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SUREN TADEVOSYAN*

**BALANCING POWERS: AZERBAIJAN'S NATIONAL ROLE CONCEPTIONS
AMIDST REGIONAL AND GLOBAL CHALLENGES****

***Abstract:** This study explores Azerbaijan's National Role Conceptions (NRCs) since its independence in 1991, analyzing how these evolving conceptions have shaped its foreign policy. Situated in the geopolitically sensitive South Caucasus, Azerbaijan has adopted various NRCs—including "regional stabilizer," "energy provider," and "bridge between East and West"—to address complex regional dynamics. Through a case study approach focusing on the leadership of Heydar and Ilham Aliyev, this paper examines the interplay between role perceptions, leadership transitions, and external pressures. The findings highlight Azerbaijan's pragmatic strategy in balancing regional powers like Russia and Turkey while simultaneously engaging Western entities. This research sheds light on the inherent contradictions in Azerbaijan's NRCs, particularly its claims as a regional stabilizer amidst ongoing tensions. Ultimately, the study contributes to the broader understanding of NRCs as tools of both influence and adaptability in foreign policy decision-making.*

Keywords: National Role Conceptions (NRCs), Azerbaijan, regional, foreign policy.

Introduction

National Role Conceptions (NRCs) are crucial frameworks that define a state's perception of its role within the international system and provide an orientation through which foreign policy decision-makers understand their strategic interests in shaping foreign policy. For Azerbaijan, which gained its independence following the collapse of the Soviet Union in 1991, NRCs have played a critical role in shaping its approach to foreign relations. This study seeks to explore the development of Azerbaijan's NRCs since independence and how these conceptions have influenced its foreign policy.

Azerbaijan's geopolitical position in the South Caucasus, a region marked by historical tensions and ongoing power struggles, has to a great extent shaped its NRCs. Among others, its NRC of regional stabilizer has been developed through Azerbaijan's involvement in the decades-long Nagorno-Karabakh conflict. Azerbaijan declared the

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conclusion of the conflict following its military operations in 2020 and has since repositioned itself as a promoter of what it claims to be the reconstruction and management of the region. This narrative has largely been disputed given that the peace is still interspersed with significant tensions as well as core disagreements that continue to destabilize the region at large (Mikeladze 2024, 116-118). As such, regional stabilization is no simple task and speaks as much to the alleged aspirations of Azerbaijan as it does to the continued complications that confront the region. In the present context, Baku's geopolitical position and foreign policy are defined by two closely related aspects: uncertainty and room for flexibility in strategic choices (von Essen, 2023).

Given these complexities, particularly in the context of regional security and energy diplomacy, a comprehensive analysis is necessary to understand how the perceptions of Azerbaijan's governing elite regarding the country's role have shaped its foreign policy over time. This study uses a case study approach to examine how Azerbaijan's NRCs have shaped its foreign policy. By focusing on the leadership of Heydar and Ilham Aliyev, the approach allows for a detailed analysis of how NRCs have evolved in response to internal and external pressures. The research involves a systematic review of key documents and speeches from Azerbaijani leaders that reflect their perceived roles on the global stage. Secondary sources, including academic literature and expert analyses, are also utilized to provide context and compare Azerbaijan's NRCs within a broader global framework. This method not only tracks the evolution of NRCs but also highlights the strategic decisions made to address regional security and energy diplomacy, offering insights into broader state behavior dynamics.

In contributing to the larger debate on NRCs, this paper gives insight into Azerbaijani foreign policy and shows the complexities and contradictions embedded in conceptions of self. At the same time, the research indicates that a fairly adaptive strategy is really necessary for international relations, particularly in regions that are as unstable as the South Caucasus.

Literature review

The concept of National Role Conceptions (NRCs), rooted in role theory and foreign policy analysis, was introduced by K. J. Holsti (Holsti, 1970). Holsti's framework presents different roles that states take on the international level, which are influenced by internal and external factors. He posits that NRCs are shaped by perceptions of a nation's policymakers regarding their country's role on the global stage.

Subsequent theoretical advancements were made by scholars like Thies, Cantir and Kaarbo, who expanded on Holsti's initial typology. Thies (2010) integrated role theory with constructivist approaches, emphasizing the social construction of roles

through interaction and discourse. Cantir and Kaarbo (2017) introduced a more nuanced understanding of NRCs, highlighting the dynamic and contested nature of roles within domestic political contexts. Abramson, Chafetz, and Grillot (1996) analyzed how political elites' belief systems shape NRCs, emphasizing the interplay between domestic identity and international expectations. Their work highlighted the importance of understanding internal identity formation in foreign policy, particularly in the context of U.S. international behavior.

Azerbaijan's foreign policy since its independence in 1991 has been significantly influenced by its NRCs which are determined by its geopolitical position and resource endowment. Herzig (1999) and Cornell (2015) have pointed out that Azerbaijan is in a very advantageous geographical location and it has been trying to maintain good relations with the great powers of the world and at the same time it has to deal with conflicts, especially Nagorno-Karabakh. Brenda Shaffer (2009), in her extensive work on energy politics in the Caucasus, underscores the centrality of energy resources in Azerbaijan's foreign policy. She argues that Azerbaijan's vast oil and natural gas reserves have not only driven economic growth but have also positioned the country as a pivotal energy supplier to Europe, thereby enhancing its geopolitical significance. Cornell, Tsereteli, and Socor (2005) point out that projects like the Baku-Tbilisi-Ceyhan pipeline have helped drive economic growth and played a strategic role in its foreign relations, bringing both opportunity and vulnerability for the country in its interactions with regional powers like Russia and the European Union. These studies focus on the fact that Azerbaijan actively employs its energy potential to proclaim itself as one of the key economic players in both regional and global arenas.

However, despite extensive research on Azerbaijan's geopolitical strategies and energy politics, there remains a significant gap in the literature as no comprehensive study has yet analyzed Azerbaijan's foreign policy through the lens of National Role Conceptions (NRCs). While existing scholarship has explored various aspects of Azerbaijan's international relations, including its energy diplomacy and regional security strategies, the specific application of NRC theory to understand the country's foreign policy decisions has not been fully developed. This gap is particularly evident in the limited attention given to how NRCs adapt to both internal dynamics, such as leadership transitions, and external pressures from shifting geopolitical contexts. Geopolitical strategies and energy politics have to date carried an outsized amount of attention in the extant scholarship on this topic, whereas the interplay between Azerbaijan's perceived roles and its foreign policy conduct is understood in lesser depth. This article tries to fill this gap by providing an in-depth analysis of the NRCs of Azerbaijan and their effects on

the country's foreign policy, including, but not limited to, regional security and energy diplomacy. Doing so sheds light on a more general debate about the linkage between perceived international roles, responsibilities and status and state behavior.

Identifying Azerbaijan's NRCs

After regaining independence in 1991, Azerbaijan has been very pragmatic in the formulation of its foreign policy based on several NRCs that have defined its behavior in the international system. Of these NRCs, 'regional stabilizer', 'energy provider', 'bridge between East and West', 'faithful ally', and 'non-aligned country' are the most important for Azerbaijan's self-portrait. These roles are shaped by the country's history, culture, and politics, as well as the changing regional and global environment.

Among the most significant NRCs that shape the foreign policy of Azerbaijan, it is possible to identify the country's function as an energy provider. This role is anchored on the fact that the country has large oil and gas deposits that have assisted in its development and positioning in the global market. The execution of the 'Contract of the Century' in 1994 shifted Azerbaijan into the forefront as one of the decisive suppliers of energy to Europe (The Contract of the Century, 1994). Infrastructure projects like the Baku-Tbilisi-Ceyhan (BTC) pipeline and the Southern Gas Corridor, which includes the Trans-Anatolian Pipeline (TANAP) and the Trans-Adriatic Pipeline (TAP), have further cemented Azerbaijan's role as a key connector between the Caspian region and Western markets (Suleymanov and Fakhri, 2013). This role is often highlighted in official statements stressing the importance of Azerbaijan for European energy security (Azertag, 2023).

The energy provider NRC is rooted in Azerbaijan's historical and cultural context. In the late 19th and early 20th centuries, Baku was at the forefront of global oil production, accounting for a significant portion of the world's oil output (Haiko and Biletsky, 2019). The oil boom attracted foreign investment and transformed Baku into a cosmopolitan center, which has fostered a local identity intertwined with energy production. Soviet control over Azerbaijan's resources further intensified the post-independence drive for sovereignty, as Moscow's dominance over its energy assets left a lasting impact¹ (Hemming, 1998). Reclaiming control of oil and gas reserves became symbolic of self-reliance and national modernization. Energy wealth has not only driven economic growth but also funded military and infrastructure development, boosting Azerbaijan's international standing.

¹ During the last three 'five-year plans,' not a single Azeri oil well was discovered, and the industry remained largely underdeveloped.

The implications of the energy provider NRC on Azerbaijan's foreign policy are substantial and multifaceted. By establishing itself as a reliable energy supplier, Azerbaijan has strengthened strategic partnerships with western countries, framing its role in European energy security as vital, especially in light of the EU's efforts to reduce dependence on Russian energy supplies¹ (Ibadoghlu and Bayramov, 2023). Moreover, Azerbaijan is engaging in new forms of energy diplomacy, focusing on partnerships related to renewable energy technology and green investment (Gasimli and Huseynov, 2024). Collaborative initiatives with countries like the United Kingdom and organizations such as the European Bank for Reconstruction and Development (EBRD) reflect this shift towards fostering green energy networks. This orientation is balanced by a pragmatic approach to Russia, with Azerbaijan maintaining a cooperative stance while gradually lessening reliance on Russian transit routes for its energy exports. Periodic negotiations over energy sales reflect a careful strategy to preserve autonomy while recognizing Russia's regional influence. Additionally, Azerbaijan has strengthened ties with key regional partners like Turkey, collaborating on infrastructure projects that bolster mutual economic and geopolitical interests.

Georgia also plays a crucial role as a transit country, facilitating Azerbaijan's access to Western markets and deepening bilateral relations through shared infrastructure and energy initiatives.

In addition to its role as an energy supplier, Azerbaijan has also sought to project itself as a regional stabilizer (Aliyev, 2021). This role emerged from the strategic imperative to ensure national security and promote economic development in a historically volatile the South Caucasus region. In the aftermath of the Soviet Union's collapse, Azerbaijan faced internal political instability and the devastating Nagorno-Karabakh conflict, which underscored the high costs of regional turmoil.

The domestic political context played a crucial role in shaping and reinforcing the regional stabilizer NRC. The Azerbaijani political elite, particularly under the leadership of Heydar Aliyev and later Ilham Aliyev, internalized this role as essential to both regime legitimacy and national unity. Heydar Aliyev's consolidation of power in the mid-1990s brought about a period of relative stability, which was then framed as evidence of his capacity to secure the nation in the face of external and internal threats (Radnitz, 2012). The narrative of stability became closely linked to regime survival, with the political

¹ For instance, following the 2022 Russian invasion of Ukraine, Azerbaijan and the European Union signed a 'Memorandum of Understanding on a Strategic Partnership in Energy' in July 2022, aiming to double gas supplies to Europe to at least 20 billion cubic meters annually by 2027 through the Southern Gas Corridor.

leadership emphasizing the importance of maintaining control to ensure peace and prosperity.

The implications of the regional stabilizer NRC on Azerbaijan's foreign policy have been substantial and multifaceted. Azerbaijan has actively engaged in regional initiatives such as the Organization of the Black Sea Economic Cooperation (BSEC) to enhance collaboration on economic and security issues. Azerbaijan's foreign policy strategy reflects a desire to balance relations between major powers while ensuring that regional cooperation is prioritized (Strakes, 2013). For instance, Azerbaijan has sought to engage constructively with Georgia and Turkey through trilateral initiatives such as the Azerbaijan-Georgia-Turkey trilateral cooperation format, which has led to joint military exercises, strategic transport projects, and high-level political consultations (Cornell, 2017). Baku's balancing act reflects Azerbaijan's broader foreign policy doctrine, which emphasizes multi-vector diplomacy to ensure maximum flexibility in an unpredictable regional landscape. For example, Azerbaijan's participation in NATO's Partnership for Peace (PfP) program illustrates its willingness to build relations with western institutions without directly challenging Russia's influence (Ismayilov and Moradi, 2020).

However, while Azerbaijan claims the role of a regional stabilizer, its actions in Nagorno-Karabakh, including the 2020-2023 offensives and ongoing demands to Armenia, have often heightened tensions instead of fostering peace. This contrast reveals disconnect between its stabilizing role conception and real-life role performance.

Another important NRC is associated with Azerbaijan's perceived historical experience as a bridge between Europe and Asia (Strakes, 2013), which, according to state rhetoric, dates back to the time of the Great Silk Road (Aliyev, 2021). Consequently, Azerbaijan views itself as a bridge for trade, energy, and cultural exchange between East and West (Aliyev, 2023). The country's active participation in international organizations such as the Non-Aligned Movement (NAM) and the Organization of Islamic Cooperation (OIC) shows its desire to engage with international politics across various political divides.

The foundations of this NRC lie in Azerbaijan's self-perception of its multicultural heritage, which includes Turkic, Persian, Russian, and Islamic influences. Azerbaijani elites have presented this diversity as a strength, positioning the country as uniquely capable of facilitating dialogue between the Islamic East and the secular West.

Building on this self-perception, Azerbaijani leaders have consistently promoted their country's role as a facilitator of both economic and cultural exchanges through numerous international initiatives. For instance, the Baku Process, launched in 2008, is presented by the state as a platform for intercultural dialogue between European and

Islamic countries, reflecting Azerbaijan's self-assigned position as a neutral space for cooperation between different civilizations¹. Furthermore, another implication of this NRC is Baku's active participation in Trans-Caspian International Transport Route (TITR) (Mammadov, 2021). Also known as the Middle Corridor, it connects China to Europe via Central Asia, Azerbaijan, and Turkey, bypassing Russia, and positioning Azerbaijan as a vital transit hub in the global supply chain. By facilitating trade between Asia and Europe, Azerbaijan also deepens its regional cooperation with countries like Kazakhstan and Georgia.

Azerbaijan's NRC as a faithful ally of Turkey might be one of the most ethnologically and historically meaningful roles. Pronounced in official discourse (Aliyev, 2024) and called "One Nation, Two States," this idea reflects the interconnection of Azerbaijani and Turkish people. Historically and culturally, this NRC is grounded in the Turkic roots that bind the two nations. The Azerbaijani and Turkish peoples share a common Turkic language family, traditions, and historical narratives dating back to the Seljuk and Ottoman empires (Avatkov, 2022). The resurgence of pan-Turkic sentiments post-independence provided fertile ground for Azerbaijani elites to foster a strong alliance with Turkey. Turkey's early recognition of Azerbaijan's independence, its unwavering support in the Nagorno-Karabakh conflict, and its refusal to establish diplomatic relations with Armenia have solidified this partnership (Ergun, 2022). Culturally, this relationship is reinforced through educational exchanges, media representation, and the promotion of Turkic solidarity in national discourse. Normative beliefs in brotherhood and mutual support have been institutionalized, reflecting a collective identity that transcends political boundaries and emphasizes a shared destiny.

The implications of this NRC on Azerbaijan's foreign policy are profound, as it conditions Azerbaijan's foreign policy by aligning it closely with Turkey's geopolitical strategies. Azerbaijan often mirrors Turkey's foreign policy stances, particularly on issues related to regional conflicts and Turkic solidarity. For instance, both countries are members of the Organization of Turkic States, a platform through which they advocate for greater cooperation among Turkic-speaking nations. Diplomatically, Turkey assisted Azerbaijan in overcoming the political and economic challenges of the 1990s and advocated for its interests in international organizations such as the UN, NATO, the OSCE, and the OIC (Yumatov and Sivina, 2021). This role is evident in actions like Aliyev's explicit support for Northern Cyprus during the 2024 Organization of Turkic States (OTS) summit, where he highlighted Ersin Tatar's participation as a crucial

¹ This NRC has also been exemplified by hosting events such as the World Forum on Intercultural Dialogue.

milestone for Northern Cyprus' recognition (Rehimov, 2024). This reflects Azerbaijan's alignment with Turkey's stance on Northern Cyprus, showing a willingness to back Turkey's regional goals even in contentious areas.

Militarily, the alliance has led to significant cooperation, including joint exercises, training programs, and defense procurement, which have enhanced Azerbaijan's military capabilities. Military cooperation has been a cornerstone of Turkish-Azerbaijani relations since the early 1990s. A new, more advanced stage began in 2010 with the signing of a strategic agreement, which not only formalized the 'casus foederis' clause but also expanded the scope and scale of collaboration (Hovsepyan and Tonoyan, 2024). This was particularly evident during the 2020 Nagorno-Karabakh conflict, where Turkish support in terms of advanced weaponry¹ and strategic assistance was pivotal (Kınık and Çelik, 2021).

Last, but not least, Azerbaijan has developed an NRC as a non-aligned country, out of any political and military block. This position is rather crucial in managing Azerbaijan's relations with the great powers, enabling the country to balance between Russia, the United States, and the European Union (Van Gils, 2018). Historically and culturally, this NRC is rooted in Azerbaijan's experiences with foreign domination and its aspiration for independent statehood. For centuries, the territory now known as Azerbaijan was under the control of various empires (Persian, Ottoman, and Russian), which fostered a collective memory of external subjugation and a strong desire for self-determination (Ergun, 2022). The traumatic consequences (for Azerbaijan) of the 1990s, including political instability and the Nagorno-Karabakh conflict, reinforced the imperative of safeguarding national sovereignty (Brown, 2004). Culturally, there is a normative belief in the importance of neutrality and balanced diplomacy, stemming from a historical need to maneuver between powerful neighbors. This ethos is reflected in national narratives that prioritize independence, non-interference, and the pursuit of national interests without external imposition (Ergun, 2022).

This NRC can also be seen with Azerbaijan's membership in the Non-Aligned Movement, as the country attempts to maintain a balance with the great powers while still establishing its autonomy and sovereignty on the international system. This non-aligned stance also allows Azerbaijan to pursue a flexible foreign policy, adapting to changing geopolitical situations without being constrained by the obligations of military alliances, thereby enhancing its strategic maneuverability on the global stage. For instance, Azerbaijan has adeptly balanced relations with Russia and the West, notably avoiding

¹ For instance, Azerbaijan's reliance on Turkish-made Bayraktar TB2 drones was crucial to its military success.

military bloc memberships like NATO or the CSTO while maintaining strong defense ties with both. This has allowed Azerbaijan to purchase arms from various power centers like Russia and Israel, showcasing its independence in decision-making and strategic flexibility.

Moreover, Azerbaijan has skillfully managed its energy diplomacy under this NRC, exemplified by its 2021 gas swap agreement with Iran and Turkmenistan. While aligning closely with Europe through projects like the Southern Gas Corridor, it also partners with Iran for energy cooperation, a nuanced move made possible by its non-aligned policy. Additionally, its active role in the Non-Aligned Movement, highlighted by hosting the 2019 NAM Summit, further strengthens its position as a neutral actor, granting Azerbaijan broader diplomatic leverage in conflicts like the Nagorno-Karabakh war, where it secured diplomatic support from non-aligned states.

Leadership transition and its implications for NRCs

Leadership transitions and similar external global changes have greatly impacted Azerbaijan's NRCs. From the former presidents Ayaz Mutalibov to Abulfaz Elchibey, from Heydar Aliyev to Ilham Aliyev, such changes have involved the maintenance, alteration, and occasionally the dismissal of certain NRCs depending on the requirements and calculations of the state.

The rule of Ayaz Mutalibov, Azerbaijan's first post-Soviet leader, is best understood in terms of the efforts to preserve the foreign independence of the country in the context of the dissolution of the USSR (Cornell, 2015). His government sought to maintain close ties with Russia, positioning Azerbaijan as a Russian-aligned state in the South Caucasus. This alignment was born out of necessity, given Russia's continued dominance as a military and political force in the region, which Mutalibov saw as a potential source of protection against both Armenia and internal unrest. During this period, Azerbaijan's NRCs were relatively passive. Unlike later administrations, which pursued robust partnerships with Turkey and regional energy initiatives, Mutalibov's government remained largely disengaged regionally. The emerging NRC under his leadership reflected a state-in-formation, struggling for recognition and stability in a volatile environment (Strimbovschi, 2016). Still, owing to the internal instability and the worsening Nagorno-Karabakh conflict, this role was not fully realized, and Mutalibov's inability to properly respond to these problems was instrumental in his ouster (Kendall-Taylor, 2011).

Having taken the office for only ten months, Elchibey brought a new phase in the NRC's more assertive activities as a promoter of Pan-Turkism and as a faithful ally of Turkey (Özer, 2019). Elchibey wanted Azerbaijan to be as close as possible to Turkey and

other Turkic states, insisting on cultural and historical connections. Nevertheless, his administration had internal conflict and military losses in Nagorno-Karabakh that caused his removal from office. The NRC was introduced during Elchibey's presidency as a loyal and faithful ally of Turkey; however, due to political turbulence, the foundation for this role could not be set before his removal.

Political instability and military setbacks led to Heydar Aliyev's return to power in 1993. A former Soviet Political Bureau member and the Committee for State Security (KGB) general, Aliyev brought experience and a strong hand to Azerbaijani politics (Radnitz, 2012). He quickly moved to consolidate power, suppress opposition, and deepen authoritarian control. It was Aliyev's pragmatic approach that recast the NRCs of Azerbaijan, especially in the context of the country's self-portrayal as an energy supplier and a stabilizing factor in the region (Ibrahimov, 2024). Heydar Aliyev's government signed the Contract of the Century in 1994 that helped to put Azerbaijan on the map of international energy players (Agasi, 2014). This process could be regarded as the formation of the NRC as an energy provider that started to play a significant role in Azerbaijan's foreign policy. Furthermore, Aliyev's emphasis on stability in the region, especially in relations with Russia, Turkey, and Iran, formulated the self-perception as a stabilizing force that has been maintained after his period.

Central to Azerbaijan's identity was its secular and moderate Islamic character, which distinguished it from neighboring states like Iran. This secularism, a legacy of both the Soviet period and the Azerbaijan Democratic Republic (ADR) of 1918-1920, positioned the country as a bridge between the East and the West. Aliyev's administration utilized this identity to build partnerships with both Islamic and western nations, promoting Azerbaijan as a moderate, progressive Muslim state. The consequences of the war helped this new elite frame Azerbaijan as a victim of 'historical injustice,' fueling a foreign policy aimed at securing international support for Azerbaijan's territorial claims, isolating Armenia diplomatically, and asserting the principle of territorial integrity in global forums such as the United Nations and the OSCE.

Ilham Aliyev, who came to power in 2003 after the death of his father, has largely maintained and has even intensified the evolution of NRCs by his father, with slight modification in view of the current global conditions. Over the years, Aliyev invested heavily in modernizing Azerbaijan's military, using oil and gas revenues to build up the country's defense capabilities, and preparing for a potential confrontation with Armenia. During his leadership, Azerbaijan not only has retained its NRC as an energy supplier but also has sought to diversify its geopolitical position between Europe and Asia, being at

the crossroads, and utilizing its energy resources to build up cooperation with various power centers (De Mares and Caro-Vargas, 2022).

The change of the NRCs of Azerbaijan has also been influenced by the global and regional transformations. The emergence of Turkey as a regional power and the resurgence of Russian influence in the post-Soviet era have all been instrumental in shaping the new NRCs for Azerbaijan. The changes in the energy market around the world, especially the instability of oil prices, have affected the NRC of Azerbaijan as an energy supplier; therefore, it has strived to diversify its economy and look for new opportunities. In recent years, this has included a growing focus on green energy initiatives aimed at positioning Azerbaijan as a key supplier of renewable energy to Europe, thereby enhancing its strategic significance in a rapidly decarbonizing global economy (Interfax, 2024).

However, it was the 2020 Nagorno-Karabakh war, which can be considered a significant turning point in the development of Azerbaijan's NRCs. This conflict, which saw Azerbaijan retrieve major territories that it lost in the early 1990s, not only reasserted its ambition as a stabilizer of the region but also added a new facet to the identity of the military might of this country. The war proved Azerbaijan's ability to change the dynamics of the South Caucasus through a well-executed military operation backed by its alliance with Turkey (Hovsepyan and Tonoyan, 2024). Since the post-war period, Azerbaijani NRCs have developed further to adapt to political changes in the country's environment. The victory in Nagorno-Karabakh has again called for a more assertiveness in Azerbaijan's regional policy, while rebuffering its NRC as a regional 'stabilizer' with a more assertive and invasive posture. The treaty signed between Baku and Ankara in the framework of the Shushi Declaration in 2021 (Ministry of Foreign Affairs of the Republic of Azerbaijan, 2021) further bolstered military cooperation between the two countries, which strengthened Azerbaijan's NRC as a faithful ally of Turkey. This alliance also means a further synchronization of the military and strategic plans of the two countries (Hovsepyan and Tonoyan, 2024), which places Azerbaijan as a significant partner within the Turkic-speaking world.

The post-war period has shown that Azerbaijan skillfully manages its relations with the leading world powers, including Russia, the European Union, and the United States, given the NRC of the country. On the one hand, Azerbaijan has kept close relations with Turkey; on the other hand, it has launched strategic dialogues with Russia to secure its concerns and priorities during the post-conflict rebuilding phase. This is quite emblematic of Azerbaijan's multi-vector diplomacy that aims at corroborating its independence with close cooperation with different powers of the world.

Conclusion

This study has provided an examination of Azerbaijan's foreign policy through the framework of NRCs, offering insights into how these roles have guided the country's strategic decisions. By focusing on the leadership periods of Heydar and Ilham Aliyev, the research has traced the evolution of Azerbaijan's NRCs, showing how these conceptions have been both a product of and a response to the changing geopolitical landscape in the South Caucasus and beyond.

One of the key findings is the dual role of Azerbaijan as both a regional stabilizer and an energy provider. These NRCs have not only driven Azerbaijan's foreign policy but have also served as instruments for securing its position within a volatile region. The research reveals that Azerbaijan's foreign policy is deeply pragmatic, rooted in the country's need to balance competing interests and maintain strategic flexibility. This pragmatism is reflected in its ability to maintain strategic relationships with regional powers like Russia and Turkey while simultaneously engaging with western institutions and markets.

The study also highlights the significance of leadership in shaping and sustaining these NRCs. The transition from Heydar Aliyev to Ilham Aliyev marked not just continuity but also an adaptation of these roles to fit new regional dynamics and global shifts. Under Ilham Aliyev, Azerbaijan has further entrenched its position as a pivotal energy supplier, leveraging its resources to build strategic partnerships and expand its influence in international energy markets. This has been complemented by a more assertive stance in regional security, particularly following the 2020 Nagorno-Karabakh war, where Azerbaijan's military success has redefined its role as a regional stabilizer.

The research also underscores the challenges that come with these roles. The NRC of regional stabilizers, for instance, is constantly tested by unresolved conflicts and emerging geopolitical tensions. Similarly, Azerbaijan's role as an energy provider faces uncertainties linked to global energy market fluctuations and the transition towards renewable energy sources. These challenges suggest that Azerbaijan's NRCs are not static but will require ongoing adaptation to remain effective in a rapidly changing international environment.

In conclusion, NRCs can serve as both strategic assets and sources of adaptability. In the ongoing effort to steer through its complicated regional and worldwide environment, the flexibility and adaptability of Azerbaijan's NRCs will be crucial in determining its future role on the international stage. Future research could build on these findings by exploring how Azerbaijan's NRCs evolve in response to new global challenges, including shifts in energy dynamics and regional power structures.

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JAPAN JOINS AUKUS: MOTIVATIONS, PROGRESS, AND IMPACT**

Abstract: *Since its establishment, the AUKUS defense system has encountered significant developmental challenges, primarily due to insufficient internal driving forces, which has created a strategic opportunity for Japan to join AUKUS. Japan seeks to enhance its own defense capabilities, deepen the Japan-U.S. alliance, and define its role in the Indo-Pacific strategy, while also aiming to form close ties with allies in high-tech fields. The U.S. and UK support Japan's entry into AUKUS and expect to expand the alliance through strategic interaction and technological alliances. However, Australia, considering factors such as geopolitical strategy, institutional construction, and domestic politics, has shown a cautious attitude. Japan's joining of AUKUS will impact the security structure of the Indo-Pacific region, potentially intensify the regional arms race, and jeopardize the surrounding environment for China's development.*

Keywords: *AUKUS Alliance Expansion; U.S.-Japan Alliance Strengthening; Technological Cooperation; Regional Security Dynamics; Attitudes of AUKUS Members.*

Introduction

Japan's decision to join the AUKUS alliance represents a critical juncture in its national security strategy, driven by a confluence of factors that reflect its evolving geopolitical landscape. This strategic move is primarily motivated by Japan's desire to enhance its self-defense capabilities in the face of increasing regional threats, particularly from China, which it identifies as the 'biggest strategic challenge' to its security. By aligning more closely with the United States and its allies, Japan aims to solidify its role in the Indo-Pacific security architecture while simultaneously addressing its technological and defense modernization needs.

The implications of Japan's accession to AUKUS are multifaceted. Firstly, it signifies a shift towards a more proactive defense posture, as Japan seeks to deepen its military cooperation with the U.S., Great Britain, and Australia, enhancing collective

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deterrence against potential aggressors. This partnership is expected to facilitate technological advancements and operational synergies in areas such as cyber security, artificial intelligence, and maritime security, thereby bolstering the capabilities of AUKUS member states.

However, Japan's entry into AUKUS is not without challenges. Australia has exhibited caution regarding the expansion of the alliance, influenced by domestic political considerations and the need to maintain regional stability. Furthermore, China's strong opposition to AUKUS, viewing it as a threat to its influence in the region, complicates the security dynamics within the Indo-Pacific.

In conclusion, Japan's participation in AUKUS reflects its strategic intent to adapt to the changing security environment, enhance its defense capabilities, and contribute to regional stability. This move not only reshapes Japan's defense policy but also has significant implications for the security architecture of the Indo-Pacific, potentially altering the balance of power in the region.

On April 10, 2024, U.S. President Joe Biden and Japanese Prime Minister Fumio Kishida held a summit in Washington and declared to strengthen the U.S.-Japan alliance and officially invited Japan to join the AUKUS alliance. This invitation marks a new strategic height in U.S.-Japan relations (United States-Japan Joint Leaders' Statement, [Whitehouse.gov](https://www.whitehouse.gov) 2024). The two leaders signed a series of cooperation agreements covering various fields, including military security, economic cooperation, and technological research and development, revealing a comprehensive upgrade in U.S.-Japan relations. That the U.S. invited Japan to join the AUKUS signifies the further expansion of the trilateral security partnership, which shaped a more robust small multilateral security framework. This significant move is not only a significant upgrade for the U.S.-Japan alliance but also a key step in the U.S. strategic blueprint in the Asia-Pacific region. With Japan's inclusion, the AUKUS will further strengthen its military presence and deterrence in the Indo-Pacific region, profoundly impact the strategic competition between China and the U.S., and potentially further escalate tensions in the Pacific region.

The establishment and dilemma of AUKUS

Establishment of AUKUS

On September 15, 2021, the United States, the United Kingdom, and Australia announced the formation of an enhanced trilateral security partnership known as AUKUS.

This alliance aims to surpass traditional bilateral models by engaging in security cooperation in a small multilateral format and integrating the security resources and capabilities of the member countries (Joint Leaders Statement on AUKUS, Whitehouse.gov 2021). On April 5, 2022, the leaders of the three countries announced that AUKUS cooperation would extend to a wide range of areas, including undersea capabilities, quantum technologies, artificial intelligence, cyber security, hypersonic, electronic warfare, innovation, and information sharing. This study employs a qualitative analysis of the AUKUS alliance's development, focusing on the integration of advanced technologies such as autonomous underwater vehicles, quantum positioning technology, and AI decision-making, to assess their impact on the security and defense capabilities of member countries (Joint Leaders Statement on AUKUS, Whitehouse.gov 2023). At this point, the two pillars of the AUKUS have been established. The Pillar I involves the United States and the United Kingdom assisting Australia in building a fleet of nuclear-powered submarines, while the Pillar II focuses on trilateral cooperation in advanced critical technologies. Through this security alliance, AUKUS aims to further enhance the influence of the three countries within the existing Indo-Pacific strategic framework.

The Pillar I dilemma of AUKUS

Since the leaders of the three countries announced the establishment of the AUKUS in 2021, the alliance's development has been slow.

Firstly, funding issues have been a key factor constraining the development of the Pillar I of AUKUS. According to the agreement, the Australian government plans to spend AUD 368 billion over the next 30 years to purchase nuclear-powered submarines. However, according to the '2024 Defence Strategy' report and the '2024 Integrated Investment Program,' Australia plans to allocate between AUD 53 billion and AUD 63 billion over the next decade to acquire nuclear-powered submarine capabilities. Defense spending for this fiscal year will reach AUD 53 billion. The methodology includes a quantitative financial analysis of defense budgets, projecting that annual defense spending will nearly double to AUD 100 billion by the 2033-34 fiscal year, based on current allocation trends. It is predicted that the percentage of defense spending in GDP will increase to around 2.4% by 2033-34 (Australian Government Defence, 2024). Furthermore, investments in shipyards and related infrastructure required for constructing nuclear-powered submarines also face challenges. Despite the government's plan to invest between AUD 14 billion and AUD 18 billion over the next decade to enhance northern bases, the specific allocation and implementation of these funds have not been fully confirmed, resulting in slow progress for the AUKUS project.

Secondly, international pressure and restrictions from the Nuclear Non-Proliferation Treaty (NPT) have also hindered the development of AUKUS. The Pillar I of AUKUS has drawn significant attention from regional countries. Some non-nuclear weapon states have expressed concerns about the AUKUS agreement. For example, the governments of Malaysia and Indonesia worry that the agreement could trigger regional arms races. These countries emphasize that AUKUS must adhere to the NPT and ensure that nuclear submarines are used solely for peaceful purposes (Official Portal Ministry of Foreign Affairs Malaysia, 2021). As a signatory of the Nuclear Non-Proliferation Treaty (NPT), Australia is committed to preventing the proliferation of nuclear weapons and technology. The AUKUS agreement must ensure that any transfer of nuclear technology is strictly restrained for peaceful purposes and does not contribute to the development of nuclear weapons. This involves adherence to stringent legal and procedural requirements to comply with the NPT, adding complexity to the project. The International Atomic Energy Agency (IAEA) emphasizes the need for strict safeguards and verification measures to ensure that nuclear materials are not diverted for military purposes. Comprehensive and transparent agreements will be required to oversee the nuclear materials involved in the AUKUS project (IAEA, 2021).

Finally, in October 2021, Australia reached an agreement with the Association of South East Asian Nations (ASEAN) to establish a ‘Comprehensive Strategic Partnership,’ which is deemed an important measure for Australia to enhance its influence in Southeast Asia (Indo-Pacific defense forum, 2021). The deep-seated alliance among Australia, the United States, and the United Kingdom contradicts Australia’s strategic relationships established with Southeast Asian countries. Southeast Asian countries’ skepticism towards the AUKUS agreement manifests genuine regional divergences in maintaining security. Within the regional security framework, AUKUS’s military enhancement measures clash with Southeast Asian countries’ security perceptions. ASEAN countries tend to uphold regional stability through multilateral cooperation and incremental approaches, treating AUKUS’s presence as a potential disruptor of this balance. The announcement of the AUKUS agreement did not involve sufficient prior communication with Southeast Asian countries, in particular, resulting in significant dissatisfaction in Indonesia (Patton, 2024). The lack of prior notification has intensified regional countries’ suspicions towards AUKUS and undermined trust between Australia and Southeast Asian nations.

The motivation of Japan to join AUKUS

Security strategy choice

In December 2022, the Japanese government approved three programmatic guiding documents at a Cabinet meeting: the National Security Strategy, the National Defense Strategy, and the Defense Buildup Program. Among them, the new version of the National Security Strategy is a guiding document for Japan's security strategy choices, which indicates an adjustment in the principles of Japan's security strategy.

Japan is gradually strengthening its self-defense capabilities to cope with the evolving security threats. This strategy includes enhancing the operational efficiency of the self-defense forces, modernizing the naval and air forces, and advancing the deployment and upgrade of missile defense systems. By increasing the defense budget, Japan has made substantial investments in modernizing weaponry and equipment, strengthening military training, and comprehensively upgrading defense systems. Data collection for this research involved reviewing governmental and defense strategy documents from Japan to understand its aim of independently addressing security challenges, thereby reducing reliance on external assistance.

Japan's security policy will continue to center on the Japan-U.S. alliance and expand its deterrence capabilities. By deepening its alliance with the United States, Japan can rely on U.S. military support and technological advantages when facing regional security threats.

Japan puts more emphasis on alliances with shared values. In its security strategy, Japan advocates achieving national security through international cooperation and proactive pacifism. The Japanese government aims to utilize 'national values' as a medium to actively engage in international affairs. This principle underlines addressing global issues such as climate change, terrorism, and cyber security threats through international cooperation. By doing so, Japan seeks to build itself as a responsible major power in the international community, further enhancing its global influence and soft power (Ministry of Defense of Japan, 2022).

In Japan's 2024 Diplomatic Bluebook, China was deemed 'the biggest strategic challenge to date.' China's military expansion and activities in East Asia demonstrate its strategic intent to pursue regional dominance. Through military presence in the East China Sea and South China Sea, China aims to control critical maritime routes and play a leading role in regional security affairs. This poses the greatest security threat to Japan and its allies advocating for a free and open maritime order in the Indo-Pacific region.

Frequent joint military exercises between China and Russia in Japan's vicinity, both in maritime and airspace domains, have exacerbated Japan's security concerns (Ministry of Foreign Affairs of Japan, 2024). On July 15, 2023, China and Russia conducted multiple joint military exercises near the Sea of Japan, including joint flights of strategic bombers and joint naval cruises. These joint military actions not only increase military pressure on Japan but also manifest deepened cooperation between China and Russia in addressing regional security affairs.

The Indo-Pacific strategy orientation

With the competition between China and the U.S. upgrading, Japan's role in the U.S. Indo-Pacific strategy has become increasingly redefined and more apparent. The Kishida administration has inherited and developed the Japanese version of the 'Free and Open Indo-Pacific Strategy' proposed by its predecessor, former Japanese Prime Minister Shinzo Abe. This strategy not only expands its strategic footprint but also demonstrates a more proactive and assertive approach in its implementation (Huang, 2023).

Following and enriching the U.S. 'Indo-Pacific strategy,' Shinzo Abe's administration proposed the 'Free and Open Indo-Pacific Strategy' with core principles of 'Rule of Law, Freedom of Navigation, and Free Trade,' aligning closely with the U.S. emphasis on a rule-based international order, economic cooperation, and regional stability. Under the administration of Fumio Kishida, this strategy has been further enriched and developed. In March 2023, Kishida introduced the 'Indo-Pacific New Plan' during his visit to India, stressed that the core of the Indo-Pacific strategy lied in 'rule of law' and 'freedom,' and expanded its scope to broader aspects of the international order. He also stressed the importance of respecting the historical and cultural diversity of countries, building 'equal partnerships,' and achieving a world where multiple nations coexist and prosper under the rule of law.

As a close ally of the United States, Japan actively engages in regional hot issues, particularly in the South China Sea and Taiwan Strait disputes (Shi, 2023). Through these actions, Japan seeks not only to solidify its own strategic position but also to align with the U.S. in containing China's rise and upholding the U.S.-led international order. Japan, along with the U.S. and certain claimant states in the South China Sea, regularly conducts joint military exercises to demonstrate support for freedom of navigation in the region. Japan also enhances maritime security cooperation with Southeast Asian countries by providing patrol ships, training coast guard personnel, and improving maritime law enforcement and monitoring capabilities (Huang, 2023). Furthermore, the analytical approach includes a discourse analysis of Japan's engagement in multilateral diplomatic

forums, particularly its advocacy for the South China Sea issue, to evaluate its strategic positioning in regional security dynamics. For instance, in international conferences such as the ASEAN Regional Forum (ARF) and the Asia-Pacific Economic Cooperation (APEC), Japan frequently emphasizes the importance of freedom of navigation and rule of law in the South China Sea, urging countries to support a rules-based international order. Meanwhile, Japan has gradually increased its political support for Taiwan regarding the Taiwan Strait issue. In recent years, Japanese political circles have repeatedly made statements in support of Taiwan, emphasizing the importance of peace and stability in the Taiwan Strait (Zhang, 2023). Shinzo Abe, during a symposium organized by Taiwan's think tank, the National Policy Research Institute, delivered a keynote speech titled 'The New Era of Japan-Taiwan Relations,' claiming that 'an emergency in Taiwan is an emergency for Japan.' Japan has also strengthened its military deployments in the southwest direction to respond to potential conflicts in the Taiwan Strait. In international forums, Japan actively advocates for a rules-based international order and opposes China's unilateral actions regarding the Taiwan Strait issue.

Japan actively sets the agenda. In his keynote speech at TICAD VI held in Kenya, Shinzo Abe delivered a talk titled 'Free and Open Indo-Pacific,' proposing the concept 'Free and Open Indo-Pacific' with the aim to enhance the 'connectivity' between Asia and Africa through a Free and Open Indo-Pacific, thereby promoting stability and prosperity throughout the entire region (Ministry of Defense of Japan, 2016). This strategy emphasizes principles such as the rule of law, freedom of navigation, and free trade. Through this strategy, Japan seeks to establish a rule-based international order in the Indo-Pacific region, thereby binding the United States to jointly maintain this order. The Free and Open Indo-Pacific strategy has not only received support from the United States but has also been incorporated into the U.S. Indo-Pacific strategy, further strengthening Japan-U.S. cooperation in the region. Additionally, in the 'Free and Open Indo-Pacific' strategy proposed by Japan in 2016, infrastructure development is highlighted as a key component (Ministry of Foreign Affairs of Japan, 2016). The Japanese government, through the Japan International Cooperation Agency (JICA) and the Japan Overseas Infrastructure Investment Corporation for Transport and Urban Development (JOIN), has formulated a series of policies and plans aimed at enhancing the quality and transparency of infrastructure projects in the Indo-Pacific region while also promoting cooperation with the United States in this field (Whitehouse.gov, 2018). Through a series of diplomatic, economic, and technological means, Japan has successfully raised issues related to infrastructure construction in the Indo-Pacific region, garnering widespread attention and support from the international community. Japan's

intervention has not only elevated its strategic position in regional infrastructure development but also strengthened its influence in international affairs.

Bottlenecks in high-tech development

Japan does indeed hold a certain leading position in the high-tech sector, especially in areas such as semiconductors, robotics, and artificial intelligence. However, in recent years, Japan has faced significant challenges in terms of research and development resources and capabilities. These challenges not only restrain Japan's potential for technological innovation but also put Japan at a disadvantage in global competition.

On the one hand, the insufficient funding for Japan's technological development is not just an issue of limited amount but also relative to its economic size and international competitors. Despite government and corporate investments, Japan's funding for technology appears constrained when compared to the massive investments made by China and the United States, particularly in cutting-edge fields like artificial intelligence and quantum computing. This disparity makes it challenging for Japan to compete effectively in these critical technology areas. Moreover, there is a significant issue of uneven resource allocation, with traditional industries receiving far more resources than emerging technology sectors, leading to inefficient use of resources (Jiang, 2018).

On the other hand, the Pillar II of AUKUS can provide Japan with energy support and promote industrial structure upgrading. Japan, as a resource poor country, heavily relies on energy imports. New energy technologies are crucial for future energy transitions, including solar, wind, and hydrogen energy, among others. By joining AUKUS, Japan can collaborate with the United States, the United Kingdom, and Australia in the field of new energy technologies and promote the development and application of these technologies. Japan can cooperate with Australia specifically in hydrogen energy technology, leveraging Australia's abundant renewable energy resources for joint research and promotion of hydrogen energy technology. Through such cooperation, Japan can ensure its energy security and also position itself favorably in the global new energy market.

In addition, semiconductors are the cornerstone of modern technology and industry, often seen as the 'grain of industry.' Japan holds a leading advantage in semiconductor manufacturing equipment and materials, while the United States takes the lead globally in semiconductor design and manufacturing technology. By joining AUKUS, Japan can deepen cooperation with the United States, the United Kingdom, and Australia across the semiconductor supply chain to ensure its security and stability. Japan can collaborate with these countries to jointly invest in semiconductor research, production, and establish

multinational semiconductor manufacturing bases. This collaboration aims to ensure the supply security of critical chips and materials. Such efforts not only enhance Japan's competitiveness in the semiconductor industry but also provide crucial support for U.S., UK, and Australian cooperation in the semiconductor field.

Attitudes of major countries towards Japan's accession to AUKUS

America's attitudes

1. The Strategic Intention of the United States

The United States' attitude towards Japan joining AUKUS is generally positive and welcoming. The U.S. believes that Japan, as an important ally and partner in the Asia-Pacific region, joining AUKUS can further enhance the security and stability of the region and counter potential threats from China (Zhu, 2021). Japan's greater participation in the security and defense fields is believed to help maintain peace and stability in the Indo-Pacific region. The strategic advantages are the following.

First of all, it can enhance the technological and military capabilities of the AUKUS partnership. The United States' intention is to enhance the technological and military capabilities of AUKUS through cooperation with Japan. The formation of AUKUS is rooted in the deteriorating security environment in the Indo-Pacific region, particularly in response to China's rapid military growth and more assertive diplomatic policies, which have heightened security concerns in the region. Japan possesses significant research and development capabilities and technological expertise in areas such as hypersonic weapons, electronic warfare, cyber capabilities, and quantum technology. Through cooperation with Japan in these fields, AUKUS member countries can enhance their competitiveness in advanced technologies. Specifically, Japan's strengths in materials science and precision engineering can contribute to significant advancements in hypersonic weapon development within AUKUS. In the realms of cyber security and artificial intelligence, Japan's technological prowess can meet the needs of AUKUS member countries to enhance network security and develop intelligent military capabilities. Through this technological cooperation, AUKUS can not only enhance the defense capabilities and strategic deterrence of its member countries but also ensure their leading position in global technological competition. This technological enhancement is crucial for addressing future security challenges and maintaining regional stability (Wang, 2024). By further consolidating AUKUS's leadership in key technological fields, it ensures that the alliance can maintain strategic advantage in the evolving global security environment.

Secondly, it can address China's geopolitical and technological challenges in the Indo-Pacific region. Another key intention is to address China's geopolitical and technological challenges in the Indo-Pacific region. Over the past decade, China has rapidly enhanced its influence in the region through military capabilities and technological innovations, directly challenging the security interests of the United States and its allies. By deepening cooperation with Japan, AUKUS member countries aim to jointly develop and apply advanced technologies to effectively deter and address China's geopolitical threats. Specifically, China's military activities in the South China Sea and East China Sea, along with its advancements in cyber warfare and artificial intelligence, have prompted AUKUS member countries to accelerate their technological cooperation and defense capability building in these areas. Japan's technological advantages in hypersonic weapons, cyber capabilities, and quantum technology complement the needs of AUKUS member countries, thereby enhancing the alliance's overall defense capabilities. For example, through collaborative efforts in developing hypersonic missiles and advanced cyber defense systems, AUKUS can more effectively address China's threats in these domains. This cooperation aims not only to bolster technological and military capabilities but also to send a clear strategic signal: that AUKUS member countries will collectively respond to any actions that threaten regional stability.

Lastly, it can promote technological cooperation and innovation to ensure strategic advantage. The United States is also committed to promoting technological cooperation and innovation in areas such as hypersonic, electronic warfare, cyber capabilities, and quantum technology to ensure the strategic advantage of AUKUS member countries in the Indo-Pacific region. Technological cooperation and innovation are central to modern military and security strategies. Through collaboration with Japan, AUKUS member countries can maintain leadership in these cutting-edge technology fields. Japan's accumulated expertise in these areas not only enhances AUKUS's overall technological strength but also promotes technology sharing and innovation within the alliance. For instance, Japan's research in artificial intelligence and cyber security can provide crucial technical support to AUKUS member countries, advancing the alliance's capabilities in military automation and network defense. Furthermore, cooperation with Japan allows AUKUS member countries to expedite the development and deployment of new technologies, thereby securing advantageous positions in critical technology sectors. Deepening technological cooperation will also foster strategic coordination among AUKUS member countries, strengthening internal cohesion and collaboration efficiency within the alliance. This synergistic effect not only enhances the alliance's military and

technological capabilities but also strengthens trust and strategic partnerships among member countries, ensuring rapid and effective responses to shared security challenges.

2. Coordinating AUKUS Engagement with Japan Act

On May 8, 2024, U.S. Senators Romney, along with his colleagues Kaine, Risch, and Hagerty, introduced a bill titled the 'Coordinating AUKUS Engagement with Japan Act.' This legislation aims to promote cooperation between the United States, the United Kingdom, and Australia within the framework of the Pillar II of the AUKUS partnership with Japan.

Firstly, the bill defines the AUKUS agreement and specifies coordinating bodies and personnel, including appropriate congressional committees, AUKUS officials, AUKUS partnership, commercial control provisions, state AUKUS coordinators, defense AUKUS coordinators, Pillar II, and the U.S. Military Requirements List.

Secondly, the bill outlines the intent of Congress, emphasizing the necessity of cooperation with Japan within the framework of the AUKUS partnership. This includes strengthening ally relationships, leveraging technological advancements, setting the vision for the AUKUS partnership, and highlighting Japan's contributions as an ally.

Thirdly, the bill specifies the requirements for the U.S. Department of State and Department of Defense to engage with the Japanese government. Within 90 days of the bill's enactment, the State AUKUS Coordinator and the Defense AUKUS Coordinator are to directly engage with relevant stakeholders in the Japanese government. This engagement includes understanding Japan's export control system; identifying areas of potential cooperation and overlapping interests with Australia, the United Kingdom, and the United States within the AUKUS partnership and other projects; adjusting necessary export control measures; evaluating and identifying areas where the Japanese government needs to adjust export controls to prevent violations and ensure its successful participation as a Pillar II partner in the AUKUS partnership; and assessing the control of sensitive technologies, particularly Japan's implementation and enforcement of export controls on sensitive technologies, including semiconductor manufacturing equipment.

Finally, the bill requires the U.S. Secretary of State, with assistance from the U.S. Secretary of Defense, to submit a report to the appropriate congressional committees within 180 days of the bill's enactment. This report should assess Japan's potential for cooperation under the Pillar II of AUKUS.

Strategic interaction with the United Kingdom

1. 'Global Britain' Interacts with the Indo-Pacific Strategy

'Global Britain' is a strategic concept introduced by the UK government post-Brexit, aiming to redefine the UK's role and position on the global stage. This concept was first proposed by then Prime Minister Theresa May following the 2016 Brexit referendum and has been continually developed and promoted by subsequent governments. Its core objectives are to expand international influence, deepen global trade relations, enhance national security, and promote British values, ensuring that the UK maintains its global leadership post-Brexit. The UK seeks to redefine its global role by pursuing the 'Global Britain' vision. This vision emphasizes that, after Brexit, the UK should maintain its global influence by strengthening connections with other regions of the world, particularly through economic and security cooperation with the Indo-Pacific region.

China's rapid rise in the Indo-Pacific region poses significant challenges to regional strategic balance and the international order. By increasing its military presence in the South China Sea, East China Sea, and Taiwan Strait, China seeks to expand its regional influence. This military expansion and technological advancement not only threaten the security and stability of the Indo-Pacific region but also pose a potential threat to the rules-based international order (Wilkins, 2023). Therefore, addressing China's strategic challenges has become a crucial component of the UK's Indo-Pacific strategy. Military deployments in the region, including carrier strike group patrols and joint military exercises, demonstrate the UK's military presence and commitment in the area.

2. UK-Japan cooperation under the Indo-Pacific strategy

The motivations for strengthening security cooperation between Japan and the UK include the need to respond to US strategic adjustments, respective proactive strategic objectives, enhancing their strategic positions in the Indo-Pacific region, and shaping the order in the Indo-Pacific through collaboration (Meng, 2020). Through its 'Global Britain' strategy, the UK aims to establish new alliances in the Indo-Pacific, while Japan seeks to enhance its influence in the region through cooperation with the UK. Japan and the UK have frequent interactions in security cooperation, including high-level security dialogues, security consultations, defense cooperation between their armed forces, and exchanges in defense matters. On January 11, 2023, Japanese Prime Minister Fumio Kishida and UK Prime Minister Boris Johnson signed the Reciprocal Access Agreement (RAA) in London. This agreement allows Japan and the UK to deploy forces on each other's territory, marking the most significant defense pact between Japan and the UK since the

Anglo-Japanese Alliance against Russia in 1902 (UK Government, 2023). Through this reciprocal access agreement, both parties have established a broader legal framework for cooperation. The UK became the first European country to reach such an agreement with Japan.

Japan hopes that Britain will play a greater role in the Indo-Pacific region, especially in providing more support in key technology sharing, strategic coordination, and agenda setting. Enhancing national security and defense capabilities is a key driver for cooperation between the two countries, as both face challenges such as cyber-attacks, technology theft, and regional military threats. By sharing advanced technologies and knowledge, both sides can enhance their defense technological capabilities and better address common security threats. In May 2023, on the eve of the G7 summit, UK Prime Minister Sunak and Japanese Prime Minister Kishida signed the ‘Hiroshima Agreement,’ which emphasizes strengthening cooperation between the UK and Japan in defense and other fields. Additionally, the UK and Japan will enhance cooperation in various areas, including economy, trade, and investment, technology, and climate change mitigation.

The complex attitudes of Australia

1. Cautious attitudes

Australia has not yet fully embraced the shift in global strategic thinking symbolized by its commitment to AUKUS and still retains a traditional strategic mindset of regional division. This model limits its openness to the expansion of AUKUS membership, and its role and position in the global strategic arrangement have been profoundly influenced by its history and geopolitical environment. Australia’s strategic thinking is more based on its role as a regional power, with strategic planning focusing more on exerting influence in the Asia-Pacific region rather than expanding globally (White, 2011). This role positioning limits its openness to the expansion of AUKUS membership, as introducing new members would require coordination and planning in a broader geopolitical context. Traditional regional division: Australia’s strategic thinking has long been influenced by regional divisions, especially regarding the South China Sea and East China Sea areas. In traditional thinking, Australia focuses more on its neighboring regions rather than the more distant Northeast Asia (He and Hundt, 2024).

Geographical proximity significantly influences Australia’s strategic decisions. As a country far from Europe and America, Australia pays more attention to the dynamics and cooperation opportunities of its Asia-Pacific neighbors. For example, Southeast Asian countries are relatively close to Australia, making Australia more willing to engage in deep economic and security cooperation with these countries. Although Japan is an

important economic partner, its relative geographical distance affects its priority position in Australia's strategic planning.

Japan has not yet reached the trust threshold for intelligence sharing, especially with significant risks in confidentiality protection. Unlike potential members such as New Zealand, Japan has not met the strict standards for intelligence sharing and confidentiality mechanisms. This means that in highly sensitive technological fields, information could be at risk of leakage (Meng, 2022). The core of the AUKUS alliance lies in the sharing of highly sensitive technology and intelligence, with trust and confidentiality capabilities among member countries being a crucial foundation for maintaining this alliance. Japan has long hoped to join the Five Eyes alliance's intelligence sharing mechanism, which is one of the world's most tightly integrated intelligence sharing systems characterized by high trust among member countries and mature confidentiality mechanisms. However, Japan's intelligence system lags behind the institutional development of Five Eyes member countries. Domestic pacifist norms and historical memories constrain Japan's government's intelligence system development (Wang, 2021). The lack of systematic organization in intelligence agencies leads Japan to frequently face cyber security attacks; thus, Japan's efforts to join the Five Eyes alliance have stalled. In this context, sharing highly sensitive AUKUS technology and intelligence with Japan could pose potential risks of leaks.

In Australia, political forces and interest groups hold differing opinions regarding the expansion of AUKUS. On one hand, some political forces and military experts support expanding AUKUS membership, believing that it would enhance the alliance's overall strength and influence. On the other hand, other political forces and interest groups are concerned that inviting new members could increase Australia's security burden and complexity. Some political parties and think tanks may argue that Japan's accession could further delay the AUKUS process, potentially requiring Australia to shoulder additional military obligations and responsibilities. This situation could potentially have negative implications for Australia's national security and economic interests (White, 2024). Public opinion significantly influences government decision-making. In Australia, there is division among the populace regarding AUKUS. Some support strengthening defense cooperation with allied nations, while others fear such cooperation could draw the country into more international conflicts and confrontations. Furthermore, public perceptions of Japan's historical issues and bilateral relations also affect their stance on Japan joining AUKUS. These divergent public opinions necessitate cautious government decision-making to avoid triggering domestic discontent and opposition.

2. Japan-Australia security cooperation

In January 2022, Japanese Prime Minister Fumio Kishida and Australian Prime Minister Scott Morrison signed the Reciprocal Access Agreement (RAA), aimed at facilitating bilateral defense and security cooperation between the two countries. According to the agreement, Japan and Australia simplified the entry and customs procedures required for each other's military personnel, equipment, and activities, relying on each other's military facilities to enter their respective territories. Recently, the defense technology departments of Japan and Australia signed a technical cooperation agreement aiming at enhancing their capabilities in underwater robots and autonomous systems development. This marks the first specific project following the bilateral agreement signed in June 2023 for military research, development, testing, and evaluation. It also signified another significant step in strengthening the 'quasi-alliance' military cooperation relationship between Japan and Australia.

Technology Security Cooperation Based on the Quad Alliance. The Biden administration launched the 'Critical and Emerging Technologies Working Group' under the framework of the Quad Alliance, emphasizing mutual cooperation on topics such as artificial intelligence and next-generation communication technologies. In response to the US request, the Australian government designed the 'Quad Tech Network' (QTN), aiming at promoting consensus through Track 1 and Track 2 cooperation, joint research, and dialogue on critical technology and cyber issues. This initiative strengthens influence with the United States, Japan, and India in the Indo-Pacific region. Meanwhile, efforts are also underway to strengthen the implementation and institutionalization of the 'Global Partnership on Artificial Intelligence' (GPAI). In January 2023, leaders of the Quadrilateral Security Dialogue (Quad) convened in New Delhi to advance cybersecurity-related agendas. During this meeting, the Quad outlined future directions and visions for cyber security policy. First, they emphasized enhancing cyber security cooperation from a technological standpoint, specifically leveraging machine learning and other advanced technologies to bolster cyber security. Second, they proposed to establish crisis management mechanisms and institutions to enhance information sharing among the four countries. A direct initiative included setting up Computer Emergency Response Teams (CERTs) and creating secure channels for sharing threat information with private enterprises. Finally, they underscored the broad impact of cyber security on supply chain security and the digital economy, aiming to safeguard information and communication technologies in critical sectors.

China's attitude toward Japan's accession

Incorporating an examination of China's response to AUKUS, particularly concerning the Nuclear Non-Proliferation Treaty (NPT) and the Pillar I, is crucial for understanding the broader implications of this trilateral security partnership. China's reaction has been multifaceted, reflecting its strategic interests and concerns about regional stability and nuclear proliferation.

China has expressed strong opposition to the AUKUS agreement, asserting that it undermines the objectives of the NPT and poses significant risks of nuclear proliferation. The AUKUS pact, which facilitates Australia's acquisition of nuclear-powered submarines, has been criticized by Chinese officials as a move that could trigger an arms race in the Asia-Pacific region. Chinese Foreign Minister Wang Yi has articulated that the Pacific should not become a battleground for major power competition, emphasizing that the introduction of nuclear submarine capabilities in the region contradicts the principles of nuclear non-proliferation and regional peace.

The Pillar I of AUKUS, which involves the transfer of nuclear submarine technology from the U.S. and the United Kingdom to Australia, has raised particular alarm in Beijing. China argues that this arrangement could lead to the proliferation of nuclear weapons technology, as it allows a non-nuclear weapon state to access advanced nuclear capabilities. This concern is compounded by the fact that Australia is a signatory to the NPT, which obligates it to refrain from developing nuclear weapons. In this context, China has called for strict adherence to the NPT and has urged AUKUS members to ensure that any nuclear technology transferred is used solely for peaceful purposes.

Moreover, China's apprehensions are not solely focused on the direct implications of AUKUS but also on the broader geopolitical landscape it creates. The AUKUS alliance is perceived as a strategic counterbalance to China's growing military influence in the Indo-Pacific, particularly in the South China Sea. As China continues to expand its military capabilities, it views AUKUS as an attempt by the U.S. and its allies to encircle and contain its influence. This has led to a heightened sense of insecurity in Beijing, prompting calls for increased military readiness and strategic partnerships with other nations in the region.

In response to AUKUS, China has sought to strengthen its diplomatic ties with Southeast Asian nations, many of which have expressed concerns about the potential for nuclear proliferation and regional instability. Countries like Indonesia and Malaysia have voiced skepticism about AUKUS, emphasizing the need for transparency and adherence to the NPT. China has positioned itself as a supporter of regional stability, advocating for

multilateral dialogue and cooperation to address security challenges without resorting to military alliances that could exacerbate tensions.

The impact of Japan joining AUKUS

Influence regional security structure

Under the AUKUS framework's the Pillar I, cooperation mainly focuses on the research, development, and sharing of advanced military technologies, including nuclear submarine technology, artificial intelligence, and cyber security. Japan's technological advantages in areas such as anti-submarine warfare, sonar, and artificial intelligence will bring new momentum to AUKUS, enhancing the alliance's overall defense capabilities (Shi, 2021). For example, Japan's technology can be integrated with the military forces of the United States, United Kingdom, and Australia to create stronger capabilities in maritime operations and anti-submarine warfare. This integration of technologies will significantly enhance AUKUS's military presence and deterrence capabilities in the Asia-Pacific region. Japan's participation will prompt the United States, United Kingdom, and Australia to deploy more military forces in Northeast Asia, particularly in strategic locations such as southwest Japan and Okinawa. These deployments also provide a broader support network for the United States' strategic positioning in the Asia-Pacific region.

Japan, as the 'Northern anchor' for the United States in the Asia-Pacific region, its inclusion in AUKUS will extend the strategic depth of the United States further into the South China Sea and Southeast Asia. This adjustment will make the U.S. strategic layout in the Indo-Pacific region more comprehensive and three-dimensional. The joint efforts of the United States, United Kingdom, Australia, and Japan will form a complete strategic line from Northeast Asia to Southeast Asia, effectively countering China's influence in this region. With Japan's participation, the influence of AUKUS will extend beyond the traditional trio of the UK, the U.S., and Australia to encompass the entire Asia-Pacific region. Military cooperation between Japan and Southeast Asian countries like the Philippines and Vietnam may also strengthen as a result. These nations may seek collaboration with AUKUS to enhance their own defense capabilities and strategic positions. This regional linkage will further consolidate the U.S. alliance system in the Asia-Pacific, creating a tighter network of defense cooperation.

Influence on the Southeast countries

Japan's accession to AUKUS will have complex and profound implications for ASEAN countries. Firstly, it will likely deepen divisions within ASEAN regarding their

security strategies, differing levels of demand for the U.S. security protection and cooperation, and varying perceptions of China's security threats (Xing, 2022). These factors directly contribute to divergent psychological responses and reactions among ASEAN member states towards the AUKUS alliance. Indonesia, Malaysia, and Cambodia have clearly opposed Japan's entry into AUKUS, expressing concerns that this move could destabilize the region and trigger an arms race. On the other hand, the Philippines has voiced support, believing it can help balance regional power dynamics and maintain freedom of navigation. Japan's participation may indeed fuel arms competition in Southeast Asia and exacerbate tensions in the South China Sea, prompting countries like Indonesia and Malaysia to increase military spending to counter perceived threats. Moreover, the expansion of AUKUS could challenge ASEAN's central position and potentially marginalize existing security cooperation mechanisms within ASEAN, weakening its influence and leadership in regional affairs (Zhou, 2022). ASEAN countries also face pressure to choose sides between the United States and China, impacting their stance on neutrality and strategic balance. To address these challenges, ASEAN nations may enhance cooperation with China and other major powers, innovate multilateral cooperation mechanisms, and seek to maintain regional peace and stability while balancing the impact of AUKUS.

Reinforcing technology alliance to contain China

In the 'National Cybersecurity Strategy' released on March 2, 2023, the Biden administration emphasized ensuring the openness, freedom, global nature, interoperability, reliability, and security of the internet. It set a goal to build a 'defensible and resilient digital ecosystem.' The strategy prioritizes cooperation with allies and adherence to international rules while expanding cyber deterrence capabilities. Particularly, the cyber security policies targeting China are more explicit and direct. This strategy aims to establish a multi-layered, broad-spectrum, and comprehensive cyber security alliance to collectively constrain China's influence in global cyberspace. Japan's inclusion in the Pillar II of AUKUS consolidates the United States' intertwined multi-lateral technology alliance system, complementing alliances such as the U.S.-Japan-South Korea, IPEF (Indo-Pacific Economic Framework), U.S.-Japan-Philippines, and the Quad. Through these multilateral mechanisms, the U.S. strengthens cooperation with countries in the Asia-Pacific region to ensure leadership in global cyber governance. This not only enhances the U.S. and its allies' cyber security defenses but also places significant pressure on China's influence in global cyberspace.

Conclusion

Japan's decision to join the AUKUS alliance marks a significant shift in the regional security dynamics of the Indo-Pacific. This move is driven by Japan's strategic objectives to enhance its defense capabilities, deepen its alliance with the United States, and shape the regional order in the face of China's growing assertiveness. The U.S., United Kingdom, and Australia have welcomed Japan's inclusion, recognizing the potential benefits it brings in terms of technological cooperation and regional stability.

The AUKUS alliance, established in 2021, has faced several challenges in its development, particularly in the Pillar I involving Australia's acquisition of nuclear-powered submarines. Funding issues, international pressure, and regional tensions have slowed progress in this area. However, the Pillar II focusing on advanced technology cooperation has gained momentum, providing an opportunity for Japan to contribute its expertise and resources.

Japan's motivations for joining AUKUS are multifaceted. As it strengthens its self-defense capabilities to cope with evolving security threats, Japan seeks to enhance its alliance with the U.S. and expand its deterrence capabilities. By aligning with the U.S. Indo-Pacific strategy and actively engaging in regional issues, Japan aims to solidify its strategic position and shape the regional order based on the principles of rule of law and freedom of navigation. Moreover, Japan's participation in AUKUS is driven by the desire to address bottlenecks in its high-tech development, particularly in areas such as semiconductors and new energy technologies.

The attitudes of major countries towards Japan's accession to AUKUS vary. The U.S. welcomes Japan's inclusion, believing it will enhance the technological and military capabilities of the alliance, address China's geopolitical and technological challenges, and promote innovation. Great Britain sees Japan's participation as an opportunity to strengthen its 'Global Britain' strategy and deepen security cooperation in the Indo-Pacific. However, Australia has shown a more cautious attitude, citing concerns over strategic considerations, institutional mechanisms, and domestic disagreements.

China has strongly opposed Japan's accession to AUKUS, arguing that it undermines the objectives of the Nuclear Non-Proliferation Treaty and could trigger an arms race in the region. Beijing perceives AUKUS as a strategic counterbalance to its growing influence and has sought to strengthen its diplomatic ties with Southeast Asian nations who share similar concerns about regional stability.

The impact of Japan joining AUKUS is expected to be significant. It will influence the regional security structure by enhancing the alliance's military presence and deterrence capabilities, particularly in Northeast Asia and the South China Sea. Japan's

participation may also deepen divisions within ASEAN and challenge its central position in regional affairs. Furthermore, the U.S. and its allies will likely use AUKUS to reinforce their technology alliance and collectively constrain China's influence in the global cyberspace. In conclusion, Japan's decision to join AUKUS represents a bold move in its security strategy, reflecting its desire to adapt to the evolving regional dynamics and shape the future of the Indo-Pacific.

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BETWEEN BLOCS AND BLOCKADES: QATAR'S DIPLOMATIC DILEMMA AND STRATEGIC MANEUVERS

***Abstract:** The article aims to analyze the dynamics of the 2017 Qatar diplomatic crisis in the context of the transforming geopolitics of the Gulf. The goal of the article is to examine the political causes of the crisis, which are directly related to regional competition and the change of power balance in the Gulf region, and to reveal why Qatar's diplomatic crisis was resolved years later without any concessions from Qatar. The article focuses on Qatar's foreign policy ambitions, Saudi Arabia's harsh opposition against it, and Doha's further expansion, which ultimately led to Qatar's five-year blockade. The study also examines the resolution of the crisis and the normalization of the relations between Saudi Arabia and its allies with Qatar, which was conditioned by the imperative to stabilize the security environment in the region. Saudi Arabia wanted to demonstrate that Riyadh will continue to be the most influential player in the Gulf region. Qatar did not make tangible concessions but accepted the rules of the game.*

Keywords: Qatar, GCC, USA, crisis, sub-region, security complexes.

Introduction

The article aims to examine the political causes of the crisis, which are directly related to regional competition and the change of power balance in the Gulf region. It also examines the resolution of the crisis and the normalization of the relations between Saudi Arabia and its allies with Qatar, which was conditioned by the imperative to stabilize the security environment in the region. The goal of the article is to reveal why Qatar's diplomatic crisis was resolved years later without any concessions from Qatar. The theory of regional security complexes developed by Barry Buzan and Ole Waever was used to retrieve the answer to the abovementioned question. According to the theory, the realities of global politics can be understood by the characteristics of the regional sub-systems within the international system. The regions function as sub-systems, where the balance of power and hostile or friendly relations between the states of the region are

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interconnected to such an extent that it is impossible to consider the security problems of these countries separately from others. This interconnectedness creates regional security complexes (RSC). RSCs are security macro regions or subregions. The authors utilized the securitization theory to explain the development of hostile or friendly relationships between states and built RSCs based on it. According to their formulation, securitization is an over-politicized process during which the political community forms ideas about a particular factor or phenomenon being a vital threat or danger to the state. This leads to the need to take urgent and exceptional measures to resist or neutralize it (Galstyan 2021, 107-108).

The security sector is an essential part of RSCs. Buzan and Waever have identified five main security sectors: military, political, economic, social, and environmental. The military and political sectors are the primary areas where countries aim to ensure security. However, in the Gulf, the social sector is of particular importance. In this regard, the Sunni-Shiite conflict in the Middle East is essential for this sub-region (Grabowski 2020, 22). Sunni-Shiite tensions are only a facade that is used to legitimize power and meddle in the internal affairs of other states. These religious divisions are used as a strategic tool to mobilize supporters for a particular cause or agenda (Grabowski 2020, 29).

To be recognized as an RSC, a collective of states or entities must exhibit a level of security interdependence that sets them apart from neighboring security regions. The Gulf Cooperation Council (GCC) stands out in this regard, functioning as an alliance against external threats and uniquely serving as a platform for consolidating the domestic security of a group of monarchical regimes (Buzan and Waever 2003, 47-48).

The first chapter of the article describes the outbreak of Qatar's diplomatic crisis in 2017 and explores its roots and reasons. The chapter shows the connection of the crisis's outbreak with the policies of the newly-elected U.S. President, Donald Trump. The crisis began with a statement made by Qatar's Emir Tamim bin Hamad Al Thani, which was seen as critical of President Trump's administration and supportive of Hamas and Iran. Soon after, several Gulf countries, including Saudi Arabia, Bahrain, the UAE, and Egypt, cut diplomatic ties with Qatar and imposed a blockade, accusing it of supporting terrorism and destabilizing the region. It outlines how Qatar evaded the blockade, primarily through Iran and Turkey's political and economic support.

The second chapter uncovers that the Qatar crisis presented a complex geopolitical challenge for the United States as the future of the Gulf security system was in question. The U.S. faced the challenge of maintaining the balance of power in the Gulf region and

protecting its interests. The high-ranking officials of the U.S. began to take steps to resolve the crisis, but it was not easy. One of the reasons for the inability to resolve the crisis was the need for a unified position among the U.S. ruling circles. Big political shifts within the GCC states could easily sweep away the U.S.'s positions in the Gulf.

The third chapter shows the diplomatic crisis's resolution in the context of the Gulf's transforming geopolitics. The resolution was achieved through the Al-Ula Declaration of 'Solidarity and Stability.' This declaration restored full ties with Qatar, even though Qatar did not meet the preconditions set by the blockading countries. This way of resolution proves that the Arab states of this sub-region are connected by a complex network of systems that no Gulf state can afford to ignore.

The Qatari crisis resolution showed that the GCC countries, led by Saudi Arabia, did not want to aggravate the situation further and question the security of this sub-region. This was the reason for settling relations with Qatar without any concessions. Saudi Arabia managed to prevent the unrest in the Gulf security complex and prevent shifts in the regional order of the Gulf. By restraining the penetration of external forces, the GCC countries normalized their relations and restored the security environment in this sub-region.

The outbreak of Qatar's diplomatic crisis

Qatar's diplomatic crisis has doubted the Gulf security system. The regional security complexes are based on distinct security interactions among states, called enmity and amity. These relationships might result from border or ideological disputes and historical ties (Grabowski 2020, 20). There are three types of security complexes based on patterns of amity or enmity. The first is conflict formation, where major powers build alliances due to the fear of violence. In the second one, states still perceive each other as a potential threat but take specific measures to reduce the security dilemma and mutual tensions. In a multilateral security complex, the expectation is that none of the states involved would engage in aggressive actions against each other, nor would they plan to do so (Grabowski 2020, 21). Factors such as history, politics, culture, and ethnicity generate patterns of amity and enmity. The regional security complex is defined by the history of mutual hatred, friendships, and specific issues that lead to conflict or cooperation based on fears, threats, and friendships. In the Gulf, long-standing partial enmities between Shia and Sunni states and non-state actors play a crucial role in this matter (Grabowski 2020, 22). Securitization statements are issued by political leaders and actors of Saudi Arabia

and Iran who try to convince the public to recognize Sunni dominance and revolutionary Shiism in the region as a threat to national or regional security (Grabowski 2020, 26).

Another threat to this security complex is political Islam. The close relationship between Doha and the Muslim Brotherhood has been crucial in shaping Qatar's foreign policy direction. By providing a platform for individuals with religio-political and radical views from the Arab Islamic world, Qatar has gained considerable leverage in terms of ideological influence across the Middle East region (Sargsyan 2019, 294-295). However, Doha acquired some regional countries' reluctance towards itself. Qatar became a platform for the Muslim Brotherhood to infiltrate other countries in the Arab world, primarily through the use of Al-Jazeera. The Muslim Brotherhood has utilized Al-Jazeera to propagate its beliefs by infiltration across different Islamic countries, except for Qatar (Dorsey 2013, 12). However, the conflict is concerned not only with support for the Muslim Brotherhood but also with a struggle for leadership among Arab countries (Grabowski 2020, 24). Since the coup in 1995, Qatar has been working towards reducing its dependence on Saudi Arabia and pursuing an independent foreign policy. In addition, Doha aimed to create a new image for the state as a progressive and influential regional actor through regional connections and relationships (Roberts 2019, 2).

The Arab Spring created new conditions for Qatar. Doha was heavily involved in promoting the uprisings and revolutions of the Arab Spring. At the same time, Qatar pursued an ambitious agenda to manage regional resources and exert control over the Arab world. Doha's program of political Islam was a key tool in advancing its geopolitical and geo-economic strategy. This program was one of Qatar's most effective tools for achieving its objectives (Sargsyan 2021, 156). During the Arab Spring movement, Qatar had a historic opportunity to influence the reconfiguration of the region and diversify its foreign policy further to expand its position of power within the Middle East (Dihstehoff and Lohse 2020, 35).

Qatar's aspirations for regional influence became more realistic when it started cooperating closely with Turkey. This cooperation was made possible by the strong ties of both countries with the Muslim Brotherhood in Egypt. As a result, a political axis was formed between Turkey, Qatar, and the Muslim Brotherhood, with the latter receiving enormous financial and diplomatic aid from both countries (Sargsyan 2021, 156). Political instability caused by popular uprisings in critical regional powers created a vast power vacuum in the region and posed serious challenges to both the status quo and the revisionist blocs. Meanwhile, a new alliance of Turkey and Qatar attempted to take advantage of this vacuum (Yeşilyurt and Yetim 2020, 132).

On November 23, 2013, the GCC adopted a declaration urging Qatar to stop supporting groups destabilizing the Arab world. The final declaration was primarily aimed at Qatar's support for the Muslim Brotherhood. The declaration stated that if Qatar continued supporting the Muslim Brotherhood, the issue of suspending Qatar's membership in the GCC and the League of Arab States would be raised (Sciutto and Herb, 2017).

In March 2014, the three member states of the GCC and Egypt withdrew their ambassadors from Doha. Saudi Arabia and the UAE attempted to convince Qatar to alter its foreign policy by ceasing its support of political Islam actors, who pose a security threat to the GCC states (Dihstelhoff and Lohse 2020, 40). Due to Kuwait's mediation efforts, the dispute was resolved within weeks by signing the 'Riyadh Agreements' (Ulrichsen 2020, 45; 59). Despite the agreement, Qatar continued cooperating with political Islamists in the region (Cherif 2017, 20-21). The underlying issues that caused the tensions were not addressed, and Qatar's ambitions remained unchanged, which led to the unfolding of the Gulf diplomatic crisis.

On January 20, 2017, Donald Trump was inaugurated as the 45th president of the United States. It is noteworthy that Trump made his first official visit as president to Saudi Arabia to participate in a joint summit with the leaders of the Arab Islamic world. During his speech at the summit, Trump called for a fight against terrorism and extremist ideology, citing groups such as the Islamic State, Al Qaeda, Hezbollah, and Hamas. He also announced that the U.S. would cooperate with any country willing to combat the extremism (White House, 2017). A few weeks after this summit, a diplomatic crisis erupted in the Gulf over Qatar. The Riyadh summit and Trump's support played an important role in unfolding the 2017 Gulf crisis. This gave Saudi Arabia, the UAE, and Egypt the green light to punish Qatar and gain favor with Washington (Zakheim, 2017).

One of the reasons for the Gulf crisis was the statement of Emir Tamim bin Hamad Al Thani, which presented Qatar's relations with President Trump's administration as strained and characterized "Hamas" as the only legitimate representative of the Palestinian people. Furthermore, he described Iran as a guarantor of regional stability and a powerful state that could not be opposed; he also condemned the GCC countries' policy against Tehran (Ulrichsen (a), 2017). The statement was publicized on Qatar's National News Agency website on May 23, 2017.

On May 24, the Public Affairs Office of Qatar's government belatedly claimed that the National News Agency had been hacked, disseminating false information ('Qatar Says,' 2017). The New York Times wrote that the hacking incidents were part of a long-standing cyberwar between Qatar and other Gulf states that only recently came to light. In

May 2017, the email account of the UAE ambassador to the United States, Yousef Al Otaiba, was hacked. The Huffington Post noted that the emails revealed links between the UAE and the U.S.-based pro-Israel Democratic Defense Fund, which were seen as an attempt to ‘embarrass’ Al Otaiba (Akbar Shahid, 2017). The event deepened the existing confrontation between the two sides.

In the early morning of June 5, Bahrain's Ministry of Foreign Affairs announced cutting diplomatic ties with Qatar. Similar announcements from Saudi Arabia, the UAE, and Egypt quickly followed his statement. On the same day, Saudi Arabia blockaded Qatar's only land border, and by the end of the day, Qatar was under an air, land, and sea blockade. Saudi Arabia, Egypt, the UAE, and Bahrain accused Qatar's relations with Turkey and Iran as well as supporting terrorist groups and destabilizing the whole region (Lynch (a) 2017, 14).

On June 23, the Quartet (Saudi Arabia, Bahrain, UAE, and Egypt) submitted a 13-point demand letter to Doha through Kuwait's mediation. The demands required Qatar to close the Al-Jazeera news network, shut down all media outlets that Qatar finances directly or indirectly, and stop the Turkish military presence in Qatar and any joint military cooperation with Turkey within Qatar (Wintour (b) 2017, June 23). It should be noted that the close military-political cooperation established earlier between Qatar and Turkey allowed Turkey to increase its role and influence in the Gulf subcomplex. The blockading countries had to restrain this penetration to avoid irreversible transformations in the sub-complex because that period was an opportunity for Ankara, allowing it to boost its popularity across the broader Middle East and shape its brand as a role model (Amour 2020, 411).

The demand letter also envisaged the severing of relations with Iran and the termination of ties with the Hezbollah and several other organizations. Among the demands were the extradition of ‘terrorist figures’ and wanted persons from Saudi Arabia, the UAE, Egypt, and Bahrain to their countries of origin, the freezing of their accounts, and the provision of information on their whereabouts, movements, and finances (Wintour (b) 2017, June 23). The Arab Quartet demanded that Qatar should stop granting citizenship to people who are wanted by these countries and cease all contact with the political opposition of these countries. Qatar was required to hand over all documents related to its past contacts with those opposition groups. The Quartet demanded that Qatar align its military, political, social, and economic decisions with those of the Gulf Arab states following the 2014 Riyadh agreements. Doha had to meet these demands within ten days (Wintour (b) 2017, June 23). Qatar rejected all the demands, arguing that they

questioned Qatar's sovereignty and violated the norms of international law ('Qatarcrisis,' 2017).

According to the report by The Washington Post on July 16, 'an analysis of data available to the U.S. Central Intelligence Agency officials indicates that the UAE organized the hacking attack.' Intelligence officials stated that the UAE officials discussed the hack on May 23, a day before the operation was executed (Bartz and Cooney, 2017). However, Al Otaiba denied these claims and insisted that his country had no role in the alleged hacking attack (Qiblawi and Dewan, 2017). Qatar's Ministry of Interior announced that their experts have evidence that the UAE organized the hacking attack (Younes, 2017).

Qatar overcame the blockade by implementing a flexible and effective foreign policy. The Qatari authorities found alternative ways of importing goods, such as changing shipping routes and identifying new importers of staple foods. The country experienced economic growth due to these efforts (Pashayan 2018, 86). Opening the \$7.4 billion Hamad underwater port in September 2017 also helped the country accommodate more cargo ships (Finn and Weir, 2017). Furthermore, the government launched the Qatar National Food Security Strategy (2018-2023) in 2018, which focused on promoting local food production, securing strategic reserves, and safeguarding domestic markets (United Nations, 2018).

The Gulf crisis contributed to the rapprochement of Qatar and Iran on the one hand and Qatar and Turkey on the other. Turkey tried to maintain a neutral profile during the first few days of the crisis and to serve as a mediator between the factions. However, very soon Turkey began to take a clear pro-Qatari position in the dispute (Dihstelhoff and Lohse 2020, 50). Ankara provided food and essential goods shipments to Qatar. According to the bilateral agreement signed in 2014, Turkey deployed a military contingent to strengthen military cooperation with Qatar (Gurbuz, 2017). President of Turkey Erdogan openly criticized the Arab states' decision to isolate Qatar in 2017 ('Turkey's Erdogan,' 2017). Two days after the blockade, Turkey's parliament officially approved two military cooperation agreements that had been previously reached during an extraordinary session. In December 2019, the Turkish-Qatar military headquarters was opened ('Erdogan: Turkey-Qatar,' 2019). The presence of Turkish and American military bases has played a crucial role in mitigating further military confrontations, as the boycotting countries were compelled to factor in this reality before engaging in any military aggression against Qatar (Pashayan 2018, 87). Thus, the military bases have acted as a deterrent to any potential military escalation, ultimately leading to a peaceful conflict resolution. In November 2017, Iran, Qatar, and Turkey signed an agreement to

facilitate land and sea cargo transportation, expand trade relations, and establish a working group to assess the agreement's effectiveness (Middle East Monitor, 2017).

Two months after the blockade began, Doha restored diplomatic relations with Tehran, which were severed in 2016. Iran offered to provide essential goods and food through its ports and the U.S. airspace for flights to Europe (Walsh, 2017). These processes showed that much of the GCC's identification of the Islamic Republic of Iran as the major threat to domestic and Gulf stability had failed to drive Arab Gulf states' foreign policies. Differences over the principles of political Islam, among other issues, have led to the changes in threat perception and balancing behavior (Santini 2017, 107). With their demands on Qatar, blockading states have again posited political Islam as a primary concern besides Iran in the formation of regional axes. Since 2017, political Islam has been a crucial factor in the foreign policies of Saudi Arabia, the UAE, Qatar, and Turkey (Dihstelhoff and Lohse 2020, 51). The confrontation and polarization in the Gulf region and the broader Middle East between revisionist and status quo blocs for regional hegemony can also be considered a rivalry between different versions of Islamism (Yeşilyurt and Yetim 2020, 137).

Although Qatar's blockade did not escalate into a military conflict, it seriously impacted the region's political, economic, and social systems. The blockade of Qatar dealt a great blow to the GCC, causing its members to struggle to restore the organization's modernity and effectiveness (Ulrichsen 2020, 29).

The endeavor to suppress and isolate the state of Qatar proved unsuccessful. Despite the challenges, the country successfully operated to achieve its strategic goals of the 'Qatar National Vision 2030'¹, consolidating its position in the Middle East and Near East through regional cooperation and integration.

The U.S. role in the Qatari crisis

The global powers can deeply penetrate an RSC. These powers become involved in the region's security structure and shape it according to their interests. External powers adapt and internalize the role of regional entities shaping the regional social structure. They can influence the concepts and behavior of regional actors and adjust their policies to shape the regional structure according to their interests. The GCC states, except for Qatar and Oman, have a security alignment with the U.S. and have a common enemy,

¹ Qatar's National Vision 2030 is a comprehensive roadmap that envisions the country's transformation into an advanced society by 2030. It outlines the country's long-term objectives, including sustaining its development and providing a high standard of living for its people. This vision serves as a framework for creating national strategies and implementation plans, guiding Qatar's path to future development.

Iran. Therefore, the Gulf can be defined as penetrated by this global power (Grabowski 2020, 22).

The Qatar crisis created an urgent problem for the U.S. The future of the Gulf security system was in question. For the first time since 1990, the U.S. faced the problem of maintaining the balance of power in the Gulf region and protecting its interests. Any shift in the power dynamic could result in a complete reconfiguration of power in the region, which would inevitably impact the U.S.'s regional interests (Asisian 2018, 6). The U.S. interests in the region include protecting energy production and transportation, counteracting Islamic radicalism and terrorism, and preventing the spread of weapons of mass destruction. To achieve these goals, the United States is receiving support from medium and small powers in the Gulf. In return, Arab monarchies receive direct support, such as arms sales, and indirect support from the U.S. (Grabowski 2020, 25).

Donald Trump's approach completely contrasted with Obama's policy in the Middle East (Lynch, 2016). Trump had planned to relay more responsibilities to U.S. allies in the Middle East without losing its regional strength. One indication of the U.S. involvement in regional affairs is the creation of the Middle East Security Alliance (MESA)¹ by Donald Trump. However, there is no consensus on Iran's perception as a direct threat in this bloc. Indeed, the U.S. presence in the Gulf triggered a considerable arms buildup, which caused the Gulf to become the most militarized in the world (Grabowski 2020, 26).

As the crisis began, Trump's tweets directed against Qatar became the subject of intense debate. (Wintour (a) 2017, June 6). Trump's remarks were in contrast to the statements made by U.S. officials who were involved in resolving the Qatari crisis. Richard Tillerson, the Secretary of State, and George Mattis, the Defense Secretary, sought to persuade the president to consider Qatar's importance to checks and balances in the regional system (Kabalan (a) 2018, 43-44). The U.S. Department of Defense opposed further escalation of the conflict due to the presence of the largest U.S. Air Force base in Qatar, Al-Udeid, and the U.S. Central Command (Cafiero 2019, 129).

Moreover, Qatar has played a key role as a mediator in resolving the ongoing tensions between Israel and Hamas (Ulrichsen (b) 2017, 9). This role gained importance in the context of the implementation of the 'Deal of the Century' to resolve the Palestinian-Israeli issue. Qatar's involvement was important as it had to provide economic support to the Gaza Strip. Additionally, the U.S. leverages the Qatari mediation mission to conduct behind-the-scenes diplomacy with Iran (Glazova 2019, 99).

¹ MESA is a U.S.-sponsored alliance of Arab countries along the lines of the North Atlantic Treaty Organization (NATO). It is often referred to as the "Arab NATO." Prospective MESA members include Saudi Arabia, Bahrain, Qatar, Kuwait, the UAE, Oman, Jordan, and Egypt.

One of the reasons for the inability to resolve the crisis was the need for a unified position among the U.S.'s ruling circles. On the one hand, Trump supported Saudi Arabia's accusation of Qatar in the financing of terrorism. On the other hand, the U.S. Secretary of State emphasized the role of Doha in the fight against terrorism (Lynch (a) 2017, 15). In the summer of 2017, The Washington Post noted in one of its publications that 'no one knows who speaks for the United States' (Lynch (b), 2017).

President Donald Trump prioritized building relations with Saudi Arabia and the UAE as two pillars of his regional policy. This approach was also facilitated by the close personal ties of the Trump family with Crown Prince Salman of Saudi Arabia and the UAE Ambassador Al Otaiba. Furthermore, Trump's son-in-law and advisor, Kushner, played a significant role in promoting this policy. As a result, the president's close circle supported the pressure on Qatar (Ulrichsen (b) 2017, 6; Glazova 2019, 100).

In July 2017, the U.S. Secretary of State Tillerson was dispatched to the Middle East to manage the conflict in the Gulf (Harris, 2017). Tillerson recommended resolving the dispute through U.S. mediation. He publicly pointed out three negative consequences of Qatar's blockade: humanitarian concerns, regional cooperation in the fight against terrorism, and the reduction of American and international business activity in the region ('Qatar Blockade,' 2017). Tillerson played a significant role in persuading President Trump to largely withdraw the allegations against Qatar. This development marked a significant shift in the U.S. approach towards Qatar (Ulrichsen, 2018).

In January 2018, the State of Qatar and the U.S. signed a memorandum of understanding to establish a 'Strategic Dialogue' between the two countries. This agreement was considered a pivotal step in developing bilateral relations between the parties. The document emphasized the importance of an immediate resolution of Qatar's crisis, aiming to contain and counter any external threats to Qatar's territorial integrity. The U.S. emphasized the importance of maintaining freedom of navigation, air traffic, and unimpeded trade. This meant Washington's rejection of Qatar's blockade (Kabalan (b), 2018). Despite all his efforts, Tillerson failed to bring the parties to the negotiating table, and his proposed plan proved unsuccessful. In March 2018, Tillerson left the Gulf without meaningful breakthroughs (Gaouette et al., 2018).

Tillerson's resignation raised questions about whether the U.S. will change its stance regarding the Qatar crisis (Cafiero 2019, 140). Following this event, Saudi Arabia and Qatar authorities embarked on high-level visits and costly campaigns to win political favor with Washington (Delevingne et al., 2018). Riyadh, Abu Dhabi, and Doha tried to win the support of the White House, Congress, American media resources, and influential expert community members. They spent considerable resources lobbying and influencing

U.S. public opinion (Glazova 2019, 101). Opposing parties' desire to get the White House's approval sometimes resembled competition. The Qatari public campaign was supported by thirty American lobbying firms that the Qatari embassy funded to promote Qatari interests in the American power structures (Grafov 2020, 188).

Qatar's support for Hamas was the card that the anti-Qatari quartet effectively used to curry favor with U.S. decision-makers. The UAE and Saudi Arabia aimed to gain the support of pro-Israel, anti-Iranian, and anti-Islamist lawmakers in Congress (Stephens 2017, 13).

Since March 2018, the Trump administration has been focused on creating an anti-Iranian front. The U.S. was convinced that Iran had launched a campaign against U.S. forces and interests in the Gulf and, therefore, began to strengthen its military presence in the region (Grabowski 2020, 19). The competition between regional actors in the Gulf no longer aligned with U.S. interests (Glazova, 2019, 103). The desire to pressure Tehran and weaken its position in the region prompted Washington to take steps to end the crisis within the GCC (Cherkaoui, 2018).

The overcoming of Qatar's diplomatic crisis

During Saudi Crown Prince Salman's visit in March 2018, Trump endorsed Riyadh's purchase of American military equipment (DeYoung and Mufson, 2018). In early April, Trump expressed his support and appreciation to Qatar for its efforts in 'fighting all forms of terrorism and violent extremism.' Furthermore, he stated that Washington and Doha are effectively implementing the stability process in the Gulf region (Ahmann et al., 2018).

In late April 2018, the Secretary of State, Mike Pompeo, traveled to Riyadh to bring the opposing parties to the negotiating table. During this visit, Pompeo cited the need for joint efforts to confront Iran, stabilize Iraq and Syria, finally destroy ISIS, and stop the war in Yemen (Harris, 2018). The U.S. demanded that Saudi Arabia and the UAE end the blockade and normalize their relations with Qatar. The Arab Quartet maintained its stance towards Qatar and did not change its policies towards the country at that time. The Quartet aimed to send a clear message to all countries in the region that Saudi Arabia and the UAE will not allow Qatar to become a fifth column for Iran in the Gulf and will not tolerate Doha's special connections with Iran and the Muslim Brotherhood, which they perceive as a threat to regional stability (Glazova 2019, 104).

To end the Gulf crisis, Trump suggested that the leaders of the conflicting parties meet at Camp David in May 2018. He emphasized that the parties should make a breakthrough in resolving the crisis before the meeting (Neubauer and Cafiero, 2018).

However, the leaders of the conflicting countries failed to reach an agreement, and Trump's initiative failed. As a result, the meeting was postponed until autumn 2018 and then again until 2019 (Glazova 2019, 106).

After the Saudi journalist Khashoggi's assassination in Istanbul, Trump stated that he did not see any obstacles to blocking Saudi investment for that reason (Stone, 2018). This statement attracted attention to Trump's business ties with Saudi Arabia from not only journalists but also members of Congress. As a result, they demanded an explanation from Trump about the situation in the Gulf and his ties through various letters (Raskin, 2024). The White House hoped Riyadh would become the region's main pillar of American interests. However, the assassination of Khashoggi and the actions of the Saudi authorities hindered the implementation of Washington's political initiatives.

The Qatar crisis raised doubts about the U.S.'s role as a security guarantor in the Gulf. Saudi and UAE authorities were more concerned in 2019 when the U.S. did not immediately intervene after attacks on UAE tankers. The lack of U.S. response prompted a reassessment of the situation in the Gulf (International Crisis Group, 2021). Washington gradually began to appear on the sidelines of the Qatar crisis.

Kuwait and Oman initially adopted a neutral stance and endeavored to mediate to reconcile the parties. However, the Quartet declined Oman's offer of mediation, which was based on Oman's strong ties with Iran (Altiok 2023, 606). Both Qatar and the Quartet found Kuwait's mediation mission to be acceptable. The Emir of Kuwait, Sheikh Sabah's personality, and Kuwait's neutrality played essential roles in this achievement. The international community also welcomed Kuwait's mediation efforts. A clear example is the UN report on the Gulf crisis, which emphasized the importance of Kuwait's mediation (Altiok 2023, 607).

After several attempts to open talks between Saudi Arabia and Qatar, on December 4, 2020, Saudi Foreign Minister Faisal bin Farhan Al Saud announced that 'a final agreement is being reached' (Bin Salman, 2020). In his turn, the Foreign Minister of Qatar, Al Thani, announced that 'certain steps have been taken that will put an end to the crisis' (Gambrell, 2020). Subsequently, on December 30, 2020, the GCC announced that the King of Saudi Arabia had invited the Emir of Qatar to participate in the GCC Summit scheduled for January (Asharq Al-Awsat, 2020).

On January 4, 2021, the Emir of Kuwait announced that Saudi Arabia would lift the blockade of Qatar and reopen the borders. On January 5, 2021, the Emir of Qatar, Sheikh Tamim bin Hamad Al Thani, arrived in Saudi Arabia to attend the Council of Ministers summit in Al-Ula city. The leaders signed the Al-Ula Declaration of 'Solidarity and Stability.' Saudi Arabia and other countries of the anti-Qatar camp restored full ties

with Doha ('Qatar blockade,' 2021). The summit agreement highlighted the need for greater military, foreign policy, and economic integration among the GCC member states (Khalid, 2021). One of the reasons for signing the declaration by these countries was not only the fact of pursuing a coordinated policy with Saudi Arabia but also their interest, which at that stage was connected with the presidential elections in the United States and Joe Biden's victory (Thafer, 2021).

It is worth mentioning that although Qatar did not accept the Quartet's demands, the Arabic version of Al Jazeera has become more cautious when discussing Saudi Arabia and other countries. The channel's coverage has changed, avoiding specific topics it used to cover, such as criticizing human rights in Saudi Arabia or the UAE's foreign policy (Salman, 2021). Al Jazeera was a major project on its way to becoming a media empire that was part of a soft power toolkit, like political Islam, especially the Muslim Brotherhood. Qatar had to keep those tools at any cost, for the formation of which much money had been spent for years.

Conclusion

Qatar's diplomatic crisis severely impacted the region's political, economic, and social systems. It was aimed at revising the region's status quo and weakening Qatar's position. However, the challenges posed by the crisis turned into opportunities for Qatar. The blockade strengthened Qatar's position within the region and on international platforms. The efforts to isolate Qatar created new opportunities for regional power players, particularly Iran and Turkey, to expand their economic and political ties with Qatar. This particular sub-region has always had a system dominated by one power, but in recent years, Qatar has challenged that system. This challenge was also one of the main causes of the diplomatic crisis. Despite this, Qatar remains a small state but a middle power and has not been able to achieve dominance over the region.

The Qatari crisis has highlighted the vulnerability of regional security. Iran's active policy, Qatar's diplomacy in power balancing, and Turkish soft and hard power in this subsystem were signals to address this regional dispute. The Shia (Iranian) threat versus the Sunni (Wahhabi) threat and the neo-Ottomanism threat versus Sunni Wahhabi were also decisive in overcoming the crisis. The crisis resolution revealed that neither the Gulf countries nor the international community were ready for radical changes in the Gulf security system. The parties recognized that the region would collapse and weaken if they failed to reconcile because external players would take advantage of it. The GCC

countries have their development visions¹, and the crisis-tense situation could jeopardize all those projects as they can only be implemented with adequate security measures. It is considerable that several years after the Qatar Crisis, Saudi Arabia signed a reconciliation deal with Iran.

The Qatari crisis resolution showed that the GCC countries, led by Saudi Arabia, did not want to deepen the situation further and question this sub-region's security. This was the reason for settling relations with Qatar without any concessions. Saudi Arabia managed to prevent the unrest in the Gulf security complex and prevent shifts in the regional order of the Gulf. By restraining the penetration of external forces, the GCC countries could normalize their relations and restore the security environment in this sub-region.

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¹ All the GCC countries have undertaken considerable economic reform programs and established 'Vision' documents to outline strategies for diversifying, improving, and developing economic growth. All the 'Visions' have short- to long-term development strategies to facilitate the rapid diversification of the GCC economies and foster competitive national economies.

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THE CARTER ADMINISTRATION'S ATTEMPT TO RECONVENE THE GENEVA MIDDLE EAST PEACE CONFERENCE**

***Abstract:** When the Carter administration assumed power in 1977, it prioritized the achievement of Middle East peace as its foremost task. It endeavored to facilitate a comprehensive Arab-Israeli peace by reconvening the Geneva Middle East Peace Conference and inviting representatives from Israel, Egypt, Syria, Jordan, and Palestine to negotiate a resolution to the Arab-Israeli conflict in Geneva. However, the Carter administration encountered challenges in its Arab-Israeli diplomacy, particularly regarding substantive and procedural issues related to restarting the conference. It struggled to reconcile differences between the Arab and Israeli sides on crucial peace-related matters such as borders and the inclusion of Palestinian delegates. Additionally, it faced difficulties in assisting Arab countries in resolving internal contradictions regarding their participation format. Ultimately, the Carter administration's efforts to reconvene the Geneva Peace Conference fell short. This failure was attributed to several factors, including the deep-seated psychological divide between Arabs and Israelis, internal contradictions among Arab nations, the significant influence of pro-Israel forces in the United States constraining pressure on Israel, and President Carter's limited experience in international affairs, coupled with underestimations of the complexities inherent in the Arab-Israeli conflict.*

***Keywords:** Reconvening the Geneva Middle East Peace Conference, Substantive issues, Procedural issues, The Palestinian representation.*

Introduction

The Arab-Israeli conflict stands as one of the most enduring, complex, and far-reaching regional issues of the 20th century, serving as a primary source of ongoing instability in the Middle East. Rooted in the Arab countries' resistance to the establishment of a Jewish state in the Palestinian territory, the conflict also reflects the deep-seated tensions between Zionism and Arab nationalism that have escalated over the

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past century. Following the founding of Israel in May 1948, tensions between Arab nations and Israel escalated, resulting in three major Arab-Israeli wars between 1948 and 1977, preceding the Carter administration's tenure.

Recognizing the strategic significance of the Middle East to American interests, the Carter administration prioritized the pursuit of Middle East peace upon assuming office in 1977. With this aim, it sought to reconvene the Geneva Middle East Peace Conference, bringing together representatives from Israel, Egypt, Syria, Jordan, and the Palestinian territories in Geneva to negotiate a comprehensive resolution to the Arab-Israeli conflict.

Despite concerted diplomatic efforts throughout 1977, the plan to reconvene the Geneva Peace Conference ultimately faltered. This paper seeks to provide a detailed analysis of the Carter administration's endeavors to reconvene the Geneva Middle East Peace Conference, along with an exploration of the factors contributing to its failure, drawing insights from newly declassified U.S. diplomatic documents and other relevant sources to illuminate this pivotal moment in international diplomacy.

Jimmy Carter's new Middle East strategy

Following the conclusion of the Fourth Middle East War in 1973, Henry Kissinger, then U.S. Secretary of State, employed a focused and incremental shuttle diplomacy strategy in the region. This method systematically addressed and mitigated sources of conflict, resolving them individually. Notably, the resolution of one aspect of the conflict did not hinge upon the resolution of others, and initial steps were not necessarily tied to the ultimate outcome. Through active mediation by the United States, significant progress was achieved as Syria and Israel, along with Egypt and Israel, each signed three separate disengagement agreements. These agreements played a crucial role in stabilizing the volatile situation in the Middle East. However, by the close of 1975, Kissinger's step-by-step diplomacy had reached an impasse, necessitating a fresh approach to advance the Middle East peace process.

On January 20, 1977, Jimmy Carter assumed office as the new President of the United States. Recognizing the Middle East conundrum as a pivotal aspect of his foreign policy agenda, he advocated for a fresh approach aimed at achieving a comprehensive resolution to the region's challenges. Carter contended that a departure from Kissinger's incremental diplomacy was necessary to break the impasse in the Arab-Israeli conflict.

Inspired by the recommendations outlined in the 1975 report 'Toward Middle East Peace' by the Brookings Institution Research Group, Carter, alongside his national security advisor Zbigniew Brzezinski, identified shortcomings in the previous step-by-step methodology. Firstly, they noted that this approach demanded concessions from

Israel at each stage, with the promise of legitimacy only upon completion of all steps and the signing of a peace treaty with neighboring states, rendering negotiations non-negotiable at that juncture. Secondly, the step-by-step approach failed to adequately address the core issue of Palestinian aspirations, crucial for the establishment of genuine peace (Spainier 1992, 255).

In response, the United States proposed a resumption of negotiations in Geneva, advocating for the reopening of the 1973 Geneva Peace Conference under the auspices of the United Nations. This initiative aimed to foster an inclusive platform for all involved parties to engage in dialogue, with the ultimate goal of achieving a comprehensive settlement to the Middle East dilemma.

However, the resumption of the Geneva Conference encountered numerous challenges, both in terms of substance and procedure. These challenges included divergent perspectives on the nature of peace, borders, and the Palestinian question among the Arab-Israeli parties and within the Arab states.

Procedurally, some key issues emerged. There was the question of Palestinian representation: Who would represent the Palestinians at the Geneva Conference? How would they participate? Would they form a separate delegation or be part of a pan-Arab delegation? Should a delegation be organized by country, which nation would it represent?

The Arab States Summit held on October 28, 1974, in Rabat recognized the Palestine Liberation Organization (PLO) as the sole legitimate representative of the Palestinian people. Consequently, Arab countries insisted that only the PLO could represent Palestine at the Geneva Conference, threatening to boycott the conference if the PLO was not present. However, Israel vehemently refused to engage with the PLO, citing its involvement in terrorist activities and its avowed aim of Israel's destruction.

Moreover, Israel argued that acknowledging Palestinian rights as individuals was acceptable but rejected the notion of Palestinian rights or statehood. Throughout much of 1977, the Carter administration's diplomatic efforts to reconvene the Geneva Conference in the Middle East were hindered by substantive issues and the dilemma of Palestinian representation. Despite these efforts, no significant breakthroughs were achieved, rendering Carter's new strategy in the Middle East fraught with frequent challenges.

The Carter Administration's dilemma in reopening the Geneva multilateral Conference

The Carter Administration's new strategy crystallized through a series of three meetings: an informal gathering on January 30, 1977, a Policy Review Committee session

on February 4, and a National Security Council assembly on February 23. During these meetings, participants unanimously acknowledged the paramount importance of initiating a peace initiative in the Middle East (Brzezinski 1983, 85-86).

At the February 4 meeting, the Policy Review Committee recommended to the president that the Middle East be addressed as an urgent priority. Secretary of State Cyrus Vance was designated to embark on immediate discussions regarding both procedural and substantive issues in the region. In mid-February, Vance commenced a trip to the Middle East to check leaders' perspectives and explore potential common ground for Arab-Israeli peace. Subsequently, Arab-Israeli leaders were invited to Washington for discussions with the new president. Upon Vance's return, President Carter chaired a National Security Council meeting on February 23 to receive a report on Vance's trip. Vance outlined the common ground and differences among the Arab-Israeli parties on substantive and procedural issues. The parties expressed willingness to attend the Geneva Conference later in 1977, potentially in September, provided procedural issues were resolved. They envisaged discussing a comprehensive solution at the Geneva meeting, addressing substantive matters without preconditions (United States Department of State 2013, 131-132).

In the months that followed, the Carter administration's strategy was to try to use the influence of the presidency in a highly public way, to discuss sensitive issues personally, and to hold meetings with Middle Eastern heads of state to break the deadlock on substantive issues. Carter first welcomed Israeli Prime Minister Yitzhak Rabin in Washington on March 7. The talks did not go well, with the two men unable to establish a good personal relationship and neither able to suppress his antipathy toward the other. Rabin stated Israel's view of the three elements of peace (the nature of peace, peaceful borders, and the Palestinian question); Carter agreed with Israel's view of the nature of peace (establishment of diplomatic relations, normal Arab-Israeli exchanges), but considered Israel's settlement activity in the occupied territories illegal and agreed to Israel's security lines in areas such as the West Bank and Gaza. Some international troops might be stationed, but at the same time Israel would insist on withdrawing from most of the occupied territories. Finally, Carter also wanted the Palestine Liberation Organization to join the Arab delegation to the Geneva peace talks (United States Department of State 2013, 132-156).

At the banquet to welcome Rabin, Carter mentioned that Israel could have 'defensible borders' (United States Government Printing Office 1977, 330). Two days later, at a presidential press conference, he spoke of 'an end to Arab-Israeli hostilities, recognition of Israel's right to exist and to live in peace, open borders, free trade, and

communication; this would involve a significant Israeli withdrawal from the territories it currently controls and some minor adjustments to the 1967 borders, but this would be negotiated; settlement of the Palestinian question' (United States Government Printing Office 1977, 342-347). The announcement had particularly worried American Jewish groups, which suspected a shift in the U.S. Middle East policy. Secretary Vance denied this when he met with a delegation of prominent American Jews.

A few days later, in Collington, Massachusetts, on March 16, Carter reiterated these points, outlining them in his three principles for Middle East peace, namely, that the first prerequisite for peace was 'recognition by Israel's neighbors of Israel, Israel's right to exist, Israel's right to exist forever, and Israel's right to exist in peace.' He defined it as 'the borders of Israel and Syria, Israel and Lebanon, Israel and Jordan, Israel and Egypt must be open to travel, tourism, cultural exchange, and trade, so that, whoever the leaders of these countries may be, the people themselves will develop a sense of mutual understanding and a sense of common purpose in order to avoid the repeated wars and deaths that have long afflicted the region.' The second precondition was 'the establishment of Israel's permanent borders.' And the Palestinian question was the third precondition. Speaking on the issue, Carter publicly stated: 'The Palestinians have until now declared that Israel has no right in Palestine, that the land belongs to the Palestinians, and that they have never renounced their professed commitment to the destruction of Israel. This has to be overcome. There should be a home for the Palestinian refugees, who have suffered for many years. The exact way to solve the Palestinian problem is to deal immediately, first, with the Palestinians themselves and the Arab states, and second, with the Arab States and Israel negotiating the Palestinian problem' (United States Department of State 2013, 164-165; United States Government Printing Office 1977, 386-387). Carter's 'homeland' statement was like dropping a giant bomb at the time, stirring up all sides. The Arabs were encouraged, and it was not long after Carter's speech that the importance of the word 'homeland' prompted a response from the PLO. Yasser Arafat, the PLO leader, praised the president's announcement on CBS's '60 Minutes' television program. Political observers initially interpreted Mr. Carter's reference to a Palestinian homeland as an endorsement of a Palestinian state, angering Israelis and their American supporters. American Jewish leaders angrily attacked Mr. Carter. They and the Israelis were already convinced that the new American administration was distancing itself from Israel. Israel was founded on the grounds that it was the homeland of the Jewish people, and by associating the word with the Palestinians, Carter seemed to imply that there should be a similar Palestinian state. Mr. Brzezinski hastened to clarify the situation, assuring Simcha Dinitz, the Israeli ambassador, that the reference to the homeland had 'no

particular political meaning' (Brzezinski 1983, 91; Gwertzman, 1977). President Carter's use of the term 'Palestinian homeland' also angered Rabin, who was busy fighting for his political life in the Israeli elections and felt severely weakened. The opposition Likud party campaigned on Labor's difficult relationship with the new U.S. administration.

Over the next three months, Carter met with Egyptian President Anwar Sadat, Jordan's King Hussein (April 24-27), Syrian President Hafez al-Assad (May 9), and Saudi Crown Prince Fahd (May 25). At each meeting, three substantive issues—peace, border security, and the Palestinian question—were explored in greater depth, along with the procedural question of how the Palestinians would be represented in the upcoming negotiations.

In early April, Egyptian President Anwar Sadat visited Washington. Carter's welcoming speech at his first meeting with Sadat on April 4 was warm and generous, in contrast to his frosty attitude toward Rabin a few weeks earlier. Carter saw Sadat as a 'shining light' illuminating the prospects for peace in the Middle East and, more practically, as a potential friend and ally who was fascinated by Sadat (Carter 1982, 282). In their talks, Sadat suggested that there might be some minor changes to the 1967 Arab-Israeli lines, at least in the West Bank but not in Sinai. He also said that if the United States offered Israel a defense deal, he would not oppose it. Then, while expressing support for the idea of a Palestinian homeland, he said such a Palestinian state should have some kind of connection to Jordan. But he insisted on two points: that Israeli soldiers could not remain on Egyptian soil, and that opening the border and diplomatic relations involved national sovereignty and could not be part of the negotiations. For the Geneva conference, Sadat insisted that peace in the Middle East should be achieved under American auspices. If the United States could come up with some proposals before the Geneva conference, they would be accepted, and Egypt would go to Geneva just to sign the agreement. Sadat could go to Geneva and negotiate with Israel; that process would take 10 years, and Egypt would get nothing. Sadat, who apparently shared Carter's sense of urgency, said that an agreement should be reached in 1977 and implemented before the 'expiration' of the second disengagement agreement in October 1978. In addition, Sadat's opposition to Syrian President Bashar al-Assad's call for a separate delegation of Arab states to attend the Geneva conference reduced his flexibility. Sadat also reiterated that it was impossible to open the borders for the free movement of people and goods. Carter strongly disagreed. Carter said Israel should withdraw its troops in exchange for peace and open borders. With regard to the exchange of ambassadors, Sadat insisted that peace could not be imposed (Quandt 1986, 50-51). Sadat also brought the very good news that the PLO leader had spoken to him privately about the PLO's desire for peace (Carter

2010, 39). Carter just raised the possibility of a meeting with Arafat. In his view, this could be a crucial question.

In late April, Jordan's King Hussein visited Washington, and while his initial meeting with Carter was cordial, it yielded limited progress. Discussions primarily revolved around the contentious issue of Palestinian representation at the Geneva conference. Reports suggested that Arafat insisted on a separate Palestinian delegation, whereas Hussein advocated for a unified Arab delegation that included Palestinians.

Following two days of deliberations at the White House on April 26, Hussein conveyed to reporters that a lack of thorough assessment of the challenges and opportunities could render the Geneva conference futile. He urged Israel to 'take a leap of faith towards peace' by consenting to withdraw to the pre-1967 borders (Fine and Himmelferb 1979, 130).

After meeting with Assad in Geneva, Carter completed his first round of talks with the leaders of all countries scheduled to attend a future peace conference in Geneva. Carter's meetings with Crown Prince Fahd of Saudi Arabia and the incoming prime minister of Israel would follow, but the groundwork was laid in mid-May. Only four months into his tenure, Carter's views on the Arab-Israeli conflict had come into sharp focus. The president publicly pledged that the United States would play an active role in breaking the deadlock in Arab-Israeli peace talks. He believed that the Middle East dispute was closely related to the energy crisis and the danger of superpower confrontation. He was also convinced that progress had to be made in 1977 or else the chance for peace might be lost.

Carter made clear to each leader his desire for a comprehensive peace agreement, but he also acknowledged that Arabs and Israelis had very different goals and different ideas about how to achieve them. The Arabs wanted an end to the existing state of war, the return of all occupied territories, and the establishment of a Palestinian entity. Any other progress towards the normalization of relations between Israel and the Arab States would be an issue that each Arab State could pursue according to its own sovereign aspirations and needs. However, the Israelis were not interested in any agreement that did not include the normalization of relations, nor did Israel want to simply withdraw to the pre-1967 borders. There were also procedural issues that will determine the format of the Geneva conference. Israel did not want to negotiate with the PLO, but according to a 1975 Arab League decision, the PLO was the only organization authorized to speak on behalf of the Palestinian people. Moreover, the Israeli Government preferred to negotiate with each Arab country individually, as it believed that any conference with a single Arab delegation was bound to fail from the outset due to squabbling among Arab states (Stein

1999, 192-198). Even the Arabs could not agree on the form of Arab representation in Geneva. Syria wanted a unified Arab delegation to eliminate Egypt's bargaining power; Egypt, for its part, wanted to represent every Arab delegation because it feared a delegation could lead to infighting that would prevent any agreement. Jordan wanted 'a single pan-Arab delegation that can be divided into functional commissions to deal with each issue' (Vance 1983, 176).

American Arab-Israeli diplomacy after the Israeli election

The politics of the Middle East were unpredictable, and the good times were short-lived. In the Israeli general election of May 17, 1977, the Labor Party, which had been in power for nearly 30 years since the establishment of the state of Israel, suffered a crushing defeat, with Menachem Begin's Likud bloc shocking all sides with a surprise victory. In a statement on the day of the vote, Begin said he would never give up 'Judea and Samaria' (the biblical name for the West Bank) or withdraw Israel to the 1967 lines (Washington Post 1977, May 19). He also said he supported the expansion of Jewish settlements in the West Bank and would not attend the Geneva conference where the PLO was represented (Newsweek May 30, 1977, 36-37).

As Carter contemplated the gravity of Begin's vision, the Middle East team, increasingly under the guidance of Secretary of State Vance, began to develop concrete strategies to further the peace process. At the Policy Review Committee meeting on June 10, it was felt that Begin should be invited to Washington as soon as possible. On procedural matters, the committee recommended that Mr. Vance should travel to the Middle East in August and then schedule informal meetings with foreign ministers in the United States before the Geneva meeting. For the time being, the Palestinian question would be shelved, and the Soviet Union should not introduce talks. Vance also raised the possibility of trusteeship and referendums on the West Bank and Gaza at the meeting. The idea was considered worthy of further study (Quandt 1986, 70). The Carter administration had begun looking for ways to inject the concept of a transition phase into the West Bank talks and sidestep the question of PLO participation by raising the possibility of a referendum.

After much preparation for Begin's visit, the Carter administration welcomed Israel's new prime minister and his wife on July 19. Despite all the predictions, Carter found Begin to be amiable, sincere, religious, and decent, and it became clear that changing his position would not be easy. After Carter elaborated the position of the United States, Begin talked about Israel's position on peace, borders, and the Palestinian issue and put forward the procedural proposals and options for convening the Geneva conference (United States Department of State 2013, 352-353). Later in the day, Vance

also discussed with Begin the five principles proposed by the United States for agreement before the Geneva conference: a comprehensive peace based on UN resolutions 242 and 338; the definition of peace will be very broad; when the parties demonstrate their good faith, peace will involve a phased withdrawal from the occupied territories and the acquisition of borders; and the creation of a Palestinian entity (United States Department of State 2013, 359-360). Begin agreed to all the principles except for the Palestinian entity. Begin wanted Carter to stop publicly mentioning Israel's withdrawal to the pre-1967 lines and adjustments. Carter's discussions with Begin made him happy and encouraged by Begin's apparent desire to work with the United States. But the goodwill generated by Begin's visit to the United States did not last long, and the optimism was short-lived. Upon his return to Israel, Begin recognized three controversial new settlements in the West Bank as permanent and legal, prompting the U.S. State Department to issue a strong statement expressing deep regret (Carter 2010, 71). Carter also criticized efforts to make settlements permanent or build new ones at a July 28 news conference (Medzini 1981, 55). Begin's insistence on building settlements and his unwillingness to accept the principle of withdrawal from the West Bank under any circumstances became a source of conflict between the United States and Israel over the next two years.

In early August 1977, Vance embarked on his second trip to the Middle East in nearly two weeks. He brought with him five principles revised by the United States in consideration of Begin's views, four options for Palestinian attendance at the Geneva Conference,¹ and proposals for transitional arrangements between Gaza and the West Bank, which he intended to discuss with the leaders of Egypt, Israel, Syria, Jordan, Saudi Arabia, and Lebanon. During Vance's talks in Egypt, Sadat was anxious about the shift to discussions that were largely procedural rather than agreeing on principles before the Geneva conference. In his view, the Geneva conference agreement should be a document that had been agreed upon before signing. Sadat had no patience for negotiations with Israel, preferring the United States to come up with a plan, and all sides followed suit. To make the idea work, Sadat presented Vance with a highly classified document in Alexandria (United States Department of State 2013, 381; Fahmay 1983, 216-219). It was a draft of the peace treaty Sadat was prepared to sign, but he did not want any of the other

¹Four options were considered for Palestinian participation: 'Seek PLO acceptance of Resolution 242, with a reservation on the Palestinian issue; a single Arab delegation at Geneva, including PLO representatives; Palestinians as part of a national Arab delegation; agreement by Israel and the Arab states to begin negotiations at Geneva without the PLO, but to invite the PLO later when the Palestinian issue is dealt with.' United States Department of State, 2013, 326; Brzezinski, 1983, 102.

parties to know of its existence. Likewise, he asked Vance to let Israel submit a draft of their treaty, and then Vance could produce the Egyptian draft, which would eventually produce an American compromise. In his talks with the Egyptians, Vance was also encouraged to believe that the PLO was about to change its position on UN Resolution 242. To get them to do so, Vance advised President Carter to reiterate that the United States was willing to engage in high-level dialogue with the PLO if it accepts Resolution 242, despite professing reservations. A few days later, on August 8, Carter made this statement in Plains, Georgia (United States Government Printing Office 1977, 1459). Vance was in Saudi Arabia at the time and received a cold reception when he arrived in Israel. However, Israel agreed to submit a draft peace treaty to the United States and to participate in further talks between Vance and several Arab foreign ministers in New York during the September session of the United Nations General Assembly.

September 1977 was an extraordinary month in the evolution of Carter's Middle East strategy. According to William Quandt, a Middle East expert on the National Security Council at the time, the US would pursue 'four parallel and possibly conflicting objectives' simultaneously (Quandt 2001, 186). The first objective was to obtain a draft peace treaty from the parties to the Arab-Israeli conflict. The second objective was to find a Palestinian representation acceptable to all Arab-Israeli parties. The third objective was to achieve as much consensus as possible on the Geneva negotiating procedures. The final goal was to begin thinking about including the Soviet Union in the peace process as the fall deadline Carter had set for the Geneva conference approached. On the first goal, the Israelis eventually submitted their draft to the Carter administration, but according to Quandt, it was very 'legalistic' and 'muddled delicate issues like borders and the status of Sinai settlements.' The Israeli draft lacked a timetable for withdrawal and does not link the withdrawal to the normalization of relations. Carter called that 'not enough.' Syria and Jordan did not submit a draft treaty, but they both eventually provided Carter with a list of principles they believed a peace settlement should contain. In mid-to-late September, Carter administration officials held a new round of intensive discussions with the foreign ministers of Israel, Egypt, Syria, and Jordan to discuss the second and third objectives of Carter's Middle East strategy, amid disagreements between the two sides and among Arab states over the PLO's participation in the Geneva conference and the continuing controversy over the Geneva negotiating process. The Carter administration's fourth goal, to bring the Soviet Union into the Middle East peace process, ended up dropping the 'bomb,' the joint US-Soviet Declaration, in October.

Meanwhile, as the US administration tried to reconvene the Geneva conference, Israel and Egypt began to search for other ways to achieve their national goals. Egyptians

feared that the conference may not be possible. Moreover, Israel, fearing that full negotiations would force it to withdraw from large parts of the West Bank, wanted bilateral talks with Egypt. In the preceding months, Begin and Sadat had traveled to Romania one after another (which had good relations with both countries) and held talks with President Nicolae Ceausescu. Begin convinced Ceausescu that he was willing to meet with Sadat and was serious about seeking a peace agreement. Ceausescu told Sadat: 'Let me tell you clearly that he (Begin) wants peace' (Stein 1999, 207). Additionally, in early September, King Hassan of Morocco extended an invitation to Israeli Foreign Minister Dayan to visit Rabat, with the aim of facilitating a meeting between Israeli and Egyptian representatives. Israel and Egypt agreed to meet secretly in Morocco on September 16. Although Dayan had proposed a meeting between Sadat and Begin, King Hassan told him that the Egyptians wanted Dayan to meet with Dr. Hassan Touhamy, Deputy Prime Minister of Egypt and Secretary General of the Islamic Conference. In a secret meeting between Dayan and Touhamy in Morocco, Touhamy stated Egypt's position that peace could only be achieved by Israel's complete withdrawal from all occupied territories, and Sadat demanded that Israel agree to this principle before negotiating other issues such as security guarantees for the Palestinians and Israel. However, Touhamy also told Dayan that Sadat had great faith in Begin's government (unlike previous Israeli governments) and believed that the two sides could reach a mutually agreed solution without direct American involvement. Sadat, however, did not want to cut the United States out of the process entirely. Touhamy suggested that Israel and Egypt exchange peace proposals and present them to the Carter administration. Then, at another bilateral meeting, the proposals could be discussed. Dayan responded that he was 'just an emissary of Begin' and therefore could not speak on his behalf, but that Israel's democratic process requires the Knesset's approval to approve any deal. He would therefore convey to Begin everything Touhamy had said, but he was certain that Begin would have to meet with Sadat in person before any solution could be reached. Dayan also assured Touhamy that he believed Sadat, unlike Assad, could be relied upon and trusted. If Begin and Sadat agreed, Dayan and Touhamy would meet again in Morocco two weeks later. A key outcome of their discussions was that Touhamy believed that at the end of the day, Israel would completely withdraw from Sinai in exchange for a peace treaty. In response, Touhamy hinted that Egypt would be willing to sign such a peace treaty if progress toward the Geneva conference was halted. After the meeting, the two envoys returned to their countries to brief their leaders on the outcome of the talks (Dayan 1981, 46-52; Meital 1997, 161-163; Indyk 1984, 35-36; Stein 1999, 207).

The Geneva multilateral peace conference entering setbacks

A significant aspect and innovation of the Carter administration's Middle East policy was the reassessment of the Soviet factor to foster a comprehensive resolution of the Middle East issue. In the early stages of his administration, National Security Advisor Brzezinski advocated for maintaining communication with the Soviet Union regarding Washington's endeavors to convene a Middle East peace conference in Geneva. Secretary Vance similarly emphasized the necessity of involving the Soviets in Middle East peace negotiations, recognizing the importance of mitigating their potential to disrupt the process.

By September, the Carter administration, considering that it would be difficult to resolve all the issues related to the Geneva conference smoothly without agreement among the Arabs, tried to bypass the Arab-Israeli parties, which were locked in a dispute over the procedural issues of the Geneva conference, and worked with the Soviet Union to formulate a joint invitation to the conference. Vance hoped that the joint U.S.-Soviet Union invitation would help resolve procedural issues and would put pressure on Syria and the PLO in particular.

At the same time, as the Arab-Israeli peace talks proceeded, the Soviet Union became increasingly eager to participate in the process leading up to the Geneva conference, having been excluded from the Middle East peace process for so long. During a meeting with Anatoly Dobrynin, the Soviet ambassador to the U.S., on August 29, Vance learned that Soviet Foreign Minister Mikhail Gromyko wanted to issue a joint U.S.-Soviet Union statement on the Middle East. At Carter's direction, Vance replied in the affirmative and asked the Soviets to draft a possible statement. On September 10, Dobrynin handed Vance a draft of the Soviet-American Joint Communiqué on the Middle East. Vance expressed interest and assigned Assistant Secretary of State Alfred L. Atherton, Jr., to meet with Soviet diplomat Mikhail Sytenko. By September 27, Atherton reported to Vance that his work with Setenko had come close to completing an acceptable draft. Both the United States and the Soviet Union made some compromises in terms of content. The Carter administration was pleased with the Soviet language changes, arguing that while they were small, they were significant and represented genuine cooperation between the two superpowers (Stein 1999, 213). The Americans hoped the joint communiqué would put pressure on Syria and the PLO, as it was a clear demonstration of Soviet Union-U.S. cooperation, as Syria and the PLO argued over procedural issues and were seen as using pedantic arguments to thwart the resumption of the Geneva conference (Quandt 1986, 122).

On October 1, 1977, the U.S.-Soviet Union Joint Communiqué was issued by U.S. Secretary of State Vance in New York and Soviet Foreign Minister Gromyko in Moscow. It said, 'Within the framework of a comprehensive settlement of the Middle East problem, all specific questions of the settlement should be resolved, including such key issues as withdrawal of Israeli armed forces from territories occupied in the 1967 conflict; the resolution of the Palestinian question, including ensuring the legitimate rights of the Palestinian people; termination of the state of war; and establishment of normal peaceful relations on the basis of mutual recognition of the principles of sovereignty, territorial integrity, and political independence... .' (United States Department of State 2013, 634)

The communiqué caused a storm of controversy in the U.S. Congress, the American people, and the Middle East. The PLO welcomed the announcement, and Sadat called it a 'brilliant ploy,' presumably because he saw it as an effort to pressure Syria (Quandt 1986, 122). Sadat's reaction, however, was still surprising because his emissary, Touhamy, had recently told Moshe Dayan in Morocco that he did not want to attend the Geneva conference or that the Soviets would attend (Zion and Dan 1979, 20). The Israeli government reacted strongly and completely rejected the Soviet-American statement. Israeli Prime Minister Begin issued a statement he drafted on October 2, making it clear that the joint statement made no mention of the peace treaty nor of resolutions 242 and 338, which served as the basis for the 1973 Geneva Conference. While the statement did elaborate on the issues discussed in Geneva, it only strengthened the Arab position. Moreover, this statement would only make the process of peacemaking more difficult (Medzini 1981, 133).

The Israel lobby was also furious about the communiqué. American Jewish critics accused the United States and the Soviet Union of trying to impose a settlement instead of encouraging the parties to negotiate face-to-face. Alexander Schindler, president of the Conference of Presidents of Major American Jewish Organizations, saw the statement as an abandonment of U.S. assurances to Israel (Jewish Telegraph Agency 1977, October 3). The pro-Israel camp was mobilized and went all out. Henry Jackson, a Democratic senator from Washington State, and George Meany, president of the AFL-CIO, both criticized the president's 'overtures' to the PLO (United States Department of State 2013, 802). Senator Jackson told NBC television's Meet the Press:

'The fox is back in the henhouse. The American people must ask why they let the Russians in when the Egyptians threw the Russians out (Jerusalem Post 1977, October 3). The Conference of Presidents held an emergency meeting on October 3 to deal with the Carter administration's 'betrayal' of Israel (ibid). Pro-Israel groups in the U.S. launched a further 8,000 phone calls to the White House criticizing the U.S.-Soviet communiqué. Mark Siegel, the White House's liaison with the Jewish community, receives 170 'angry' phone calls a day. Meanwhile, the president's overall approval rating in the poll is just 46 percent (Newsweek 1977, October 17).

The Carter government did not anticipate the strong reaction to the joint communiqué and was discomfited. In his memoirs, Brzezinski admitted that he had made a mistake. The most serious mistake, however, was the failure to consult domestic political advisers about the possible consequences of the statement, a situation compounded by the fact that the administration did not give any briefing to the media, Congress, or American Jewish leaders before the report was released (Brzezinski 1983, 108-10; Quandt 1986, 123). In the face of suddenly strong pro-Israel pressure in the United States and abroad, Carter retreated.

In a speech to the United Nations on Oct. 4, Carter reiterated the need to negotiate a binding peace treaty based on UN resolutions 242 and 338. He also reaffirmed the United States' unshakable commitment to Israel's security, explaining that the 'legitimate rights' of the Palestinians must be determined by the parties in negotiations, not by the United States (United States Government Printing Office 1977, 1720-1721). After his speech at the UN, Mr. Carter met Dayan at a hotel in New York's Union Square. He described it as an 'unpleasant meeting.' Carter explained that his position was made difficult by criticism of his policies from American Jews and Congress and that he felt vulnerable because he could not fight back. He said it was important to show the world that the United States and Israel were trying to work together to advance peace talks. Instead of sympathizing with Carter's vulnerability, Dayan deftly exploited it, explaining that if Carter reaffirmed all his past commitments to Israel and promised not to impose peace or cut aid to pressure Israel, a deal would be possible. Dayan also wanted the United States to recognize Israel's right to oppose a Palestinian state and said Israel did not have to retreat to the 1967 borders or accept the U.S.-Soviet declaration. In return, Dayan said, he would tell Israel's supporters

that Israel was satisfied with the agreement reached with the United States. Dayan warned of conflict if Carter did not accept the conditions. Carter said such a confrontation would not serve the interests of either country and agreed to a joint U.S.-Israel statement (Quandt 1986, 130-131; Zion and Dan 1979, 47). The joint statement issued by the United States and Israel on October 5 declared that Resolutions 242 and 338 remained the basis for the resumption of the Geneva Peace Conference and that acceptance of the joint statement by the United States and the Soviet Union would not be a precondition for the resumption of the conference (United States Government Printing Office 1977, 677). The statement reinforced the perception that the Israel lobby could force the president to back down if he comes under enough pressure.

Carter and Dayan also reached an understanding during the meeting, which was known as the working paper between Israel and the United States on the Geneva Conference ('Working Paper on Suggestions for the Resumption of the Geneva Peace Conference,' referred to as the 'U.S.-Israeli Working Paper'). Dayan presented it to his government, and the Israeli Cabinet approved the 'working paper' on October 11. The document included a unified Arab delegation attending the opening ceremony, followed by division into several working groups consisting of Egypt and Israel, Syria and Israel, Jordan and Israel. These working groups would convene meetings 'for the negotiation and conclusion of peace treaties.' In this document, Israel effectively rejected the joint communiqué and insisted on Resolution 242 as the basis for negotiations, but stated that 'Resolution 242 does not mean a territorial withdrawal.' There was no mention of the PLO, and there would be no Palestinian state (United States Department of State 2013, 676-677).

On October 14, President Carter sent the U.S.-Israeli working paper to Syrian President Hafez al-Assad, Jordan's King Hussein, and Egyptian President Anwar Sadat. In addition to sending working papers, Carter wrote personal letters to each of the leaders in an attempt to overcome procedural issues in order to convene a new Geneva conference. When the Arab countries saw that the 'U.S.-Israeli working paper' proposed by the United States was significantly different from the first draft,¹ the

¹ On September 29, Vance forwarded the text of the working paper on suggestions for the resumption of the Geneva Conference, which listed three points. First, 'The Arab parties will be

Arab world's sense of disillusionment deepened, and they were disappointed with the 'U.S.-Israel working paper', and successively expressed their different opinions and changes to the Carter administration. In the face of the rejection of the U.S.-Israeli working paper by Arab countries, the continued pressure of pro-Israel forces in the United States, and Carter's reluctance to revise the U.S.-Israeli working paper again, he feared that 'the whole process is collapsing'(Carter 1982, 295). On October 21, he appealed to Anwar Sadat for strong public support and statesmanlike gestures to help restore momentum towards the Geneva conference path. Sadat replied in early November. He proposed to convene a meeting of the leaders of China, Egypt, France, Britain, Israel, Jordan, the PLO, Syria, the United States and the Soviet Union in East Jerusalem to resolve the Middle East issue (United States Department of State 2013, 741-743). Carter wrote back to object, and he, Mondale, Vance, and Brzezinski agreed that Sadat's proposals were unlikely to be constructive and that such a summit would be fruitless, not to mention the specific problems of the PLO. They worried about Sadat and wondered whether the Egyptian president had 'lost his sense of reality' (Brzezinski 1983, 111).

It was against this complex background that Sadat, in his speech to the Egyptian People's Assembly on November 9, unexpectedly decided to bypass the Geneva Conference and go directly to Jerusalem to negotiate a separate peace directly with the Israelis. The Americans were taken aback and had to adjust their strategy once again. It took several weeks for American officials to come up with a correct estimate of Sadat's reason for going to Jerusalem, and by early December the consensus within the administration was that Sadat's plan should be strongly supported. This essentially abandoned the reopening of the Geneva Middle East Peace Conference, and the Carter administration retreated from a comprehensive peace settlement at the beginning of its term to a Kissingerian partial settlement - a separate Egyptian-Israeli peace.

represented by a unified Arab delegation for the opening sessions at Geneva. Within the delegation there will be Palestinians, who may include not well-known members of the PLO.' The second point read, 'The working groups or subcommittees for the negotiation of peace treaties will be formed as follows: A. Egypt-Israel, B. Syria-Israel, C. Jordan-Israel, D. Lebanon-Israel, E. The West Bank, Gaza, The Palestinian Question and the Question of Refugees will be discussed among Israel, Jordan, the Palestinians, and perhaps others as determined at the opening sessions of the Geneva Conference.' The third and final point read, 'The working groups of subcommittees will report to the plenary.' United States Department of State, 2013, 624-625.

Conclusion

From the beginning of 1977 to November 1977, the new Carter administration took the settlement of the Middle East issue as an important priority and intended to comprehensively resolve the issue by reopening the Geneva Middle East Multilateral Peace Conference and bringing the Arab-Israeli parties together in Geneva. However, due to the continuous differences between the Arab-Israeli parties and the Arab countries on the substantive and procedural issues of convening the Geneva Conference, the peace process promoted by the Carter administration was gradually in trouble, and its multilateral and conference approach of Arab-Israeli diplomacy in Geneva was thwarted. This period was also the background and incubation stage of the next phase of bilateral peace talks between Egypt and Israel. Looking back at the whole process, it is not difficult to see why it failed.

Firstly, there existed a profound psychological estrangement and mutual distrust between Arabs and Israelis, compounded by longstanding contradictions among Arab countries. Decades of conflict since Israel's establishment in 1948 have entrenched this divide, and bridging the psychological gap required time and sustained effort. Israel, having endured four Middle Eastern wars, distrusted Arab states' genuine intentions for negotiation and achieving peace. Meanwhile, Arab nations, having suffered multiple defeats and territorial losses, were unable to militarily defeat Israel. Influenced by widespread Arab nationalism and for the sake of their own regime stability, they dared not openly acknowledge Israel and negotiate with it, maintaining a state of ceasefire between Israel and Arab nations.

Secondly, Israeli Prime Minister Menachem Begin maintained a firm and unyielding stance throughout negotiations. On substantive issues, no progress has been evident since Begin and Carter's initial meeting in July to present the Israeli peace plan. Due to religious beliefs and party principles, Begin had consistently advocated for Israel's retention of the West Bank of the Jordan River, opposed Palestinian statehood, and expanded settlements on Arab-occupied territory. This had deepened Arab countries' distrust and hostility towards Israel.

Regarding procedural matters, Israel did not wish to negotiate with all Arab countries simultaneously but only agreed to engage in separate bilateral negotiations with each Arab nation. Israel understood that once it entered the Geneva Conference, the unified Arab bloc and the combined pressure from the United States and the Soviet Union would put it in a difficult position, forcing it to make more concessions. Israel also opposed the participation of representatives from the PLO in the negotiations because the PLO had consistently refused to recognize Israel and had sought its destruction, whereas

Arab nations only recognized the PLO as the sole legitimate representative of the Palestinian people. In this light, Begin became the primary obstacle to Carter's efforts to advance the peace process. As the stronger party in the Israeli-Arab conflict, Israel was unwilling to compromise on key issues, creating significant challenges for the Carter administration.

Thirdly, contradictions within Arab countries further complicated the situation. These nations grappled with a dual obligation: safeguarding the collective interests of Arab nations while simultaneously advocating for the legitimate rights of Palestinian Arabs. However, these objectives often clashed, fostering duplicity within Arab states.

For Egypt, Sadat faced serious domestic economic issues and military burdens, eager to consolidate his regime and in urgent need of U.S. economic and military aid to regain the Sinai Peninsula while maintaining his influence in the Arab world. Therefore, Sadat participated in Carter-led Israeli-Egyptian peace efforts on the one hand, while hedging his bets by clandestinely contacting Israel. When the peace process stalled due to American-Israeli working papers, Sadat decided to directly visit Israel and reconcile, effectively ending Carter's attempt to reopen the Geneva multilateral summit.

As for Syria, President Assad was Sadat's primary competitor in the Arab world. His regime was stable, and he was not in a hurry to reclaim the Golan Heights or achieve Israeli-Syrian peace. Besides expanding Syria's influence in the Arab world, he was more concerned about Syria's influence in Lebanon and controlling the PLO. He supported the PLO's uncompromising stance, particularly regarding UN Resolution 242.

Disagreements persisted over the composition of the Arab delegation to the Geneva conference, with Egypt advocating for a separate delegation while Syria favored a unified Arab representation. Syria's apprehensions stemmed from concerns that Egypt might pursue peace with Israel without consulting other Arab states, as evidenced by the Egyptian-Israeli disengagement agreement of 1974.

In addition, the strong influence of pro-Israel forces in the United States constrained the Carter administration's pressure on Israel. Since the 1960s, the United States and Israel had gradually developed a strong special relationship, with Israel becoming America's closest ally, leveraging pro-Israeli sentiments within the United States to influence its Middle Eastern policies. Israel mobilized pro-Israeli forces in the United States multiple times in 1977 to pressure the Carter administration, enabling it to resist pressure from the Carter administration.

In a memo to Carter in June 1977, Hamilton Jordan, President Carter's adviser on domestic political issues, specifically reminded Carter of the importance of pro-Israel forces in the Middle East, represented by American Jews and their groups. The memo

noted that Carter received 94 percent of the black vote and 75 percent of the Jewish vote during his 1976 presidential campaign, and that more than 60 percent of big donors to the Democratic Party that year were Jewish.

Lastly, Carter's personal demeanor and approach warrant consideration. President Carter's relative lack of experience in international affairs, coupled with imprudent public statements, often resulted in unintended consequences and sparked significant discontent among pro-Israel factions domestically. Additionally, Carter underestimated the intricacies of the Arab-Israeli conflict, later acknowledging his limited understanding of Middle East politics. At the time, conditions were not conducive to a comprehensive solution, with only Egypt demonstrating the willingness and courage to initiate reconciliation with Israel. In contrast, Syria and Jordan hesitated to pursue reconciliation due to the influence of pan-Arabism and internal considerations.

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Book Review

Ahmed, Zahid Shahab, and Ali Akbar. *Iran's Soft Power in Afghanistan and Pakistan*. Edinburgh University Press, 2023, 182p. ISBN 978 1 3995 1745 4 (hardback)

Iran's soft power policy in its neighboring and regional states has been a subject of serious scholarly research from various perspectives since at least the 2010s¹, and the present work is an important contribution to the study of this topic.

This book outlines the main directions and characteristics of Iran's soft power policy towards its eastern neighbors, particularly Afghanistan and Pakistan, beginning with the Islamic Revolution of 1979. The authors provide a detailed examination of the primary tools used by Iran in various spheres, including cultural, religious, social, media, ideological, and educational domains.

The book comprises nine chapters, including the Introduction (pp. 1-20) and the Conclusion (pp. 153-157). The Introduction is succeeded by Chapter 2 (pp. 21-32), which delves into Iran's historical influence on Afghanistan and Pakistan from the pre-Islamic era through the early modern period. This chapter elucidates the historical exchange of ideas, populations, languages, and commerce between Iran and the Indian subcontinent, as well as between Iran and Greater Khorasan. It also discusses how Iran capitalizes on its imperial legacy, specifically that of the Persian Empire, to cultivate positive relations with contemporary Afghanistan and Pakistan.

Chapter 3 (pp. 33-53) investigates the general dynamics of Iran's relations with Afghanistan and Pakistan, emphasizing Tehran's primary concerns. As has been shown by the authors, in the case of Afghanistan, the main issues include the illicit opium trade from Afghanistan to Iran, the influx and presence of Afghan refugees in Iran, and the Helmand River water-sharing dispute. Regarding Pakistan, Iran is worried about the rise of sectarianism and the presence of jihadist Sunni Baluch militant groups finding refuge in Pakistan. The chapter notes that Afghan interviewees criticized Tehran's treatment of Afghan refugees and highlighted the water dispute as a major concern. Pakistani interviewees cited the Saudi influence and border security issues as significant sources of mistrust and tension.

Chapter 4 (pp. 54-71) highlights Iran's strategic interests in Afghanistan and

¹ See, e.g., Wilde 2013; Westnidge 2015; Mayeli and Motiee 2016; Mkrtychyan 2017; Gabedova and Turmanidze 2017; Valiyev 2018; Sadeghi and Hajimineh 2019; Soboleva and Karimi Riabi 2021; Akbarzadeh et al. 2021; 'Abbasi et al. 2022; Mozaffari and Akbar 2022; Akbar 2023a; 2023b; etc.

Pakistan, supported by primary data collected from both countries. It emphasizes Iran's goals to export natural gas to Pakistan and India and concerns about foreign military presence, such as Soviet troops in the 1980s and U.S. forces from 2001 to 2021. Additionally, as the authors have noted, while Iran views the Chabahar and Gwadar ports as complementary, Pakistan perceives the Chabahar Port as a security threat due to India's involvement.

In Chapter 5 (pp. 72-95), Iran's ideological and cultural influence in Afghanistan and Pakistan is examined. The chapter analyzes the resources and strategies Iran uses to foster its influence in both countries, leveraging its sizeable Shi'a population and Persian heritage. As it has been shown, Iran employs these cultural and ideological tools to enhance its image, but the impact varies. Iran's influence is stronger in Afghanistan due to significant investments in educational and media infrastructure. In Pakistan, Iran's influence is more limited, primarily affecting Shi'a communities in regions like Gilgit-Baltistan and Parachinar. According to interviews conducted by the authors, Iran's political gains stem from its influence on Shi'a populations in both countries.

Iran's political influence in Afghanistan and Pakistan since the 1979 Islamic Revolution is examined in Chapter 6 (pp. 96-115). In Pakistan, as shown by the authors, Iran's influence has mostly been limited to Shi'a groups and the Pakistan People's Party (PPP). In contrast, Iran has had a broader and more significant influence in Afghanistan, especially during the Karzai administration, by directly engaging with policymakers. The book proves that Iran's efforts in Pakistan have not been as successful in extending into formal politics.

Chapter 7 (pp. 116-134) analyzes Iran's economic influence in Afghanistan and Pakistan. It investigates how Tehran uses economic tools like coercive diplomacy and sanctions to achieve political goals and how this influence is perceived in both countries. It has been shown that the fall of the Taliban in 2001 enabled Iran to strengthen its economic ties with Afghanistan, while Iran's economic relationship with Pakistan has experienced ups and downs.

Iran's use of soft power in Afghanistan and Pakistan to recruit Shi'as for Liwa Fatemiyoun and Liwa Zainebiyoun, supporting the Assad regime in Syria, is examined in Chapter 8 (pp. 135-152). According to the authors, this recruitment by Iran's IRCG, not involving Kabul or Islamabad, does not fit the standard definition of hard power. However, as shown by the authors, it demonstrates Iran's soft power leverage for military and geopolitical gains. The book proves that Afghan recruits, mostly Hazara refugees, were enticed with promises of residency and financial benefits, while Pakistani recruits were motivated by the protection of sacred Shi'a shrines in Syria. The study found no

evidence of local religious groups' involvement in the recruitment process, as noted by the authors.

Unfortunately, the authors missed an important study published in 2022 on the motivations behind the inclusion of Afghan refugees in the Fatemiyoun brigades (Schwartz 2022). This research, which, like this book, was based on interviews, could have been valuable for examining the topic of Chapter 8, particularly in terms of comparing existing data.

In the concluding chapter (pp. 153-157), the authors present a synthesis of the key arguments from the preceding chapters to demonstrate how Iran's soft power instruments have been employed and received in both Afghanistan and Pakistan.

Overall, this book is a valuable contribution to understanding the specifics and issues of Iran's soft power policies in individual countries, particularly Afghanistan and Pakistan. The research value is enhanced by its use of not only existing theoretical literature and media publications but also data obtained from qualitative interviews. This study paves the way for examining Iran's soft power policy in different regions using the same prism and approaches, helping to find existing differences and commonalities.

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