies, the problem was obviously the brutal way in which the Athenians had been imposing their rule. The tragic fate of the inhabitants of the island of Melos (described later in the Greek historian's work) was just a further continuation of the imperial practices of the arrogant Athenians, inducing fear and justifying the decision for war.

Thirdly, in the seventeen examples of hegemonic rivalry Allison chooses, he often seems to forget Thucydides and his *History*: these rivalries or wars are ones that were fought over a balance of power unrelated to the security of the main antagonists (e.g., over benefits from overseas expansion or maritime trade), were initiated for ideological reasons, or even were started out of a sheer desire for dominance – no matter if the states around the aggressor were significantly weaker (did not threaten its security), and no matter if the aggressor could count on far-reaching concessions thanks to the appeasement strategy taken by victims unaware of their later fate.

Consequently, the concept of Thucydides's trap that Allison invokes remains unclear. Allison himself describes it as „the natural, inevitable discombobulation that occurs when a rising power threatens to displace a ruling power. This can happen in any sphere. But implications are most dangerous in international affairs”. He believes such a situation invariably leads to „cataclysm”⁸. Yet, crucially, the concept strays from the facts at this juncture. In Thucydides, there's no mention of surprise or frustration due to a challenger threatening the leading position. As Allison notes, there was a sole leader in Hellas at that time: Athens. It was Athens' imperial ambitions that threatened the security and independence of other Greek city-states, prompting them to see defense as their only option. Where, then, lies the trap? It seems that the real trap was Athens' imperial overreach and its failure to temper its conquest ambitions. Labeling anyone's instinctive defensive reaction against conquest or vassalization as a „trap” is, in my view, off the mark.

⁵ G. Allison, *Destined For War...*, xv.

⁶ G. Allison, *ibid.*, vii.

⁷ Thucydides, *History of the Peloponnesian War*. 1.88.1, as adapted by Graham Allison (2017, p. 37) from the translation of Rex Warner: Thucydides, *History of the Peloponnesian War*, ed. M.I. Finley, trans. Rex Warner, New York: Penguin, 1954.

⁸ G. Allison, *Destined For War*, xvi.

Allison's selected examples – his case studies – unfortunately do not help in clarifying this. Of the seventeen cases of hegemonic rivalry, only in four instances was war avoided, and one of these examples is completely misaligned. It involves the rivalry between Germany on the one hand, France and Great Britain on the other, following Germany's reunification in 1990 up to the book's publication in 2017. Not for a moment throughout this period was there a situation of hegemonic rivalry, let alone the risk of war – the mutual membership of these three powers in the European Union effectively ruled out such a possibility. Furthermore, two prominent examples of hegemonic rivalry and war in modern times were not Thucydides's traps. The first example is the Napoleonic Wars, and the second is the war waged by Nazi Germany against Europe. Germany could not have felt threatened by anyone, yet between 1939–1941, it engaged in successive aggressions with the aim of extending its imperial control over Europe. But in both cases, the wars initiated by Napoleon and Hitler, the cause was their quest for hegemony. Therefore, one could argue that, firstly, the trap concept's inapplicability to the very scenario described by Thucydides and, secondly, the Allison's considerable nonchalance in selecting examples, both call into question the explanatory power and utility of the Thucydides's trap concept.

This, however, doesn't mean that there is no problem with hegemonic rivalry, which sometimes culminates in a major war⁹. For the case discussed in this article, certain parallels in modern times can be found in the situation prior to World War I and in the US-Soviet rivalry. The German-British relations before World War I, in a multi-polar power politics scenario that replaced the dominant concert of powers for the majority of the nineteenth century, certainly merit such a classification. Although the pretext for the war was an incident in the Balkans, which weaker powers at the time, Austria-Hungary and Russia, first responded to, what was really at stake in World War I was stopping Germany from aspiring to continental hegemony. The United Kingdom, in particular, was keen to prevent a victorious Germany from challenging its naval supremacy. Germany, the challenger, was poised to contest the UK's position as the premier European power (though the UK acted more as a balancer on the continent rather than a hegemon). Furthermore, the situation was much more complex, as the war was a clash of coalitions of powers, whose potentials ultimately determined the conflict's outcome. This bears certain similarities to the present scenario, where the United States can count on having Europe, as well as Japan and India, on its side, whereas China can rely on Russia and possibly on some mid-sized powers.

⁹ See especially B. Simms, *Europe: The Struggle for Supremacy. From 1453 to the Present*, Allen Lane, 2013.

The most compelling comparison, however, is to the purely hegemonic rivalry between the United States and the Soviet Union. The two superpowers far surpassed all other countries in potential, especially military, and made no secret of the fact that what was at stake in their confrontation was maintaining the number-one position (the US) or usurping it (the USSR). This confrontation was also two-layered, strategic and ideological, touching on nearly all aspects of their mutual relations and affecting all regions of the world. It concerned not only hegemony but also the ideological shape of the global international order – a historical first in this respect. Although the antagonists skirted close to war, they did manage to avoid it, perhaps in large part due to their nuclear weapons and the resulting situation of mutually assured destruction (MAD). It's also worth recalling the general strategies each side employed with respect to the other over the decades of this confrontation. While the narrative on the Soviet side championed, almost until the very end, the optimistic notion that victory for the „forces of peace and progress” was a historical inevitability, on the American side, two approaches clashed: the idea of engaging with the Soviet Union for the sake of overall stability and security (including mutual respect for each other's spheres of influence) and a strategy aimed at containment, defensive posturing, and ultimately seeking to precipitate the collapse not only of the Soviet Union but of (international) communism as such¹⁰. As is well-known – and this is an important lesson – the outcome of this rivalry hinged not on military might but on competitive advantages in developmental capacity and the overall appeal of the system that combined market capitalism with liberal democracy.

In concluding this section of the paper, we need to acknowledge another significant flaw of the Thucydides's trap concept within the context of hegemonic rivalry: its theoretical confinement to the realist school of thought. It is not always the case that the spark triggering a conflict is – as in the Peloponnesian War – a security issue, as posited by advocates of realist theory in international relations (who somewhat erroneously claim Thucydides as their precursor). For instance, one might speculate, somewhat whimsically, whether the Cold War would have occurred if the United States and Western Europe had embraced communism. After all, the formation of the first anti-French coalition following the French Revolution was driven by regime change (restoring monarchical power), not hegemonic ambitions. Hence, ideological or cultural dynamics can significantly influence rivalries and conflicts that realists might too readily categorize as hegemonic, even though the quest for dominance does often intertwine with ideology in politics, including on the international stage.

¹⁰ Representative examples of both approaches can be found in H. Kissinger's *The White House Years*, Weidenfeld and Nicholson, London 1979, and Z. Brzezinski's *Game Plan: How to Conduct the U.S.-Soviet Contest*, Atlantic Monthly Press, Boston 1986. The Reagan Administration pursued a distinct strategy aimed at weakening the USSR in order to ensure its defeat as a US rival.

■ THE U.S.-CHINA CONFLICT AS A CONTEST FOR HEGEMONY

Due to what realists term the structure of the international order (essentially, the shifting balance of power in a world without a „global government”), China and the United States are indeed destined to be drawn into a hegemonic rivalry. To grasp how much the potential of these two superpowers „stands out” above other significant nations among the world’s top ten in terms of the overall potential that qualifies a country as a power (global, mid-level, or regional), let’s examine some basic data. The United States remains at the forefront at the start of this decade, with a GDP of around 23.5 trillion USD, a *per capita* income of approximately 70,000 USD, a population exceeding 330 million, and defense expenditures over 800 billion USD (or about 3.5% of GDP). China’s corresponding figures are approximately 18 trillion USD in GDP, with a *per capita* income of around 12,500 USD, a population of about 1.4 billion, and defense spending about 300 billion USD (or about 1.8% of GDP – considered to be an unreliable indicator, likely understated).

It’s not very clear who should be seen as ranking next in this lineup. In terms of GDP, Japan still claims third spot with around 5 trillion USD, yet with a relatively small population of about 125 million people and defense spending around 55 billion USD. In terms of population, India surpasses everyone, with slightly over 1.4 billion people, but it has a GDP of merely about 3.2 trillion USD (about 2,300 USD *per capita*). India does have significant military expenditures – about 77 billion USD – but this is still 4 times less than China’s and more than 10 times less than US spending. Russia is another power, mainly thanks to its vast area, though its GDP is just 1.8 trillion USD, its population about 143 million and military spending around 65 billion; however, Russia also boasts the second-largest nuclear arsenal after the United States. Also ranking high are three Western European powers – especially Germany, with a GDP of over 4.2 trillion USD, a population of about 84 million, and cautious yet growing defense expenditures of about 60 billion USD. However, like Japan, Germany does not possess nuclear capabilities. By contrast, this status is held by the other two Western European powers: the United Kingdom (with a GDP of about 3.2 trillion USD, a population of about 67 million, and defense spending around 70 billion USD), and France (with a GDP of about 3 trillion USD, a population of about 67 million, and military expenditures of about 57 billion USD).

What about the powers of the Global South? Consider the other two founding members of the BRICS group (besides the aforementioned China, India, and Russia). Brazil can boast of a population of about 215 million and a decent GDP of about 1.6 trillion USD, but its defense spending is just about 20 billion USD. South Africa fares worse, with a GDP of about 420 billion USD (much less than Poland’s), a population of about 60 million, and negligible defense spending of about 3.3 billion USD. And how about other countries? Indonesia, for example,

stands out due to its population of about 280 million, yet its GDP is only about 1.2 trillion USD, with military expenditures barely reaching 8 billion USD. How does Iran, known for its militant stance, rank? Poorly, as its population is nearly 90 million, but its GDP is alarmingly low, at about 360 billion USD, and its defense spending is also not impressive, at about 28 billion USD (for comparison, Saudi Arabia, with a population of 36 million, spends over 56 billion USD on its military, or twice as much as Iran). Nuclear-armed Pakistan, in turn, despite having a population of over 230 million, has a GDP of at just about 350 billion USD (only half that of Poland, with a population of just under 38 million), and so its military expenditures are likewise modest – at slightly over 11 billion USD.

Aggregated data for the EU, if treated as a collective power, also place it below the United States and China: the EU's total GDP is about 17 trillion USD, with defense spending around 260 billion USD¹¹. Even if these figures merit attention, it's important to remember that the EU is not a strategic actor, and in security matters, especially in the face of threats from Russia, its members prefer to rely on the NATO and the United States. This implies that the European Union cannot be regarded as an entity capable of hegemonic rivalry, even in relations with Russia, which is significantly weaker in terms of GDP and much smaller in terms of population and military spending.

The comparison above clearly demonstrates the extraordinary dominance of the United States and China over other global powers across categories. Even though this analysis relies on conservative data that excludes variables like natural resource endowments or technological progress, it vividly shows how comprehensive the capabilities of the United States and China are when compared to other nations. They have considerable strengths in land area, population size, GDP, defense spending, and technological advancement. Naturally, material factors alone, whether considered in relative or absolute terms, do not automatically „destine” nations to come into hegemonic rivalry or conflict, especially not armed conflict. Yet, history has undeniably shown us that as powers gain significance and civilizational momentum, they become more assertive, demanding recognition and compliance from those around them, and strive to enhance their influence by shaping the international order within their grasp (which typically means expanding their spheres of influence). Graham Allison sees this dynamic as something perfectly natural in the case of Athens in the runup to the Peloponnesian War. This same pattern was also the case for the United States and is now being replicated by China.

Indeed, having a substantial overall potential, particularly in military terms, is a necessary but not sufficient condition for the emergence of a hegemonic conflict (be it a rivalry, confrontation, or eventual war). What is also necessary is a certain

¹¹ All figures cited after K. Jędrzejowska, *Aneks: Państwa świata – wybrane dane i wskaźniki* [Annex: Countries of the World – Selected Data and Indicators], in: *Rocznik Strategiczny 2022/23*, Wydawnictwo Naukowe Scholar, 2023.

sort of politics: encompassing ambitions regarding one's role, perceptions of the external world, and the determination to face challengers, that is, to defend or acquire a hegemonic position. Also crucial are motives such as concern for one's security or status and the desire to expand influence in order to obtain certain benefits, which are often connected to a quest for prestige. Frequently, this involves the need to protect one's established position, including economic relations and networks with other countries (spheres of influence, interests, or forms of hegemony over certain regions). The decisive factor is the volitional element evident in a particular ruler, leadership group, or the entire ruling class.

In the case of the United States, the ambition to play a leading, sometimes specifically hegemonic role in relation to much of the world has been notably present since at least World War II. This ambition, of varying intensity, remains a constant within the US political establishment, irrespective of whether Republicans or Democrats happen to be in power. During the Cold War, American leadership was „limited” to the free world; with respect to Latin America, it could be characterized as the classic US hegemony. After the Cold War ended, however, this leadership potential expanded globally. This was the result of a unique geopolitical, specifically geostrategic vacuum caused by the collapse of the Soviet Union as a superpower and the temporary absence of powers in other regions of the world. Only the United States had global „power projection” capability at that time, the ability to exert force anywhere in the world. This sparked an ideological aspiration and material pressure in America to make this leadership a reality. Numerous statements by prominent American analysts, researchers, diplomats, and politicians highlighted the need and inevitability for the United States to assume the role of a global leader, policeman, or hegemon. American foreign-policy discourse introduced such concepts as „unipolar moment”, „indispensable nation”, „American world system”, and „bound to lead” (attributed to Charles Krauthammer, Madeleine Albright, Zbigniew Brzezinski, and Joseph Nye, Jr., respectively)¹². Emphasizing America's international leadership became a staple for subsequent US Presidents. This pursuit of leadership manifested itself in its most assertive, hegemonic form, based on sheer force, during President George W. Bush's Administration. The 2003 invasion of Iraq can be seen as a hegemonic war by proxy, aiming to signal to the rest of the world Washington's leadership resolve and the cost of its defiance by any nation. This ambition was bolstered by immense pressure from the background in the form of large interest groups, especially transnational corporations (TNCs), financial institutions, PR agencies, think-tanks, arms manufacturers, etc. This was

¹² Some of the most persuasive arguments supporting global U.S. leadership were articulated in the following works: Ch. Krauthammer, *The unipolar moment*, „Foreign Affairs” 1990, no. 1; Z. Brzezinski, *The Grand Chessboard. American Primacy and Its Geostrategic Imperatives*, HarperCollins Publishers, New York 1997; R. Kagan, *Of Paradise and Power: America and Europe in the New World Order*, Knopf Publishers, London 2003.

strongly linked to the second wave of globalization, propelled by the US economy and its support for building a liberal international order.

This case has been well-documented and does not require further elaboration in an article as concise as this. However, it's important to revisit the current US perspective on its leadership role in the light of China's recently disclosed ambitions and capabilities. It's also important to remember that quite recently there was a US President, namely Donald Trump, who showed little interest in maintaining America's global leadership, focusing instead primarily(?) on the nation's economic interests and being the first US President to openly label China as a trade-level rival or adversary. The stance of the current US Administration, under President Joe Biden, has been succinctly outlined in the National Security Strategy signed on 12 October 2022. For our purposes here, three aspects of that stance need to be highlighted. First, the document assumes that global „need for American leadership is as great as it has ever been”, indicating no US intention to cede its number-one position in the evolving international landscape¹³. Second, it views China as a formidable rival, not just challenging America's power but also aiming to reshape the international order to benefit autocratic regimes. Thus, the hegemonic conflict extends beyond mere rivalry between the two powers and encompasses fundamental issues and the shape of the global order. Third, the United States is committed to managing this rivalry responsibly, aiming to prevent it from escalating into armed confrontation.

Facing off against America in this hegemonic conflict is China. As the only other superpower currently on par with the United States, China presents a formidable candidacy for global leadership. As potentially the most powerful empire of antiquity, for centuries its profound cultural influence has radiated to its surroundings. However, the world has not been then yet sufficiently interconnected for China to extend its leadership beyond its immediate neighborhood. That was a time when empires were so far apart from one another that hegemonic rivalry or wars were not really possible. For instance, two thousand years ago, a hegemonic conflict between the Roman and Chinese empires was unthinkable. In modern times, during the dawn of the global world, China experienced regression and, due to its weakness, fell under the humiliating influence of Western European powers. The communist experiment made it a formidable force to be reckoned with, but did not spur its development. It was only the second wave of globalization and the liberal international order that presented China with an opportunity that it took full advantage of, partly thanks to its culture, undergoing rapid, profound, and comprehensive modernization through a (controlled) opening up to the West. The United States and the Western Europe helped the most (by providing access to their markets and technology). America, in particular, championed the power of liberal ideas and the free market, which were

¹³ J. Biden, *Global Security Strategy*, The White House, October 2022, <https://www.whitehouse.gov/wp-content/uploads/2022/10/Biden-Harris-Administrations-National-Security-Strategy-10.2022.pdf>.

also expected to transform Chinese society and politics and make China a responsible partner in addressing global issues.

The reality unfolded quite differently. Letting itself be deceived by its own ideological naivety and the profit motive of its corporations, America inadvertently nurtured a rival that is now, feeling no gratitude, intent on usurping its global leadership¹⁴. Back in 1989, China was not even in the top ten in terms of GDP or military expenditure, but just over two decades later, it had secured itself a solid second place. In 2012, Xi Jinping came to power, departing from the great reformer Deng Xiaoping's strategy of concealing China's strength as long as possible and exercising restraint in foreign relations to avoid alarming potential rivals prematurely. By the latter half of the 2010s, with China's share of global GDP surpassing 15% (compared to about 22–23% for the United States), it became evident that China was on the chase, with some projections suggesting it might overtake the United States before 2030. Beijing recognized it was time to unveil its ambitions. Thus, at the CPC congress in 2017, Chairman Xi proclaimed „an era that sees China moving closer to center stage and making greater contributions to mankind”¹⁵. A place at the center of the political scene is reserved for one actor, a bit like in the old Chinese adage that has again become fashionable in political Beijing: „There can be only one sun in the sky”.

This readiness to lead the world – part of what Xi Jinping termed the „Chinese Dream” – was well-founded. China was evolving into a comprehensive superpower, no longer just the „world's factory” but also a leader in new technologies, space exploration and modern weaponry, with expanding its influence in Africa and Latin America. Through the „Belt and Road” mega-project, it aimed to weave its economic influence throughout Asia and Europe¹⁶. As two French economists warned in 2011, Chinese imperialism, striving for world hegemony with a blend of political, military, economic, cultural, and ideological dimensions, can be characterized as „economic” due to its primary mode of operation¹⁷. Although Xi openly asserted to Trump in 2017 that China considered itself an equal power to the United States, a gesture that seemed like a challenge being made to America, in recent years the challenger has encountered some problems that could delay the final showdown for center stage (Beijing's handling of the Covid pandemic, which originated in China,

¹⁴ R. Spalding, *Stealth War: How China Took Over While America's Elite Slept*, Portfolio, 2019.

¹⁵ J. Xi, Report delivered at the 19th National Congress of the Communist Party of China, October 18, 2017, https://www.chinadaily.com.cn/china/19thcpcnationalcongress/2017-11/04/content_34115212.htm; for broader discussing in Polish see B. Góralczyk, *Powrót Chin do centrum światowej sceny* [China's return to the world center], in: *Rocznik Strategiczny 2018/19*, Wydawnictwo Naukowe Scholar, 2019.

¹⁶ The „Belt and Road Initiative” is a vast transcontinental project encompassing both land and sea routes, designed to facilitate the export of Chinese goods to numerous countries across the globe. It also aims at importing capital, technology, and resources to fuel China's ascent as a global power.

¹⁷ French edition A. Brunet, J.P. Guichard, *La visée hégémonique de la Chine – L'impérialisme économique*, Editions L'Harmattan, 2011; English edition *China's strategy to rule the world*, Editions L'Harmattan, 2013.

led to increased mistrust towards it; China is experiencing an economic slowdown; increased centralization may impede its development). Nonetheless, the growth in potential, international expansion, and China's „body language” unequivocally suggest it has positioned itself for a hegemonic clash with America. Simultaneously, there is a prevailing belief within the Chinese leadership that time is on their side, suggesting they may achieve supremacy through a „long march” rather than an immediate showdown, given the current relative equilibrium between the two powers.

The strategic cultures of the two rivals might play a pivotal role in determining the outcome of this contest. Americans are often perceived as being quick to adopt a combative stance, having a capacity for brinkmanship, and tending to employ the argument of force, particularly military force. Such an inclination is borne out by their foreign policy actions since World War II. Undoubtedly, driven by both its economic interests and the distinct ideology of American exceptionalism – the idea of being a „city upon a hill” – the United States is determined to maintain its premier position in the hierarchy of powers that shape the international order. The strategic culture of modern China, however, is not as straightforward. While it is ancient, it is marked by discontinuities. Modern China has not had the opportunity to test itself in direct confrontation with other powers. Its foreign policy over the past three decades has been influenced by the philosophy of Sun Tzu, favoring a so-called indirect strategy (contrary to America's approach), which involves advancing tactically, seizing every chance to expand its influence through peaceful means, economic measures, and soft power. This strategy echoes that of the communist Russia as described by George Kennan in his renowned „Long Telegram” of February 1946. I refer to this as a strategy of osmosis, where Chinese influence subtly permeates other states, subsequently making them compliant with Beijing's expectations. Xi Jinping's response to the American pledge of a trade war with China ran somewhat contrary to the indirect strategy: „In the West you have the notion that if somebody hits you on the left cheek, you turn the other cheek. In our culture we punch back”¹⁸. It seems Xi didn't realize that the same is true in American culture as well... However, whether the extreme divergence in the great cultures of the East and the West, represented by these two powers, will propel them towards or deter from Thucydides's trap (assuming we adopt Allison's framework) and a hegemonic war remain an open question. Historical precedents are inconclusive. Athens and the Spartan coalition shared the same, albeit very homogeneous culture (and went to war), whereas the United States and the Soviet Union were markedly different (yet did not).

However, were China, in its hegemonic conflict with America, to stick to its indirect strategy, its promise to unify Taiwan with the People's Republic of China could indeed become a true trap. Beijing has not shied away from suggesting it might

¹⁸ L. Wei and Y. Kubota, *China's Xi Tells CEOs He'll Strike Back at U.S.*, „Wall Street Journal”, 25 June 2018, <https://www.wsj.com/articles/chinas-xi-tells-ceos-hell-strike-back-at-u-s-1529941334>.

resort to force, while the Biden Administration has stated it would defend Taiwan's independence if China attempted to act against the will of the Taiwanese people. The pushback against Russia's aggression in Ukraine undoubtedly serves as a cautionary tale for Beijing. It can be assumed that China may continue to exercise restraint in the near term, but the Taiwan issue could potentially ignite a direct hegemonic confrontation between China and America in the foreseeable future. As long as Beijing cannot assert its dominance in the South China Sea region, it cannot consider itself a hegemonic power on a global scale, whatever the term „hegemonic” is taken to mean today (in addition to the number-one position in the power hierarchy).

■ FACTORS DETERRING A HEGEMONIC WAR

While a hegemonic conflict (confrontation) between America and China is widely regarded as inevitable, it does not necessarily have to find its resolution in the form of a hegemonic war (as is the case in most of the scenarios analyzed by Allison). There are several factors or barriers that will hamper this rivalry from escalating into such a conflict. This is, of course, assuming, first, that the parties act rationally, which is never guaranteed. And second, that there won't be an uncontrollable escalation of the use of mutual force emerging out of a situation initially considered strategically secondary. So, what are these preventative factors?

The concept of mutual assured destruction (MAD) is the most straightforward such a factor to identify. This principle is credited with having prevented a great war between the United States and the USSR. Among known instances of hegemonic confrontation, the standoff between these powers and their respective alliances posed the greatest threat of war, primarily due to the strength of the ideological antagonism. Despite the current significant disparity in nuclear capabilities favoring the US (with some 500 warheads for China versus almost 4,000 for the US)¹⁹, China's nuclear potential is deemed sufficiently deterrent. Moreover, China has significantly stepped up its nuclear warhead production in recent years, aiming to match the United States in the number of deployable warheads by 2035. If China does not pose a threat to the physical security of the United States (its territory), which we should assume it won't, the United States would have no rationale to risk a nuclear attack on China, unleashing the MAD scenario. Particularly in this aspect, the assumed rationality of both actors is the key issue. The Americans would also have to weigh the risk that, in the event of a nuclear exchange with China, they could be additionally vulnerable to strikes from Russia, which possesses a larger missile arsenal than they do.

Positive economic interdependence acts as another significant deterrent. China's rapid advancement post-1989 largely resulted from its extremely favorable trade relationship with the United States. Even now, its GDP growth benefits from trade

¹⁹ As of January 2023, *SIPRI Yearbook 2023*, Oxford University Press, p. 250 and 286.

with America, despite recent US efforts to balance the massive trade deficit with China and restrict its access to the cutting-edge technology, particularly in the military sector. Nonetheless, the United States remains a sort of „goose laying golden eggs” – a vital source of revenue for China. Despite a decline in US imports from China in 2023 by about 20%, the import volume still reached approximately 430 billion USD, while China's imports from the USA, despite a 4% drop, amounted to just under 150 billion USD. To bypass American sanctions, Chinese firms have shifted their production to Southeast Asian countries, from which they can more easily access the US market. The ties between America and China go well beyond trade and are significantly broader than the Cold War relationships between the USSR and the US. These connections will likely prevent Beijing from pursuing further actions that could harm Chinese interests or manifest hostility towards America. However, should China continue to distance itself from the West – a trend that has been noticeable for several years – the impact of this factor could weaken over time.

Thirdly, the global international environment will play a significant role in preventing the escalation of the hegemonic conflict between the United States and China. If we look back at the Peloponnesian War, it's important to remember that Athens and Sparta were virtually alone. There was no one within or around Hellas who might have moderated the conflict. Today, surrounding China and the United States are numerous countries and powers of varying significance, many of which cooperate with them while balancing between them (known as swing powers), and none of which have an interest in any war, especially not in a hegemonic one. These powers are already serving and will continue to serve as a check on the mutually aggressive postures of the two superpowers. The comparisons made in the second part of this paper not only show how much the United States and China stand out above other powers but also highlight the existence of many other powers with significant potential and influence that are needed by either China or the US. These smaller powers, with the exception of Putin's Russia, will dampen the severity of polarization caused in the world by the current „hegemon” vs „challenger”. China is expanding its influence in many countries across Africa, Asia, and Latin America, but in geostrategic terms, the United States still has greater coalition capabilities (not only NATO but also AUKUS and the QUAD)²⁰. The likely rise of India in the hierarchy of powers will slightly alter the balance of power and further bind China's hands in its geopolitical zone.

²⁰ AUKUS is a strictly military pact among Australia, the United Kingdom, and the USA, designed to coordinate their collective efforts to ensure stability in the Indo-Pacific region. The QUAD, on the other hand, is a consultative mechanism among four nations: the USA, India, Australia, and Japan, dealing with security matters in East Asia. From Beijing's perspective, both arrangements are seen as efforts to „encircle” China by countries concerned about its growing influence in that region.

In discussing the international environment that could soften the polarization driven by the hegemonic rivalry between America and China, and its potential to evolve into a conflict-generating trap, it's important not to reduce this environment to a simplistic view of states as billiard balls. The twenty-first-century international context is dense with factors that tighten the bonds between states and create a much more cohesive whole than in the past, and this happens at a sub-state level. While leaders may prefer to view their nations as solid and impenetrable „billiard balls”, social connections rule this out. These factors include a plethora of non-governmental relationships, norms, international organizations, development ideologies, human rights concerns, the need to care for „global commons” like the climate, and international public opinion, etc. These elements may not always be quantifiable in terms of traditional power metrics, yet they are tangible. The culmination of this trend is a global network of a deep and a wide-ranging interconnectivity, which cannot be severed without detriment to oneself and the wider community. This network will keep the temperature of the US-China hegemonic rivalry below a certain level. It will also provide both superpowers with opportunities for a dialogue, recognizing fears and expectations, and seeking a compromise. While this does not mean they will become friends or converge ideologically and politically, nor agree on a division of influence zones (a soft understanding of condominium), it will lead them to act with a greater restraint towards each other.

■ CONCLUSIONS

Can all these factors prevent a hegemonic war between China and America? That remains uncertain. However, they do suggest that this relationship cannot appropriately be viewed as a „trap” (Thucydidean or otherwise) fraught with fatalistic determinism. After all, wars can and do also occur outside the logic of such traps. The combined strength of the restraining factors listed in the three sections above warrants a cautious optimism. Yet, history has shown us, not just in the China-America context but also in the relations between Russia and the West before 2022, how predictions can be upended. This brings to mind the work of Jan Bloch, a Polish entrepreneur and philanthropist, who authored a seminal study on the prospects of a major European war at the turn of the nineteenth and twentieth centuries. Bloch deemed such a war impossible because it was... irrational. The level of interdependence between nations at that time, which he thoroughly investigated, in his opinion, made war unprofitable²¹. However, there also remains the human factor – the leaders. Their emotions, fears, often pathological ambitions, obsessions with power, errors in judgment, and misperceptions – irrespective of

²¹ J. Bloch, *Przyszła wojna pod względem technicznym, ekonomicznym i politycznym* (opracował G.P. Bąbiak), PISM, Warszawa 2005.

differences in interests – have been behind the wars of the twentieth century and earlier, just as they are behind Russia's aggression in Ukraine today.

Can the leaders of China and America avoid these pitfalls during their hegemonic confrontation? This remains an open question. Nevertheless, both parties should bear in mind that the Peloponnesian War wasn't the inevitable outcome of a trap, but rather the result of Athens' lack of moderation – as Allison himself puts it, „Athenian assertiveness swelled into hubris”²².

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²² G. Allison, *Destined For War*, p. 40.

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Roman Kuźniar

CHINA VS THE UNITED STATES: STRUGGLE FOR HEGEMONY OR *THUCIDYDES'S TRAP*

This article discusses the prospect of the transition of the Chinese-American rivalry into an open, all out war. The problem arises from the experience of history – two leading powers eventually refer to war in order to assume their, one of them, strategic and political primacy within the relevant international order of their time. The present situation – after a demise of the international liberal order – of confrontation between the US and China is being compared to the so-called Thucydides's trap, which is the reference to the Peloponnesian war. The author is challenging both the comparison and the inevitability of the war between the Big Two, without however totally excluding the possibility of some military demonstrations of their resolve to push for or to defend their global status. Reasons for such an assessment are based upon negative (nuclear capabilities) and positive (economy, development) interdependence factors between the only two superpowers and the nature of the contemporary international environment, complex and tight, which will be preventing the Big Two from sliding into the world war, disastrous for all.

Keywords: Peloponnesian war; Thucydides's trap; hegemonic conflict; international liberal order (decline of); new bipolarism; power politics; negative/positive interdependence

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TURKISH FOREIGN POLICY IN THE MIDDLE EAST: EVOLUTION AND TRANSFORMATION

Türkiye is increasingly identified as a major country with multiple roles in the politics of the Middle East. These roles include being a peacemaker, a contestant, a military actor and sometimes an intruder in the politics of the region. Although as a big and relatively strong country in the region, its important role played in regional politics may be viewed as being natural, in terms of history, but this is rather new. What characterized the foreign policy of the Turkish Republic established in 1923 was not its involvement in regional politics but, until recently, its aloofness from it. In examining the role of Türkiye in the current conflicts in the Middle East, it may be useful to examine, if only briefly, how this policy evolved from basically non-involvement to assuming a variety of roles in regional politics².

■ THE EARLY REPUBLICAN PERIOD – THE SECOND WORLD WAR

The Ottoman Empire lost the First World War, a struggle which it had entered along with Germany in the hope of recovering some of the lost territories of the rapidly declining empire. Much of the territory that was under Ottoman rule including those that constituted the Turkish heartland of the Empire was conquered by the Allies, notably England and France. Britain's encouragement of Greece to conquer the western parts of Anatolia (Asia Minor) constituted a critical step inviting the formation of the National Liberation Movement that defeated the Armenians in the East, the French in the South and the Greeks in the West, thereby also inviting British withdrawal from Istanbul, opening the way to a new peace conference in

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² The historical part of this paper has benefited in large part from the report on foreign policy I had prepared for the Turkish Industrialists and Businessmen's Association. Cf. <https://www.tusiad.org/tr/yayinlar/raporlar/item/10895-kuresel-siyaset-forumu-makale-dizisi-no-1-dis-siyasete-i-liskin-gozlemler>.

Lausanne to replace the Sevres Treaty that had been imposed on the defeated Ottoman Empire. When it was also invited to Lausanne although it had not been a part of the liberation movement, the Sultan's government was abolished. Soon after the signing of the Lausanne Treaty, on October 29, 1923, a republic was declared.

The territories that the Nationalists aimed to liberate were covered in the so-called National Pact. This document depicted that all territories that were under Ottoman rule at the time of the signing of the armistice at Mudros marking the end of the Empire's withdrawal from the World War belonged to the Turkish state. Yet, some of those territories in Syria and Iraq, occupied by Britain and France after the signing of the armistice, remained in their hands. Rather than initiating a major military action against colonial powers to recover those areas, the Nationalist Government chose to end the war, sign a peace treaty and then try to settle the border issues through diplomatic means. Türkiye failed to get Mosul-Kirkuk area from the British, but succeeded in forcing the French in 1938 to make the Sandjak of Antioch and Alexandrietta independent (from Syria). The Sandjak voted in 1939 to join Türkiye. On another front, Türkiye also achieved full sovereignty over the Turkish Straits by the Montreux Convention of 1936 which replaced the Straits Convention in Lausanne that had left them to the international control.

The newly founded republic ruled over a territory and population that had been exhausted through a string of wars, the last of which was the national liberation struggle. The government of the republic chose to focus on reconstructing the economy at home rather than pursue costly external goals, especially those of a territorial nature. Furthermore, the republican regime that had been established to replace the Sultan's empire needed to consolidate its rule, directing it to expend its resources and energies mainly on domestic politics. These constraints led the government to formulate a foreign policy based on using instruments that would not rely on expending material resources. The Nationalist Government turned to international law, the International Court of Justice and the League of Nations as instruments it would rely on in running its external affairs. And finally, the government, trying to keep its distance from those against whom it had fought the war of liberation and to avoid joining those that had been defeated in the First World War and were therefore clamoring for revisionism, chose to pursue a neutralist foreign policy. This choice, understandably, led to a lower level of involvement in international affairs.

During the First World War much of the land inhabited mainly by Arabs had been occupied by Britain and France. Shortly after the war ended, these areas were accorded to them as mandates by the League of Nations. Iraq was placed under British and Syria under French mandates. The mandatory powers were presumably responsible for preparing the mandated country for independence but apart from establishing ineffective national governments, these lands were run like as if they

were colonies. Palestine, on the other hand, remained in British hands. Britain also continued to prevail in the Arabian Peninsula. The Gulf had come under British domination earlier. Egypt, while preserving the appearance of independence, had already come under British domination toward the end of the nineteenth century.

Türkiye did not take deep interest in the politics of the Arab Middle East for several reasons. First, as already indicated, it was not interested in developing a conflictual relationship with Britain and France. Second, also as indicated, Türkiye was interested in focusing on its own internal development. Third, as part of establishing its own authority and its secularizing reforms, Türkiye had abolished the Caliphate, a move that was not welcomed by the Sunni Muslim population in the region. This helped reduce warm feelings toward Türkiye. Fourth, during the war, cooperating with the British, the traditional Arab leadership had initiated a revolt against Turkish rule. Turks felt this was nothing less than stabbing them in the back. Therefore, neither the republican leadership nor the Turkish public harbored warm feelings toward the Arabs. Finally, the republic was a nation state. To transform the population of the republic of various imperial origins into a community in which all citizens felt that they belonged to the Turkish Nation necessitated establishing a sense of distinction from other peoples of the region, mainly the Arabs. Everyone knew that the Turks were not French or German but often failed to distinguish them from other peoples in the region. National identity, in other words, had to be built mainly against the Arabs with whom a common religion, another major source of identity, was shared. These factors came together leading to the pronouncement of a foreign policy principle attributed to Kemal Atatürk that Türkiye should not get involved either in inter-Arab politics or in the domestic politics of any Arab country. As we shall see later, this principle has given direction to Turkish foreign policy until recently.

In contrast to relations with the Arab countries, Türkiye's relations with Iran had always been stable. The Persian and the Turkish Empires had discovered as early as the 17th century that natural barriers among others, did not allow them to expand at each other's expense. The border became more or less stabilized after 1638 with the signing of the Kasr-ı Şirin Treaty. While mutual relations contained both elements of cooperation and competition, an outward appearance of friendliness was always maintained. The Kadjars of Iran were deposed in 1925 by the commander of the Shah's Cossack guards Reza Pahlavi who, after toying with the idea of declaring a republic, had made himself the Shah. He tried to set the country on a path of modernization modeled after Atatürk's Türkiye. This choice made for friendly relations between the two countries.

The Second World War did not produce changes in Turkish foreign policy toward the Middle East. Türkiye's major concern was to stay out of the war. It shied away from getting entangled in conflicts between the Allies and the Axis that included competition to dominate various parts of the Middle East. At the end of

the Second World War, the strong wave of decolonization that emerged also affected the Middle East. Starting with Iraq and then Syria in 1946 and ending with Kuwait in 1961, all mandates and colonies became independent. The decolonization of Palestine, however, proved problematical, leading to a war between Jewish forces backed by settlers and the neighboring Arab countries (Syria, Jordan and Egypt). The latter were defeated. The war culminated in the founding of the state of Israel and its declaration of independence in 1948. Türkiye was one of the first countries to recognize Israel, but in line with its „traditional” foreign policy, it avoided in getting involved in Arab-Israeli conflicts.

■ THE COLD WAR

As the Second World War was coming to a close, two rival blocs with North America and Western Europe on one side and Eastern Europe and Russia on the other, separated by ideology as well as the operating economic and political order, had begun to take shape. Their highly competitive relationship that appeared to preclude an armed conflict in Europe came to be referred to as the Cold War.

Türkiye had stayed out of the Second World War despite various efforts, particularly on the side of the Allies, to become involved. As the War was coming to a close, the Soviets announced that they would not renew the Friendship and the Non-Aggression Treaty they had signed with Türkiye in 1925 until the Montreux Convention of 1936 that gave full sovereignty to Türkiye on the Straits was modified so as to give the Soviets a role in their administration. The Soviets also expected some revisions in their favor on Türkiye’s Eastern border. The unfriendly Soviet position was probably in part a reaction to Türkiye’s refusal to join the war on the side of the Allies, but it caused a deep concern in Ankara that interpreted these demands as a return of Czarist expansionism toward the South, now in Soviet garb. Türkiye began to look for ways to join the emerging Western Bloc under American leadership as a way of countering the Soviet threat. After incessant efforts that included sending troops to Korea in 1950 to fight the Chinese, it managed to join NATO along with Greece in 1952.

Türkiye’s attention, particularly during the early stages of the Cold War, was almost exclusively focused on preventing the Soviets from expanding in their direction. The Soviet „threat” was not seen as only one of a military challenge but also one of an ideological penetration. Therefore, a very strict anti-Communist line that often took the form of anti-Soviet and more explicitly, anti-Russian internal policy was pursued with vigilance. Furthermore, Türkiye accepted the American doctrine that to contain the USSR, it had to be encircled by a network of connected alliances. Accordingly, in addition to NATO, it became a leading force in the Baghdad Pact along with Iran, Pakistan and initially with Iraq.

Türkiye’s strong pro-NATO and anti-Soviet policy offered a marked contrast to the policy preferences of the Arab Middle East. Having constituted a target of

the Western imperialism, having been either under colonial domination or some kind of western tutelage, many Arab countries moved to developing closer relations with the USSR to counter western European attempts to retain their domination through economic and other means. The anti-western proclivities of Arab governments became more evident after traditional governments were toppled by military juntas in almost all countries. In Iraq, for example, the Kingdom was ended by General Kassem in 1958 who also took the country out of the Baghdad Pact. The succeeding military governments all maintained an anti-Western outlook. Egypt moved closer to the Soviets after Britain and France tried to invade Egypt as a response to its nationalization of the Suez Canal. The new friendship got another boost when the Soviets promised that they would support the construction of the Aswan Dam although they failed to do so in the end, inviting Egypt to change sides. Syria developed closer relations with the Soviets especially after al-Assad consolidated his power. In this way, the distance between the Arab Middle East and Türkiye grew. An interesting early symbol of the growing distance was Türkiye's siding with France on the issue of Algerian independence so as not to disturb its western connection. Similarly, during the Arab-Israeli wars, it kept its distance. On the other hand, it maintained active relations with Israel.

■ THE SEARCH FOR CLOSER RELATIONS

Türkiye's deep commitment to the Western alliance did not mean that all was well on the western front. In fact, starting in the mid-1950's, Türkiye had been drawn into the Cyprus conflict in order to protect the interests of the Turks of the island when the island's Greek population wanted to gain their independence from the British. Britain, the United States and Türkiye's European allies all seemed to be sympathizing with the Greek side. In fact, Türkiye's plans to intervene on the island to protect the Turkish community was rudely prevented in 1964 by the American president Lyndon B. Johnson. Under the circumstances, Türkiye thought it might turn to its co-religionists in the Middle East to find some support for its position. In retrospect, such transactional hopes appear to have been misplaced in part because Türkiye itself displayed considerable hesitancy in taking part in the meetings and the activities of the Islamic Conference Organization because its constitution required it to be a „laïque” state. Liel notes that the 1969 Rabat conference was the first time that Türkiye participated at the level of a prime minister³. More generally, sharing a religion was only one of the various variables on which states based their foreign policy, and not necessarily the most important one. Furthermore, Türkiye itself was reluctant to employ religion as the common element on which external policy should be based.

³ A. Liel, *Turkey in the Middle East*, Boulder, Co., 2001, p. 138.

Nevertheless, other developments led Türkiye to search for ways to link up with Middle Eastern actors. In 1973, the sudden rises in the price of oil with the emergence of the OPEC cartel posed exceptional external payment problems for Türkiye. The crisis intensified in the following years such that Prime Minister Demirel volunteered at one point that Türkiye was in need of 70 cents. Türkiye again hoped that this time Saudi Arabia might come to its relief, but to no avail.

Closer economic relations had to wait economic reforms. On 24 January 1980, the government of Süleyman Demirel made a number of critical decisions which, taken together, defined a major shift in Türkiye's economic policies. More specifically, Türkiye moved from an import-substitution oriented economy to one driven by export led growth. The new policy guided Turkish businesses to find markets to export goods and services. Not surprisingly, the Middle East offered itself as one of the main targets of expansion. Türkiye's hopes to improve its economic presence in the Middle East was facilitated by the fact that the Cold War had lost its intensity. The two Germanies were drawing closer, there were mutual reduction of arms and agreements on the limitation of strategic arms between the two camps. Under such circumstances, Türkiye's intensifying its economic relations with countries of the Middle East appeared as nothing more than normal⁴. The end of the Cold War shaped by the dissolution of the Warsaw Pact and the demise of the Soviet Union only opened even greater space for economic relations to flourish.

■ THE COMING OF THE JUSTICE AND DEVELOPMENT PARTY

Political change of a fundamental nature took place in Türkiye with the elections of 2002 with the Justice and Development Party achieving an impressive electoral victory. This party represented the religiously and socially more conservative electorate that had historically been more cautious in the modernization cum westernization policies of the Republic. It was also the case that such a political movement had never been in power by itself. There were questions as regards how the new government team would approach matters of foreign policy. Interestingly, initially the new government attached deep importance to Türkiye's advancement toward membership in the European Union. But it also turned to developing close relations with Türkiye's Middle Eastern neighbors⁵.

⁴ Ö. Tür, *Türkiye'nin Irak ve Suriye İlişkileri*, in: F. Sönmezoğlu et al., XXI. Yüzyılda Türk Dış Politikasının Analizi, İstanbul 2012, p. 593–618, but esp. p. 595, emphasizes that Turkey has generally pursued a pragmatic approach in establishing relations with countries of the Middle East.

⁵ Gürpınar argues that it took time for the AKP to free itself from the yokes of the western centered foreign policy. See D. Gürpınar, *Foreign Policy as a Contested Front of the Cultural Wars in Turkey: The Middle East and Turkey in the Era of the AKP*, „Uluslararası İlişkiler Dergisi” 2020, 17, 65, p. 3–21.

In retrospect, it seems that the ideas of Professor Ahmet Davutoğlu who authored the book *Strategic Depth* was influential in shaping the foreign policy thinking of Abdullah Gül who served as the foreign minister until 2007 after Mr. Erdoğan became the prime minister in 2003. Mr. Gül was elected president in 2007. Davutoğlu argued that Türkiye's geographical location and historical experience blessed it with the resources to expand its major role in its region⁶. It was generally thought that the territories he had in mind were those where the Ottoman Empire had prevailed and where Islam had often constituted some kind of uniting force. His thinking appears to have been influential in governmental circles, exceeding that of an advisor to the government. In fact, he was made the Minister of Foreign Affairs in 2009 although he had not yet been elected to the parliament, being elected only later in 2011. Davutoğlu developed the doctrine of „zero problems” with neighbors to complement his grand vision. Until the outbreak of the Arab Spring, this doctrine did not end all of Türkiye's issues of contention with its neighbors but allowed Türkiye to assume a role of trying to build peace with and among them⁷.

It may be argued that Davutoğlu's thinking was well received by his party mainly because it was in line with the thinking that already prevailed in it. For example, the relations with Syria had been transformed in 1998 after the commander of the Turkish Land Forces General Attila Ateş had threatened that the Turkish Army would march into Syria if Assad continued to support the Kurdish separatist terror organization the PKK on its soil and host its leader Abdullah Öcalan in Damascus. Assad, appreciating that he might be dragged into a military conflict with Türkiye in which he was unlikely to emerge as the victor, changed policy, signing Adana accords in 1998 thereby terminating his links with the PKK. Relations continued to improve afterwards, upon which Davutoğlu built more comprehensive ties such that the Erdoğan's hosted the Assads in an Aegean resort town in August 2008. A „strategic partnership” was formed between the two countries by 2009. During this interim, Türkiye succeeded in helping Syria and Saudi Arabia settle their

⁶ Ali Bakir and Eyüp Ersoy offer an excellent evaluation of the concept in their *The Rise and Fall of Home Grown Concepts in Global IR: The Anatomy of Strategic Depth in Turkish IR*, in: „All Azimuth” 2022, 11, 2, p. 257–273. An excellent evaluation is also available in N.F. Onar, *Democratic Depth: The Missing Ingredient in Turkey's Domestic/Foreign Policy Nexus*, in: K. Öktem A. Kadioğlu, M. Karlı (eds.), *Another Empire: A Decade of Turkey's Foreign Policy Under the Justice and Development Party*, Istanbul 2012, p. 62–64.

⁷ Cengiz Çandar offers an excellent analysis of Strategic Depth interpreted as neo-Ottomanism, saying that initially it was a way of building bridges with Middle Eastern societies using historical-cultural heritage but later evolved into seeing neighbors as former dependencies rather than as nation states. See his *Turkey in Syria: A Neo-Ottomanist or a Nationalist Movement for Erdoğan*, in: N. Christofis (ed.), *The Kurds in Erdoğan's New Turkey: Domestic and International Implications*, New York 2022, p. 203.

differences and even came close to affecting a *modus vivendi* between Syria and Israel⁸.

Similarly, Türkiye and Iraq had developed a working relationship after 1992 that would allow Turkish forces to pursue PKK terrorists even after they had escaped into Iraq. The Turkish public and many members of parliament were ambivalent, however, about allowing American forces to go through Türkiye in their planned invasion of Iraq. Although the Turkish government accepted the idea after long negotiations and bargaining⁹, the Turkish parliament rejected the motion to allow passage of American forces, causing an erosion of trust in the commitments of Turkish government, but the decision appears to have been in line with the later pronounced Strategic Depth doctrine.

If one were to summarize Türkiye's foreign policy in the early years of Justice and Development Party (JDP) rule, one could say that there is a gradual intensification of getting involved in Middle Eastern politics although closer relations based on economic linkages had already been growing. What distinguished the JDP foreign policy was that while Türkiye continued to abstain from intervening in the domestic politics of other countries, it departed from an earlier practice of staying away from being involved in the relations between the countries of the region and actually aimed to help facilitate better relations among them. However, in this endeavor, it took care to maintain an equal distance between countries and retain the confidence and trust they extended to Türkiye.

■ THE ARAB SPRING AS A TRANSFORMATIVE EVENT

Observers of the Turkish foreign policy, for the most part, failed to predict that the Turkish government would come to view the Arab Spring as an opportunity to assume the protection of Muslim Brotherhood movement in the region. Such a course represented a fundamental break from the policy that Türkiye had followed until then. The only major development preceding the Arab Spring that had deviated from the traditional policy was the deterioration of relations with Israel. The problems with Israel, however, were generally attributed to the behavior of the Israeli prime minister Ehud Olmert who had agreed to a peace arrangement with Syria with Türkiye's mediation, asking that he return to Israel to get it approved by his government. Surprisingly, instead of coming back, he had initiated a major bombardment of the Gaza Strip. Feeling betrayed, the then Prime Minister Erdoğan insulted the Israeli president Shimon Peres harshly before

⁸ There was a general perception globally that Türkiye was becoming a regional leader. See K. Öktem, A. Kadioğlu, *Introduction*, in: K. Öktem, A. Kadioğlu, M. Karlı (eds.), *Another Empire: A Decade of Turkey's Foreign Policy Under the Justice and Development Party*, Istanbul 2012, p. 1–15.

⁹ The extensive negotiations are elaborated in C. Mumcu, *Türkiye-ABD İlişkilerinde Irak'a Askeri Müdahale' Müzakereleri*, „Öneri” 2006, 7, 25, p. 175–191.

walking out at the Davos Conference in Switzerland in January 2009. Relations experienced a deeper blow in May 2010 when Israel commandos boarded a ship in open seas destined to deliver aid to Gaza, killing eleven Turkish citizens. Diplomats were called back and the relations were put into the deep freezer.

The Arab Spring began in early 2010 in Tunisia where a street vendor set himself on fire as an act of an economic desperation. Protests against the Tunisian government and the departure of the authoritarian leader Zein-al-Abidin encouraged similar developments in neighboring countries with authoritarian governments that were insensitive to the plight of the masses. Within a year, major protest movements had challenged the governments of Egypt, Libya, Yemen, Syria and Bahrain where civil strife commenced. Anti-government demonstrations also raged in Algeria, Morocco, Iraq, Lebanon, Kuwait, Oman and Sudan¹⁰. The Turkish government judged that change would sweep the region. It saw the Muslim Brotherhood not only as a movement with whose goals it sympathized, but also as the best organized opposition that would gradually take over governments. In Tunisia, the Brotherhood achieved power. In Egypt, the government of Mubarak fell, elections were won by the Brotherhood, bringing Muhammed Morsi to power. Foreign Minister Davutoğlu traveled to Syria a number of times, trying to persuade Bashar al-Assad that he should also hold free elections in which the Brotherhood should be allowed to compete freely. While al-Assad agreed to holding elections, he was not willing to allow the Brotherhood to take part in them.

Developments took different turns in each society but in none did the Brotherhood prove to be particularly successful in achieving power or retaining it in the long run. In Egypt, the Brotherhood managed to have its candidate Mohammed Morsi elected president. A period of turmoil during which Morsi tried to change the constitution ensued, along with pro and anti-government manifestations in which some extremist religious groups also took part. The military that had maintained a dominating role in Egyptian politics under the Minister of Defense Abd-el-Fattah al-Sisi whom Morsi had appointed to restrain the military in his attempts to transform the Egyptian system, took over the government approximately a year after Morsi's ascent to the presidency. A military dominated system was restored while Morsi and many in his entourage were imprisoned¹¹. Türkiye, having extended extensive support including economic assistance to the Morsi government, immediately rejected cooperating with al-Sisi. The Turkish President Erdoğan referred to him in insulting terms. Relations between Egypt and Türkiye came to be characterized by mutual hostility.

¹⁰ https://en.wikipedia.org/wiki/Arab_Spring.

¹¹ For an account of developments and analysis, see the article by E. Trager, G. Wenig, *Sisi the Invincible: Why Egypt's Next President Won't Fear a Revolution* in: https://www.foreignaffairs.com/articles/middle-east/2014-02-18/sisi-invincible?utm_source=google&utm_medium=cpc&utm_campaign=dsa_middle_east_tfd&gad_source=1&gclid=Cj0KCCQj.

In Syria where anti-government demonstrations became frequent, after failing to persuade al-Assad to allow the Brotherhood to take part in an election, the Turkish government chose to support armed opposition to his regime. As the more moderate opposition forces failed to achieve results, more radical religious movements appeared to benefit from receiving tacit or open support from the Turkish government. Türkiye's intervention soon also assumed an anti-Kurdish character. Initially, the Kurdish population near the Turkish border were invited to join the struggle against the Assad government. When they refused to take arms against Damascus, they became targets for the Turkish military that argued that they extended support to terrorism which presented a separatist threat to Türkiye. Turkish armed forces engaged in operations to establish control over parts of Northwest Syria.

Türkiye's intervention in Syria was fraught with problems. Russia had come to the support of the Assad regime. Care had to be exercised not to engage Russian forces, but rather cooperate with them. Russia exercised control over airspace, and this restricted Türkiye's ability to extend aircover to possible land operations¹². Problems also arose with the United States that had decided that Türkiye would not support its efforts to stop the expansion of the Islamic State. The Americans chose instead to work with the Kurds which they euphemistically named Syrian Democratic Forces (SDF) in their war against the IS. These forces were closely linked with the PKK that Türkiye identified as a terrorist organization that challenged its territorial integrity. The Americans, on the other hand, while agreeing that the PKK was terrorist, defended SDF as a different organization that had nothing to do with terror. As a result, Türkiye became increasingly suspicious that what the Americans really aimed at was nothing less than establishing a Kurdish state by uniting the Kurds of Iraq and Syria, that would extend along the Turkish border all the way to the Mediterranean. Such a state would be at American mercy for its existence and therefore serve as an instrument of American interests in the region, including extending support to Israel if needed. Although one may find Turkish concerns exaggerated, how the United States would leave the area and sever its ties with the Kurds remains an open question.

In almost all Arab societies, there was turmoil. In some like Libya this took the form of a civil war; in others, it was more in the nature of domestic political struggles characterized by turmoil and political instability. By siding with the Muslim Brotherhood as the wave of the future, Türkiye appears to have made a major error of political judgment for several reasons. To begin with, in most societies, although there might have been unhappiness with the ruling authoritarian cadres, there was a widespread reluctance to allow the Muslim Brotherhood to take over the reins

¹² For Turkish and Syrian relations in Syria see İ. Ruma, M. Çelikpala, *Russian and Turkish Foreign Policy Activism in the Syrian Theater*, „Uluslararası İlişkiler Dergisi” 2019, 16, 62, p. 65–84.

of government. They were viewed as potential extremists whose basis of support derived from groups that challenged the values and the style of living that had characterized the middle classes prevailing in society. They were also branded as being divisive since they wanted everyone to conform with their vision of society in which Sunni Islam prevailed. Be it in Egypt, in Syria or elsewhere, the anti-Brotherhood coalition of social groups, in the final analysis, preferred to support the existing arrangement against the challengers.

Second, the traditional regimes in the region, mainly those in the Gulf such as Saudi Arabia and United Arab Emirates perceived a danger that if the Brotherhood were allowed to succeed in countries like Egypt, Syria and Libya, they would come under the challenge of a political change by their own masses. Save Qatar, these countries formed a united anti-Brotherhood front and extended material and financial support to those regimes that were fighting the Brotherhood rule. In fact, this support assumed questionable dimensions as Egypt and UAE supported the adventurer General Haftar in his attempt to take over all of Libya that was stopped by Turkish UAVs that destroyed Haftar's tanks¹³. Türkiye was supporting the internationally recognized government of Libya.

Third, Türkiye underestimated the international support the anti-Brotherhood governments would enjoy. By way of example, the Syrian government managed to get the full backing of Russia that was looking for a way to return to the Eastern Mediterranean to fill the space that had been left void by the withdrawal of the Soviet Union. The Russians returned to using the Tartus naval base and also developed a number of air force facilities. Iran was equally interested in extending support to Syria as well as the Hezbollah in Lebanon presumably to deter Israeli encroachments. America also entered the picture using the fight against the IS as a reason or a pretext for its presence in Syria. Similarly, Egypt became the recipient of extensive Saudi, UAE and more significantly, American economic and military assistance. In Libya, France and Britain got involved in domestic fighting to bolster the position of pro-Western groups.

Türkiye's misjudgments deriving from its misreading of who would do what did not mean that its relations with all countries were bad. Qatar pursued a pro-Brotherhood policy, a reason for developing good relations with Türkiye. In Iraq, good relations were developed with Kurdish Regional Government controlled by the Barzani family that also felt that the PKK constituted a challenge for it. In Libya, Türkiye sided with the internationally recognized government of Dibeybe against the military adventurer General Haftar. Despite these links, Türkiye felt isolated in the region. Politically, it had bad or no relations with the major countries; economically, it was kept off from some of the lucrative markets. At one point,

¹³ <https://www.bbc.com/turkce/haberler-dunya-52936620#:~:text=Erdo%C4%9Fan%20ve%20Sarrac%C4%B1n%20g%C3%B6r%C3%BC%C5%9Fmesi,Ankara%20Haftar'i%20ma%C4%9Flup%20etti.>

when some Turkish foreign policy analysts expressed criticism that Türkiye had become isolated in the region, İbrahim Kalın, currently head of Turkish Intelligence but an advisor to President Erdoğan at the time, volunteered that the country might well have become isolated but it was an „honorable isolation”.

It has become clear these days that Muslim Brotherhood is no longer a major force in the politics of the region while Türkiye has begun to see that it is being pushed away from exercising influence in the region even in matters that it considers important to its own national interest. It experiences more and more problems with the United States and its European allies in NATO. It feels more intensely the economic deprivations the country suffers because of its pro-Brotherhood sympathies. In conclusion, the country has felt the need to reconsider and revise its policy. This is a slow and painful process and target countries do not always respond with excitement to the prospect of improving relations with Türkiye, but this is where things stand now. And we shall now turn to Türkiye's role in the region and how it relates to ongoing conflicts.

■ THE DETERMINANTS OF CONTEMPORARY TURKISH FOREIGN POLICY IN THE MIDDLE EAST

As the Turkish foreign policy of supporting the Brotherhood is being abandoned and Türkiye is trying to break out of the isolation that its policies have led the country, it may be appropriate to look at the basic concerns that give direction to the Turkish foreign policy as well as how this change is reflected in the relations between Türkiye and specific countries. Three considerations appear to be influential in the shaping of the Turkish foreign policy. First and foremost, Turkish thinking in the field of external relations is highly security oriented. While security is a guiding principle in the foreign policies of all countries, it occupies a very critical place in the Turkish mind since it is accompanied by a basic feeling of a lack of trust in other countries, a disposition that has been shaped by the historical experience. To be more specific, the country was founded by conducting a war of liberation against the imperial powers of Europe. In the period that preceded the end of the Ottoman Empire, its territories piece by piece were wrested from the empire by European powers that extended support to separatist nationalist movements. As a result, Turkish policymakers, suspect the ulterior motives of even allied countries, want to be sure that territorial integrity may be maintained even when outside powers, including friendly powers, are working to undermine it.

Second force directing the foreign policy have been economic benefits. The ascent in the importance of economic considerations in the formulation of the Turkish foreign policy is rather recent. While recognizing that economic benefit is a prime variable in shaping state behavior, the rise of its relative importance can be traced to a fundamental shift in the economic policy from import substitution

orientation to export led growth. As long as a strategy of import substitution was pursued, the goal was to be self-sufficient. If one were to translate this into foreign policy terms, one would conclude that the aim was to move economic factors as a major consideration from external affairs. Such an aspiration is unrealistic and costly. It is unrealistic in the sense that no country, particularly a middle-sized country like Türkiye could ever meet all its economic needs from domestic sources. It is costly, on the other hand, because by insisting on producing everything locally, the country is deprived from the benefit of international trade which allows a country to export goods it produces at an advantage and import those that it would produce more expensively. Türkiye became integrated to the international economy after 1980 and moved to newly industrializing and eventually to the group of middle-income countries. At that stage, it became important for elected governments to perpetuate the increasing economic prosperity that export led growth produced. In this way, economic factors began to play a shaping role in the foreign policy. But again, historical consciousness enters the picture. Retaining the memory of capitulations, the exclusive economic privileges the European powers enjoyed in the Ottoman Empire and the struggle they pursued to maintain their privileges when the republic was being established, has given way to a suspicious mindset that perceives the economic actors as being in search of ways of exploiting Türkiye, getting something in return for giving nothing.

Finally, Türkiye perceives itself as a regional power and a descendant of an empire that should wield influence as a regional leader. After 1980, gradually developing closer economic and eventually political links with the region, Türkiye began to perceive itself as a regional power, a position it initially shared with Egypt and Iran. It perceived itself, however, as being strategically more critically located than its rivals and also as being economically more advanced. Such feelings of being in a superior position were enhanced by the fact that Iran was treated as an outcast in the international system while Egypt had to cope with domestic economic and political difficulties. And as indicated above, there was a period when Türkiye was involved in the politics of the region as a mediator in conflicts, as a provider of goods and services for other countries in the region. This is a time when Türkiye expanded its reach to other parts of the broader Middle East such as North Africa and the Gulf. The misreading of the Arab Spring, the changes it would bring and the opportunities it would offer to Türkiye, led to its isolation in the region, a status from which it has recently been trying to break out¹⁴. This leads us to the question of the role of Türkiye in current conflicts in the Middle East.

¹⁴ For the evolution of Turkish foreign policy and recent changes under AKP rule, see M.B. Altunışık, L.G. Martin, *Turkey and the Middle East and North Africa under the AKP: A Three Level Analysis of Foreign Policy Change*, „Uluslararası İlişkiler Dergisi” 2023, 20, 78, p. 79–96.

■ TÜRKİYE AND THE CURRENT CONFLICTS IN THE MIDDLE EAST

In discussing Türkiye's role in the ongoing conflicts in the Middle East, it may be useful to distinguish between those in which Türkiye is itself actively involved and those in which it is not involved militarily but takes a position.

CASES OF ACTIVE INVOLVEMENT

Syria

The major conflict in which Türkiye is an active participant is the domestic strife in Syria. This is a multi-dimensional involvement, one part of which is connected with the Kurdish terrorist organization, the PKK, while the other part is Türkiye's support for forces that are engaged in a struggle to replace Bashar al-Assad with a „more democratic” leader. Regarding the Kurds in Kobane region along the Turkish frontier, Türkiye asked the leadership to join it in fighting the Assad forces, a request that they declined, thereby becoming opponents of a Turkish vision for the region. There were, on the other hand, Kurdish populations in Afrin, neighboring the Turkish province of Hatay that had offered accommodation to the PKK in the past. Türkiye's negative approach to the Kurds of Kobane led it to group them with the PKK, creating a self-fulfilling prophesy. Türkiye has used its own military force along with local cooperants to achieve control some border areas with a certain degree of success. The local cooperants have included the Turcoman populations as well as other Sunni Arabs.

The Turkish foray into Northern Syria has run into difficulties¹⁵. On the one hand, to the South, Russian forces have come in to support al-Assad. This has put not only limits to how far Turkish forces could advance, but also because the Russians have established control over Syrian air space, the Turkish air force can operate only in areas not challenged by the Russians. To the East, the Americans have chosen to cooperate with Syrian Kurds to fight the forces that are tied to the Islamic State. Türkiye has opposed this American-Kurdish cooperation, arguing that the PYD/YPG is but the name of the local PKK connected organizations. The Americans, as already indicated, who have euphemistically named the Kurdish forces Syrian Democratic Forces, have argued that while they have designated the PKK as a terrorist organization, the SDF is a legitimate organization with whom cooperation is limited to terminating the IS presence in the area¹⁶. Many Turkish observers have judged that the aim of the Americans is to develop a Kurdish state

¹⁵ For a critical view of Türkiye's Syrian policy, see E. Başaran, *Frontline Turkey*, London 2017, passim.

¹⁶ For the effect of SDF on Turkish-American relations, cf, A. Mammadov, Riccardo Gasco, *Will US-Turkey Relations Survive the Wars in Gaza and Ukraine?* „The National Interest”, 18 March 2024; see also S. Çağaptay, *The Future of US-Turkish Ties: A New Relationship, Not a Reset*, „Policy Watch”, 3832, 26 January 2024.

stretching along the Turkish border all the way to the Mediterranean. It is feared that such a state that would have hostile relations with all its neighbors (Syria, Iraq, Türkiye and possibly Iran) and therefore highly dependent on the United States for its existence, thereby becoming an American pawn in the region. It is also felt that such a state would ease the Arab pressure on Israel.

The Turkish government discovered that the moderate forces it tried to develop within Syria had low fighting competence, guiding it to cooperate with more militant religious groups. Despite difficulties, however, Türkiye has managed to achieve effective control in a section of Syria neighboring Hatay. It has organized local government along the lines of Turkish public administration, it has been building public facilities and housing so that some who have left their homes can return to the region. The Turkish lira is used as the legal tender. How this area will be integrated into a future Syria, is a matter of speculation¹⁷.

The Syrian imbroglio for which Türkiye, by opposing al-Assad, bears some responsibility, has produced continual waves of immigration into Türkiye. The size of the Syrian immigrant community in Türkiye is thought to approximate four million. Such a large presence has transformed the demographic composition of some border towns generating local tensions, it has imposed significant costs of maintenance on the national budget inevitably resulting in deprivations in some public services, the assistance given to the refugees have prompted negative reactions among the poor that have judged that the refugees are taken care of by the government while they are not. Equally importantly, a significant portion of the refugees have viewed Türkiye as a temporary passage point to other countries in Europe although there is little desire on the part of the European Union member countries to accommodate them. Türkiye has come under pressure of the EU to prevent this massive emigration. Agreements have been reached whereby the EU has offered modest compensation for harboring this immigrant population. Despite Turkish efforts to prevent emigration, some refugees have managed to find ways to leave the country, some among them meeting the dramatic end of drowning in the waters of the Aegean. Some are also caught in national territorial waters while some are returned to Türkiye in line with international agreements. The refugees will constitute a source of irritation between Turkey and its affiliates to the West while also generating local tensions that may erupt into difficult to control anti-refugee manifestations.

Iraq

Another area where there is active Turkish involvement is Iraq where again the conflict is multi-dimensional involving the use of armed forces as well as harboring political dimensions. When the PKK found that it was difficult to organize and

¹⁷ Aslı Aydıntaşbaş questions whether Türkiye has the ability to control this area or pursue broader goals in Syria, *New Gaza: Turkey's Border Policy in Northern Syria*, „Policy Brief: European Council on Foreign Relations” 2020, quoted in C. Çandar, op. cit., p. 199.

conduct an armed struggle against the Turkish government within the country's national borders, it moved its activity into Iraq. It started conducting operations in Türkiye, but returned to Northern Iraq afterwards. Turkish forces often crossed the border in hot pursuit. Eventually, during the rule of Saddam Hussein, a *modus vivendi* in the form of a Hot Pursuit agreement was reached. To the unhappiness of the Iraqi government, Turkish forces established bases in Northern Iraq to prevent the PKK from penetrating into Turkey. Despite changes in the government of Iraq, Türkiye has continued its hot pursuit activity as well as maintaining its bases there.

After the fall of Hussein, the Iraqi government has accepted the idea that Northern Iraq is inhabited mainly by Kurds and agreed to the setting up of a Kurdish regional government (KRG) there with its capital in Erbil. This area is Kirmanchi speaking and its politics have historically been dominated by the Barzani family. The Barzanis themselves are opposed to the PKK, possibly perceiving them as a threat to their traditional rule and do not oppose the Turkish government's fight against the PKK. Further to the South in Suleymaniya, the politics is dominated by the Sorani speaking Talabani clan. A number of Iraqi presidents such as Calal Talabani and Barham Salih have come from this area. They are of friendly disposition to the PKK earning Türkiye's wrath. The central Iraqi government in Baghdad have in recent years kept its distance from the intra-Kurdish rivalries, but it has also abstained from interfering with PKK activities in part because its relations with Türkiye were distant but also in part, because it simply was not capable of bringing the PKK under control. Of particular difficulty for all is establishing control in the Qandil Mountains, where the military command center of the PKK is located. This is an area where it is next to impossible to conduct a military operation owing to the nature of the terrain, further complicated by the fact that part of it is located in Iran.

Changing military technology over the years, has provided Türkiye with means nowadays to monitor effectively PKK forays into Türkiye. A combination of sophisticated UAVs and hard intelligence has also given the national Intelligence Organization the capability to hit and neutralize both local agents and top PKK leaders in Iraq and Syria. Despite its successes, the Turkish government continues to maintain its vigilance against the PKK, because it also possesses a comprehensive network of supporting organizations in EU countries. Türkiye wants to be sure that it will not grow stronger and hopefully be eradicated. The Turkish President Erdoğan visited Baghdad on 22 April and Erbil on 23 April, agreeing to set up a strategic command control center whose mission, apparently, will be to bring the PKK fully under control.

Recent developments suggest that the Iraqi government may now take a greater interest in bringing an end to the PKK presence on its soil. A pipeline to transport Iraqi crude to world markets was built in the 1970s and had operated successfully for some time. The PKK had challenged the security of the pipeline starting in the early 1990s. After the first American war with Iraq, the amount shipped was

limited to meet only the emergency economic needs of the Saddam regime. Later, the pipeline operated off and on depending on political developments in Iraq. After the KRG was established, Türkiye struck an agreement with it to send oil to the international markets. The consent of the Iraqi central government was not secured. The Iraqi government took Türkiye to mediators in London who ruled in its favor and penalized the former. But recent changes in Iraqi government have made it possible for the three governments to agree on shipping Iraqi oil through the pipeline to the Turkish port of Yumurtalik. All actors agreed that the safety of the pipeline must be guaranteed and that the PKK creates a security challenge. Especially Türkiye has insisted that all governments must work to suppress the PKK. Since all parties aim to benefit from this project, it is expected that the Iraqi actors will cooperate to allay Turkish concerns.

The potential of cooperating with Iraq on other projects have recently gained new ground. In view of the difficulties that have been experienced in shipping goods and fuel through the Suez Canal, a search has begun for finding new ways for products to reach European markets. In this context, a project of connecting Basrah on the Persian Gulf (port of Great Faw) through Türkiye to Europe through railroads, highways and pipelines seems promising. Much of the needed infrastructure in Türkiye already exists and what is needed in Iraq can be constructed with speed provided that sufficient credit is found. The project referred to as the „Development Road” has attracted international attention in addition to the respective countries that will be involved¹⁸.

As the opportunities for economic cooperation between Iraq and Türkiye multiply, it is expected that all parties will have good reason to fight against actors like the PKK that may aim to sabotage such cooperation. As a gesture to promote further cooperation and show the rewards it will bring to Iraq, the Turkish government has indicated that it is willing to negotiate with a view to making more water available from the Tigris River to Iraq to help it meet its needs better, particularly in light of the fact that Iran has been reducing the water the Tigris receives from Persian rivers emanating from the Alborz mountains. While a similar gesture is not totally impossible regarding the Euphrates, since that river crosses Syria before entering Iraq, it necessitates a different way of handling than the Tigris which, for all practical purposes (there is a small portion of it that forms the Syrian border with Türkiye) enters Iraq from Türkiye.

Libya

When, shortly after the outbreak of the Arab Spring, the question of how to deal with the Qaddafi regime came up, initially Türkiye did not favor change, but after

¹⁸ *Kalkınma Yolunda Tarihi İmza*, „Ekonomi”, 23 April 2024, p.1 and 18; see also mine *Türkiye's Relations with Iraq are on the Right Track*, published in the internet weekly TR „Monitor”, 26 April 2024, <https://outlook.office.com/mail/inbox/id/AAQkAGRjN2RmMzQ4LTU3MmMtNDhmNy1iMDUwLWRmN2Y0MTUzNGMzMgAQALNiWSt%2BD0i0if9LCko%2BjwQ%3D/sxs/A>.

the intervention of France and Britain to get rid of the Libyan leader, Türkiye did not engage in sustained opposition but rather tried to assume the role of an actor that would have a say in how the future of the country is shaped. As it is known, Libya harbors regional differences that have constituted the background of an internal armed struggle for power. On the one side there has been the government recognized by the United Nations which the Turkish government also recognizes. It was known that the government had more of a religious coloring. On the other side there has been a rebel government led by an adventurous ex-general who had previously worked for both the CIA and the KGB, but interestingly is also backed by the current parliament. Fearing the religious coloring of the UN recognized government, Egypt and the United Arab Emirates have supported the rebel general while Türkiye has extended military support to the UN recognized government. Turkish assistance to the Dibeybe government (and its predecessors) was in the nature of offering training and supplying equipment. This aid that may have included Turkish military personnel that have helped operate UAVs that proved critical in fending off a sustained attack by General Haftar to take over Tripoli. The general's tanks were stopped by Turkish built UAVs and he was forced to terminate his campaign.

Türkiye has continued to offer training and sending material to forces loyal to the Dibeybe government. Nevertheless, recent Turkish attempts to break the isolation in which the country has found itself has led it to search for ways to improve relations with Egypt. Press reports have alluded to the fact that the impasse in Libya has come up in the conversations between Turkish and Egyptian officials, but at the time of this writing, no *modus vivendi* had yet been achieved. Türkiye attaches importance to having good relations with Libya as a source of oil, as a country that has often used Turkish contractors in the past to complete major public development projects, as a country that sends off large number of tourists to Türkiye who buy major consumer products, as a country with whom cooperation on the demarcation of the Exclusive Economic Zones in the Eastern Mediterranean is possible (more on this point later) and finally as an example of Türkiye's new policy of reaching out to the countries of the region as a regional leader.

Qatar, Somalia and other locations

As already indicated, shortly after the Arab Spring, many Arab regimes led by those possessing traditional leaders, engaged in an intense effort to prevent the Muslim Brotherhood from achieving power in any country. Türkiye and Qatar, on the other hand, sympathized with the Brotherhood and extended support to it to achieve power or retain it where it might have achieved it, like Egypt. The sharing of a common orientation regarding the Brotherhood brought the two countries closer together, while Qatar's relations with its neighbors rapidly worsened. This coincided with the time that Türkiye was trying to expand its role as a regional leader in the Middle East. Qatari feelings of insecurity emanating from the hostile

position of its neighbors and Türkiye's desire to expand its influence led, in 2015, to the opening of a Turkish military base on the isthmus. This was intended, among others, to discourage Qatar's neighbors from coercing it to change policy. It appears to have worked since when in 2017 Qatar was excluded from regional cooperation mechanisms, a critical point was the Saudi request to close the Turkish base. In 2021, the exclusion of Qatar from common regional mechanisms was restored but the Turkish base, mainly used these days for training Qatari forces, has remained active¹⁹.

Türkiye has also sent military forces with a view to opening bases in other countries in the region. The most significant country is Somalia where Turkish forces have been helping military forces under the control of the central government to meet terrorist activity such as that coming from al-Shaab. The assistance is again in the nature of training and providing of equipment. There is also a modest military presence in Djibouti. During the rule of Omar al-Bashir, Türkiye had also rented from Sudan the Sewakin Island to develop a military facility there as a counter-weight to Saudi Arabia. The island was felt also to be important in terms of assuring safe passage for ships. After the turmoil in the Sudan and the outbreak of a civil war, the fate of this project remains uncertain.

CASES OF CONFLICT WITHOUT MILITARY INVOLVEMENT

We have so far examined cases in which Türkiye has been involved militarily. Military involvement does not mean being involved in fighting, it covers such activities as training, supplying of weapons, supporting local fighting units or conducting military exercises. There are a number of cases in which Türkiye is not involved militarily but is either in a conflictual relationship with another country or takes a position regarding a country's relations with others.

Egypt

We have already noted that after the al-Sisi takeover of Egypt, Türkiye reacted very negatively to the military intervention. Diplomatic relations were severed, Türkiye pronounced its displeasure openly in the international arena and used less than kind words in referring both to the country and its leader. Economic relations in particular suffered since prior to the al-Sisi takeover, Turkish businesses had begun to look at Egypt as a location they could move their production as labor and other costs were going up, but discovered that this market had suddenly closed to them.

To continue challenging the Egyptian government, the Turkish government offered a home to Muslim Brotherhood organization and allowed broadcasts against Egypt to be conducted from Türkiye. More broadly, the two countries

¹⁹ There is a good summary of the Turkish base and its contribution to Qatari policy in https://www.economist.com/middle-east-and-africa/2021/01/21/how-qatar-and-turkey-came-together?utm_medium=cpc.adword.pd&utm_source=google&ppccampaignID=18.

competed with each other for dominance in the Middle East as was evident in the case of Libya where they were on the opposing sides. Countries like Saudi Arabia and the United Arab Emirates, opposed to the rise of Muslim Brotherhood as a political force, joined Egypt in resisting Turkish efforts to achieve a dominant position in the region. To that end, they also closed their markets to Turkish products, stopped awarding contracts to Turkish construction companies or more broadly, they minimized their relations with Turkey.

Türkiye's recent efforts to reconcile with Egypt after it became clear that its pro-Brotherhood position had brought no benefits, were met with a cautious response from Egypt. There is little doubt that Egypt would also like to improve its relations with Türkiye, but still harbors doubts about the extent to which the latter has decided to part with the Brotherhood. While Türkiye has terminated unfriendly Brotherhood activity against Egypt emanating from its territory, it still maintains, for example, a close relationship with Hamas, calling it not a terrorist organization but one of national liberation, in contrast to both Egypt and traditional Arab regimes in the region that perceive it as a challenge to their rule.

It may be predicted that Turkish-Egyptian relations will advance to become more comprehensive, that the two countries will soon exchange ambassadors, that they will look for a mutually acceptable solution to the impasse in Libya and that they will advance their economic relations, but an element of mutual suspicion will still continue to characterize their relationship as long as the current Turkish leadership, which the Egyptians do not trust, continues to stay in power. In this context, there is no reason for Türkiye to expect that Egypt will undermine its relations with Greece and Israel, for example, that it developed during the period when relations with Türkiye were at an ebb.

Israel

In the past, Türkiye tried to have good relations with Israel not only because it was the only other country in the region with a strongly Western orientation but also because this was a way of ensuring that the Jewish lobby in the United States came to its assistance in the face of strong anti-Turkish challenges from the Greek and Armenian lobbies. As noted earlier, under the AKP government, the Turkish-Israeli relationship began to deteriorate after 2009–2010. Incessant efforts on the part of the United States proved ineffective in restoring them to their earlier closeness. The Jewish lobby, on the other hand, dropped its support for Türkiye and occasionally joined others in influencing the American government against Turkish concerns, as exemplified in the decision of the American government after many years to recognize the fate of the Armenians in the Ottoman Empire as genocide as opposed to calling it the Great Disaster.

Along with the general thawing of relations between the various Arab regimes and Israel, Türkiye had also begun to reconstruct its relationship with Israel when

the most recent Gaza crisis came. This development has served to slow down the regional warming of relations with Israel but in contrast to the cautious way other countries in the region have approached the emergency, recognizing that the entire process was triggered by Hamas possibly to arrest the rebalancing of relations with Israel, the Turkish government gave Hamas unconditional support, calling it, as implied before, a national liberation movement. This will not only render repairing relations with Israel more difficult, even after the departure of Mr. Netanyahu, but it will also undermine Türkiye's credibility in its efforts to make a comeback to regional politics after the long isolation it suffered as a result of its commitment to Muslim Brotherhood.

Interestingly, despite denials by the government, trade with Israel continues to thrive, tourism is open, but it is clear that the normalization of relations may take some time²⁰. Türkiye will likely continue to maintain its pro-Palestinian stance until some kind of solution is found to alleviate the plight of the Palestinians. This appears to be a national position that may not be affected in a major way by the change of those in power.

A REGIONAL QUESTION

The search for energy sources in the sea has produced unexpected results. Search in the Eastern Mediterranean has led to the discovery of major gas deposits in Israeli and later in Egyptian economic zones²¹. Further discoveries followed in the Greek Cypriot economic zone. Türkiye also began exploration in the areas which it considers either to be its own or Turkish Cypriot economic zones. Two types of problems have merged in this process. First is the delineation of economic zones over which there is significant disagreement between Türkiye and Greece and in particular Greek Cyprus. Second, there is the question of how the gas should be shipped to European markets. On both questions, during the time Türkiye had been enjoying its „splendid” isolation, other countries developed a consortium to work together, excluding Türkiye as a partner.

It seemed that the cheapest way to ship gas to Europe might be to connect to the Trans-Anatolian pipeline that runs through Türkiye transporting Azeri and hopefully Iranian and maybe even Kazakh and Turkmen gas to Europe. Yet, not trusting Türkiye as a reliable partner for shipping particularly the Israeli gas to Europe, Israel, Egypt, Greece and Greek Cyprus have joined forces to search for other ways that would exclude Türkiye. It has become increasingly evident that some

²⁰ The Turkish government has announced that it is determined to stop trading with Israel. This seems to be a direct response to criticism by the opposition and it remains an open question to what extent the government will follow this decision.

²¹ For a review of the gas findings and potential see https://www.economist.com/middle-east-and-africa/2022/10/13/middle-eastern-countries-are-sitting-on-an-ocean-of-natural-gas?utm_medium=pcp.adword.pd&utm_source=.

of the routes envisioned like one that goes from Cyprus to Greece is unjustifiably expensive given the nature of the bottom of the sea, while collecting the gas in Egypt and rendering into LPG might be somewhat more attractive although not nearly as inexpensive as the Turkish route. Yet, none of the actors have sufficient confidence in working with Türkiye. The question of shipping routes is still an undecided issue, but the search for keeping Türkiye out will continue.

A more interesting situation has developed in the demarcation of exclusive economic zones. Egypt, Israel, Greece and Greek Cyprus had agreed on the demarcation of exclusive economic zones. Their designation of economic zones ran into conflict with Turkish claims. A Turkish Admiral, using a different map projection than the Mercator projection that the above mentioned countries had used but more in line with the curvature of the earth, came up with a different map which not only made Turkish zone connect with a Libyan zone, but it also promised to expand the area designated for Egypt²². The Libyan government has signed an agreement with Turkey on the demarcation of exclusive economic zones that runs into conflict with the existing arrangement. While it is expected that Egypt, Israel, Greece and Greek Cyprus will continue their cooperation regarding gas production, the situation will be unsettled and open to contestation. There appears to be no immediate urgency to address this issue and there is no reason to expect that the disagreement among the various actors will escalate into a major conflict.

■ CONCLUSIONS

In terms of its earlier history, Türkiye kept its distance from the politics of the Middle East. Economic imperatives, changes in the global system as the Cold War came to an end, the difficult relations with the European Union, the ideological proclivities of the current government that has been ruling the country for the past twenty years and the outbreak of the Arab Spring each contributed to the emergence of an aspiration for Türkiye to become a regional leader. The country has been involved in armed conflicts to retain its territorial integrity and to assert its regional leadership. Aspirations to become a regional leader built on success of the Muslim Brotherhood appear to have been ill founded, leading to the country's isolation. Attempts to return to the region through reconciliation with others proved only partially to be successful since Türkiye is still suspected of retaining its Brotherhood sympathies. Its reintegration into the region has been rendered more difficult by the recent developments in Gaza where Türkiye has expressed a clearcut sympathy for Hamas. Despite such difficulties, however, Türkiye continues to be a major actor in the region, with a large population, a more developed economy and technology

²² C. Yayı, *Türkiye'nin Denizlerdeki Misak-ı Millisi*, İstanbul 2023.

and a more modern society that is ruled by an authoritarian system, but where political competition is still possible as demonstrated by the recent local elections²³.

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²³ On 31 March 2024 local elections, the total vote of the leading opposition party exceeded the votes received by the government party candidates. The major opposition party, the People's Republican Party, won the mayoralty of almost all major metropolitan areas.

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İlter TURAN

TURKISH FOREIGN POLICY IN THE MIDDLE EAST: EVOLUTION AND TRANSFORMATION

After its founding, the Turkish Republic kept its distance from Arab affairs. During the interwar period, Türkiye worked to develop its own national identity while maintaining a balance between imperialist and revisionist powers. After WWII, Türkiye, threatened by Soviets, joined NATO whereas the newly independent Middle Eastern states viewed Russia as an anti-colonialist friend. The coming of *détente* and changes in Turkish economic policy toward export-led growth, guided Türkiye to develop closer economic relations with its neighbors. Its clear foreign policy rule, however, was not getting involved in the politics of any Arab country or in inter-Arab matters. The Arab Spring led the religiously oriented AKP to judge that Türkiye could lead Sunni-majority countries. Facing total failure, Türkiye is trying to restore former relations with regional countries but lacking trust, this is a slow and only partially successful process.

Keywords: Turkish foreign policy; the Middle East; the Arab Spring; the Justice and Development Party (AKP); Sunni majority states

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THE DEMOCRATIC REPUBLIC OF THE CONGO (DRC) AND THE INTERNATIONALIZATION OF INTERNAL CONFLICTS

■ INTRODUCTION

It has been painful, almost heart breaking, that nowhere in Africa – except for South Africa – the colonial rule was as absolute and savage as it was in the Belgian Congo. The colonization of what is currently known as the Democratic Republic of the Congo (DRC) by the Belgians was one of the most brutal. Though Belgium was a relatively weak power in comparison to other European colonizers, it managed to appease its neighbors by not venturing into territories outside central Africa (Nzongola-Ntalaja 2002).

King Leopold II's interest in the Congo was driven by a desire for wealth and prestige. At a time when European powers were competing for colonies, Leopold sought to establish his own personal empire. He portrayed his rule over the Congo as a civilizing mission, promoting the idea of bringing „light” to a „dark” continent. Beneath this ideological façade of a „civilizer” laid a ruthless pursuit of profit, primarily through the extraction of natural resources.

■ INDEPENDENCE AND THE CONTINUATION OF PILLAGE OF AFRICA

In the early 1960s, at the onset of independence, Ghana's respected statesman Kwame Nkrumah acknowledged the Congo as the „heart of Africa”, occupying a pole position in the continent's „future political fortunes”. Regrettably the fate of the country was different. The country has not escaped the paradox of poverty in abundance – the resource curse! The wealth of the nation has

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attracted global, regional and in-country speculators, investors, predators and abductors.

Their local agents, following directives from the US government, got the popularly elected Prime Minister Patrice Lumumba, the country's first nationalist and unapologetic revolutionary leader, executed by a firing squad on the 17th January 1961, soon after independence. Lumumba had to be led away by both Belgium as a colonial power, and the US as the guardian of global imperialism. The levers of power transited to local vicious collaborators. The heart of Africa has never been the same again since.

■ INDEPENDENCE AND NEO-COLONIALISM

From time to time, elections have been held to legitimize political power in the DRC, as elsewhere in Africa. No doubt there have been incremental changes in terms of regime legitimacy every time elections have been held. The elections somehow politically legitimize the continued plunder of Africa under the rule of „democratically elected” leaders. Such elections are often fought by political parties organized largely on regional, ethnic or religious lines. That is why it is often assumed that the common denominator of conflicts in the African politics revolves around ethnic identity and the irrationality of forcing people with no common history to live within one nation-state. This may appear to be true; but only superficially. In the DRC, the rains began to beat us in the late 19th century. In this essay, I will attempt to demonstrate how, during the scramble for Africa, the „dark continent” was dismembered and shared as colonies by European powers primarily on the basis of what each colony offered in terms of resources, trade and human capital.

Walter Rodney's book, *How Europe Underdeveloped Africa* (Rodney 2018) gives a useful analysis of this phenomenon: „Colonialism was not merely a system of exploitation, but one whose essential purpose was to repatriate the profits to the so-called mother country”. Belgian colonization of the Congo was both typical and atypical compared to African countries ruled by the French, British, Germans or even the Dutch in South Africa.

The Belgians had no inclination or capacity to politically or culturally assimilate the colonized society into the so-called Western civilization. Having brutally seized the landmass as his personal property in 1885, King Leopold II treated Congo as a real estate that could be leased and auctioned according to his whims. Initially, the DRC's wealth was realized through the rubber trade. The late 19th century saw a surge in demand for rubber, particularly for use in industrial applications and consumer goods. Leopold II's administration enforced a system of forced labor, compelling Congolese villagers to collect rubber in brutal conditions. The regime employed violent tactics to maintain control and enforce production quotas, leading to widespread suffering, mutilation, and death.

The extraction methods were horrifyingly exploitative. Reports from missionaries and travelers documented atrocities committed against the Congolese, including punitive raids and the killing of those who failed to meet the rubber quotas. These brutal practices resulted in a significant decline in the population and a legacy of trauma that would haunt the region for generations.

The world had been conveniently silent when it came to the brutalities that had been going on in the DRC under the Belgian rule. In the book *King Leopold's Ghost: A Story of Greed, Terror and Heroism in Colonial Africa*, Adam Hochschild chronicles this sad chapter in history, observing that „the world we live in is shaped far less by what we celebrate than by the painful events we try to forget. Leopold's Congo is but one of those silences of history”. The author is particularly candid: „From the colonial era, the major legacy Europe left to Africa was not democracy (...) it was authoritarian rule and plunder. On the whole continent, perhaps no nation has had a harder time than the DRC in emerging from the shadow of its past”.

Despotism has its sell-by-date. National and international pressure drove Belgium to concede and reluctantly grant „independence” to Congo in 1962. But it hasn't given up yet, decided behind the scenes to stir up discontent and uncontrolled rebellion, deception, which eliminated Patrice Lumumba. Further lending credence to Walter Rodney's assertion „the metropolitan capitalists had no intention of allowing rivals to arise in the dependencies”. In the DRC the flag independence simply caused perpetual political chaos and instability. A trend that has continued for decades with few interregnums of stability under military or civilian rule. The UN reports 6 million deaths and 7.2 million internally displaced persons since 1996 in an unending international conflict that has sucked in the neighboring states of Rwanda, Uganda, Burundi and Kenya. With huge reserves of mineral deposits that greedy multinational corporations already have access to on their own terms, the chaos simply provides an opportunity for these corporations, strongly supported by their „home governments”, to systematically and continuously pillage resources in the turbulent republic. 22 years ago, a brutally honest dossier in the „Guardian” (2002) exposed British companies helping to plunder resources in the war-torn African country.

The paper cited Barclays Bank, De Beers and Anglo American. It is brutally honest: so lucrative and elaborate was the looting that there were attempts to prolong the fighting by stirring conflict between rival militias and rebels. In the words of a panel involved in the enquiry, „those [criminal] groups will not disband voluntarily. They have built up a self-financing war economy centered on mineral exploitation”. In a research article on cobalt and corruption Anderson (2023) is curt: „the history of the Democratic Republic of the Congo is littered with foreign influence and corruption. While colonial forces sought for diamonds and rubber, the nation's abundance of cobalt, a key metal in cellphone and electric vehicle construction, has fueled a recent flurry of international interest”.

While the rubber boom defined the early years of Leopold's rule, the DRC's mineral wealth — particularly copper, cobalt, and diamonds — began to attract attention in the late 19th and early 20th centuries. The Congo is endowed with vast mineral resources, which were not extensively exploited during Leopold's reign but laid the groundwork for future extraction. Leopold's regime invested in infrastructure to facilitate the transport of these resources. Railroads and ports were developed, but these projects primarily served colonial interests rather than contributing to local development. The focus remained on maximizing profit for Belgium, with little regard for the well-being of the Congolese people.

The extraction of resources under Leopold II had catastrophic economic and social consequences for the DRC. While the colony generated immense wealth for Belgium, little was reinvested in local infrastructure or social programs. Education, healthcare, and other essential services were largely neglected, resulting in a population that was unprepared for the complexities of modern governance and society.

Moreover, the legacy of exploitation set the stage for future conflicts. The brutal practices of the colonial regime fostered deep-seated grievances among the Congolese, which would later erupt into violence during the struggles for independence and beyond. The lack of political development and trained leadership meant that when the DRC gained independence in 1962, it met a significant instability, a situation exacerbated by external interests vying for control over its mineral wealth.

In the Eastern Congo, particularly in the Kivu province, where the Goma city is situated, mining interests, both local and foreign, encourage and tolerate political chaos. Under such chaos they pay no taxes to the state and pillage as much as they want. It is a situation of permanent primitive accumulation. The historical exploitation during colonial times established patterns of resource extraction that persists today. Foreign interests often continue to dominate, perpetuating a cycle of underdevelopment and dependency.

Of the theories advanced to explain the mechanics of colonial systems, currently the most popular is the one in which the main pillar of imperialism is collaboration. Put simply, the theory contends that no imperial power can rule a subject people without affording consultation and conceding a large measure of consent to the governed. The consent of the governed is secured either soon after military conquest or as part of the continuing process of imposing – or superimposing – foreign rule over traditional rulership.

Belgium's colonial rule over the Democratic Republic of the Congo is often cited as a particularly harsh and exploitative period in history. Below are some of the key indicators that underline why the Belgian rule is viewed as detrimental to the DRC and they are discussed below.

First, it is worth noting that the primary goal of the Belgian colonization was the extraction of natural resources, particularly rubber and minerals. The Congolese people were forced to work in brutal conditions, leading to widespread suffering and death.

Second, the regime used violent tactics to control the population. Under King Leopold II there were severe punishments for those who did not meet rubber quotas, including mutilation and killings, the origin of violent suppression later to be witnessed throughout the years.

Third, Belgian authorities showed little respect for Congolese culture and traditions. Education was often limited and focused on indoctrination rather than the empowerment of the local population. Hence, Belgians polluted completely the Congolese culture.

Fourth, although the colony generated significant wealth for Belgium, little of this wealth was reinvested in the DRC. Infrastructure development primarily served the interests of the colonial administration rather than benefiting the local population.

Fifth, the Belgians did not prepare Congolese people for self-governance. When independence was finally granted in 1960, the country faced significant political instability, partly due to the lack of trained leaders.

These factors contributed to a legacy of underdevelopment and conflict that has persisted long after independence. King Leopold II's exploitation of the Democratic Republic of the Congo is a stark reminder of the destructive potential of colonialism. His focus on resource extraction, particularly on rubber and minerals, led to immense suffering and underdevelopment in the region.

The consequences of King Leopold's brutal regime are still felt today, as the DRC continues to grapple with the legacies of colonial exploitation and conflict over its rich mineral resources. Understanding this history is essential for addressing the ongoing challenges faced by the Congolese people and for promoting a more equitable and just future.

The legacy of Leopold II's mismanagement left deep scars on the DRC, contributing to ongoing challenges in governance, human rights, and economic stability. For a detailed exploration of this dark period, *King Leopold's Ghost...* by Adam Hochschild (1998) is an excellent resource, providing a comprehensive account of the atrocities committed during this colonial era.

The DRC gained independence from the Belgian colonial rule on June 30, 1960. However, the transition from colonialism to self-governance was fraught with challenges, leading to decades of political instability, economic turmoil, and social strife. In this essay, an attempt has been made to examine the key events and factors that shaped the DRC's post-independence trajectory, highlighting the ongoing struggles that the country continues to face today.

Upon gaining independence, the DRC faced significant political challenges. The newly formed government, led by Prime Minister Patrice Lumumba, was unprepared for the complexities of self-governance. Lumumba's vision for a unified and independent Congo clashed with regional interests, particularly in Katanga, a resource-rich province that sought to secede. The power struggle between Lumumba and various regional leaders set the stage for conflict and instability.

The immediate aftermath of independence was marked by chaos. The military, largely composed of former colonial troops, was untrained and disorganized. In July 1960, just weeks after independence, a coup attempt led by General Joseph-Désire Mobutu (later Mobutu Sese Seko) and the secession of Katanga plunged the country into crisis. Lumumba's government struggled to maintain control, but foreign powers, including the United States and Belgium, became increasingly involved, basically taking over the control of government under the guise of fearing the rise of communism in the region.

In September 1960, Mobutu staged a coup that effectively sidelined Lumumba. Lumumba was arrested and later assassinated in January 1961, an act that drew international condemnation and highlighted the nefarious role of foreign interests in Congolese affairs. Mobutu consolidated power and established an authoritarian regime, ruling for over three decades.

Under Mobutu's leadership, the DRC was renamed Zaire, and he implemented a policy of „Zaireanization”, which aimed to replace foreign influence with local ownership. However, this policy led to widespread corruption and economic mismanagement. The regime's focus on personal enrichment and patronage networks resulted in the depletion of the country's resources and a decline in living standards for the majority of the population.

The DRC is rich in natural resources, including copper, cobalt, diamonds, gold, and coltan, yet the vast wealth generated from these resources has not translated into improved living conditions for the Congolese people. Instead, the economy suffered under Mobutu's corrupt administration, exacerbated by falling commodity prices in the 1980s. Infrastructure deteriorated, healthcare and education systems collapsed, and poverty became pervasive.

The social fabric of the DRC was further strained by ethnic tensions and regional disparities. Mobutu's regime favored certain ethnic groups, leading to marginalization and resentment among others. This division laid the groundwork for future conflicts, as various factions began to vie for power and resources.

The 1990s brought new challenges to the DRC. In 1990, facing international pressure and internal dissent, Mobutu promised political reforms. However, these efforts were largely superficial, and discontent grew. In 1997, a coalition of rebel forces led by Laurent-Désiré Kabila ousted Mobutu, marking the end of his long rule.

■ THE REIGN OF KABILA AND CONTINUED UNDERDEVELOPMENT AMID PLENTY

Kabila's ascendance to power was short-lived. His failure to address the country's deep-seated problems led to the outbreak of the Second Congo War in 1998, which drew in several neighboring countries and resulted in millions of deaths. The war was fueled by competition over the DRC's abundant resources, with various armed

groups vying for control. The conflict left the country in ruins, with a devastated economy and a fractured society.

In the early 2000s, peace agreements led to a semblance of stability. The transitional government was established, and elections were held in 2006, marking the first democratic vote since independence. However, the DRC continues to grapple with numerous challenges. The political landscape remains unstable, with ongoing violence in eastern regions fueled by armed groups and militias that politically camouflage the continued pillage of the country's minerals by external and local interests.

Corruption remains endemic, and the exploitation of natural resources often occurs at the expense of local communities. Despite the DRC's rich mineral wealth, most of its population lives in poverty, and basic services such as healthcare and education are severely lacking. The abundance of cobalt, copper, and diamonds, attracting multinational corporations and foreign governments, is only relevant to the poorly paid local labor that helps in the mining and transport of these resources.

■ CONCLUSIONS

The DRC's strategic location and resources have made it a focal point of regional and global geopolitical dynamics. During the Cold War and beyond, foreign powers supported various factions to maintain influence, often exacerbating internal conflicts. While foreign aid aims to foster development, it can also entrench corrupt governance and mismanagement. Conditionalities attached to aid can serve the interests of donor countries rather than addressing local needs.

International interests in the DRC's resources have fuelled conflicts, as different groups vie for control. This has led to humanitarian crises and has made the country a battleground for proxy wars. Trade policies and agreements often favour the extraction of resources rather than sustainable development, limiting local economic growth and self-sufficiency.

Foreign investment has often neglected environmental sustainability, leading to degradation that disproportionately affects local communities, contributing to social tensions. Overall, the interplay of international interests with local dynamics has created a complex political economy in the DRC, characterized by both opportunities and challenges for its development.

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Peter Anyang' Nyong'o

THE DEMOCRATIC REPUBLIC OF THE CONGO (DRC) AND THE INTERNATIONALIZATION OF INTERNAL CONFLICTS

From the time it was colonized to the present day, the Democratic Republic of the Congo (DRC) has neither experienced democracy nor lasting peace and stability. Instead, it has all the qualitative attributes of a fragile state. Empirically, the beginnings of a fragile state are linked to rebellions which led to civil wars and thereafter took on a long-run trend with the capture and exploitation of resources. For example, diamonds in Sierra Leone, oil in Sudan and South Sudan and rare metals in DRC. Fragility stems from being in conflict repeatedly, a sign of a vicious cycle where conflict generates grievance and grievance generates further conflict. However recurring conflicts are also often driven by greed for resources whose control can fund a conflict ad infinitum especially if the resources are in demand globally. Hence the conflict becomes internationalized. The entry of international players is based on predatory opportunities to control commodity exports. Because the conflict also displaces people (and creates a rebellious diaspora), especially those with influence and money, these grievances fuel the discontent of diaspora which mobilizes funds to finance the conflict further.

Keywords: civil wars; exploitation of natural resources; international actors and fragile states

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ARMENIA AND NAGORNO-KARABAKH: THE HISTORY OF AN UNSETTLING RELATIONSHIP

■ INTRODUCTION

In the spring of 2018, mass demonstrations shook Yerevan, the capital of Armenia. This public unrest led to the collapse of Serzh Sargsyan's government. Sargsyan was widely considered to be corrupted and utterly unfit to solve Armenia's economic problems. The new leader, Nikol Pashinyan, promised to usher in a new democratic era and planned to reform the country and foster its prosperity (Ishkanian 2018: 275 and 276). His government faced intricate structural challenges. Azerbaijan conquering Nagorno-Karabakh in September 2023 and the expulsion of its Armenian population are only one, high unemployment rates and brain-drain are other issues. The continuing hostility from Azerbaijan and the utter worthlessness of alliance with Russia (CSTO) put Pashinyan's government under severe distress (Łapaj-Kucharska, Miarka 2022: 701 and 702; Nikoghosyan, Ter-Matevosyan 2024).

This article provides a brief overview of Armenia's current challenges. It shows why there cannot be any easy way out. To understand this, we must go back to the beginning of the twentieth century. The international relevance of the Nagorno-Karabakh question has become pressing again since 2020. Compared to any other post-Soviet conflicts, this issue has the most devastating potential, as it involves not only the rising regional powers – Turkey and Iran – but also Russia and the EU, France in particular. Azerbaijan exports a large amount of fossil resources to Europe. Their constant exploitation and safe transport are key for diversifying Europe's energy imports and decoupling from Russia.

Sociologists like Georgi Derluguian, historians like Claire Mouradian but also journalists like Thomas De Waal and practitioners like Vladimir Kazimirov have already extensively studied the Armenian political field and the role national narratives play. Their studies reveal how the persistent economic stagnation and key political figures are product of the Nagorno-Karabakh conflict. The former presidents Serzh

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Sargsyan and Robert Kocharyan, both originally from Nagorno-Karabakh, gained their initial political capital as militia leaders in the war against Azerbaijan and then as politicians within the de facto state (Antonyan 2016: 116–122; Minasyan, Mikaelian, Iskandaryan 2016: 113–115, 129). Distinguished historians like Ronald Suny, Arsène Saparov or Jeremy Smith have depicted how the genocide and the formation of the Soviet South Caucasus formed the Armenian national narratives (Suny 1993; Saparov 2015; Smith 2015). However, they often neglect to consider how certain interest groups exploit such narratives to create „groupness“. „Groupness“ rather than „nation“ should be in the researchers’ focus. This term describes the shared feelings of belonging to a certain group. As they depend on concrete contexts, such feelings are highly volatile: „It allows us to treat groupness as an event, as something that «happens» (...)” (Brubaker 2004: 12). Groupness may or may not crystallise into a national movement with an impact on politics. In the course of time, such a mobilisation can decline, and a national movement can disintegrate. Ethnopolitical entrepreneurs, i.e. nationalists, play a vital role, as they appeal to groupness to gain political legitimacy for themselves (Brubaker 2004: 11–13). Such processes can create self-sustaining feedback loops, after they have reached a certain tipping point (Kaufmann 2017: 16 and 17). In the Armenian case, certain factors – they will be expounded in depth later – have kept groupness on a constant elevated level.

This article attempts to synthesise the above-mentioned insights on the Armenian political field from a historical perspective. I focus on the Armenian groupness as it was the main driver within the whole conflict between 1988 and 2018. To be clear, this is not an attempt to blame a certain side for the conflict, but an essay to provide an insight into the complexity of the current powder-keg. Therefore, it focuses on the modes how certain interest groups could make use of national narratives to create and maintain Armenian groupness, how they have been caught by these narratives and how this creates opportunities for foreign intrusion. To handle these questions I, first, develop a short genealogy how these national narratives took shape. Then, I ask how ethnopolitical entrepreneurs used these narratives to strengthen groupness to gain political legitimacy. Finally, I examine the consequences for the field of power (Bourdieu 1984: 315–317) in Armenia and the opportunities for other powers like Turkey, Russia, Iran, France and particularly Azerbaijan to take advantage from Armenia’s precarious position.

■ TRAUMAS FROM THE FIRST WORLD WAR

National symbols and the narratives related to them are ubiquitous in Armenia. A visitor inevitably faces them almost on every step. In the late 2010s, the picture of the forget-me-not flower was present in public space. It has been designed to commemorate the one-hundredth anniversary of the Armenian genocide in 2015. Foreigners also experience that locals ask if they know about the atrocities of 1915.

Despite harsh domestic political conflicts, there are signs of a strong „groupness” within the population of Armenia and the Armenian diaspora all around the world. The genocide and the Nagorno-Karabakh question appear today as two interconnected pillars in commemoration. Located in the First World War and its aftermath, they were produced and reproduced in the Soviet era. In the perestroika era, they became one of the many factors that led Soviet Union to collapse (Derluguian 2005: 187–190; Marutyan 2007: 100; Krzysztań 2021: 33).

The term „Armenian genocide” itself is problematic as it implies not only an analytical, but also a moral and legal stance. It is today widely used in the transnational political debate in Armenia as well as within the Armenian diaspora, but also in the scientific discourse to label the mass murders committed by Ottoman forces against the Armenian population in Anatolia after April 1915. The Ottoman leadership, the Committee of Unity and Progress, ordered these atrocities as a measure to get rid of an „unreliable” part of the population, as the Empire faced imminent collapse due to the Russian troops advancing in the East and the Entente invading Gallipoli in the West. During these in their scale unprecedented intentional atrocities of a modern state against its own subjects allegedly more than one million Armenians died. These horrors were a highly traumatic experience for those surviving. Later, it has become one of the central pillars of the national narrative among the Armenian diaspora and in the Soviet Armenia (Kieser, Schaller 2003; Bloxham 2005; De Waal 2015a; Suny 2015).

The beginning of the twentieth century was also a traumatic era for the Armenians living under Russian rule. Between 1904 and 1905, acts of interethnic violence between Armenians and Azerbaijanis, at that time labelled as „Tatars”, shook the South Caucasus (Peyrat 2020: 37–46). After the October Revolution in 1917 and the subsequent civil war, an independent Republic of Armenia formed in May 1918. However, this republic was confronted with unbearable challenges. On the one hand, it had no defined borders and on the other it was in a state of war with the Ottoman Empire. The regions of Nakhichevan (today Nakhchivan), Zangezur and Nagorno-Karabakh were particularly contested between Armenia and the newly formed Republic of Azerbaijan. The region was again the stage for ethnicised violence. The pogroms in Baku in 1918 and the massacre of Shushi/Shusha in 1920 were among the most horrible examples (Smith 2015: 11–13).

In December 1920, the Bolsheviks seized the opportunity to take over Armenia, suffering under a Turkish invasion. In the treaties of Moscow and Kars in 1921 between the government of Mustafa Kemal (later known as Atatürk) and the Soviets, the latter not only ceded the territories around Kars, but also stated that Nakhichevan will belong to Azerbaijan². Later, the Armenian side perceived these

² Russian text copies of the Kars treaty is stored at: http://hrono.ru/dokum/192_dok/19211013kars.php, accessed 25 August 2024.

concessions as a proof for the Soviet betrayal of Armenian interests (Hovannisian 1974–1996, 4: 379–398; Mouradian 1990: 34–37; Rindlisbacher 2024: 57–59).

With the rise of the Soviet power in the South Caucasus, the independent statehood of Georgia, Azerbaijan, and Armenia but also the open ethnicised violence came to an end. The Soviets accepted the existence of national defined republics as such. Hence, they were immediately confronted with a severe problem. These republics did not have any defined borders. The Kavburo, the intermediate organ of the Communist Party in the Caucasus region, took a large scale decision in the border issue, as it attached Nagorno-Karabakh to Azerbaijan and Zangezur to Armenia. Although many books and articles have been written on this topic, there is no sound explanation for the Kavburo's decision. In the decisive session on 5 July 1921, the Kavburo granted a special autonomous status to Nagorno-Karabakh within Azerbaijan. However, on the previous day, the members of the Kavburo had planned to give the region to Armenia (Saparov 2015: 110 and 111; Smith 2015: 18 and 19; Welt 2015: 718)³. In addition, Stalin, at this time people's commissar for nationality affairs, also attended these sessions. These are the ingredients for many conspiracy theories of shady intrigues behind the scenes. One of them blames the Georgian Bolsheviks for intervening. They allegedly argued that following only national-ethnographic rationales when bordering the South Caucasus would be detrimental for Georgia and could lead to the secession of Abkhazia and Adjara (Derluguian 2005: 186). Most of them ignore that Stalin, regardless of his later significance, was a rather minor figure in the party hierarchy in 1921. However, the lack of sources leads to such legends. They, however, omit that the Bolsheviks did not primarily think in national, but in economic categories. In their logic, the attachment of Nagorno-Karabakh to Azerbaijan should bring national peace to the region and respect the existing economic ties, as it was much better connected with Baku than with Yerevan. Such economic reasoning also played a crucial role in other border issues within the Soviet state (Saparov 2015: 123; Rindlisbacher 2023: 58–60).

These decisions, taken under a logic of economic utility, evoked a long-lasting opposition among the Armenian population, particularly in Nagorno-Karabakh itself. The Azerbaijani Bolsheviks showed only few efforts in the Karabakh issue, as it took them two years to install the Nagorno-Karabakh Autonomous Oblast (NKAO). Its exact borders remained unclear, as the NKAO was initially not defined by geodetic points, but by the villages belonging to it (Saparov 2012: 312–317, 2015: 121, 162–165; Smith 2015: 20–22)⁴.

³ Protocols of the Caucasian Buro (Kavburo) of the Russian Communist Party, 4 and 5 July 1921, in the *Russian State Archive of Socio-Political History* (hereafter RGASPI), *fond* (collection, hereafter f.) 85, *opis'* (inventory, hereafter op.) 18, *delo* (file, hereafter d.) 58, *listy* (pages, hereafter ll.) 17–18.

⁴ Table with all villages belonging to the NKAO, 1923, in: *National Archives of Armenia* (hereafter NAA), f. 113, op. 3, d. 116, l. 42.

■ THE MATRIX FOR NATIONAL NARRATIVES IN SOVIET ARMENIA

The effects of the genocide and the Nagorno-Karabakh question appeared only as two out of many problems the Bolsheviks in Armenia had to face during the 1920s (Mazower 2001: 21). Famines afflicted the region up to the mid of the 1920s. Armenia was the smallest of the three republics in the South Caucasus and had the lowest number of inhabitants. Despite this, it had to deal with many refugees arriving from the former Ottoman Empire and Greece. The absolute numbers of about 50,000 Armenian refugees arriving in the Republic Armenia after 1921⁵ may not seem high in absolute numbers, but this was a considerable challenge for a country in ruins with only 880,000 inhabitants in 1926 and the size of Belgium (Tsentral'noe statisticheskoe upravlenie 1928, 14: 128). Between 1922 and 1936, Armenia, Georgia and Azerbaijan were merged into a Transcaucasian Socialist Federative Soviet Republic (TSFSR), as an administrative intermediate between Moscow and the republics. The constitution restricted the competences of the TSFSR. Foreign policy and military were prerogatives of the Union in Moscow, whereas justice, police, education, healthcare and culture were domains of the republics. What was left for the federal governance, were economic issues and the task to settle border conflicts between its member republics (Rindlisbacher 2025, chapter 5)⁶. The region had been devastated from the wars since 1914 and the means of communication and transport had to be re-established. The Armenian Republic benefited from federal transfers and economic development support (Suny 1993: 150 and 151). Pushed by Lavrentii Beriia, the TSFSR was dissolved 14 years later during the constitutional reform in 1936 (Peyrat 2017: 550 and 551).

During the 1920s, the territories of the Soviet republics were still in flux. The exact border between Armenia and Azerbaijan had been object of a debate till 1929, when it was roughly defined by geodetic points. In the eyes of the Armenian political actors, it seemed still feasible to transfer Nagorno-Karabakh to Armenia. For instance, in November 1945 Grigorii Arutyunov, the first secretary in Armenia, asked Stalin directly for a transfer of Nagorno-Karabakh. Arutyunov pointed to the national affiliation of the population and the close economic ties between the NKAO and Armenia. Though Stalin rebuffed his petition, Arutyunov kept insisting on this issue without facing repercussions (Lehmann 2012: 65–75).

After Stalin's death, the Soviet government tried silencing the Nagorno-Karabakh issue as well as the memory of the genocide. The Bolsheviks refused to promote particularistic commemoration of the atrocities as such „national deviation” threatened to enable political agency outside the party's control (Martin

⁵ This number is based on an internal report of the Transcaucasian government from 11 November 1927 to fund a suitable accommodation for these refugees, *Central Archive of Contemporary History of Georgia* (SUIC'A), Tbilisi, f. 617, op. 1, d. 1800, l. 34.

⁶ Constitution of the TSFSR: *Zarya Vostoka*, No. 197, 11 February 1923, 5.

2001: 356–362). Facing this neglect, Armenian intellectuals organised informal commemoration. On 24 April 1965, on the occasion of the fiftieth anniversary of the atrocities, they arranged a mass demonstration on the Lenin Square (today Republic Square), in the centre of Yerevan. Tens of thousands of citizens rallied and commemorated together. This mass happening, tolerated by the Communist Party, was a striking performance of the Armenian groupness. The Armenian party under its then first secretary Yakov Zaboyan decided to enter into discussion with the crowd and make concessions. Moscow was not at all pleased; however, a large monument commemorating the genocide on Tsitsernakaberd – a hill slightly outside the centre of Yerevan – could be built (Suny 1993: 227 and 228; Lehmann 2012: 291 and 292; Saparov 2018: 874–879).

In the 1970s, discontent from Armenia kept troubling the Soviet government. In this time, Moscow was planning a revision of the Soviet constitution. Activists from Armenia took this opportunity and sent petitions, asking for a re-evaluation of the territorial belonging of the NKOA. Though the Soviet authorities rebuffed these petitions again, Armenian politicians and intellectuals kept insisting on this issue (Lehmann 2012: 358 and 359; Hasanli 2020: 420–424). In the 1970s, Armenian nationalists were allegedly involved in terrorist attacks against the Soviet government. On 8 January 1977, three explosions shook the centre of Moscow. The National United Party was blamed. Soviet press censorship silenced these attacks, and the Soviet judges convicted the perpetrators secretly (Payaslian 2007: 186).

In the mid of the 1980s, the antagonisms between the Armenians and the Azerbaijanis have not eased at all. Many Armenians in the NKAO saw themselves marginalised by the Azerbaijani government (Saparov 2015: 164 and 165; Hasanli 2020: 406–419). Until 1986, the communist ideology, the censorship and the KGB had publicly silenced these tensions. Then, the policies of perestroika and glasnost introduced under Mikhail Gorbachev opened up a space for expressing such grievances (Saparov 2015: 164 and 165). The Karabakh movement stood at the beginning of the eruption of the nationality issues in the Soviet Union. In February 1988, even before the national movements in the Baltics took momentum, a grass-root movement initiated by public intellectuals like Silva Kaputikyan, Levon Ter-Petrosyan or Vazgen Manukyan initiated a mass mobilisation in Armenia and the NKAO, demanding a revision of the territorial status-quo (Derluguian 2005: 174 and 175). Gorbachev's administration was not at all sympathetic to such demands. A transfer of the NKAO could appear as Pandora's Box triggering a myriad of other territorial conflicts in the Union, such as in Crimea or Abkhazia. Although prominent intellectuals like Andrei Sakharov supported the Armenian territorial claims, Moscow rebuffed it again, as it had done for almost seventy years (De Waal 2013: 67; Rindlisbacher 2025, chapter 6). However, this time something crucial has changed. The pogrom in Sumgait on 27 February 1988 marked the beginning of a deadly escalation. In this town near Baku, Armenian residents were attacked with

an exceptional brutality. During the massacre the Azerbaijani police forces failed to intervene. The exact number of victims has not been established; at least twenty-eight Armenians were killed (Suny 1993: 199–201; De Waal 2013: 40 and 41).

From a historical perspective, the Sumgait pogrom appears to be a decisive tipping point. It had a highly mobilising effect on the Armenians, as it triggered the collective memory of the genocide. Exploited by ethno-political entrepreneurs it became a driver for a positive feedback loop around which the Armenian groupness further crystallised. The Soviet government tried, on the one hand, to mitigate the events in the media, but the news spread all around the Union. On the other, the Soviet government presented a plan for economic development and declared a state of emergency in the NKAO (Marutyan 2007: 90–95; De Waal 2013: 68 and 69). However, Moscow's dithering behaviour after the Sumgait pogrom and the slow investigation, led to a further strengthening of the Armenian groupness (Manutscharjan 2009a: 38).

The national movement then institutionalised itself in the Karabakh Committee that gained supremacy within the Armenian field of power after 28 February 1988. As in other parts of the USSR (Derluguian 2005: 166–218), ethno-political entrepreneurs like Levon Ter-Petrosyan were able to establish a new political legitimacy. Confronted with this pressure group, the Supreme Soviet of Armenia, still controlled by the Communist Party, declared unilaterally the (re-)unification of NKAO with Armenia in June 1988. On the other side, the Azerbaijani government declared an economic blockade of the NKAO. This escalation was going along with mass deportation of Armenians living in Azerbaijan and Azerbaijanis living in Armenia. Many were now convinced not to step back in the Nagorno-Karabakh issue. There should be no „second genocide”; even if this meant going to war (Mouradian 1990: 434 and 435; Manutscharjan 2009a: 58–61; De Waal 2013: 56–58).

The fate of old political elites in Armenia was sealed by a natural disaster. On 7 December 1988, an earthquake shook the northern part of Armenia with its epicentre in Spitak near Leninakan (today Gyumri). The number of victims is not clear, but at least 25,000 people, mostly Armenians, died, many more became homeless (Doose 2018: 926). Respect for Gorbachev's government fell to an absolute zero, as the Soviet aid for the victims was perceived too slow and bureaucratic. Due to the Soviet government's inability to maintain political legitimacy, to provide humanitarian aid and to manage the disaster combined with its unwillingness to use military force to settle the boiling territorial conflict, it lost control over Armenia. The national movement stepped into this political vacuum. Its supporters won the elections to the Armenian Supreme Soviet in summer 1990 (Minasyan, Mikaelian, Iskandaryan 2016: 42–44). The newly formed Armenian government declared to secede from the Union on 23 August 1990. At the same time, militias began to organise themselves to „protect” the Armenian population in the Republic and in the NKAO. During the collapse of Soviet structures, all

sides began to prepare for war. In the following months, the initiatives of the new Russian government under Boris Yeltsin failed to find a political settlement. After the dissolution of the USSR on 25 December 1991, two of its former republics were at war with each other (Doose 2018: 938 and 939).

■ SORCERER'S APPRENTICES AND THE FORCES OF ARMENIAN NATIONALISM

Though Turkey has blocked the border to Armenia since 1993 and the economy was in a desperate situation, Armenian forces gained upper hand in Nagorno-Karabakh and were able to conquer the areas between Armenia and the former NKAO, the so called Lachin corridor. The Armenian militias forced the Azerbaijan and Kurdish population in the occupied territories to flee. The Azerbaijani town of Agdam had inhabited 28,000 people in 1989. As Armenian troops occupied it, they first compelled the remaining residents to leave and then they destroyed the buildings and the infrastructure. During the war, Armenian militias committed several atrocities, as they murdered, for instance, the inhabitants of the village Khojaly in 1992 (De Waal 2013: 182–185). On the Armenian side, these militias were not easy to control as almost every political party equipped its militia, as e.g. the Dashnaksutyun, the Armenian Revolutionary Federation did. As they were in opposition to the ruling National Movement, they posed a vital threat to the Ter-Petrosyan government. Subsequently the Armenian government banned the Dashnaksutyun after the war ended in 1995 and dissolved their militias (Minasyan, Mikaelian, Iskandaryan 2016: 111 and 112).

The war from 1991 to 1994 had a deep impact on the Armenian society. Not only the hardships following the collapse of the Soviet Union shook the economy, but also the high public spending on the war effort. The diaspora organisations mobilised donations from abroad. Although Azerbaijan had more advantages in weaponry and better access to the markets, the Armenian side won this war due to its better organisational, logistic and strategic skills. They had the nimbus of having better warriors (De Waal 2013: 175 and 176; Kogan 2015: 5 and 6).

After the armistice in 1994, the Armenian side played a double game, as the government in Yerevan did not recognise the government of Nagorno-Karabakh in Stepanakert officially. In recognising Nagorno-Karabakh as a part of Azerbaijan, the Armenian government avoided providing further reasons for its international isolation (Manutscharjan 2009a: 41 and 42). Apart from this, the governments in Stepanakert and Yerevan were intricately connected on the personal as well as on the economical level⁷. For the ethnopolitical entrepreneurs from Nagorno-Karabakh the war appeared

⁷ For instance, regular consultations between the two governments took place and they publicly declared their close bilateral cooperation, available at: <http://www.gov.am/en/news/item/9244/>, accessed 25 August 2024.

as a golden opportunity to accumulate prestige, as, for instance, Robert Kocharyan and Serzh Sargsyan did. Kocharyan had been the first prime minister and then president of the Nagorno-Karabakh Republic (Artsakh) until he was appointed as Armenian prime minister. After leading the army of the Nagorno-Karabakh Armenians from 1991 until 1993, Sargsyan was then appointed as Armenian minister of defence.

At the end of the 1990s, this „Karabakh clan” and its political arm, the Republican Party, were able to get access to the most prestigious positions in the Armenian establishment. Though the first president of Armenia, Levon Ter-Petrosyan, had also gained his political capital in the Karabakh Committee, i.e. in the civic structures, he was willing to find a compromise with Azerbaijan and Turkey. In 1998, he officially announced a plan for a peace agreement, omitting guarantees for the Nagorno-Karabakh Armenians. This led immediately to his downfall. Moreover, during the 1999 parliament assault Vazgen Sargsyan, at that time prime minister, and Karen Demirchian, the head of the National Assembly, were assassinated. This further strengthened and enabled the rise of Kocharyan’s Republican Party (Manutscharjan 2009a: 52 and 53). After 1999, there was a political consensus that the rights of the Nagorno-Karabakh Armenians to self-determination were non-negotiable (De Waal 2015b: 132 and 133; Broers 2019: 175 and 176). This was the core of the deadlock within Armenia: politicians were aware of the hardships related to the international isolation, but on the one hand, they profited from this situation economically and on the other, they built their political legitimacy on these nationalistic narratives (Antonyan 2016: 166–168). This provided the political background for the „Karabakh clan” to convert military prestige into the political and economic influence and thus dominate the field of power. In the 2010s, Serzh Sargsyan was commonly known to be the „first oligarch” of the country (Antonyan 2016: 117–120; Minasyan, Mikaelian, Iskandaryan 2016: 112 and 113; Miarka 2021: 1192 and 1193).

In the era of Armenian rule over Nagorno-Karabakh, the population shrank from around 190,000 in 1989 to 145,000 in 2015⁸. This demographic decline was not only due to the expulsion of the Azerbaijani population, but also due to the economic stagnation. Many young people left the region to study or work in Yerevan or abroad. In this sense, Nagorno-Karabakh lost much of its mobilising appeal. Some, mostly prominently and internationally well-connected intellectuals in Yerevan, began to see it as a burden.

The economic stagnation of Armenia since the end of the war in 1994 was one of the driving forces that led to the downfall of Serzh Sargsyan and his cronies in 2018. The new government under Nikol Pashayan promised to bring economic prosperity

⁸ Demographic data from the last Soviet census in 1989: https://www.demoscope.ru/weekly/ssp/sng89_reg1.php; and the last census in the Artsakh Republic in 2015: https://web.archive.org/web/20180731153437/http://stat-nkr.am/files/publications/2016/Mardahamar_2015_rus/MAS_2/5_2-1_189_190.pdf, accessed 25 August 2024.

by positioning the country closer to the West. Nagorno-Karabakh and its status became a secondary issue. At the beginning of 2020, it seemed that the Armenian political discourse became increasingly pragmatic and forward-looking (Féron, Baser 2023: 394 and 395; Nikoghosyan, Ter-Matevosyan 2023: 212).

■ OPPORTUNITIES FOR FOREIGN INTRUSION

Although Turkey, Iran, Russia, the EU and the United States have certain stakes in the South Caucasus their involvement there is very limited (De Waal 2015b: 133). There is an imbalance of power between Armenia and Azerbaijan. Currently Azerbaijan's standing is better on almost every level than that of Armenia. Relying on large oil and gas resources, the Azerbaijani government under the Aliyev dynasty seeks equidistance to all other powers, except for special relations with Turkey (Babajev 2009: 81–83; Hovsepyan, Tonoyan 2024: 642 and 643). Azerbaijan tries to balance between the West and Russia, profiting from both sides. On the Nagorno-Karabakh issue the official Azerbaijani position has been firm since 1991. According to Baku, Nagorno-Karabakh is a part of Azerbaijan. After bringing the whole territory under its control again in 2023, it „encouraged” all Armenian inhabitants to leave for Armenia⁹. Now, the Azerbaijani government openly claims a corridor that would connect the enclave Nakhchivan with the Azerbaijani mainland, i.e. parts of the Syunik Marz province in the South of Armenia (Saparov 2023: 195 and 196).

Compared to Armenia, Azerbaijan has a greater geopolitical leverage in the region. Baku closed all Russian military bases after the dissolution of the USSR. Notwithstanding some fluctuations, the relations between Russia and Georgia have been tense since 1991 due to the Russian support for South Ossetia and Abkhazia, the Russian military bases in Armenia are the last ones in the South Caucasus that are under a firm legal umbrella. Turkey is supporting Azerbaijan as an allied Turk nation. Therefore, it has ceased all diplomatic relations and trade with Armenia since 1993. Only in 2023, the Turkish and the Armenian governments announced the opening of their borders, but it is unclear if this plan will ever come into force (Sahakyan 2023: 873 and 874; Papazian 2024: 327).

Iran also tried to make use of the Armenian-Azerbaijani conflict to strengthen its influence in the South Caucasus. Thereby, the Iranian government under the command of Ali Khamenei shifted several times between the two sides. Since Heydar Aliyev came again to power in 1993, his government had a strong secular approach and rejected Iranian appeals to common history and Shia-tradition and opted for closer relations with Turkey and thereby for an access to the western

⁹ On the deportation of the Armenian population from Nagorno-Karabakh: <https://www.theguardian.com/commentisfree/2023/oct/02/nagorno-karabakhs-tragedy-has-echoes-of-europes-dark-past-but-a-remedy-lies-in-europe-too>, accessed 25 August 2024.

markets. As it perceives Turkey as the main opponent competing for influence in the South Caucasus, the Iranian government has sought closer relations with Armenia (Manutscharjan 2009b).

From the Armenian point of view, the close economic ties with Iran are vital. Confronted with a blockade in the west and in the east and besides connections to Georgia in the north, the trade corridor to Iran via Meghri is key for the survival of the Armenian economy. This is also why the Armenian government did not apply sanctions taken against Iranian atomic programme between 2005 and 2016, as this would have evoked an economic disaster. Armenia is today an attractive place for Iranian tourists and for Iranian investments. From this perspective, the current situation in the South Caucasus appears as an asset to Iranian foreign policy (Manutscharjan 2009b: 192–195).

The EU has a major interest in the oil and gas resources in Azerbaijan and their safe transfer via Georgia to Turkey. The Baku-Tiflis-Ceyhan-Pipeline has been finished in 2006. The Baku-Tbilisi-Akhalkalaki-Kars railway was inaugurated in 2017 and opened for passenger transportation in May 2018. The Trans-Anatolian gas pipeline has been operational since 2018. A coalition of the Turkish, the Georgian and the Azerbaijani governments pushed these projects. From the perspective of EU countries, they ensure and ease the transport of resources from Azerbaijan and Central Asia to Europe. Moreover, these transport lines are outside of a possible Russian interference. For Azerbaijan, they guarantee a steady income on the one side, and the economic isolation of Armenia on the other¹⁰. In the Nagorno-Karabakh issue, the EU followed a dilatational stance, referring to the OSCE Minsk Group format that had been a dead end since the armistice in 1994 (Łapaj-Kucharska, Miarka 2022: 701).

The tide began to shift decisively against Armenia and Nagorno-Karabakh after Azerbaijan attacked the Armenian positions in summer 2020. In less than a month, Azerbaijan could bring most territories around the populated core of Nagorno-Karabakh, i.e. the former NKOA, under its control. Only a Russian intervention could stop the Azerbaijani operation. However, Nagorno-Karabakh was then encircled by Azerbaijani troops. Russian forces were tasked to guarantee the security of the population in Nagorno-Karabakh. Notwithstanding these guarantees, the Azerbaijani government began a blockade of Nagorno-Karabakh, forcing to starve the Armenian population¹¹.

¹⁰ Vladimir Socor, *Interest Growing All-Round in Trans-Anatolia Pipeline Project*, „Eurasia Daily Monitor”, 9 April 2012, available at: <https://jamestown.org/program/interest-growing-all-round-in-trans-anatolia-pipeline-project/>; Nailia Bagirova, *Azerbaijan, Georgia, Turkey launch ‘Silk Road’ rail link*, 30 October 2017, Reuters, available at: <https://www.reuters.com/article/azerbaijan-railway/azerbaijan-georgia-turkey-launch-silk-road-rail-link-idUSL8N1N52XR>, all accessed 25 August 2024.

¹¹ Luke Harding, *‘They want us to die in the streets’. Inside the Nagorno-Karabakh blockade*, 22 August 2023, <https://www.theguardian.com/world/2023/aug/22/inside-nagorno-karabakh-blockade-armenia-azerbaijan>, accessed 25 August 2024.

Despite losing the 2020 war against Azerbaijan, Pashinyan was re-elected prime minister in June 2021. He promised to continue his reformist policies. Nonetheless, the path dependencies laid down by his predecessors pose severe challenges. The reaction of his government to the multiple crises appeared „chaotic” and created friction in Armenian society and diaspora (Féron, Baser 2023: 394 and 395; Nikoghosyan, Ter-Matevosyan 2023: 221 and 222).

The relations between Russia and Armenia are complicated. On the one hand, Russia is Armenia's only formal ally; on the other Russia also maintains good relations with Azerbaijan. Its army guaranteed the 2020 ceasefire in Nagorno-Karabakh (Miarka 2021: 839). However, this relation became even more alienated when Russia started its invasion of Ukraine in February 2022. The Armenian government refused to support the „special military operation” and became a safe haven for Russian émigrés. Many well-educated people from Russia settled down in Yerevan¹². Publicly, Putin and Pashinyan do not even hide the fact that they do not like each other¹³. As Azerbaijan occupied some territories internationally considered as Armenian in 2022, Russia refused to intervene in the scope of the CSTO. This made the alliance between Armenia and Russia utterly worthless¹⁴.

Without any larger opposition from Russia, Azerbaijan could reopen hostilities in September 2023, leading to the almost instant collapse of the Nagorno-Karabakh Republic and all its 145,000 inhabitants leaving for Armenia. Under the current government of Ilham Aliyev, they saw no perspectives of living under Azerbaijani rule (Sahakyan 2023: 873–875). Thus, since September 2023, the Armenian government tried to resettle the refugees from Nagorno-Karabakh within Armenia, particularly in its border regions. The government provides subsidies and helps the refugees to find new jobs¹⁵.

After Russia's failure to provide any meaningful assistance, France started to support Armenia against any territorial claims from Azerbaijan. On the one hand, this can be seen as a part of France's larger strategy to counter Turkey's power projection in the Mediterranean, for instance in Libya, Greece and in Cyprus¹⁶.

¹² Shaun Walker, *Russian émigrés fleeing Putin's war find freedom in the cafes of Armenia*, 25 August 2022, <https://www.theguardian.com/world/2022/may/13/russia-émigrés-putin-war-ukraine-armenia>, accessed 5 May 2024.

¹³ Daniel Boffey, *Putin's grip on regional allies loosens again after Armenia snub*, 22 November 2022, <https://www.theguardian.com/world/2022/nov/25/putinsgrip-regional-allies-loosen-again-after-armenia-snob-csto-summit>, accessed 25 August 2024.

¹⁴ Shaun Walker, *Former Soviet states eye opportunities as Russia struggles in Ukraine*, 14 September 2022, <https://www.theguardian.com/world/2022/sep/14/former-soviet-states-eye-opportunities-as-russia-suffers-ukraine-rout>, accessed 25 August 2024.

¹⁵ Press release of the Armenian government, 15 March 2024, <https://www.gov.am/en/news/item/10503/>, accessed 25 August 2024.

¹⁶ Elise Vincent, *La France et l'Arménie concrétisent leur coopération de défense*, „Le Monde”, 25 February 2024, https://www.lemonde.fr/international/article/2024/02/25/la-france-et-l-armenie-concretisent-leur-cooperation-de-defense_6218466_3210.html, accessed 25 August 2024.

This rivalry among the NATO members, Turkey and France, could further disunity within the western alliance. On the other hand, there is an important diaspora in France lobbying for support to Armenia¹⁷.

■ CONCLUSIONS

The discourse revolving around the genocide and the status of Nagorno-Karabakh could mobilise Armenian groupness and thus decisively influenced the field of power after 1988. Until 2018, they have been the main drivers in Armenian politics, but due to economic and social stagnation they lost a lot of their appeal. The rise of Nikol Pashinyan was a sign that the Armenian society has changed. Economic issues and a further rapprochement towards the West became the main priorities. However, Azerbaijan took the initiative when it reconquered Nagorno-Karabakh in 2020 and 2023. Aliyev's claims for a corridor to Nakhchivan as well as Russia's war against Ukraine put Armenia in an impossible position. Against its will, the country could become the epicentre of a large-scale regional war.

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¹⁷ *Arménie. Tensions entre l'État et la 'Grande diaspora'*, Radio France, 7 November 2023, www.radiofrance.fr/franceculture/podcasts/cultures-monde/armenie-tensions-entre-l-etat-et-la-grande-diaspora-1846814, accessed 25 August 2024.

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Stephan Rindlisbacher

ARMENIA AND NAGORNO-KARABAKH: THE HISTORY OF AN UNSETTLING RELATIONSHIP

The Armenian-Azerbaijani conflict has been a visible constant on the international stage since 1988. On the Armenian side, the commemoration of the genocide of 1915 and the Soviet decision to attach Nagorno-Karabakh to Azerbaijan in 1921 appeared to be the main drivers to produce and reproduce „groupness”. Whereas Armenian nationalist narratives had first been silenced and then mitigated during the Soviet era, they have become decisive since the dissolution of the USSR. Armenian ethnopolitical entrepreneurs exploited them to establish a new political legitimacy. With the wars in 2020 and 2023, the tide turned in favour of Azerbaijan, as it managed to reconquer Nagorno-Karabakh and expel its Armenian population. Now, Azerbaijan appears as the main driver of the conflict when it utters claims for a corridor to Nakhchivan through the Armenian territory.

Keywords: Armenia; Nagorno-Karabakh conflict; Azerbaijan; South Caucasus

INFORMACJA O WYDAWCY I REDAKCJI

„Studia Socjologiczno-Polityczne. Seria Nowa” wydawane są jako półrocznik. Tytuł czasopisma bezpośrednio nawiązuje do „Studiów Socjologiczno-Politycznych” założonych w 1957 roku przez Juliana Hochfelda i wydawanych do roku 1968. Stanowi symboliczną kontynuację tego periodyku. W sensie prawnym „Studia Socjologiczno-Polityczne. Seria Nowa” są czasopismem nowym, założonym w 2014 roku i w tym samym roku zarejestrowanym w rejestrze czasopism prowadzonym przez Sąd Okręgowy w Warszawie.

Wydawcą czasopisma i właścicielem tytułu jest Uniwersytet Warszawski, który działa przez Wydział Socjologii. Redagowaniem czasopisma zajmuje się Zespół Redakcyjny pracujący pod kierownictwem Redaktora Naczelnego. Redaktora Naczelnego powołuje na 4-letnią kadencję Dziekan Wydziału Socjologii Uniwersytetu Warszawskiego po uzyskaniu pozytywnej opinii Rady Wydziału. Funkcje doradcze i programowe sprawuje Rada Redakcyjna. Zespół Redakcyjny zajmuje się wszystkimi sprawami związanymi z redagowaniem i wydawaniem czasopisma, w szczególności wstępnym opiniowaniem tekstów oraz formułowaniem szczegółowych zaleceń dla autorów na podstawie recenzji zewnętrznych, sprawdzaniem poprawionych tekstów. Członkowie Redakcji mogą być redaktorami i redaktorkami numerów i sekcji tematycznych.

Redaktor Naczelny podejmuje wszystkie ostateczne decyzje dotyczące publikacji tekstów. Sekretarz Redakcji wykonuje czynności zapewniające sprawne przeprowadzenie procesu oceny tekstów, w tym koresponduje z autorami, recenzentami i członkami Redakcji oraz współpracuje z partnerem wydawniczym podczas procesu produkcji czasopisma.

Rada Redakcyjna wyznacza kierunek i określa strategię długofalowego rozwoju czasopisma oraz wspomaga Zespół Redakcyjny w procesie recenzowania tekstów zgłoszonych do druku w czasopiśmie. Jej członkowie są proszeni o pomoc w rozstrzygnięciu sprzeczności między zaleceniami recenzentów, a także przygotowują recenzje tekstów w przypadku trudności z terminowym ich uzyskaniem od osób spoza Redakcji.

Informacje o składzie osobowym Zespołu Redakcyjnego, Rady Redakcyjnej oraz obsadzie stanowisk Redaktora Naczelnego i Sekretarza Redakcji znajdują się w dziale „Rada i Redakcja”: https://studiasocjologicznopolityczne.pl/rada_i-redakcja.html.

INFORMACJE DLA AUTORÓW „STUDIA SOCJOLOGICZNO-POLITYCZNE. SERIA NOWA”

„Studia Socjologiczno-Polityczne. Seria Nowa” przyjmują do publikacji wyłącznie teksty oryginalne. Złożone teksty nie mogą jednocześnie być rozpatrywane pod kątem publikacji na łamach innych czasopism lub w ramach publikacji książkowych.

„Studia” publikują także teksty w języku angielskim, jeśli są napisane starannym językiem i przejdą zwykłą procedurę kwalifikacyjną. Zarówno teksty zgłoszone w języku angielskim, jak i w języku polskim mogą być odrzucone przez Redakcję ze względu na niestaranność językową.

Artykuły zgłaszane do publikacji winny być nadsyłane w formie pliku elektronicznego w formacie MsWord .doc lub .docx pocztą elektroniczną (jako załączniki) na adres socpol.redakcja@is.uw.edu.pl. Artykuły muszą być opatrzone tytułami (polskim i angielskim), posiadać abstrakt w języku angielskim (do 150 słów) oraz do pięciu słów kluczowych w języku polskim i angielskim (rzeczowniki w liczbie pojedynczej lub określenia wielowyrazowe). Czasopismo przyjmuje także eseje recenzyjne i recenzje, które mogą być opatrzone tytułem. Tekstów nie zamówionych Redakcja nie zwraca. Zgłaszane recenzje książek powinny dotyczyć publikacji nie starszych niż dwa lata od planowanej daty ukazania się danego numeru czasopisma.

Dołączony do tekstu abstrakt powinien być przygotowany w formie tekstu ciągłego i zawierać informacje o tle teoretycznym prowadzonego wywodu, jego celach, metodach analizy oraz wynikach badania empirycznego lub konkluzjach rozważań, jeżeli artykuł ma charakter wyłącznie teoretyczny lub przeglądowy.

Wszystkie złożone teksty podlegają procedurze kwalifikacji do druku opisanej w sekcji „Etyka i standardy publikacyjne”: https://studiasocjologicznopolityczne.pl/etyka_i_standardy_publicacyjne.html.

Wymagania techniczne

Autorów prosimy o stosowanie się do następujących dyrektyw: format A4; czcionka Times New Roman 12; interlinia 1,5; tekst wyjustowany, marginesy 25 mm; paginacja w prawym dolnym rogu; numeracja stron ciągła; tytuł całości pogrubionymi literami i wyśrodkowany; pozostałe tytuły wyrównane do lewej, wyróżnione pogrubieniem. Akapity należy rozpoczynać od wcięcia.

Tabele odpowiednio ponumerowane i zatytułowane, wykresy kolejno ponumerowane i podpisane. Rysunki, mapy i wykresy mogą być wyłącznie czarno-białe. Tabele, mapy i rysunki należy dołączyć na końcu tekstu na osobnych stronach.

Tekstów nie należy podpisywać. Dane autora składającego tekst (imię i nazwisko, stopień i tytuł naukowy, afiliacja, telefon, adres pocztowy i elektroniczny) powinny być załączone – w celu zapewnienia anonimowości – w osobnym pliku. Możliwe jest także dołączenie informacji o profilu ORCID. Autorzy powinni unikać podawania w tekście informacji sprzyjających ich identyfikacji. Odwołania do własnych wcześniejszych publikacji powinny być wprowadzane w trzeciej osobie lub bezosobowo. W przypadku artykułów wieloautorskich prosimy o wskazanie autora głównego i podanie jej/jego nazwiska jako pierwszego. Wszyscy autorzy są zobowiązani podać swój adres e-mail oraz informacje o afiliacji (nazwa instytucji wraz z jej adresem pocztowym). Prosimy także o podanie pocztowych adresów korespondencyjnych wszystkich autorów artykułu.

Złożenie tekstu jest równoznaczne z oświadczeniem, że praca jest wyłącznym i oryginalnym dorobkiem autora(ów), że udział innych osób, które przyczyniły się do powstania tekstu, został odnotowany (np. w formie przypisu lub podziękowania za udostępnienie danych, opracowanie metody pomiaru, konsultację metodologiczną itp.).

Rekomendowany format not bibliograficznych na końcu tekstu

- Szczepański Jan (1969), *Elementarne pojęcia socjologii*, Warszawa: PWN.
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Przy tym systemie not bibliograficznych odsyłacz w tekście ma następującą postać: (Szczepański 1969: 31) lub: jak pisze Jan Szczepański (1969: 31). Jeśli w tekście są przypisy, powinny być nieliczne, krótkie i umieszczone na dole każdej strony.

ETYKA I STANDARDY PUBLIKACYJNE – OŚWIADCZENIE DOTYCZĄCE PROCEDUR STOSOWANYCH PRZEZ CZASOPISMO W SYTUACJI NARUSZEŃ ETYCZNYCH I BŁĘDÓW W SZTUCE (ETHICS AND MALPRACTICE STATEMENT)

Autorstwo – zasady związane z określaniem autorstwa artykułu i wkładu w jego powstanie

Za autorów tekstu zgłaszanego do czasopisma uważa się wskazane osoby, o ile spełniają one następujące kryteria:

1. Osoba wskazana jako Autor wniosła znaczący wkład w koncepcję artykułu lub przeprowadziła analizę lub interpretację danych
i / lub
2. Osoba wskazana jako Autor napisała artykuł lub dokonała jego znaczących uzupełnień pod kątem kluczowych treści;
i
3. Osoba wskazana jako Autor brała udział w ostatecznym zatwierdzeniu wersji artykułu do publikacji;
i
4. Osoba wskazana jako Autor wyraża zgodę na ponoszenie odpowiedzialności za wszystkie aspekty artykułu i deklaruje gotowość do udzielenia odpowiedzi na pytania związane z dokładnością lub integralnością jakiegokolwiek części artykułu.

Autor przesyłający zgłoszenie artykułu w imieniu własnym lub zespołu autorów:

- jest odpowiedzialny za komunikację z redakcją czasopisma związaną z wszelkimi kwestiami dotyczącymi kwalifikacji tekstów do druku oraz za rozstrzyganie wątpliwości w sprawie ewentualnych naruszeń praw autorskich i innych związanych z tym problemów;
- powinien uzyskać odpowiednią zgodę od innych autorów / redaktorów / wydawców na wykorzystanie fragmentów ich publikacji, w szczególności zaś wykresów, grafik i podobnych źródeł;
- jest odpowiedzialny za przedstawienie zgód na prowadzenie badań z udziałem ludzi i zwierząt wydanych przez stosowny komitet nadzorujący etykę badań, jeśli są wymagane;
- musi uzyskać odpowiednią zgodę od innych współautorów (jeżeli występują), aby spełnić wymagania redakcyjne wymienione w niniejszej sekcji oraz „Informacji dla autorów”: https://studiasocjologicznopolityczne.pl/informacje_dla_autorow.html.

Osoby, których wkład w postanie artykułu był niewielki lub miał charakter wyłącz- nie doradczy albo techniczny, powinny być wymienione w sekcji „Podziękowania”.

W większości sytuacji, zwłaszcza w naukach społecznych i humanistycznych, ustalenie osoby, która winna być wymieniona jako autor, nie jest problematyczne. Zalecamy, aby w przypadku publikacji wieloautorskich ustalić listę autorów i ich kolejność przed rozpoczęciem przygotowania artykułu.

Redakcja dopuszcza możliwość zmiany listy autorów po pierwotnym zgłosze- niu artykułu do druku, a przed jego publikacją. Dołączenie dodatkowego autora lub usunięcie nazwiska autora wymaga uzasadnienia złożonego przez autora zgła- szającego artykuł oraz pisemnej lub wyrażonej e-mailem zgody wszystkich współ- autorów. Uzasadnienie powinno zawierać informacje o wkładzie poszczególnych autorów w przedmiotowy tekst.

Analogiczna procedura odnosi się do zmian w spisie autorów wprowadzanych po publikacji. Po zebraniu odpowiednich oświadczeń redakcja podejmuje decyzję o zmianie listy autorów, dokonuje zmian w archiwach oraz publikuje stosowną informację w następnym numerze czasopisma. Zmiany na liście autorów nie sta- nowią podstawy do retrakcji tekstu opublikowanego.

Wolność wypowiedzi a kwestie zniesławienia

Redakcja czasopisma uważa wolność wypowiedzi za kluczową wartość dla badań i rozwoju dyskursu naukowego oraz nieskrępowanej publikacji treści. Zarazem nie popieramy publikacji jakichkolwiek fałszywych stwierdzeń służących zniesławie- niu osób, grup lub organizacji. Wspieramy wykorzystanie języka inkluzywnego ze względu na kwestie tożsamości płciowej, narodowościowej, etnicznej i orientacji seksualnej. Sprzeciwiamy się stosowaniu cenzury.

Ghostwriting i autorstwo gościnne

Wśród autorów artykułu nie należy wymieniać osób, których wkład w powstanie tekstu był znikomy bądź w ogóle nie miał miejsca. Aby zapobiec praktykom typu ghostwriting i autorstwo gościnne, Redakcja wymaga od zgłaszających autorów, aby na żądanie ujawnili wkład poszczególnych autorów w powstanie artykułu (w szcze- gółności podając ich konkretne wkłady, informacje o autorze koncepcji, hipotezach, metodach, protokoły i inne dokumenty powstałe w procesie tworzenia artykułu). Główna odpowiedzialność za treść artykułu spoczywa na autorze zgłaszającym. Bio- rąc pod uwagę fakt, że ghostwriting i autorstwo gościnne stanowią symptomy daleko idącej nieuczciwości naukowej, Redakcja przekazuje każdą taką sprawę odpowied- nim instytucjom (jednostkom akademickim zatrudniającym autorów, stowarzysze- niom akademickim, stowarzyszeniom redaktorów akademickich itp.).

Zasady antyplagiatowe

Nadesłanie tekstu jest równoznaczne z deklaracją jego autora/autorów, że jest/ są jego faktycznym/i jedynym/i autorem/ami oraz że tekst jest oryginalny, nieopublikowany nigdzie wcześniej ani nieoddany do publikacji w żadnym innym czasopiśmie, niezależnie od jego charakteru. Redakcja zastrzega sobie prawo do weryfikacji prawdziwości tej deklaracji (w tym także poprzez wykorzystanie programu antyplagiatowego). W przypadku artykułów wieloautorskich osoba zgłaszająca tekst do czasopisma oświadcza jednocześnie, iż jest do tego upoważniona przez pozostałych współautorów. Wszystkie tezy i fragmenty zapożyczone od innych autorów muszą być adekwatnie oznakowane oraz opatrzone odnośnikami do literatury.

Plagiat może dotyczyć wszystkich rodzajów treści umieszczanych w publikacji, w tym w szczególności:

- tekstu, ilustracji, cytatów muzycznych, wyprowadzenia formuł matematycznych, kodów komputerowych, syntaksów oprogramowania statystycznego itp.;
- materiałów pobranych ze stron internetowych lub zaczerpniętych z rękopisów lub innych mediów;
- materiałów opublikowanych i niepublikowanych, w tym wykładów, prezentacji i szarej literatury.

Ponowna publikacja

Ponowna publikacja jest nadużyciem, gdy dana praca lub jej istotna część zostaje opublikowana więcej niż raz przez jej autora bez zamieszczenia odpowiedniej informacji dotyczącej miejsca uprzedniej publikacji oraz uzasadnienia ponownego wykorzystania fragmentu tekstu. Dotyczy to również publikacji w różnych językach.

Ponowną publikację całego tekstu dopuszczamy wtedy, gdy spełnione są łącznie następujące warunki:

- uważamy, że jego publikacja wzmocni dyskurs akademicki, np. przyczyniając się do upowszechnienia tekstu opublikowanego wcześniej w trudnodostępnym medium;
- uzyskana zostanie zgoda oryginalnego wydawcy;
- podano informację o miejscu pierwotnej publikacji.

W odniesieniu do fragmentów tekstów dopuszczalne jest wykorzystanie fragmentów wcześniejszych publikacji autora w częściach tekstu dotyczących omówienia istniejącej literatury przedmiotu oraz opisach źródeł, transformacji oraz metod analizy danych wykorzystanych w części empirycznej artykułu. Zasadniczo niedopuszczalne jest ponowne publikowanie fragmentów prezentacji wyników i konkluzji artykułów, chyba że artykuł stanowi znaczące rozszerzenie tez z wcześniejszej publikacji.

Procedura opiniowania i kwalifikowania tekstów do druku (peer-review process)

Każdy zgłoszony artykuł jest anonimowo recenzowany przez dwóch specjalistów, którzy nie otrzymują informacji o tożsamości autora. Recenzje przygotowywane są według jednolitego dla wszystkich zgłaszanych artykułów i esejów formularza, który przekazywany jest recenzentowi wraz z tekstem (wzór formularza recenzji – https://drive.google.com/file/d/1m_ka5kCGb3T7GR64Uz5HBP8JttDHEGL/view). Recenzje książek i inne teksty nie będące artykułami naukowymi poddawane są ocenie członków Redakcji i Rady Redakcyjnej. Autor otrzymuje recenzje wraz z decyzją Redakcji dotyczącą publikacji tekstu. Artykuł może zostać przyjęty, przyjęty warunkowo po wprowadzeniu zmian zaleconych przez Redakcję lub odrzucony bez możliwości poprawy. Autorzy powinni wprowadzić zalecane poprawki w terminie wyznaczonym przez Redakcję. Autorzy powinni na prośbę Redakcji udostępnić protokoły z realizacji badania terenowego (w tym transkrypcje wywiadów) i zbiory danych w celu ich weryfikacji oraz replikacji wyników. Autorzy proszeni są o krótkie ustosunkowanie się do uwag recenzentów w chwili przesłania nowej wersji artykułu.

Autorzy mają prawo odwołać się od decyzji Redakcji, jeśli ta odmówiła publikacji ich pracy na podstawie uzyskanych recenzji. Wszystkie odwołania muszą zostać złożone na piśmie do Redakcji w ciągu dwóch tygodni od otrzymania zaawizowania o odrzuceniu. Odwołanie powinno zawierać argumenty przemawiające za publikacją zgłoszonego artykułu. Redakcja, na podstawie przedstawionych argumentów, podtrzymuje pierwotny werdykt lub prosi o ponowną ocenę artykułu przez nowych recenzentów. Czasopismo nie pobiera opłat za publikację tekstów. Wszystkie opublikowane artykuły umieszczane są w wolnym dostępie na stronie czasopisma.

W przypadku, gdy jednym z autorów bądź auterek złożonego tekstu jest osoba należąca do Zespołu Redakcyjnego lub Rady Redakcyjnej, to tekst winien być złożony na ręce Redaktora Naczelnego, który prowadzi proces redakcyjny, zachowując zasady recenzji podwójnie ślepej. Analogicznie proces redakcyjny tekstów autorstwa Redaktora Naczelnego prowadzi Przewodniczący Rady Redakcyjnej czasopisma.

Przebieg procedury recenzowania i oceny zgłoszonego artykułu

1. Ocena formalna artykułu: sprawdzenia poprawności technicznej i kompletności nadesłanego materiału (w tym poprawności wyświetlania ewentualnych ilustracji, tabel, znaków specjalnych oraz obecności wymaganych elementów, takich jak abstrakt, słowa kluczowe itp.) dokonuje Sekretarz Redakcji.

2. Artykuł jest poddawany ocenie wstępnej przez Redaktora Naczelnego oraz redaktorów prowadzących numer tematyczny, do którego artykuł został zgłoszony. Na tym etapie artykuł oceniany jest pod kątem spełniania kryterium oryginalności tekstu. W przypadku naruszenia zasad etyki związanych z publikacją tekstów naukowych Redakcja zastrzega sobie prawo do odrzucenia tekstu oraz przekazania informacji do instytucji podanej w afiliacji autora. Artykuł oceniany jest także pod kątem zgodności z profilem czasopisma i planowaną tematyką numeru, do którego został zgłoszony.
3. Po wstępnej akceptacji artykuł jest poddawany anonimizacji (treść pliku i metadane), a następnie przekazywany do recenzentów spoza grona Redakcji. Na tym etapie każdy nadesłany tekst jest opiniowany przez dwóch specjalistów. Stosowane są następujące kryteria oceny artykułów: przejrzystość założonego celu, oryginalność badań, tło teoretyczne, jakość badań empirycznych, oryginalność wniosków, znaczenie dla obszaru badań zgodnego z profilem naukowym czasopisma i tematem numeru, jakość języka, zrozumiałość, interpunkcja i dobór źródeł adekwatnych do podjętego celu artykułu. Jeżeli recenzent uzna, że rozpoznaje autora artykułu lub nie ma kompetencji do oceny tekstu, to przekazuje tę informację Redakcji, która wysyła artykuł do innego recenzenta.
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