

Understanding Asia: Political, Economic and Socio-Cultural Dimensions

**Edited by
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Preface

The monograph that we have pleasure to present to the Reader is a result of cooperation of scientists representing both Polish and foreign research institutions (Azerbaijan, Kazakhstan, South Korea). *Understanding Asia: Political, Economic and Socio-Cultural Dimensions* is a supplement to the “Library of Asia and the Pacific” (*Biblioteka Azji i Pacyfiku*) series, initiated by Adam Marszałek Publishing House. The presented volume consists of ten chapters. The authors of the chapters making up this volume represent various research experiences and perspectives. The common denominator of the works contained in the monograph is their discussion of Asian issues.

The ambition of the authors and editors was to prepare an interdisciplinary volume, enabling a view of Asia from many perspectives: historical, political, economic, legal, social, and cultural. We believe that only such an approach, emphasizing diversity, makes it possible to understand the specificity of the Asian continent and the changes taking place on it. Dynamic changes being observed in the international arena and uncertainty about the future shape of the global order justify the need for multidimensional research on Asia. Although opinions of experts on the future of the world order differ, no one seems to question the fact that it will largely depend on Asian countries – their strength, stability and commitment on the international stage.

Having general character, the first chapter, entitled *The Formation of State Ideology in Transformational Societies through the Promotion of Social and Cultural Values* is a valuable introduction to the issues presented in the volume. Ivan Parubchak

attempts to analyze the importance of some critical terms for social sciences, such as: ideology, socialization, and social capital (among others). Researcher's findings can be applied in the analysis of numerous societies, including those of Asian states, most of which are witnessing processes of rapid development and modernization.

Another group of chapters are related to Azerbaijan. They include Toghruł Allahmanlı's paper about globalization, international economic relations and geo-economic factors, historical analysis presented by Aliyev Shirinbey Hajiali Oghlu (*The "Mamluke Period" in the History of the Atabey State in the Context of Azerbaijani-Georgian Relations*), as well as Nargiz Qafarova's and Jabir Khalilov's recommendations on the establishment of a jury system in Azerbaijan. Even though these chapters are explicitly related to only one state, most arrangements also apply to other countries, either directly (Azerbaijani-Georgian relations) or indirectly (general comments on geo-economics). When it comes to institutional solutions being described (such as a jury system in Azerbaijan), most comments can be reviewed in the context of constitutional systems of other states, not only Asian countries.

Paula Tomaszewska's and Michał Dahl's chapter entitled *Implementation of the Belt and Road Initiative in Selected Balkan States* brings the narrative to East Asia. Although Belt and Road Initiative has been present in public discourse and relatively well-described in the literature, authors decided to focus on rather minor aspect of Chinese geopolitical project – its implementation in the Balkans. The chapter also characterizes the infrastructural cooperation of selected Balkan states (Albania, Bulgaria, Croatia, Greece, North Macedonia, and Serbia) with China and the European Union.

Next two papers are related to South Korea. *The Inevitable Conflict. South Korea Relations with Japan during the Moon*

Jae-in Presidency – this chapter written by Roman Husarski gives an overview of the history of problematic relations between South Korea and Japan. The author points out to the fact that current conflict in the bilateral relations between Seoul and Tokyo could not be avoided due to the ruling Democratic Party's and President Moon Jae-in's agenda. Stanisław Juszczak, Yongdeog Kim and Suwan Kim in their chapter focus on answering the problem of an impact of digital media on communication and education of the youth. Using the empirical research methods, authors provide comparative analysis of Polish and Korean youth, resulting in construction of a model that can be useful for further contributors.

In her paper entitled *Elections to the House of Representatives in Thailand in 2019 – Selected Issues* Maria Ochwat not only focuses on the recent parliamentary elections in Thailand, but also provides an overview of political, economic and social situation of this country. She also presents selected issues related to the electoral law, and more details about the campaign and the conduct of the elections from March 24, 2019. Łukasz Danel's contribution to the monograph is related to Maldives – a small country, and therefore rarely of interest to analysts undertaking research within the discipline of international relations. *The Asian Part of the Commonwealth – the Problematic Case of the Maldives* presents mechanisms used by the Commonwealth governing bodies to judge member states. It also characterizes the Asian members of the Commonwealth, pointing out to their specificity and problems associated with membership.

The next chapter of the book is related to the Middle East, specifically to *Islamist Strategies in the Context of "Bottom-Up Islamization"* in Selected Middle Eastern Countries. Anna Zasuń discusses models of "bottom-up Islamization" observed since 1990s. On the example of selected Middle Eastern states,

e.g. Egypt, Jordan, and Turkey the author presents the political involvement and methods used by Islamists to affect the political sphere.

In the next section, Olivier Harenda dealt with the works of Anita Desai, an Indian writer commenting the political and social life in the contemporary India. Although her main interest concern family issues and the problem of alienation of women and gender inequality, she also pays attention to more general, national issues related to building and changing national identity. Harenda discusses Desai's writings particularly in this context, and by relating it to the broader context outlined by modern Indian literature.

The last chapter of the book, written by Guliyev Ibrahim, discusses and compares the poems of Nizami Ganjavi (Azerbaijan) and Said Shirazi (Iran). The paper focuses mainly on explaining the specific meaning of thoughts expressed by the authors which makes their interpretation much easier and accessible to readers unfamiliar with this type of poetry.

Chapters included in the monograph do not cover all the necessary issues related to the role of Asia in the contemporary world. Instead, as intended by the authors and editors, selected issues were presented, focusing on interdisciplinary character of the problems being analyzed. The editors express hope that reading *Understanding Asia: Political, Economic and Socio-Cultural Dimensions* will contribute towards the better comprehension of Asia – its uniqueness and multidimensionality.

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The Formation of State Ideology in Transformational Societies through the Promotion of Social and Cultural Values

Introduction

Ideology explains and justifies social realities through their correlation with higher-order values, and gives meaning to the transformations taking place in society. Ideological values organize and direct the activities of people in the political, moral, state and other spheres of society, and ensure the integrity of the social sphere in general. It is said that the ideological structure is the determining force in the development and functioning of all systems of the social sphere. Ideology is an important factor in legalization of state power, justifies its right to manage society and creates the basis for a particular policy. Socialization, as a process of formation of the social essence of human, has been a field of research for over a hundred years. All theories of socialization, in the end, differ from each other in the way they resolve the issue of the relationship in the formation of the human individual and social personality. Society introduces the biological instincts of a person into a certain framework, exercises control over individuals, and ensures social stability by maintaining the homogeneity of society. The social order can be ensured by harmonizing the value system

of society with the internalized value structure of the individuals who make it up.

The main mechanism for maintaining the stable function of the social system as a whole is ideological socialization, as the process of assimilation by an individual of ideological norms and values, the most fundamental economic, social and political, legal, cultural, moral, environmental and other orientations that constitute the value normative core of the ideological system. The development of the topic of the functional interaction of social institutions makes relevant the position of the activity approach, the meaning of which is that social actors can have different possibilities of influencing others and correcting rules of social relationships. They include their social capital in social interactions and thus indicate their potential to influence the course of events. These attitudes focus on providing entities opportunities for interaction to use their social resources in the development of social space.

The Social Significance of Ideological Socialization for the Function of Social Institutions in the State

Interest in problems related to the essential content of the concept of “ideology”, the definition of the functions and place of ideology in public life has not faded in scientific thought for two centuries. With the advent of this concept, various approaches to its interpretation have developed in the humanities: from understanding ideology as an illusory, false, distorted consciousness, to considering it as a necessary social subsystem that performs the functions of integration, maintaining stability, as a certain normative and value matrix that determines the course of diverse social processes.

A common feature of modern ideology studies is the recognition of the fact that it is not possible to give a universal

definition to this phenomenon; the concept of ideology covers a diverse complex of phenomena of a social nature. The main function of ideology is to ensure unity and order in the fulfillment of social roles, and, consequently, the reproduction of production relations. Therefore, ideology is a necessary element of every society¹. Researchers are focusing on both substantive and functional aspects of ideology. Ideology as a logically based system of symbols fulfills an important function of linking cognitive and evaluative perceptions of social conditions with collective action programmes of strengthening, changing and transforming society. The task of science is the formulation and implementation of a scientifically grounded value system that orientate society to action that ensures social progress.

Ideology should not be viewed from the standpoint of truth or falsity, due to the social functions it performs, including: integrating society into a single whole, ensuring the processes of managing the company, formulating the goals of social development, legalization state power and many others. On the basis of a sociological study of ideology, it begins to be seen as an integral system of production, distribution and consumption of spiritual products, implemented through social institutions and expressing the interests of a particular social group of society, including the apparatus of ideological influence, as an instrument for the realization of ideas and values. The foundation of every society is the underlying system of fundamental social and cultural values.

Socialization is the process that leads to the harmony of value systems of individuals, the rules of their behavior with each other and the value system of society, it is methodologically important to understand socialization through the pro-

¹ J. Visser, *Data Base on Institutional Characteristics of Trade Unions, Wage Setting, State Intervention and Social Pacts, 1960–2010 (ICTWSS)*, University of Amsterdam, <http://www.uva-aias.net/208> [Accessed: 17.09.2019]

cess of interpretation. There is a duality of socialization processes: on the one hand, the individual learns social experience and on the other, actively reproduces social relations at a new level in the process of its activity, active inclusion in the social environment. Socialization in its the broadest sense is vital for society and the individual, process of transfer and assimilation of social experience, which includes the whole set of rules, norms, attitudes, roles, standards and values.

Socialization is a path leading to a double goal – to promote our interaction based on social roles and to ensure the preservation of society through the assimilation by new members of the belief and patterns of behavior that have developed in it. The dynamism of modern society, its informational nature, the multiplicity and often inconsistency of the actions of the institutions of socialization lead to the fact that the individual today requires a large degree of autonomy from each of these socializing institutions. Socialization is one of the most important factors in the normal function of society, ensuring and stabilizing the social order and the necessary continuity of social development². Societies differ in mechanisms of regulation of social life, fixing these or those values. The society forms a certain strategy of its development on the basis of priority social guidelines. Using a system of legal and moral norms, society prescribes its members certain patterns of behavior in a wide variety of situations.

The society also forms a system of social control over the implementation of social norms. The value-regulatory mechanism of regulating social life reflects the nature of the relationship between society and the individual, the state and society. If we understand ideology as a value-normative subsystem of society, a peculiar worldview of society, the ideological basis

² E. Stockhammer, *Why Have Wage Shares Fallen, ILO, "Conditions of Work and Employment Series"* 2013, No. 35, p. 61.

of all existing social relations in the field of economics, culture, politics, it is obvious that ideological values do not apply only to the sphere of politics. We call the most fundamental ideas about the proper economic system, the attitude to forms of ownership, methods of distribution of material wealth, the nature and degree of state intervention in the economy, economic and ideological values.

The ideology of state apparatuses is of great value, since it emphasizes the role of the state in the articulation of ideology as a necessary element of some social formation. The reproduction of public relations cannot be ensured only by repressive state apparatuses called upon to carry out direct violence. Any class will not be able to hold its dominant position if it does not exercise hegemony in ideological state apparatuses, since they provide reproduction of the relationship of exploitation, providing individuals with those forms of subjectivity that correspond to their position in the system of production relations.

Moreover, this effect is carried out imperceptibly, hiding behind obvious things so that a person acts, as if it were on her own free will, obeying free choice, without even noticing the power of ideology, which is institutionalized in the ideological apparatuses of the state. Ideology focuses on the macro level of social processes, with the goal of regulating the life of society in a historical perspective. It fulfills the objectively extremely important function for society of the highest legalization of ideas about the world and a person's place in it, a certain social structure, social relations, types of behavior and lifestyle, and thereby acts as a volitional impulse that ensures the long-term organization of all social life, as a source of social motivation for a person, groups, social institutions, society as a whole.

Ideology always includes subjective and value factors, irrational elements, and elements of an objectively true reflection

of the world, a plausible and often scientific interpretation of social processes. Ideology – the expression of interests, views, ideas of certain social groups, the justification and protection of their social and political positions; it is also something that goes beyond these narrow group positions, merges with universal human approaches to the social world, with universal values, attitudes, values shared by the whole nation, state or each of its citizens³. Among many approaches in determining the essence of ideology, its place in social systems, the role in social processes, the most fruitful are institutional matrices, where ideology is defined as a social subsystem, which is a set of dominant ideas that manifest in all areas of social function and performing integrated functions, maintaining the value-normative model, socialization, legalization of social relations.

According to the interpretation of ideology as a social subsystem, one can single out another layer of understanding it, in addition to its interpretation as a system of values, ideas, behavioral norms, formed through the activities of various social institutions that determine the function and development of society as a whole. In a broad sense, ideology represents a complex system of ideological production, including a system of ideas, an ideological mechanism – population, a set of organizations, institutions, enterprises, distribution of an ideological product, ideological relations that develop in the process of interaction between subjects and objects of ideological relationship. In this interpretation, it is the basis of the structure of society, its value-regulatory framework.

Social capital in general can be defined as a special quality of social relations, social connections, expressed in such characteristics as reliability, the trust of the members of society in each other, to social institutions, willingness to sacrifice

³ R. Rajan, *Fault Lines: How Hidden Fractures Still Threaten the World Economy*, Princeton 2011.

their interests for the sake of a “common cause,” a collective good, mutual assistance and cooperation. Its role in society cannot be overestimated: social capital – “trust capital” – acts as a kind of public bond, consolidates society, helps to activate its activity forces and the effective development of the social system as a whole⁴. For political stability, for an effectiveness of governments and even for economic progress, social capital is perhaps even more important than physical or human capital. When the distrust of ordinary citizens to other people is a shortage of social capital – the possibilities of voluntary cooperation, cooperation in achieving some common goals are very limited.

In economic activity, this leads to high transaction costs, reducing the efficiency of the economy as a whole and hindering the growth of living standards of the population, and in the political sphere, to the weakness of institutions of representative democracy. Ideological socialization is used as part of the process of political socialization, in the context of an individual assimilating ideological values in the political sphere. The category “ideological socialization” understood as a two-way interdependent process of interaction of an individual with the ideological sphere of society, as a result of which, on the one hand, the assimilation of ideological norms and values, that is, the most fundamental economic, social and political, legal, cultural, moral, environmental and other landmarks and sense-forming attitudes that make up the value-normative core of the ideological system, and on the other hand, the individual forms its own system of values – has great heuristic potential in the analysis of the formation of human citizenship.

Ideological socialization appears, on the one hand, as a large-scale macro-level social process, as part of the ideologi-

⁴ R. Kwon, A. Roberts, *Financialization and Income Inequality in the New Economy*, “Sociology of Development” 2015, vol. 1, No. 4, pp. 442–462.

cal process, which we understand as the genesis and evolution of the ideological system of society. The process of ideological socialization is quite complicated, and its result, determined by a complex of factors: subjective attitudes of the personality, the ratio of the influence of institutionalized and natural mechanisms of socialization, is not obvious. Ideological socialization is not limited by any timeframe, it lasts a person's whole life and includes a targeted ideological impact of society on a person by institutions that, to one degree or another, carry out an ideological function, the totality of spontaneous influences the social environment, also affecting the formation of personality, and its own activity. Ideological socialization can be carried out only on the basis of common, fundamental values, the most basic concepts in the political and legal spheres of life that have already been assimilated by a person.

The state is the main institution of ideological socialization and this statement is true for states with authoritarian regimes and for modern democracies; the only difference is in the ways of maintaining the stability of the ideological sphere. In democratic regimes, the state performs the functions of accumulating ideological values that are the most relevant in society, developed by society itself, the totality of civil society institutions, as good as the function of transmitting these values and consolidating them in the public consciousness in order to maintain the integrity of society, the integration of various social groups and communities of components is working out national consensus on areas for further development of state and society. The latter function is the ideological and socializing function of the state itself, which it realizes through the mechanisms of state policy, the system of upbringing and education.

This function of the state is especially relevant in the era of social crises, when it is necessary to ensure the consolidation

of society, to mobilize its internal forces. The state, by virtue of its social nature, represents the interests of all social groups⁵. The ideology formulated by it often serves the ruling elites to a greater extent, but the state cannot completely disengage from the needs and interests of citizens, since in this case social tension and social cataclysms become inevitable. Therefore, the consequence of the state's complete departure from the sphere of ideological regulation and ideological motivation of political activity was the replacement of it with other entities, whose ideologues and value dominants no longer express the interests of all social groups and society as a whole.

Values that objectively serve the interests of rather narrow, elite groups of the population are beginning to act as normative and general societal values, nonetheless trying to present them as universally valid. The substitution of societally significant values by narrow group values, realized or felt by the citizens of the country, leads to an even greater degree of alienation of the individual from society and the state, and to an increase in the atomization of society. Anomie contributes to the erosion of social capital, deterioration of the quality of social relations among people, the spread of total "social distrust", expressed in a variety of forms. There is a growing tension in international relations, an image of the enemy is formed, often on a national basis; in these conditions the constructive activity of society, the building of democratic relations, the strengthening of civil consciousness and the formation of civil society are impossible.

The solution to this disastrous situation is possible with the help of active state intervention, the activation of its cultural, educational, ideological functions. Some effective ideology contains programmatic provisions that determine the prospects and

⁵ P. Genschel, B. Zangl, *Transformations of the state: from monopolist to manager of political authority*, 2008, No. 76, Collaborative Research Center.

directions of development of society and form the foundation for motivation and mobilization of its members. This determines the close relationship between ideology and the state, since ideology serves as the spiritual basis for the exercise of state power, the formation and implementation of state policy as a whole. It is the main factor in the legalization of state power, justifies its right to manage society and implement a particular strategy. One of the most important functions of ideology is the integration of society, since it is quite obvious that without the development of national goals, an integrating system of values, it is impossible to successfully resolve urgent problems in the economy, politics and the social sphere.

The ideologies broadcast by the state are reflected in the ideological doctrine of the state – an integrated set of principles, ideas that formulate the main national and state values and interests of the country and its people, on their basis determining goals and objectives of the development of the state, strategic priorities of the nation⁶. An ideological doctrine can be a single programme document, but most often, especially when it comes to modern developed democracies, its postulates are explicit or implicit, but are present in various state regulations, laws, appeals of the president to parliament, as well as in such programme documents as the doctrine of national security, foreign policy of the state, social construction.

The Transformation of Values of Social Space as a Factor of Institutionalization of the State Ideology

An ideological doctrine is as integral to some state as state sovereignty, territory, and the legal system. Their weakness can

⁶ V. Zhilina, *Philosophical analysis of socialization of person*, "Proceedings of the XXIII World Congress of Philosophy" 2018, No. 72, pp. 165–169.

lead to crisis phenomena, up to the collapse of this state. The weakness of an effectiveness of public administration in its entire vertical, reaching a critical level are, undoubtedly, dangerous for the state, but to the same extent as the weakness of its ideological foundations and support for their public opinion. The consequence of this is the weakness of national or state self-identification, the loss of the subjective significance of the state for its citizens. The feeling of the personal nature of the relationship between the state and the individual disappears, which cannot affect the strength of the state.

Socialization is an interconnected process of adaptation, integration, self-development and self-realization of a person in interaction with the environment, where the social and institutional nature of socialization is manifested in mechanisms of translation of social norms and values, according with the functions of social institutions, the nature of social relations, and the needs of individuals and groups. The institutional foundations of socialization are a system of social institutions in the totality of their connections and functional interactions that arise in the process of socialization. A social institution is a combination of formal and informal values, norms, rules and standards of behavior; prescribing individuals and social groups to perform specific social functions by which their needs and interests are satisfied. Functional interactions of social institutions are defined as the interaction of social institutions at the level of prescribed functions.

Socialization involves the process of assimilation and active reproduction by mankind of social practices, which provides it with opportunities for entry and activity in various spheres of society. Separate spheres of the life of society represent a special form of social organization with a variety of common and specific features, which determines the institutional nature of socialization. Society as a whole, from the point of a functional

approach, can be defined as a system of self-regulating social institutions that are in functional relations and connected with each other for some time.

The institutional foundations of socialization are a system of social institutions in totality of relations and relations between them that determine the process of socialization in a particular human life period. According to the general idea, the transformation period in development is a special historical subsystem in which its own structure, its development trends and its methods of regulation are revealed⁷. Social development appears as a sequence of three types of social organization: pre-industrial, industrial, post-industrial.

Among the main signs and properties of modern social institutions, objects that are in the focus of transformational activity, various aspects stand out. A developing social object is not identical with itself; the very possibility of establishing new institutions. Instead, the question arises about the boundaries of institutional transformations; subject to constant modification and the uniqueness of the development spiral of each object brings additional uncertainty to the overall structure of its social ties. The relationship of states and events are mediated by a transition process in which there are no rigid laws, the situation is not predetermined, which excludes the possibility of logical derivability of subsequent states from previous ones.

There are the following types of dependence between old and new institutions:

- deep connection, strong dependence of new institutions on old ones;
- less strong dependence, leaving room for the emergence of completely new institutions;

⁷ M. Tepe, B. Kittel, K. Gottschall, *The Competing State: Transformations of the Public/Private Sector Earnings Gap in Four Countries. State Transformations in OECD Countries*, London 2015, pp. 41–66.

- the lack of a clear connection between new and old institutions.

The existence of social institutions in a certain period of time – the emergence, disappearance, change – can destroy the organic unity of various spheres of society. Developing spontaneously, institutions are developing into a dynamic system in which there is a place for harmony and conflict, integration and disintegration. The phenomenon of the contradiction between the pace of economic development and the stagnation of development indicators in the social sphere of different societies is called deformation development. Under conditions of deformed development, the main problem lies in the disharmony of various aspects of social development – mainly economic and social.

Signs of such disharmony are poverty and unemployment, low health indicators, drug addiction and alcoholism, aggression and crime, deprivation, poor housing conditions and the breakdown of family relations, accompanied by an increase in the level of frustration of the population. In the social and regional aspect of the deformation of development has the consequence of the degradation of small towns and rural areas. The consequence of deformation is the alienation of social groups from development sources, discrimination, restriction of access to social mobility and social exclusion.

Institutional distortions are those institutional forms that do not correspond to the functional nature of institutions and have a destructive effect on the institutional system as a whole. The expression of distortion is a serious and long-term change: either the acquisition of another function unusual for the institution, or the adoption of forms alien to the institution⁸. As new institutions emerge from the existing institutional envi-

⁸ J.D. Stephens, *The Transition from Capitalism to Socialism*, London 1979.

ronment, the source of distortion lies in the imposition of new ideas on old institutions and traditions. The function of a social institution normally implies the achievement of a specific goal and the solution of specific tasks that are being completed in the results of its activities.

The results of the function of the social institution can be created by material and spiritual values, satisfaction of personal and social needs, as well as changes in the processes of public life. It is worth noting that there are some limitations for conclusions regarding the function of social institutions, a clear linking of empirical research data to the results of the function of a single social institution. As a limitation, the problem of achieving uniformity in the process of socialization can be presented. In modern society, a person is surrounded by a variety of autonomous complexes of rules and subcultures. An institution, the norms of which the individual must internalize, and which in turn must integrate the individual in its normative community, is no longer an organically inborn part for society.

All of these factors that generate deviant behavior of individuals create certain obstacles for the social system. The real behavior of people recorded in sociological studies indicates flaws in the chain of transmission of norms and behavioral stereotypes, but cannot be directly related to any particular social institution. Despite the discussion of the issue of the positive direction of the socialization process and the possibility of the existence of a negative direction of socialization mechanisms, the forms and norms of socialization that dominate at a particular historical moment in the life of society can exist under the influence of transformations arising from the invasion of innovative processes in traditional mechanisms, socially disorientation.

It is argued that the factors and components of the socialization process cannot be considered completed in principle.

Because in each new phase of life, the subject of socialization needs a change in attitudes and the assimilation of new skills for action. And also because of the society itself, depending on its own changes, can dramatically change socially accepted and approved forms of activity. A change in the nature of subordination in the social world can be imagined as the development of the uncontrollability of the social or the imbalance of social functions of both the subject of management and the object of management. In the study of the institutional foundations of socialization, understood as a system of interacting social institutions, it is very important to clarify the options for considering the system.

The concept of a social institution that we adopted in this study, which is understood as the form of existence of a social community, the totality of whose norms, institutions and functions provides a basis for highlighting a system-containing space. This is the target functional geometric space of the local community, public associations formed by their functions. Along with the concept of a system, the concept of structure is among the basic concepts of system analysis. Initially, in theoretical and applied system analysis, the concept of structure arises as a result of the operation of structuring a system. Structure of system should be understood as a representation of a system in the form of a combination of two types of objects interconnected by a certain rule: a set of elements and a set of connections between them.

Understanding the interaction of system elements in space and time, the allocation of a specific system from the surrounding world consists in the existence of a viewing angle that allows you to see the obvious overall quality of the union of parts – this is social space. Social space reflects the conditional boundaries within which various forms of interaction between the individual and individual communities arise, de-

velop and manifest themselves, the totality of which allows you to get the desired result⁹. Social space is heterogeneous and multidimensional, and each individual occupies a certain social position in it, which is established through interaction with other individuals and groups of individuals.

Achievement of a specific result of activities within the framework of social space is possible at: purposeful streamlining, coordination of interests, needs, relationships; the presence of the required legal, economic, social, organizational, mental, material and technical support in the required volume, condition, duration, relationship; a certain degree of activity and dynamism of the subjects of social space. The evolution of the values of education, the attitude to it as a value, in the main, is due to the development of the needs of society as a whole. Public needs cannot be measured as directly tangible and observable. They do not belong to isolated individual, or social communities, or some area of social life or a social institution.

Social needs are the needs of society to organize itself, preservation and development itself as a social system. Social needs take various forms, depend on the level of development of society and culture, which are quite clearly manifested in the conditions of transformation of society. A social network, in contrast to a hierarchy, is a collection of horizontal connections between individuals supported by an informal and formal way. In transitional societies, the rules of interaction emerging within a social network often play an autonomous role in relation to formal institutions, in fact replacing them. Members of a social network begin to be guided exclusively by established norms of behavior in it, deliberately violating or ig-

⁹ P. Oliver, H. Johnston, *What a Good Idea! Ideologies and frames in social movement research*, "Mobilization: An International Quarterly" 2000, vol. 5, No. 1, pp. 37–54.

noring formal regulations. Based on trust and, thereby, reducing transaction costs, social networks act as an additional or alternative regulator of interaction with respect to institutions.

Moreover, a social network performs a function of stabilization, preventing the collapse of the system of social institutions by increasing its flexibility in period of crisis. This is the logic of the rationale for the modern local community. The negative and positive processes must be considered when building the functional interaction of social institutions, so that the imposition of a normative and value mechanism on the specifics of the local community produces the necessary characteristics of the social space. The interactions of the individual and its social environment are stimulated by creating conditions for realization of itself in various types of cultural activities and organizing participation of public associations in various events at the place of residence.

At the same time, the local community as a social network can stimulate: the desire of community members for social approval; the relationship between informal norms and formal rules; the formation of citizenship, where the value and purpose of socialization become socio-cultural self-determination, patriotism and responsibility for the survival of a particular community¹⁰. The multidimensional nature of the development and function of society is associated with the development of civil society, the basis of which is the conscious voluntary, individual or collective participation of citizens in public life.

The activity of members of the local community when participating in volunteerism stimulates the development of the relationship between informal norms and formal organizational rules and the inclusion of additional groups of people in it,

¹⁰ L. Althusser, *On the Reproduction of Capitalism: Ideology and Ideological State Apparatuses*, New York 2014.

which will correspond to social networks in the form of interaction. The attitude to volunteerism and the behavior of community members is largely determined by the place occupied by the community in the city, by the mental perception of its borders. Based on the material studied on the development and practical activities of public organizations, it is concluded that the socialization activities of public organizations can be successfully carried out in collaboration with various social institutions.

Moreover, each side is a carrier of its own ideas, methodological techniques, forms of social interaction, social practices. Assessing the amount of knowledge accumulated to date in the study of socialization problems, we note that a sociological study of the problems of integration, the development of forms and methods of the functional interaction of social institutions in the process of socialization as an independent direction of scientific analysis in domestic and foreign science was not undertaken. In recent years, a synthesis of approaches has been noticed, recognizing the mutual influence of factors in explaining the actions of social actors and the course of social processes. The functional interactions of social institutions and their integration are ensured by normative-value mechanisms capable of forming a social space, giving the process of interaction ordered forms, socially significant standards and guidelines.

Extremely complicated and large systems, which are the institutional foundations of socialization, can be described in various ways: based on their essence; depending on the target and basic functions of social institutions; from selected means of achieving goals; the main technology to achieve the goals of optimizing the interaction of institutions, as good as the structural description of the corresponding system. This study implements the requirement of systemic completeness of the description of the functional interaction of social institutions.

The local community always has its own perceived or inherited basic ideas that determine public morality, promote or block the interaction between representatives of various social sectors of society based on interest and activation of massive behavioral regulators. Awareness of common problems, existing stereotypes of behavior becomes the basis for self-identification of a person with a particular community. At the local community level, there are potential opportunities for using this social institution as an element of the structure of the institutional foundations of socialization; an additional impetus for the development of social activity of members of the local community can serve as a variety of areas and organizational forms of work offered by public associations; in organizational work at the local community level, the specificity of internal relationships – a social network should be used¹¹.

The controlled variables identified during the study of the function of social institutions allow us to establish the most significant relationships characterizing a system object and, using a cognitive model, to consider the controllability of a global social object – the institutional foundations of socialization. The choice of a point control method that allows you to make changes to the entire system locally is due to the position that under external influences some system tends to go into the state of the maximum possible equilibrium under given conditions. The balance, in this particular case, is considered as a certain ratio of a set of functions and the fulfillment of its role by each of the presented institutions of society in order to achieve certain characteristics of the whole system. Such a remark is important enough to design a self-development process in which the laws of optimal control are involved.

¹¹ A. Kirichok, *Definition of the concept of public relations and public relations as a social institution. State and regions*, "Series: Economics and Entrepreneurship" 2015, vol. 1, No. 21, pp. 127–132.

Conclusions

Gradually, the local community develops an optimal ratio of its own functions performed in the structure of the institutional foundations of socialization. The cognitive model, as a result of the activation of controlled variables of the function of specific social institutions, clearly demonstrates the process of structuring the system of institutional foundations of socialization. The presented model of the functional interaction of social institutions is an ideal option. In the absence of external constraints, the value of factors will increase to infinity. In reality, resources are limited, so a few steps and managerial actions are sufficient to bring the functional interaction of social institutions into a coordinated state. Dynamics of quantitative and qualitative transformations; the interaction of various objects with each other and interconnected change; the stable and unstable state of objects – systems, the person and, finally, the state of processes is linked to the targeted management impact of the subject on the object; the effectiveness of external influences.

Based on the results of modeling the functional interactions of social institutions, it is possible that in the analysis of the state of social institutions, determining the factors of their development and the system as a whole, conclusions were drawn with a fair amount of fidelity. The considered theoretical and methodological provisions can serve as the basis for public administration of the institutional foundations of socialization and the development of recommendations for the integration of social institutions, optimizing their functional interactions in the process of socialization. One can emphasize the importance of the state once again as an institution of

ideological socialization, as a macro agent in the regulation of the ideological sphere of society.

To sum up, the theoretical analysis of the substantive and formal aspect of ideological socialization, once again, we should note the need for this process to maintain the stability of the ideological sphere of society and, accordingly, the entire societal system as a whole. The ideological doctrine, embodying the general principles of state policy, the strategy of its development, formulates an idea about the direction of development of society and the state. It forms a concrete image of the future of the country, thus acting as the driving force of social development, an instrument of integration and mobilization of society.

National ideology is one of the ways to ensure the legality of power. The ideology, supported by society, increases the legalization of power and, accordingly, increases the effectiveness of social and state transformations. Thus, ineffective attempts to reform and modernize the country are largely due to the lack of clearly defined ideological guidelines, strategies and prospects for further development in the actions of the government, as good as a decrease in the legitimacy of power and the loss of its social significance for citizens. The ideological doctrine is not necessary only for the state, but also for its citizens. It forms a certain system of “public outlook”, provides an understanding of the guidelines, goals, ideals of the development of society, determines the place of an individual in the system of social relations. Its absence leads to the loss of coordinates, allowing a person to navigate in society, to “senselessly” social reality.

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Abstract

The development of the topic of the functional interaction of social institutions makes relevant the position of the activity approach. In modern reality, the competition of traditional and emerging institutions has been manifested. The latter have become not only comparable to the resources of traditional institutions, but have also begun to seize the initiative in managing the social process itself, gradually transforming and blurring the boundaries of traditional norms and measures. Moreover, the uncertainty of the grounds on which social space is structured means the uncertainty of the rules and norms of interaction with various categories of people. This situation is fraught with identification conflicts, the basis of which is wariness and even hostility.

A condition in which a large number of individuals are in a situation characterized by a serious lack of integration with stable institutions, which are essential for their own personal stability and the successful function of social systems. The institutional foundations of socialization are a system of social institutions in totality of relations and relations between them that determine the process of socialization in a particular human life period. According to the general idea, the transformation period in development is a special historical subsystem in which its own structure, its development trends and its methods of regulation are revealed. Social development appears as a sequence of three types of social organization: pre-industrial, industrial, post-industrial.

Keywords: ideology, transformation, social and cultural values, transformational societies, socialization

Globalization, International Economic Relations, and Geo-Economic Factors (Based on Economic Relations between Azerbaijan and Poland)

Introduction

Globalization and the developments in the international economic sphere determine the emergence, development and prospects of new scientific directions. Geo-economics, as a scientific field, has been formed in recent years, but is characterized by a serious scientific base. Geo-minology, geo-informatics, geology, geo-culture, and globalization are the phenomena of reality at the beginning of the 21st century. Geo-economics has many advantages, which are due to the colorful and pragmatic nature of what is happening in the global economic landscape.

Transnational world powers and local states are represented at the level of geo-cultural relationships with a serious programme of action in the South Caucasus and the Caspian basin. In general,

Through the last decades of the twentieth century and the beginning of the 21st century, political and international events around the world, the Caspian Sea and the Caucasus region have once again become one of the central places in the world. The Caspian Basin and the South Caucasus have become geo-economic interests, attracting the attention of

the transnational world with its rich hydrocarbon resources, East-West, North-South, transport and communications capabilities in the face of the growing energy needs of the planet and the need to expand trade links¹.

These considerations of the Caspian Sea, the Black Sea basin, and the South Caucasus, in turn, determine the processes and causes of economic interests in the geo-economic space of the world.

Generally, “geo-economics – 1) conceptual views reflecting the global world through a system of economic attributes; 2) a system of economic attributes and economic relations that go beyond the national framework defining the outlines of the global economic space in which global economic processes take place; 3) symbiosis of national economies and state institutions, the “touching” of national and higher national economic and state structures; 4) the introduction of internationalized reproduction nodes (cycles) of national economies and their entities in order to participate in the formation and distribution of world income based on high geo-economic technologies, economic factors, operations in the global geo-economic atlas system”². Apparently, direct geo-economic factors play an important role in the success of international economic relations.

Modern processes emphasize the focus on strategic resources and the role of geo-economic factors in their formation. Institutions analyzing the genetics of the global community in the context of global change are focusing on the economic prospects of the path. What is important is not the formation of a global income and a complete picture of it, but it is one of the important issues, however, on the basis of the

¹ E. Hesenov, *Caspian-Black Basin and South Caucasus geoeconomics: Azerbaijan's energy policy*, Baku 2016, p. 9.

² E.Q. Kochetov, *Geoeconomics*, Baku 2015, p. 17.

legality of the distribution of that income. All economic institutions and theorists of economic thought concentrate on what is happening and seek to unleash the perspective of the global economic pulse. Certainly, there are issues such as dynamic and secure connection, the provision of fertile conditions, and the determination of new development points.

It is also necessary to ensure sustainability in the general context of the course of geopolitical processes embedded in “national interests” and “national security” and to what extent their perspective is calculated. To the extent that the modern world realizes and analyzes the rapid renewal of the party and proposal packages through scientific mechanisms, what is happening? The principles of the economic sphere, which are embedded in the minds of classics, neoclassicals, postmodernists, as well as the emerging theories, such as product life theory, competitive advantage theory, intersectional theory is.

The dynamic picture of new global processes in the modern world realizes that, in the long run, of course, the environment and reality are relevant. In addition to its geo-economic relations, its mechanisms include development technologies and specificity schemes. The climatic conditions for the success of geo-economic factors (areas and areas favorable for the economy), the current conditions for the development of various sectors of the economy, natural resources, the proper orientation of resources, etc. whatever it is, they determine whether they are represented in a geo-economic environment as a whole.

The degree of certainty of international economic relations is characterized by the weight of the geo-economic factors and the success rate. For example, the Caspian Black Sea basin, as a geo-economic space, draws attention to the richness of its energy resources. Perspectives of modern geo-economic processes raise the question of what qualities and what are characteristic of what is happening in the economic space. The Caspian Basin

and the South Caucasus's rich resources, which are in the interest of the transnational world powers and local governments, are the key to success in economic, trade and other relations.

The outgoing processes and developments in the economic space emphasize the shift in geopolitical interests in Eurasia. The Caspian – Black Sea Basin and the South Caucasus are increasingly interested in economic and trade relations and prospects. That is why transnational forces pay more attention here. The importance of geo-economic factors is of particular importance as an important party. What is happening in the Caspian Sea and the South Caucasus, its richness, and its fertility for economic processes have increased its interest in the region. The priority of geopolitical factors in the regulation of international economic relations dictates the need for mutual benefit. Here, the course of international economic processes as a global economic space defines new attributes and economic relations beyond the national framework.

Joint market regulation in the geo-economic space determines the degree of profitability and productivity of the economic environment. Undoubtedly, this also reveals mutual influence and dependence.

The intersection of the reproduction processes, the creation of new technologies, the 'mindset' of the international exchange – all of this could not be reflected in world commodity relations. New objects and subjects of international communication have been created. One of the most important aspects of the modern foreign sphere is the consideration of the mutual influence and interdependence of the evolution of the economic structure of commodity change and the organization of world economic relations³.

In modern international economic relations, the importance of geo-economics factors comes from interrelationships, inter-

³ Ibidem, p. 33.

dependence and understanding, which are the basis for joint regulation of markets.

Our analysis in the context of Azerbaijan and Poland does not only show the economic relations between the two republics, but also identifies new lines, directions and perspectives. Because Azerbaijan, as a geographical location, is making great promises in terms of its success rate. The presence of favorable conditions for the development of non-oil sectors in the Caspian basin, hydrocarbons, the prospects for the oil industry and its achievements, large-scale projects and the development of the non-oil sector are the basis of the importance of Azerbaijan. In this regard, the Caspian basin and the geo-economic characteristics of the South Caucasus are promising in the international and regional context. This region, due to its importance, is in the focus of the world.

The 21st century puts internationalization in public life as a necessity, and the processes openly support this. In addition to those in science, technology and production, cultural and spiritual aspects make this a basis for thinking. Conditions for scientific and technological development make it necessary for modernization in the geo-economic sphere and for their successful use and mutual benefit. Internationalization is dynamic in its geo-economic space, with renewal of its scientific and technical progress and new successes. New scientific developments, advances in technology, changes in labor practices do not recognize the boundaries, and tend to be updated with zigzag movements. Achievements in the scientific field, as a rule, make application of production, expansion of units, large industries, and organization of innovation work. Of course, the modernization of existing production structures is also in the spotlight.

The internationalization of geo-economic space provides the links between one geo-economic space and the other, making it easier to think that global economic processes are orga-

nized into a common system and that the overall process is accounted for. They all contribute to world economic life. "In these circumstances, internationalization is one of the main directions in making any decision in the field of foreign economic policy. The issue is not whether or not it is part of the international division of labor, but about what pace, priority, and most importantly, proportional areas of international relations, to avoid the tedious source of internationalization"⁴. Therefore, the correct definition of geo-economic factors in the success of international economic relations and the accuracy of its prospects are of paramount importance.

Success of international economic relations lies in finding common points of international economy with national economy in geo-economic space, correctly evaluating the essence of economic opportunities, because the national economy is an integral part of the international economy. The modern world depends on the importance of these geopolitical factors. The main areas to be considered in the context of the importance of geo-economic factors: a) differences in the distribution of natural resources by countries, b) soil-climatic conditions, and c) geographical position of countries, d) availability of labor resources, e) the potential of domestic markets, f) efficiency and economic interests, g) scientific and technical progress. All this clarifies the importance of international economic relations in the geo-economic context. In addition, the correctness of the mechanism of understanding and implementation of the essence of the international division of labor is based on the formation and development of international economic relations. As it is known,

in international competition, countries (their enterprises) prevail in areas where they are dominated; they are defeated in areas where they do not have advantages. They specialize

⁴ Ibidem, p. 36.

internationally and refuse others. Thus, the specialization of the countries in the UAE in one or another area is primarily the first form of international trade, and the deepening of the UAE will then lead to the formation of the remaining forms of the WIP, creating initial elements for their development⁵.

The specialization of countries in the international division of labor, and their significant advantages in certain areas is due to the establishment of a successful system of international trade, which is the starting point for the creation and development of other forms of international economic relations.

The modern world is characterized by the rapid development of new geo-economic processes, new content and meaning, and the need for deeper and more efficient division of labor as a problem. Because,

deepening the international division of labor creates opportunities for individual countries to raise the level of specialization of the national economy and, thus, to increase production through more efficient use of available economic resources. Thus, as a result of the development of foreign economic relations, countries are able to generate additional income through the specialization of products that they can produce relatively efficiently and by exchanging these products for products that are relatively ineffective. In addition, imports contribute to the growth of machinery and equipment, raw materials and materials needed for development, and exports to eliminate domestic market constraints. At the same time, the attraction of foreign investments will reduce the restrictions on the investment needed for economic development⁶.

The international economic sphere is becoming increasingly relevant as a need for deepening economic ties in both vertical and horizontal levels.

⁵ G. Genciyev, *International Economic Relations: Contemporary Situation and Development Problems*, Baku 2005, pp. 8–9.

⁶ U.A. Bölek,, *Problems of development of investment cooperation between Azerbaijan and Turkey*, Baku 2014, p. 3.

The world is not so inaccessible to the level of understanding we have and the rapid development of technology, but rather the need to make the most of its richness. Analysis of international economic relations, division of labor is based on economic specialization, links, mutual benefit, joint projects development, and without these problems can be solved. Therefore, serious issues such as enhancing specialization in national economies and utilizing available economic resources are at the forefront.

It is important that all processes in the geo-economic sphere are accounted for, the clarity and caution of strategic objectives, as a whole, is considered.

It is worth noting that global processes in the world economic system need to be pursued with a purposeful foreign policy, considering the advantages that the country has in the international division of labor, the potential of national economies and the specifics of specific conditions. This, in turn, provides for the establishment of an efficient and flexible system of state regulation of international economic relations, international economic relations, and effective foreign economic activity, considering the peculiarities and prospects of the national economy⁷.

The development potential of the national economy is linked to global processes in the world economic system, and the advantages that countries enjoy in the international division of labor make the need for systematic use of them. Considering the specific conditions, the level of success of the geo-economic sector, the growth rate in foreign trade represents a positive trend in the economic interests of countries.

The processes occurring in the geo-economic space of the Caspian Basin, West-East, North-South directly affect the saturation of the geopolitical landscape in those areas. The rich hydrocarbons in the Caspian basin, the richness of the under-

⁷ A. Kocherli, *Theoretical problems of development of foreign trade in modern conditions*, Baku 2011, pp. 3–4.

ground resources, energy resources, and the fertile environment for the transportation of natural resources naturally increase the interest of countries around the world. Other areas include land and climatic conditions, the geographical position of the South Caucasus countries, the level of access to labor resources, the potential of domestic markets, efficiency and economic interests, and so on. Such serious factors play an important role. All this also contributes to geopolitical conflicts, conflict of interests, and gaining dominance in intersecting interests.

Proper assessment of geo-economic situation affects all processes, improvement of national economies, welfare. As it is known,

the development of international economic relations is based on two main conditions: first, the objective necessity of foreign economic relations; and second, that these relationships are mutually beneficial.

World experience shows that economic relations between countries are constantly growing and expanding. The objectives of this process are:

- worldwide division of labor;
- Internationalization of economic life.

The theoretical and methodological foundations of the importance and role of foreign economic relations in modern foreign economic development have been discovered that Azerbaijan has great potential for active integration into the system of international economic relations⁸.

The growing trend between the countries is based on the importance of geo-economic factors.

The transnational interests at the intersection of the East-West and North-South, and the opportunities in the field of transport and communications, have drawn the world's attention. The overall picture of such wealth also outweighs the geo-

⁸ A. Eyvazov, *Directions for improving economic relations between Azerbaijan and Ukraine*, Baku 2008, p. 8.

political and geostrategic goals, even if there are geo-economic difficulties and challenges in the interests of large power centers.

We also add that

the evaluation of the geo-economic parameters requires that the main objectives of intercontinental competition in the Caspian basin are:

- have a dominant position in the Caspian Basin's energy resources or its use;
- participation in the development and promotion of basin energy resources to world markets;
- to own or own technology and financial resources used in the energy production of the basin;
- distribution of production;
- to influence the choice of energy export routes and transport-communication systems of the region and to control their activities;
- acquisition of other geo-economic dividends in the field of oil and gas production, consumption and export, etc.

It is made up of people⁹.

Apparently, the importance of geo-economic factors in international economic relations is remarkable with its exceptional functionality and exceptional essence. This example, given by the countries of the Caspian basin, fully reveals the existing landscape in economic relations, the mutual benefit, the success rate of technology use, and the direction of problem solving. It is true that there are facts of conflict of interest regarding position advantage here and inevitability.

Conclusions

In general, modern globalization necessitates the international integration of national economies, the allocation of resources,

⁹ E. Hesenov, *Caspian-Black Basin and South Caucasus geoeconomics: Azerbaijan's energy policy*, Baku 2016, p. 13.

the creation of economic order, the use of technology, the separation of labor from a unified system. In addition, it was impossible for a country to pay for all its problems and eliminate the needs at the expense of domestic opportunities. It is in this context that the solution of problems within the framework of international economic relations requires a position on the level of importance of geo-economic factors. Differences in distribution of natural resources by countries, soil-climatic conditions, geographical position of countries, level of accessibility of labor resources, potential of domestic markets, efficiency and economic interests, scientific and technical progress, etc. Factors such as these make the geo-economic sector significant.

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Abstract

The global economic space in which global economic processes take place defines economic relations with their subjects and reveals the sustainability, correctness and prospects of these relations. Implementation

of geo-economic policy due to high geo-economic technologies is considered to increase revenues, successful distribution and improvement of welfare. There is, of course, another tendency to redefine the world, which is the basis of new approaches, principles, and regularities of system upgrading. Geo-economic factors make it necessary to create modern mechanisms of internationalization in the economic sphere. All that is now due to the emergence of new economic boundaries, that is, the emergence of supplements and alternatives.

Keywords: International economics, globalization, geo-economics, geopolitics, Azerbaijan, Poland

The “Mamluke Period” in the History of the Atabey State in the Context of Azerbaijani-Georgian Relations

At the end of 1175, “the decisive and true judge of the state’s fortune” in the Iraqi Sultanate, the founder of the Azerbaijan Atabey State, the farsighted great political figure Atabey Sham-saddin Eldeniz died in Nakhchivan. About a month later, his guardian Sultan Arslan Shah also died, and Muhammed Jahan Pahlavan, eldest son of Eldeniz (1176–1186), was appointed to be the atabey (literally means “fatherly lord” in Turkic) of the juvenile Sultan Togrul. The strengthening of the central government during the first period of his rule had a positive impact on foreign policy. During the ten years rule of Atabey Jahan Pahlavan, the state was not subjected to any foreign aggression. It was during his rule that “Georgians made peace with him and accepted his demands”¹.

Although wars with Georgia were interrupted on the eve of the “Mamluke period” in the history of the Azerbaijan Atabey state, in other words, during the reign of Atabey Jahan Pahlavan, the Eldenizids tried to intervene in the struggle for power by using the unrest in Georgia in 1178. Activation of some forces within the country against the rule of the Georgian king Georgi III, as well as palace conflicts known as the

¹ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti (1136–1225-ci illər)*, Bakı 2007, p. 78.

“Prince Demna’s revolt”² created favorable conditions for the Eldenizids to intervene in Georgia’s internal affairs.

Some big feudal factions in the Abkhaz-Kartli kingdom accused Georgi III of seizing the throne and intended to dethrone Georgi and to bring Demetri (Demna), who was considered by many to be a legitimate successor, to power. Prince Demna was the nephew of Georgi III, son of David, who was a king for only 6 months between 1155 and 1156. According to Mkhitar Gosh,

David was a man, who was especially well-disposed toward the Armenian princes being his subordinates ... David intended to consult, to learn all the truth about the faith, and thus adhere to Orthodoxy (Monophysitism – Sh.A). When the Georgian princes learned of David’s intention, most of all, the Orbelian family, flew into a rage, and they poisoned and killed king David³.

A Georgian source not drawing much attention to the issues of faith, notes that Demetrius preferred his younger son Georgi, “blasphemed and insulted his eldest son David”⁴ or “David betrayed his father and opposed him”⁵. And characterizes prince Demna as “the doctrines of Christ, religious sins, and the absence of God’s fear”⁶.

Despite the fact that the Georgian source tries to veil the issue of faith, it is clear that both David and his son Demna were prone to monophysitism, and were largely supported by the

² Г.М. Майсурадзе, *Один Армянский источник о восстании царицы Демны*, “Сб: Грузия в эпоху Руставели”, Г.М. Майсурадзе, Тбилиси 1966, p. 310.

³ М. Каланкатуклу, *Albaniya tarixi*. Мхитар Қош. *Alban salnaməsi*. Тәrcümә еdәni, müqәddimә, qeyd vә şərhләrin müәllifi akad. Z.M. Bünүyаdov, Bakı 2006, p. 271.

⁴ Картлис цховреба, *История Грузии*, Главный редактор академик Р. Метревели, Тбилиси 2008, p. 244.

⁵ *Ibidem*, p. 251.

⁶ *Ibidem*.

monophysite feudal lords. Big feudal group plotting against the king was also led by the head *emir sipahsalar* (supreme commander/minister of war) of the army, of the monophysite faith Ivane Orbeli. In 1178, supporters of prince Demetre (Demna), led by Ivane Orbeli, the head *emir sipahsalar* of the Georgian army, rebelled against the king Georgi III. The rebels that consolidated in the Armenian provinces mainly subordinated to Georgia and where the population was mostly monophysite, asked Atabey Muhammad Jahan Pahlavan for help⁷. It is no coincidence that Atabey Shamsaddin Eldeniz and his followers were hoping to draw the Christian population of Azerbaijan and neighboring provinces to their side in an ongoing fight with Georgia. To this end, the Azerbaijani Atabeys were patronizing local clergymen⁸.

Georgian king Georgi III used the disorder inside the country, and having crushed resistance of the people of former Sheki realm⁹ (after being amalgamated to Georgia Sheki eristavate), forced out Ivane Orbeli and the supporters of the rebellious prince and sieged them in the castle Lori. According to S. Ashurbeyli, Shirvanshah Akhsitan I came with his troops to Georgia and helped Georgi III in the suppression of the rebellion¹⁰. While being sieged in Lori Castle, Ivane Orbeli sends his brother Liparit to Atabey asking him to come with his troops to Georgia. Although Liparit, who was sent by Ivane and accompanied by his sons Elikum and Ivane came to Ata-

⁷ История и восхваление венценосцев, Грузинский текст перевел, предисловием и примечаниями снабдил К.С. Кекелидзе, Тбилиси 1954, p. 29.

⁸ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., p. 66.

⁹ Ş.H. Əliyev, 1178-ci il Şəki üsyanı, "Bakı Universitetinin xəbərləri. Humanitar elmlər seriyası" 2001, № 2, pp. 83–86.

¹⁰ İbn əl-Əsir, *Əl-Kamil fit-t-tarix*, Ərəb dilindən tərcümə edən M. Əfəndizadə, Bakı 1959, p. 139.

bey, hurried to help his brother with a force of 60.000¹¹, but it was too late. By reason of the extension of the siege, Georgi III suggested Ivane Orbeli to surrender, because they were concerned about Atabey's coming. Believing in the promise of the king, Ivane and the rebellious prince surrendered, then were captured and suffered grave tortures¹². Georgi III severely punished the rebels: Ivane Orbeli was blinded and his sons and relatives were killed; prince Demetre (Demna) was blinded and castrated¹³. After the march to Georgia, Liparit remained in service at Atabey. One of his sons, Elikum, began to serve at Atabey, and his other son, Ivane, began to serve at governor of Atabey in Ganja¹⁴.

After the death of Georgian tsar Georgi III in 1184, his daughter Tamar (1184–1213) ascended the throne¹⁵. Her years of power are described as the “golden age”, when Georgian tsardom flourished and reached the zenith of power and authority. The main factor influencing the growth of the Georgian tsardom's power at that time was the disturbance of the balance of forces in the region and the emergence of a new political situation. The struggle for power in the Atabeys state that has been the main rival of the Georgian tsardom in the region for a long time, got heated and the stability in the country was shattered. After the death of Atabey Muhammad Jahan Pahlavan in 1186, a 30-year “mamluke period” in the history of the Atabey state begins¹⁶. At the time, when the former mamlukes of Jahan Pahlavan showed political activism, there was a heated struggle for power between Atabey Qizil Arslan

¹¹ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., pp. 60–61.

¹² История и восхваление..., op.cit., pp. 29–30.

¹³ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., p. 61.

¹⁴ Ibidem.

¹⁵ История и восхваление..., op.cit., p. 34.

¹⁶ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., p. 84.

and the last Seljuki sultan of Iraq Togrul III. Since most of the mamlukes were on the side of Qizil Arslan, Sultan Togrul III was forced to appoint him atabey¹⁷, but soon there arise an irreconcilable animosity between the parties followed by bloody clashes.

A Georgian source provides us with information on several successful marches of Georgian troops (in the direction of Kars, Basiani, Dvin, Arran) during Tamar's first marriage with Georgi Rusa in 1185 (1185–1188). According to Georgian sources, when Georgian troops marched to Qelakuni they confronted with a group of Qelakuni Turkmens led by Rustam and Yalquz-Alfaz, the emirs from the Shamlu tribe, being under the command of Qizil Arslan. The fight ended with victory of the Georgians¹⁸. Qizil Arslan, who achieved power in the Atabey state with difficulty (1186–1191), approached Van Lake and seized Bitlis to prevent Georgians¹⁹.

In 1188, tsarina Tamar's first husband, Georgi Rusa, was expelled from the Georgian palace and sent to Constantinople. A Georgian source notes that among those who wished to marry Tamar, was one of the sons of Qizil Arslan, but he was deprecated by his father for fear of renouncing his religion²⁰. In 1189, Tamar was married with Ossetian origin David Soslan²¹. A Georgian source provides us with information that having known about it, Georgi Rusa returns from Constantinople and attempts to seize power in Georgia in 1190–1191. Most of the feudal lords, who were dissatisfied with tsarina Tamar, also take his side. In the decisive battle that took place in Javakheti,

¹⁷ Указанное сочинение, р. 89.

¹⁸ История и восхваление..., op.cit., pp. 40–43.

¹⁹ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., p. 95.

²⁰ История и восхваление..., op.cit., p. 43.

²¹ Указанное сочинение, р. 46.

Georgi Rusa's forces were defeated²². Georgi Rusa, reluctant to reconcile with his defeat after his failed attempt to seize power with the support of feudals, who were displeased with tsarina, sought for his allies to start fighting again. In 1191, he appealed to Qizil Arslan, who has just accepted the title of Sultan in the Atabey state of Azerbaijan. Thus, by defending Georgi Rusa the Eldenizids had the opportunity to intervene in the struggle for power in Georgia for the second time. According to a Georgian source, Georgi Rusa asked the Azerbaijan ruler to allocate area for him in Arran. From here with the troops of Ganja and Arran he leaves for Kambisena (Kambechovani), destroying the fields throughout the country, seizing a large number of loot and captives. Hearing about it the ruler of Khornabuj, Sagir Makhatelisdze summoned up his army and attacked Georgi Rusa and forced him to flee²³.

After the assassination of Sultan Qizil Arslan in 1191²⁴, in the Atabey state the intestine wars for power began. The central power created by the Eldenizids collapsed. Despite of all the efforts of Abu Bakr (1191–1210), who seized power in Azerbaijan, the state collapse could not be prevented, and the recession of Azerbaijan Atabeys (1191–1225) began. Abu Bakr fought against his brothers and, in 1192, near Tabriz, he was able to defeat the combined army of Qutlu Inanj and Emir Emiran Omar. Emir Emiran Omar, pursued by his brother Abu Bakr, fled to Shirvan²⁵ and took refuge in the palace of Shirvan-

²² Ibidem, pp. 49–50.

²³ Ibidem, pp. 55–56.

²⁴ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., p. 97.

²⁵ Садр ад-Дин Али ал-Хусайни, *Ахбар ад-Даулат ас-Селджукийя*, (Сообщения о Сельджукском государстве. Сливки летописей, сообщающих о сельджукских эмирах и государях), Издание текста, перевода, введение, примечания и приложения З.М. Буниятова, Москва 1980, p. 157.

shah Akhsitan I. The Shirvanshah and Georgian tsarina Tamar used the disorder in the Eldenizid palace. Shirvanshah Akhsitan I welcomed Emir Emiran Omar, took who refuge in Shirvan, married his daughter with him, and gave military aid in the fight against his brother Abu Bakr. However, in 1192, in the battle near Beylagan Abu Bakr defeated his brother and Shirvanshah's forces and seized Arran. At the same time, Shirvanshah, whose country was ruined by the devastating earthquake in Shirvan and Emir Emiran Omar, had to resort to his ally tsarina Tamar²⁶.

A Georgian source deals in detail with the welcoming ceremony of the Shirvanshah and Emir Emiran Omar, who were invited to Tiflis²⁷. Arriving at tsarina Tamar's palace, Emir Emiran Omar announced that he was ready to fight against his brother together with Georgians. Georgians welcomed him, treated him with the dignity of their forefathers, had a profound respect for him, and met all his needs. In his meeting with tsarina Tamar, Emir Emiran Omar made a vicious promise that if Omar succeeded in defeating his brother, "then everything is before you, take whatever you want, because you have no more rivals there"²⁸.

Thus, tsarina Tamar found an ally for herself in the fight against the Atabey. It was mentioned that in the events of 1178 the Eldenizids by defending the successor to the throne, prince Demna, who was opposed to the ruling government and fought for power in Georgia realized his first attack, and then in 1191, by defending tsarina Tamar's first husband realized his second attack. Then Tamar skillfully used the disorder in the Eldenizid palace. Emir Emiran Omar received every

²⁶ История и восхваление..., op.cit.,p. 57.

²⁷ Указанное сочинение, pp. 58–59.

²⁸ Садр ад-Дин Али ал-Хусайни, *Ахбар ад-Даулат...*, op.cit., p. 158.

support from the Georgians in the fight against his brother. The Georgian tsarina ordered to assemble troops from all over the country to attack Arran and Azerbaijan. In June 1194, the Georgian-Shirvan army and Emir Emiran Omar's troops led by Tamar's second husband David Soslan, approached Shamkir. Abu Bakr, who was severely defeated in the Shamkir and Beylagan battles was forced to leave Arran²⁹.

A Georgian source informs that after these victories – the capture of Ganja by David Soslan without fight and “the vassalage of Atabey Jahan Pahlavan's son”, the Georgian palace was very pleased³⁰. However, it is known from other sources that Ganja people allowed only Emir Emiran Omar to enter the city accompanied by few Georgian commanders³¹. Although Emir Emiran Omar seized power in Arran, including Ganja, he was killed 22 days later as a result of an attempt and Abu Bakr regained control over Arran³². After the Georgians left Ganja, Emir Emiran Omar began to oppress the Muslim population of the city, and protected the Christians. As a result, the city noblemen attempted on his life and killed³³.

According to a Georgian source, the man sent to kill brother of Atabey Abu Bakr, who sheltered in Nakhchivan, secretly kills Emir Emiran Omar with poison. Only then Atabey Abu Bakr was able to return Ganja. In Ganja, Emir Emiran Omar's fighters fought with him, but some of them were killed and some were forced to flee. Although Abu Bakr has strengthened his position in the city by making Ganja dwellers to swear to

²⁹ История и восхваление..., *op.cit.*, pp. 59–62.

³⁰ Указанное сочинение, pp. 62–63.

³¹ Садр ад-Дин Али ал-Хусайни, *Ахбар ад-Даулат...*, *op.cit.*, pp. 159–160.

³² История и восхваление..., *op.cit.*, pp. 64–65; Садр ад-Дин Али ал-Хусайни, *Ахбар ад-Даулат...*, *op.cit.*, p. 160.

³³ Z. Bünyadov, *Azərbaycan Atabəyləri...*, *op.cit.*, p. 108.

be his subordinate, he feared to stay there long and soon left the city. The Georgian palace, which learned about the death of Emir Emiran Omar and the capture of Ganja by Abu Bakr, went into mourning³⁴.

The effort of tsarina Tamar and her husband David Soslan to re-capture Ganja was unsuccessful. The Georgian army sieged Ganja for 25 days, but was not able to break the resistance of the Ganja dwellers. Tsarina Tamar personally arrived in Ganja, which was under siege, and Shirvanshah Akhsitan I hurried to meet and to serve her. But the Georgians, unable to capture the city, took the siege and returned³⁵.

At the beginning of the 13th century, due to the temporary weakening of the Islamic-Turkish military political factor in the region, the Georgian tsar gained certain success. The Georgian army seized Dvin in 1203, Trabzon in 1204, and Kars in 1206³⁶. Although, during the siege of Dvin that were under control of the Atabeys, the people appealed to Abu Bakr, but he refused to help. Desperate for help, the people of Dvin was forced to surrender the city to the Georgians. Fearing that the Georgians would move inside the country after the capture of Dvin, Abu Bakr left Nakhchivan for Tabriz³⁷. The Georgians campaigned the western provinces of Azerbaijan twice in 1205/160 and plundered several places and marched to Khilat³⁸.

A Georgian source reports about the plunder of Ardabil by the Georgian troops in 1208. After the capture by Ardabil ruler of the city Ani, which was subordinated to the Georgian tsardom³⁹, the Georgian army passed through the Khudafarin

³⁴ История и восхваление..., op.cit., p. 65.

³⁵ Указанное сочинение, p. 66.

³⁶ İ.A. Cavaxışvili, *Gürcü xalqının tarixi*, kitab II, Tiflis 1965, p. 273.

³⁷ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., pp. 109–110.

³⁸ Указанное сочинение, p. 114.

³⁹ История и восхваление ..., op.cit., pp. 80–81.

bridge and killed 12.000 people in mosques on the day of the Muslim holiday⁴⁰.

During the Ardabil march, the Mkhargrdzeli brothers once again became convinced that there was no force in the Atabey state to oppose the Georgian troops. This led to the predatory marches of the Georgian armies to the South Azerbaijan cities in 1210–1211⁴¹. Georgians, who passed by Nakhchivan plundered the city of Marand, where the people took refuge. The governor of Tabriz, Zahida Khatun, by giving to the army a large amount of money, jewelry, and craft items saved the city from destruction and plunder. The Georgians plundered the Tabriz region and took many captives. They took their livestock with them. The city of Miyana also followed the fate of Tabriz. Cities such as Zanjan, Qazvin, Uchan, Abkhar showed a weak resistance, and as a result, they were seized by arms and plundered. The Georgian army, which reached the eastern shores of the Caspian Sea, could not continue the march due to the abundance of military loot, and had to return. On their return, they mercilessly punished the rebellious Miyana dwellers⁴².

No one could seriously resist them, except for the Ganja people, when the Georgian troops made one of the largest marches on the territory of Azerbaijan. Although Atabey Abu Bakr decides to become related with the Georgian palace to prevent the Georgians from attacking the country, it causes serious resentment among Muslims. Abu Bakr’s intention to establish relation ties with the Georgian palace was linked to

⁴⁰ Указанное сочинение, р. 82.

⁴¹ Садр ад-Дин Али ал-Хусайни, *Ахбар ад-Даулат...*, op.cit., pp. 160–161.

⁴² История и восхваление..., op.cit., pp. 83–86; Y.M. Mahmudlu, *Azərbaycan tarixi. İntibah dövrü: IX əsrin ikinci yarısı – XIII əsrin əvvəlləri*, Bakı 1996, pp. 28–29.

the real political situation and the lack of the necessary force to fight with Georgia⁴³.

After the death of Abu Bakr, the last ruler of the Azerbaijan Atabey state, the weak willed Uzbek (1210–1225) comes to power, and soon he became the vassal of Kharazmshah. After the death of Zakharia Mkhargrdzeli, the chief *emir sipahsalar* of the Georgian army in 1212, and the tsarina Tamar in 1213, the devastating marches of Georgians against Azerbaijan relatively abated⁴⁴. According to a Georgian source, when 18-year-old Georgi Lasha came to power, countries, dependent of Georgian tsardom, including Ganja people, refused to pay tribute. Tsar Lasha, who went on march to punish Ganja people, faced a severe resistance and was unable to capture Ganja⁴⁵. The next Georgian march forced Atabey to complain to Kharazmshah against Uzbek, who was his vassalage. Kharazmshah Tekish sent an envoy to Georgian tsar Georgi IV Lasha, and demanded to stop the marches. At the same time, he allocated 50.000 horsemen for march to Georgia. The Georgian Tsar sent envoys to Kharazmshah with rich gifts with the intention of preventing the attack of the Kharazm dwellers to Georgia⁴⁶.

After the collapse of the Kharazmshah state, the Mongols crossing through the areas of Khorasan and Irani Iraq, which were vassal-dependent of Kharazmshah, invaded Azerbaijan in January 1221. As the Mongols approached Tabriz, Atabey Uzbek sent his envoy and asked for peace, in addition to fulfilling all their demands, sent money, clothes, and livestock⁴⁷. Along with this, when the Mongols passing through Mughan

⁴³ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., p. 120.

⁴⁴ Ş. Hacıəli, *Şimal-Qərbi Azərbaycan: İngiloylar*, Bakı 2007, p. 199.

⁴⁵ Карлис цховреба, *История Грузии*, Главный редактор академик Р. Метревели, Тбилиси 2008, pp. 331–332.

⁴⁶ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., p. 124.

⁴⁷ İbn əl-Əsir, *Əl-Kamil fit-t-tarix*, op.cit., p. 171.

and took their way toward Arran and Georgia, Atabey Uzbek sent a letter to Georgian tsar Georgi IV Lasha through his envoy to warn Georgians. The letter said: “From this day on we must help and support each other. Enough we saw so many destructions, deaths and ruins”. However, the Georgian palace ignored this warning⁴⁸.

The monk Makagia writes that the Tatars were “focused on Agvania and Kartli” after the conquest of Iran⁴⁹. According to Ibn al-Asir, the Mongols met 10.000 men Georgian troops while crossing the Georgian border. The Georgians were severely defeated⁵⁰. Despite the victory, Mongols did not march on Tiflis and returned Mughan to spend the winter.

After his first great defeat, Georgi IV Lasha attempted to form an alliance with other nations in the fight against the Mongols. According to Ibn al-Asir, the Georgian tsar appealed to neighboring rulers, including Atabey Uzbek, for this purpose. Atabey Uzbek and Georgi IV Lasha concluded an armistice and an agreement on joint action against the Mongols. They agreed and planned to attack the Mongols in the spring of 1221. However, the Mongols, knowing about this, intruded Georgia for the second time in January 1221⁵¹. Atabey Uzbek’s governor in Arran Mamluke Nasireddin Agh-Qush together with troops assembled from the Turks and the Kurds passed to the side of Mongols. It is presumed that it was he, who gave information to the Mongols about the negotiations between Atabey Uzbek and Georgi Lasha⁵². For this reason, Atabey Uz-

⁴⁸ Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., pp. 125–126.

⁴⁹ Инок Магакия, *История народа стрелков (монголов). О том, откуда он явился, и каким образом подчинил себе многие страны и области* (пер. К.П. Патканова), “История монголов инока Магакии, XIII века”, Москва 1871, p. 5.

⁵⁰ İbn əl-Əsir, *Əl-Kamil fit-t-tarix*, op.cit., p. 171.

⁵¹ Ibidem.

⁵² Z. Bünyadov, *Azərbaycan Atabəyləri dövləti...*, op.cit., pp. 126–127.

bey was inactive in the decisive battle between the Georgians and the Mongols and could not help the Georgians.

The monk Makagia writes that the Georgian tsar fought against the Mongols in the great Kotman plain with 60.000 cavalry men⁵³. According to the Georgian source “Centennial Chronicle”, the Mongols, who had reached the Georgian territory, after plundering Somkhuti confronted the Georgian army on the banks of the Berduci River. Tsar Georgi Lasha “assembled 90.000 cavalry men” and with numerous local forces from the Gagi lands jumped into the battle and fought. The Georgian army was destroyed by the traditional tactics of Mongols, such as “retreating one part and striking the enemy with the rest of the ambush”⁵⁴.

According to Ibn al-Asir, Mongols attacked the Georgians by placing Agh-Qush’s units in the foreground. This time the Georgians, who were more prepared for the war, initially forced the Mongols to flee, but were later ambushed and defeated⁵⁵. The Mongols, who plundered the eastern provinces of Georgia, returned Azerbaijan.

After the Mongols passing through Derbent left Azerbaijan, the Kipchaks that were suppressed by them intruded to Shirvan in the north in 1222. After Shirvan, a 50.000-strong Kipchak army marched to Gabala, which was in the hands of Georgians⁵⁶. Since the siege of Gabala was unsuccessful, the Kipchaks, who plundered the surrounding areas⁵⁷, moved to Ganja. When Atabey Uzbek’s governor in Ganja Emir Kush-

⁵³ Инок Магакия, *История народа стрелков...*, op.cit., p. 5.

⁵⁴ Карлис цховреба, *История Грузии*, Главный редактор академик Р. Метревели, Тбилиси 2008, pp. 336–337.

⁵⁵ İbn el-Əsir, *Əl-Kamil fit-t-tarix*, op.cit., p. 171.

⁵⁶ Указанное сочинение, pp. 178–179.

⁵⁷ А.А. Ализаде, *Социально-экономическая и политическая история Азербайджана XIII–XIV вв*, Баку 1956, p. 101.

khara welcomed the Kipchaks with his troops, they sent a letter to the emir requesting permission to settle in outskirts of Ganja. By Atabey Uzbek's consent, Kipchaks were placed near Mount Gilkun. After that, frequent bloody clashes take place between Kipchaks and Georgians. Considering the danger of Georgian attacks on Ganja, Emir Kushkhara gathered the Kipchaks in the city. But because of the immoral behavior of the Kipchaks in the province he drove them back to Shirvan. In Shirvan they were destroyed by Shirvanis, Georgians and Lezgins⁵⁸. A Georgian source gives a brief description of these Kipchak marches: “...the troops intruded into Somkheta and Hereti, and inflicted some damage to the country. Georgi Lasha succeeds in expelling them from the country”⁵⁹.

The Georgian palace was trying to regain Georgia's previous authority in the region, using the relative stability created in the Georgian Palace after the first serious blows delivered as a result of the Mongol and the Kipchak marches in the recent more than 100 years. According to Ibn al-Asir, after defeating the Kipchaks, the Georgians marched to Arran in February 1222 and seized the town of Beylagan. After the Georgians seized the town without resistance, they used their swords, repeating the massacres and plunders implemented by the Mongols here⁶⁰. Meanwhile, Atabey Uzbek was in Tabriz, drinking and taking no action.

In 1225, Georgian troops again invaded Arran and attempted to besiege Ganja. But they were destroyed by the Ganja people and withdrew. That year Georgians' attempt to invade Arran failed again. Georgian units taking position in

⁵⁸ Ibn al-Asir, *al-Kamil fit-t-tarix*, op.cit., p. 180; *Киракос Гандзакецци, История, Перевод с древнеармянского Т.И. Тер-Григоряна*, Баку 1946, p. 105.

⁵⁹ Kartlis Tsovreb, c. I. Tiflis 1955, p. 370.

⁶⁰ Ibn al-Asir, *al-Kamil fit-t-tarix*, op.cit., p. 189.

the mountain passages were forced by Muslims to retreat. As Georgians prepared for a new attack, Kharazmshah Jalaladdin Mangburnu, who fled from the Mongols, marched to Azerbaijan. These circumstances forced the Georgians and Atabey Uzbek to make peace and join against the new enemy. While Sultan Jalaladdin was still in Maragha, the Georgian palace sent an envoy to Atabey Uzbek and called for an alliance against Jalaladdin. The rapid campaigns and invasions of Kharazmshah Jalaladdin did not allow these intentions to be materialized. With the strengthening of the Kharazmis in Azerbaijan, the state of Atabeys collapsed.

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Abstract

The Azerbaijani state of Atabegs and Abkhaz-Kartli tsardom which since the second half of the 12th century was viciously fighting for hegemony in the region, were always in conflict. The rivalry and tension between these two countries was observed by recurring clashes, prolonged wars at times, repeated marches on each other's territory, a fierce struggle for power and by every support of princes – succes-

sors to the throne, who opposed to the ruling government. After the death of Atabey Muhammad Jahan Pahlavan in 1186, begins a 30-year “mamluke period” in the history of the Atabey state. At the time, when the former mamlukes of Jahan Pahlavan showed political activism, there was a heated struggle for power. At the end of the 12th–early 13th centuries, the state of Atabeys faced serious problems in preventing attacks of Georgian feudal lords on the territory of Azerbaijan.

Keywords: Azerbaijan, Georgia, feudal states, atabey, relations

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Recommendations on the Establishment of a Jury System in Azerbaijan

Since Azerbaijan gained independence, reforms have been undertaken in all spheres of society and the country, resulting in major changes and the creation of new institutions. Current political and social processes occurring in every society have taken on a universal nature. In this period of intensive globalization, there are almost no closed, isolated societies. Under such conditions, the social progress taking place in every country is an integral part of its international development. At the same time, one of the basic motivating sources of each internal process is an international factor. Thus, in contemporary times it is impossible for any society to make progress in isolation from the processes of the world.

Understanding this necessity, the government and the people of Azerbaijan have taken a path toward comprehensive integration into international life and global processes. For this reason, Azerbaijan has created a number of new institutions considering the experiences of developed foreign countries. One of them was the establishment of a jury system, based on European standards and the experiences of other countries of the world.

Despite the fact that the institution of trial by jury is reflected in legislation (for example, in the Constitution of the Azerbaijani Republic, in the Law on Courts and Judges of the Republic, in the Criminal Procedure Code of the Republic), many are ignorant about it because it has not actually been applied in practice. Now, the Azerbaijani Republic is searching for an acceptable model for jury trials. For this purpose, scientific conferences, seminars and meetings with participation of leading international and local organizations are taking place in Azerbaijan, and the concept of participation of jury in criminal procedures is developing.

Regarding the application of these innovations, there is no consensus of opinion among scholars or practitioners. Thus, trials with the participation of a jury are not operating yet, and it is difficult to give a concrete idea about this. However, it can be mentioned that trials by jury have been operating successfully for a few hundred years in the United States and in a number of European countries. This confirms that this institution has already fully developed and has justified itself.

Therefore, trials by jury in Azerbaijan should begin operating, and the experience will gradually show its strong and weak sides. On the one hand, judgments issued by inexperienced people may be viewed as negative. On the other hand, their objectivity and judgments based on human values rather than just on articles of legislation may be positively appreciated. It is important to note that in the experience of the US and other developed Western countries, the institution has proven itself for many years. At the same time, the jury increases the authority of courts' power, thus the decisions are made not by government officials, but by citizens, representatives of the nation.

This idea is proved by the fact that, despite serious protests, the Russian Federation started to implement the jury system

for the first time in 1993. However, this innovation was applied starting in a few areas, then in 2002 it was included into the new Criminal Procedure Code of the Federation, and today it works as a permanent institution.

The notion of jurors in legislation is defined by the following: “Jurors are the citizens of Azerbaijan Republic who are included in the list of jurors and involved in lawsuits in the manner and cases stated in the legislation of the Republic”.

This laconic definition is followed by a wide range of requirements, by which the following people are not included in the list of potential jurors:

1. People who are not entitled to the right of choice;
2. People who are under 25 years old until the list of jurors has been compiled;
3. People with double citizenship;
4. People who have obligations before other states;
5. People who have been convicted, suspected or accused of committing a crime;
6. Anyone with an intellectual disability, as defined by law.

The law also requires exemption of the following citizens from the list:

- a. People who do not know the language of procedure;
- b. Dumb, deaf, or blind disabled people;
- c. People who are unable to perform the functions required of a juror because of medically documented physical or psychological disabilities;
- d. Citizens over 70 years old;
- e. Administrative employees and deputies of legislative or executive powers, judges, prosecutors, administrative and staff employees of internal affairs and national security organs, investigators, lawyers, and notaries;
- f. Military service members;
- g. Religious clergy.

It may be observed that while the noted requirements are numerous and heavy, almost all of them are substantial and important. Considering the population size of the Republic of Azerbaijan, it is obvious that these requirements sufficiently limit human resources and selection becomes difficult. However, the selection of the jury is still not over even when the requirements are met.

The law authorizes the chairman of the court to excuse individual jurors from service in a particular case for various reasons. If a juror is excused, he may leave the court. The court secretary then will submit the list of selected candidates to the public prosecutor, as well as to the accused person and her counsel, in order for them to exercise the right of unfounded objection under instruction of the chairman of court. Each of them has the right to exclude two jurors from the general list.

Upon implementation of all the mentioned procedures, a jury panel consisting of 14 persons (2 alternates) is assigned to the trial.

In addition, statistics indicate that there is a high number of felonies in the country, and taking this point into account, the number of jury panels (which can be established only in felony cases) will also be substantial.

Thus, is it possible to establish several jury panels consisting of 14 persons who meet the requirements in the court of serious crimes?

In addition, several factors not described in the law should be considered, because they can impact the establishment of jury trials. These include the size of the country, the size of its population, court culture, the judge's reputation, freedom of speech, free thinking, intellectual levels, and national mentality. In order to eliminate such complications, several solutions can be recommended. For instance, it is possible to reduce or simplify the number of requirements and ultimately decrease the complexity.

For comparison, although the United States of America has a population of 309.5 mln, to qualify for a jury a person should be a US citizen; be at least 18 years of age; reside primarily in the judicial district; be adequately proficient in English to satisfactorily complete the juror qualification form; have no disqualifying mental or physical condition; and never have been convicted of a felony.

The author believes that age limit should also be reduced in the legislation and lawyers, notaries and military servants should not be exempted from the list of potential jurors. Each citizen who is 18 years old is considered mature and can exercise full constitutional rights and freedoms. For some reason this legislation deprives him the right (or the position) of being a juror. Moreover, the exclusion of lawyers from the list of jurors is groundless. We cannot agree with opinions such as: "a lawyer will always support the defendant and will seek to help him in any case, and ultimately the objectivity of the verdict will not be ensured". In fact, the vast majority of lawyers participate in court not on the side of the defendant, but as a plaintiff and prosecutor. This does not damage their objectivity, equitable position and status in general. No small part of the population are military servants, and excusing them from this right (or position) is unreasonable. In fulfilling the obligation of jury duty, a military servant is not only released from the workplace, but also rank subordination, and ultimately, he is not subjected to marginal impacts. As for notaries, there are no grounds for this requirement in the legislation.

One simple change would greatly help simplify this problem: to decrease the number of jurors from 14 to 12 or 10 persons. In this case, jury selection will become much easier.

The general requirements for jurors are to protect them from public impact within the overall procedure. They are required to reach a verdict based on only the facts the judge

has decided are admissible, and they are not supposed to see evidence that has been excluded as prejudicial. Sometimes jurors should be sequestered, or placed beyond public reach and denied access to outside media such as television and newspapers, and allowed only limited contact with their families. In decision making they should not communicate with anybody, or even answer their phone calls. Decisions should be made behind closed doors. The deliberations of the jury are secret and there is no set procedure which jurors are bound to follow in reaching their verdict. After completion of the process, the jury is not allowed to communicate with journalists; that is even considered a crime in some countries. To put pressure on jurors is absolutely considered an offense.

Trials by jury are more widespread in the US than in all other countries of the world: 90% of the world's jury trials take place in the US, where the practice is thriving.

However, despite all the challenges, the institution of jury trials is deeply rooted in the US. Juries make decisions about human lives while relying on the power of the country. Who are the jurors? Millions of Americans could respond to this question, each in his or her own way. But the fact that a person can respond to this question, sit in the courtroom, follow the process and ultimately decide about whether a citizen like her is guilty, speaks about transparency and democratic values.

The US cannot be considered an ideal country and its judicial system is far from perfect. However, traditional jury trials provide an opportunity for ordinary citizens to directly and indirectly take part in administration of justice and establishment of an equitable society.

Supporters of the jury system refer to major studies performed by Harry Kalven and Hans Zeisel on a number of selected court cases in 1966. The scholars asked presiding judges to make a note of their own decision while the jury were dis-

cussing in the jury deliberation room. The scholars found out that in most cases the judge's decision would be based on the jury's verdict. 29% of all Americans, or approximately 88.5 mln people, have served at least once on a jury.

Analyzing modern court practice and the historical practices of foreign countries, we conclude that jury trials are reasonable. A jury panel is a temporarily established body of unfamiliar persons. The main goal of this body is to make an objective and just decision from a moral point of view on a certain criminal case. Thus, it would be worthwhile to establish such a system in Azerbaijan soon and operate it successfully.

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Abstract

In spite of the legislative allocation of the institution of jury, it has not been practically applied. Some suggestions are brought forward in order to simplify the selection process of the candidates to become a member of jury. It is essential to decrease the age limit to 18. The lawyers, military servants and notary should be allowed to be selected as a member of jury. It is also possible to reduce the number of jurymen from 14 to 12 or 10. The trial of jury successfully functions in the countries of Europe and America.

Keywords: jury system, court, the age limit, judicial system

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Implementation of the Belt and Road Initiative in Selected Balkan States

Introduction

Although the Belt and Road Initiative (BRI) was inaugurated relatively recently (2013), its – yet incomplete – implementation has completely changed the geopolitical system not only of the Asia-Pacific region, but also of the whole world. Even though the Belt and Road is by its very nature an economic project, there are a number of other, no less important components that determine its effectiveness. One of them is undoubtedly Chinese diplomacy, which complements a well-thought-out geostrategic concept. The consistent implementation of adopted programs meant that China began to play an increasingly important role in regions in which it had previously shown little or limited activity.

An example of a region that, thanks to the implementation of the BRI-related projects, is evolving from a peripheral area to an important for the People's Republic of China's policy, is the Balkan Peninsula. Balkan governments and societies are aware of Beijing's ever-growing international position and its role in the region.

Starting from September 7, 2013, when President Xi Jinping officially inaugurated the concept of creating an “economic belt on the Silk Road”¹, China gradually began to join the group of entities that after World War II enjoyed the greatest influence in Europe, including the Balkans, constituting competition for the European Union (among others).

The role of the People’s Republic of China in the Balkan Peninsula is becoming increasingly apparent and cannot be ignored, although the potential for economic cooperation has not yet been fully exploited. Despite the conclusion of agreements between China and individual Balkan states and the implementation of a number of infrastructure projects, the European Union remains a key trading partner for the region. Trade turnover with the EU constitutes 73% of the value of the trade balance of the Western Balkans² (according to the definition of EU institutions, these region includes countries such as: Albania, Bosnia and Herzegovina, Montenegro, the Republic of Kosovo, the Republic of Northern Macedonia and the Republic of Serbia)³.

The purpose of the chapter is to characterize the Chinese strategic engagement in the Balkan Peninsula, implemented through initiatives taken as part of the Belt and Road Initiative – the largest geopolitical project of the 21st century. The analysis was presented on the example of countries, such as Albania, Bulgaria, Croatia, Greece, North Macedonia and Ser-

¹ *President Xi Jinping Delivers Important Speech and Proposes to Build a Silk Road Economic Belt with Central Asian Countries*, Ministry of Foreign Affairs of the People’s Republic of China, https://www.fmprc.gov.cn/mfa_eng/topics_665678/xjpfwzysiesgjfshzzfh_665686/t1076334.shtml [Accessed: 21.03.2020].

² V. Zeneli, *China in the Balkans*, *The Globalist*, <https://www.theglobalist.com/balkans-china-fdi-belt-and-road-eu/> [Accessed: 21.03.2020].

³ *Balkany Zachodnie*, Ministerstwo Spraw Zagranicznych Rzeczypospolitej Polskiej, <https://www.gov.pl/web/dyplomacja/balkany-zachodnie> [Accessed: 21.03.2020].

bia; however, the described mechanisms can serve as a picture of Beijing's relations with many partners, also from outside the Balkan area. The chapter also compares the specificity of infrastructural cooperation of the Balkan countries with China and the European Union, pointing to its characteristics and potential attractiveness.

Balkan Peninsula on the New Silk Road

The growing importance of China in the Balkan Peninsula is not fully reflected in macroeconomic data. China's trade with the Western Balkan countries, reaching 4.5 billion USD in 2018 and representing only 5.5% of regional trade value⁴, may serve as an example justifying this thesis. Given the population, economic and development potential of the Balkan countries, one can get the impression that the state of trade relations with the PRC still does not allow to take full advantage of the opportunities offered by mutual cooperation. These indicators would certainly be more spectacular if the parties – the Balkan states in particular – were more involved in cooperation with the Middle Kingdom, however, non-economic conditions, including obligations arising from membership in international organizations and alliance systems, often do not allow it.

The Belt and Road Initiative is a project that defines the importance of the Balkans for Beijing's international position. Greece is symbolic for the project because the port of Piraeus – after being taken over by the Chinese firm COSCO – has undergone a thorough modernization, becoming second among the Mediterranean's highest-ranking commercial ports in 2018

⁴ V. Zeneli, *The Western Balkans: Low Hanging Fruit for China?*, <https://thediplomat.com/2020/02/the-western-balkans-low-hanging-fruit-for-china/> [Accessed: 22.03.2020].

(right after Valencia, Spain)⁵. The other countries that are the subject of this article also play an important role in the success of BRI, being on one of the key economic corridors: China-Central West Asia⁶. This makes it possible to predict that over time the region's importance for the Chinese economy will be greater than at present.

BRI projects in selected Balkan states

Greece

Greece is one of the first EU member states to have signed the protocol of arrangements regarding the relation of this initiative. A specific example of cooperation between Greece and China is the aforementioned COSCO company's investment in the port in Piraeus⁷. As soon as in 2008, the COSCO company – a state-owned maritime transport giant – began to operate in the port. In 2016, it acquired the majority stake (51%) of Piraeus Port Authority for 280.5 million EUR⁸. The port in Piraeus is considered to be the gate for Chinese products coming to Southeast, Eastern and Central Europe. It is a strategic spot in the Mediterranean region. The port in Piraeus is 2.725 square meters big and has a coastline of approximately 24 kilometres. It has become

⁵ D. Glass, *Piraeus becomes second largest port in the Med.*, Seatrade Maritime News, <https://www.seatrade-maritime.com/asia/piraeus-becomes-second-largest-port-med> [Accessed: 22.03.2020].

⁶ *China's Belt and Road Initiative in the global trade, investment and finance landscape*, "OECD Business and Finance Outlook" 2018, p. 12.

⁷ Xie Fuzhan, *Greece a valuable partner in BRI growth*, China Daily, <https://www.chinadaily.com.cn/a/201911/09/WS5dc6147ca310cf3e35576595.html> [Accessed: 25.02.2020].

⁸ *Press Release Cosco (Hong Kong) Group Limited 51% shareholder of PPA, "HRADE"*, <http://www.hradf.com/storage/files/uploads/66ad66921f937592f1692beea1b7f6fd.pdf> [Accessed: 25.02.2020].

one of the fastest-developing container terminals in the world, the second biggest port in the Mediterranean and seventh biggest in Europe. Moreover, an express-route interchange is being built around the port. The route leads from the Greek port, through Skopje in Macedonia, through Belgrade in Serbia to Budapest in Hungary. According to the COSCO's CEO, the sea and land route under construction will shorten the total time of shipping goods from China by 7–11 days⁹. It is also emphasized that the investment has brought to the Chinese companies' attention the idea of allocating their financial assets to Greece. Companies, such as China Investment Corporation, Air China and State Grid Corporation of China have intensified their activities¹⁰. Recently, the Piraeus Port Authority (PPA) has published the financial report for 2018 stating the profit of 43.3 million EUR for that year, almost a double of 21.2 million EUR for 2017¹¹. It is further pointed out that the COSCO investment in Piraeus has created 3000 local, direct and over 10 000 indirect jobs in Greece¹². Although it is not clear to what extent the COSCO's investment in Piraeus has influenced the volume of Greek-Chinese exchange and investment, closer economic co-

⁹ Liu Qianqian, P. Davarinou, *Sino-Greek Economic Cooperation: COSCO's Investment in the Port of Piraeus*, "Institute of Development Studies" 2019, vol. 50, No. 4, <https://bulletin.ids.ac.uk/index.php/idsbo/article/view/3065/3045#N4> [Accessed: 25.02.2020].

¹⁰ Zou Xiaoli, *Speech by Ambassador Zou Xiaoli at the Seminar "The New Silk Road of China: One Belt, One Road (OBOR) and Greece*, Embassy of the People's Republic of China in the Hellenic Republic, <http://gr.china-embassy.org/eng/zxgx/t1351970.htm> [Accessed: 25.02.2020].

¹¹ *Press Release: The Financial Results for the Year 2018 of PPA S.A. were Presented to the Hellenic Fund and Asset Management Association*, Piraeus Port Authority, <http://www.olp.gr/en/press-releases/item/4389-the-financial-results-for-the-year-2018-of-ppa-sa-were-presented-to-the-hellenic-fund-and-asset-management-association> [Accessed: 25.02.2020].

¹² *Belt and Road Cooperation: Shaping a Brighter Shared Future*, China Daily, http://global.chinadaily.com.cn/a/201904/28/WS5cc4fa20a3104842260b8cf7_5.html [Accessed: 25.02.2020].

operation between the two countries has been observed, which is still developing.

What is worth noticing is that the eighth “16+1” project summit in Dubrovnik, Croatia (2019), saw the first expansion of this group since its creation. Greece was accepted to join the group¹³. That action can be seen as contributing to the fragmentation of the European Community. Inviting one of the first founding members of the European Union – which at that time was in conflict with Berlin and Paris on the EU policy towards China (among other issues) – could be read as Beijing’s attempt to stimulate tensions in Europe. The inclusion of Athens in the “16+1” talks is also a tactical step from the point of view of implementing Chinese infrastructure projects in the Balkan Peninsula.

Serbia

China perceives Serbia as the economic leader of the Western Balkans, and Beijing’s involvement in the Balkans largely relies on investments in that country. Due to the fact that trade in Chinese-Serbian relations tripled between 2005 and 2016, reaching 1.6 billion USD, the country is also sometimes referred to as “China’s open door to the Balkans”¹⁴.

Projects implemented in Serbia are valued at 2.5 billion EUR, and the extension and modernization of the Belgrade-Budapest railway line can be considered the largest investment¹⁵. This

¹³ J. Jakóbcowski, M. Seroka, *Szczyt w Dubrowniku: europeizacja i rozszerzenie formatu 16+1*, Ośrodek Studiów Wschodnich im. Marka Karpia, <https://www.osw.waw.pl/pl/publikacje/analizy/2019-04-17/szczyt-w-dubrowniku-europeizacja-i-rozszerzenie-formatu-161> [Accessed: 25.02.2020].

¹⁴ D. Bechev, *China enters the Balkans. Can Beijing leverage its investments to become another major player in the region?*, Al Jazeera, <https://www.aljazeera.com/indepth/opinion/china-enters-balkans-190827100236857.html> [Accessed: 24.03.2020].

¹⁵ V. Zeneli, *China in the Balkans*, op.cit.

project is of strategic importance to the authorities in Beijing, as it will enable faster transport of goods between the port of Piraeus and Western Europe. The investment has the priority status for the authorities in Belgrade¹⁶, however, the route of the railway line in the territory of Hungary, the method of selecting the contractor and economic viability of the project raise concerns of the Hungarian public. On the other hand, the European institutions question the lack of transparency in the Hungarian-Chinese agreements, including those regarding financing of the investment¹⁷.

Serbian authorities have also expressed interest in buying drones made in China, negotiating the possibility of acquiring technology that would enable the production of equipment by the Serbian defense sector. Bilateral talks also concerned, among others, cooperation in the development of face recognition technology and organization of joint military exercises¹⁸.

North Macedonia

North Macedonia has joined and is open to all initiatives promoted by the PRC. One of crucial projects for the Balkan part

¹⁶ *Serbia is focused on Belgrade – Budapest railway project*, Railway Pro, <https://www.railwaypro.com/wp/serbia-is-focused-on-belgrade-budapest-railway-project/> [Accessed: 24.03.2020]. At the same time Serbian leaders underline that the project - similar to other investments undertaken in Serbia - is being realized with the use of the European standards. According to Zorana Mihajlović, Deputy Prime Minister of Serbia and the Minister of Construction, Transport and Infrastructure, "Everyone is welcome to invest in Serbia, but everything that is being built in Serbia, regardless of where the contractors come from, must be in line with European standards. For example, for the Belgrade-Budapest railway line, a notification body has been selected that will check that everything that is built and installed, from the beginning to the end of the project, is in line with all standards." *Serbia is focused...*, op.cit.

¹⁷ A. Prager, *Budapest-Belgrade railway: Orbán flirts with China*, Euractiv, <https://www.euractiv.com/section/eu-china/interview/budapest-belgrade-railway-orban-flirts-with-china/> [Accessed: 24.03.2020].

¹⁸ D. Bechev, *China enters...*, op.cit.

of the BRI in North Macedonia is the investment in high-speed trains and the construction of a segment of the new railway line Budapest-Belgrade-Skopje-Salonica to the port in Piraeus in Greece¹⁹. Another ambitious initiative is to build a waterway – a canal between the river Morava in Serbia and the river Vardar in North Macedonia. This project aims at improving water transport in Southeast Europe. It is an opportunity to connect the Danube with the Aegean Sea²⁰. In 2019, during one of the interviews, a PRC's ambassador, Zhang Zuo stated that thanks to the Belt and Road Initiative and the "17+1" cooperation platform, China and North Macedonia had already achieved a complex cooperation in many areas. China is Skopje's biggest trading partner outside Europe, and North Macedonia is a destination for Chinese tourists. The breakthrough projects for cooperation are the innovations in the digital economy, e-commerce, financial technology and smart-cities²¹. However, it should be highlighted that the West Balkan region has massive gaps in infrastructure and suffers from financial difficulties. The Chinese are attracted by flexible regulatory practices, little-demanding rules for government procurements and working regulations in force in the West Balkans. The main form of the Chinese economic cooperation is, therefore, lending money for infrastructural projects, particularly in the areas of transport and energy²². The negative and sceptical opinions

¹⁹ M. Sokółowski, *New Silk Road on the Balkans. Case of Macedonia and Serbia*, "Polish Journal of Political Science" 2018, vol. 4, No. 2, p. 35–36, https://www.researchgate.net/publication/334490836_New_Silk_Road_on_the_Balkans_Case_of_Macedonia_and_Serbia [Accessed: 25.02.2020].

²⁰ Ibidem.

²¹ *Ambassador Zhang Zuo gave an exclusive interview on MRT Interview of the Week hosted by Zoran Bogatinov*, Ministry of Foreign Affairs of the People's Republic of China, https://www.fmprc.gov.cn/mfa_eng/wjb_663304/zwjg_665342/zwbd_665378/t1706935.shtml [Accessed: 25.02.2020].

²² V. Zeneli, *Chinese investment could become a challenging factor for*

about the Chinese investments in Macedonia are easy to find. For instance, the report of the European Institute for Security Studies underscores the typical character of the Macedonian case for the Chinese model of investment in infrastructure in the Balkans, in which Chinese companies are awarded procurements directly from the governments, not in a competitive tender procedure.

Croatia

Croatia joined the Belt and Road Initiative in May 2017. China considers this country as an important partner in Europe. The symbol of this cooperation is the Peljasac Bridge, which is also a project keenly presented in the media. The construction of the bridge started in 2018. The Hrvatske Ceste company and the Chinese consortium led by China Road and Bridge Corporation (CRBC) signed the agreement worth approximately 281 million euro for its construction on the Peljesac peninsula. The total cost of the investment is estimated at over 500 million euro²³. The aim of the project is to connect the area around Dubrovnik, separated by Bosnia and Hercegovina's territory, with the rest of the country²⁴. China stresses that the project is a model of tri-lateral cooperation between Croatia, China and the EU, and adds that apart from permanent cooperation in the traditional areas, China, Croatia and the EU can also support new points linked with the growth of cooperation, such as communication

the European future of the Western Balkans, The Globalist, <https://www.the-globalist.com/balkans-china-fdi-belt-and-road-eu/> [Accessed: 24.03.2020].

²³ M. Seroka, J. Jakóbowski, *Dispute around Chinese contract to build bridge in Croatia*, Ośrodek Studiów Wschodnich im. Marka Karpia, <https://www.osw.waw.pl/en/publikacje/analyses/2018-04-25/dispute-around-chinese-contract-to-build-bridge-croatia> [Accessed: 5.02.2020].

²⁴ *Croatia Participating at Belt and Road Forum in Beijing*, Total Croatia News, <https://www.total-croatia-news.com/politics/35548-belt-and-road-forum> [Accessed: 25.02.2020].

and the digital economy²⁵. The cooperation between Beijing and Zagreb will, according to the Prime Minister Li Keqiang, who visited the Peljasac Bridge construction site during his trip to Croatia in 2019, contribute to the undertaking of further common projects, including the modernisation of the Zagreb-Rijeka railway and Croatian ports²⁶. Concerning practical cooperation, the Chinese side declares to be ready to increase both the scale of trade volume with this state and the level of bilateral investments as well as boost the import of Croatian specialist products, meeting the requirements of Chinese market. Again, China is supposed to support its own companies in constructing ports and railways in Croatia on the basis of the market rules.

Albania

The implementation of the Belt and Road Initiative is not the first situation in which Albania has proved to be a valuable partner for China. In recent history it was called the “true socialist lighthouse of Europe” and described by Mao Zedong as Beijing’s only foreign ally during the Cultural Revolution. Although bilateral relations deteriorated during the period of Deng Xiaoping’s reforms (after Enver Hoxh described the path taken by Deng as the “revisionist path”), the relationship between Beijing and Tirana remained strong²⁷.

²⁵ *Remarks by Ambassador Xu Erwen at China-Croatia top Think-Tanks Dialogue*, Ministry of Foreign Affairs of the People’s Republic of China, https://www.fmprc.gov.cn/mfa_eng/wjb_663304/zwjg_665342/zwbd_665378/t1737667.shtml [Accessed: 25.02.2020].

²⁶ *Croatia and China open ambitious chapter in economic and trade relations*, Government of the Republic of Croatia, <https://vlada.gov.hr/news/croatia-and-china-open-ambitious-chapter-in-economic-and-trade-relations/25727> [Accessed: 25.02.2020].

²⁷ Shen Simon, *Why China-Albania relationship is warming up again*, ejinsight, <https://www.ejinsight.com/eji/article/id/1922396/20180822-why-china-albania-relationship-is-warming-up-again> [Accessed: 24.03.2020].

The symbol of Chinese involvement in Albania is Tirana National Airport – the only international airport in this country, bearing the name of Mother Teresa, which is currently managed by China Everbright Limited (CEL). Although the company has the rights to administer the airport until 2027, the way it exercises its powers has caused controversy on the Albanian political scene, mainly due to the Chinese flag being displayed at the airport entrance. Although the Chinese flag was not displayed alone (the Albanian flag was next to it), former Foreign Minister Tritan Shehu pointed out to the consequences that the symbolism of flags can have for Tirana’s European aspirations²⁸.

Bulgaria

To briefly determine the state of Sino-Bulgarian economic relations, the term “unsatisfying” can be used. It is true that although trade flows between partners are intensifying, Bulgarian participation in BRI initiatives is – according to the politicians of this country – too low²⁹. The lack of coherent strategy for cooperation with China, including the definition of the basis for cooperation (what Bulgaria can offer, what it wants to achieve), is mentioned as the main reasons for this fact. Historical considerations allow the formulation of a pattern according to which Beijing’s relations with Sofia depend on the international context. Similarly in this case, Bulgaria’s obligations arising from belonging to the European Union and NATO play an important role³⁰.

²⁸ *Why is the Chinese flag in Tirana’s airport a concern for some in Albania?*, China-CEE, <https://china-cee.eu/2019/03/28/albania-external-relations-briefing-why-is-the-chinese-flag-in-tiranas-airport-a-concern-for-some-in-albania/> [Accessed: 24.03.2020].

²⁹ R. Filipova, *Chinese Influence in Bulgaria: Knocking on a Wide Open Door?*, CHOICE, <https://chinaobservers.eu/chinese-influence-in-bulgaria-knocking-on-a-wide-open-door/> [Accessed: 25.03.2020].

³⁰ *Ibidem*.

Nine key areas of cooperation were mentioned in a document signed on July 1, 2019 in Chinese Dalian by the Bulgarian President Rumen Radev and the PRC Prime Minister Li Keqiang. These include: “transport infrastructure; financial and investment activity and financial technologies; IT sector and start-up companies; research and development activity and innovations; opening up a direct airline Sofia-Beijing; tourism, agriculture; sustainable development and urban planning; energy”³¹. These arrangements are general, but specific examples of Chinese investments in Bulgaria can be pointed out. One of them is the construction plan for “The Saint Sofia project” – a 750 million EUR complex containing hotel, office and recreation part, located near Sofia, referred to as “the Bulgarian Las Vegas”³².

Instead of summary: the EU versus China: a “tough” versus an “easy-going” lender

In the Balkans, several projects led by China lack clarity and public debate about the open tender procedures. The Chinese capital is relatively easy to get. The public debt of some of the countries in this region reaches 70% of the GDP (Montenegro’s reached 80%). Noticeably, the EU offer is less attractive than the Chinese because of troublesome, time-consuming and bureaucratic rules governing its financial engagement. The EU gives subsidies, whereas China limits its financial operations to providing long-terms loans. The Chinese loans enable politicians to finance their supporters and cause the spread of (already

³¹ *Bulgaria and China – Establishing Strategic Partnership Relations*, China-CEE, <https://china-cee.eu/2019/08/06/bulgaria-external-relations-briefing-bulgaria-and-china-establishing-strategic-partnership-relations/> [Accessed: 25.03.2020].

³² M. Cheresheva, *Bulgaria Backs New Chinese ‘Smart City’ Near Sofia*, Balkan Insight, <https://balkaninsight.com/2017/08/09/bulgaria-extends-support-for-chinese-smart-city-near-sofia-08-08-2017/> [Accessed: 25.03.2020].

dramatically huge) corruption in the Balkan countries. The Chinese finance is usually provided under the conditions of realising the planned projects by the Chinese companies (mainly public ones), and employing Chinese workers.

However, it ought to be pointed out that the projects financed by the EU have been gaining momentum. Broadening the TEN-T network and paying attention to the infrastructural exclusion of the Balkans, as well as the migration crisis, have all contributed to a considerable growth of the regional pool from the European Investment Bank within the Initiative for Economic Resilience. An example of the intensification of cooperation between the Balkans and the EU is also a new EU's strategy for the West Balkans and the continuation of the so-called "Berlin process". The European rules have been stated in order to mitigate the risk of financial abuse and protect the countries from the foolhardy governments, which frequently "govern" to satisfy their particularistic interests.

In the Balkans, there is no public debate about the opportunities and challenges concerning the growing Chinese presence in the region. The main aim of Beijing is to use the region as a gate and trade platform to reach Western Europe. This follows from the political economy of this region, cuts in spending, economic competitiveness and deepening divergence in other security issues.

China can become a challenge for the European future of the West Balkans. Given the growing resistance among some EU member states for the further enlargement, it is in the interest of the Balkan states to dismiss any doubts related to their pro-European political orientation and show the readiness to undertake even the most difficult political reforms required by the EU. Certainly, the Chinese projects have negative influence on the perspectives for integration of the Western Balkans with the EU. The Chinese investments take the Balkan

states further from an already distant access to the EU, but also put the inclusion of those countries in the pre-access programs into question. The growing rivalry between the West and China will force the Balkan states to declare clearly their position.

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Abstract

The purpose of the chapter is to characterize the Chinese strategic engagement in the Balkan Peninsula, implemented through initiatives taken as part of the Belt and Road Initiative – the largest geopolitical project of the 21st century. The analysis was presented on the example of countries such as: Albania, Bulgaria, Croatia, Greece, North Macedonia and Serbia; however, the described mechanisms can serve as a picture of Beijing's relations with many partners, also from outside the Balkan area. The chapter also compares the specificity of infrastructural cooperation of the Balkan countries with China and the European Union, pointing to its characteristics and potential attractiveness.

Keywords: Belt and Road Initiative, The Balkans, People's Republic of China, Albania, Bulgaria, Croatia, Greece, North Macedonia, Serbia

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The Inevitable Conflict. South Korea Relation with Japan during the Moon Jae-in Presidency

Introduction

Moon Jae-in was elected as the 19th President of the Republic of Korea (ROK) on May 9, 2017, as a first progressive candidate since 2008. As a representative of the Democratic Party (Minju Party) he and his government came to power under the conditions of an early election, after passing the impeachment for corruption allegations against president Park Geun-hye, who was later sentenced for 25-year imprisonment. Moon, who only slightly lost the presidential election in 2012 with Park, was very active during protests in Seoul and often participated in marches and public speeches after the disclosure of the political scandal¹. This context is crucial to understanding the current policies, as Moon presents himself as the voice of the people. One of the main slogans of the Democratic Party is “candle victory” (*ch’otpul süngni*²), which is a direct link to the events on Gwanghwamun square. As a revolutionary government, Minju Party from the beginning of its rule puts a lot of emphasis for change, which was understood as the revision

¹ H.B. Mosler, *President Moon Jae-in – The Right Choice for South Korea*, “Asia PolicyBrief” 2017, vol. 1, pp. 1–3.

² I use McCune’a-Reischauer transcription from Korean language with the exception of names popularized in English.

of laws established by corrupt predecessors. It came that Japan became the important part of its political discourse.

To put it plainly, Korea, as a former Japanese colony (in years 1910–1945), does not have an easy relationship with Japan. There are several problems which divide both countries and shape bilateral relations. One is Japan's attitude toward its past crimes and history. Several Korean politicians, lawyers and activists argue that Japan should change its perception of war (e.g. presented in historical books), Japanese officials should stop pressing nationalistic symbols (e.g. the Yasukuni Shrine in Tokyo where II World War, class-A criminals are buried), and that sincere apologies are necessary – this became especially vivid when Shinzō Abe become a prime minister³, and who is considered in Korea a right-wing revisionist. The issue of wartime compensation has been appearing in the public discourse regularly in the last decades. The two main issues are the sexual slaves for Japanese troops during II World War (the so called “Comfort women”) and the forced laborers, especially those who worked in large manufactures or were sent to Sakhalin Island in the North Pacific and abandoned after war⁴. Both countries are also arguing over the disputed territory (Dokdo/Takeshima), without the clear result to this day⁵. However, a political approach toward Japan differs in South Korea.

³ First, he served this position in years 2006 to 2007. He became prime minister again in 2012.

⁴ C. Arrington, *Japan-South Korea Relations and Litigation*, [in:] *Challenges Facing Japan Perspectives from the U.S.-Japan Network for the Future*, Washington 2018, pp. 11–13; R. Blomquist, D. Wertz, *An Overview of North Korea – Japan Relations*, “The National Committee On North Korea” 2015, No. June, pp. 1–9; K. Zakowski, B. Bochorodycz, M. Socha, *Japan's Foreign Policy Making. Central Government Reforms, Decision – Making Processes, and Diplomacy*, Łódź 2018, pp. 55–60.

⁵ S. Choi, *The Politics of the Dokdo Issue*, “Journal of East Asian Studies” 2005, vol. 5, No. 3, pp. 465–494; S. Horowitz, *South Korea and Japan since World War II: Between Ideological Discord and Pragmatic Cooperation*, “Pacific Focus” 2016, vol. 31, No. 1, pp. 79–99.

Japan in Korean Ideological Landscape

From the democratization of South Korea in 1987, one bone of contention between camps of the progressives (left) and the conservatives (right) is the attitude toward Japan and the colonial past (1910–1945). Since the end of World War II, South Korea has not maintained any official diplomatic contacts with Japan. It was Park Chung-hee, who managed to change the stagnation in relations between both countries. Not without the trouble as the wounds after colonization were still fresh. The preparation took four years and the whole project faced a lot of resistance and protests all around the country. The Treaty on Basic Relations between Japan and the Republic of Korea was signed on June 22, 1965, which reestablished diplomatic relations and embassies were opened in both countries. As a war compensation Japan supported the Korean economy in loans, borrowings and grants. In total, Korea received \$500 million in commercial credits. Japan also helped its former colony to modernize outdated technologies and open for the global market. Probably the most famous outcome of this cooperation was the model of directly state supported giant industrial conglomerates, called in Japan *zaibatsu* and in Korean *chaeböl*, which was successfully installed in Korea⁶. The impact of partnership between both countries was cannot overestimated. Were it not for the support of Japan, there would be no “Miracle on the Han River”⁷.

⁶ H. Kwon, M. Koo, *The Korean Government and Public Policies in a Development Nexus*, 2014, vol. 1, pp. 97–99; M. Peterson, P. Margulies, *A Brief History of Korea*, New York 2010, pp. 218–224.

⁷ A. Buzo, *The Making of Modern Korea*, London 2007, pp. 111–129. More on *chaebol*: Kwon, Seung Ho, Michael O’Donnel, *The Chaebol and Labour in Korea: The Development of Management Strategy in Hyundai*, London 2003.

However, in modern times, the perspective on the Park Chung-hee era (1962–79) is one of the main issues which divides political left and right. When conservatives appreciate his devotion to the state and call him a “father of the Reformation”, the progressive camp sees him as a dictator and pro-Japanese traitor. The left likes to emphasize his pro-Japanese past, and ridicule him by calling “*sakura*” (a Japanese word for “cherry blossoms”). Indeed, Park received a Japanese education, he finished the prestigious Japanese Military Academy (JMA) in Zama in 1944, and served as a lieutenant in the Imperial Army of Manchukuo in the last year of war. He was strongly influenced by Japanese militaristic ideology which can be seen in his emphasize on heavy industries and reformation of army⁸. Park himself liked to say that he is doing for Korea a “Meiji Restoration”⁹. “Takagi Masao”, Park Chung-hee’s Japanese name from the colonial period is often brought up and appears on various left-wing protests to discredit him as a non-Korean and Japanese puppet.

The Korean right, even when generally critical about colonial period (although there are some pro-Japanese sentiments in Korea too), argues that their country doesn’t have a better choice than to cooperate with Japan. The right sees the closest allies in the USA and Japan, even as a lesser evil, as thanks to both countries, Korea today owes its development, security and freedoms, which are lacking, e.g. in its northern neighbor. Rather than reviewing the past, both countries should concentrate on future development and cooperation. However, for the left, the same national sentiment which makes them to look on both mentioned superpowers, if not out rightly hostile, at least

⁸ J.C. Eckert, *Park Chung Hee and Modern Korea. The Roots of Militarism, 1866–1945*, London 2016.

⁹ Kim Byung-kook, E.F. Vogel (eds), *The Park Chung Hee Era: The Transformation of South Korea*, London 2011, pp. 118–124..

distrustfully, pushes them in to unification with North Korea. Once again, Park Chung-hee is to blame for creating hostility between both nations and serving the interest of foreign powers.

Japan as a New “Enemy”

There are two main reasons why Japan fulfills the ideal conditions to fit the category of “enemy” for the Moon Jae-in government. First, it is the result of current government historical politics, which is constructed in opposition to its predecessors. The second is the new rapprochement with North Korea. One of the few things which makes both countries closer is a common enemy. As the anti-Japanese struggle is the “foundational myth of the DPRK”¹⁰, rise of the Japanese sentiment can accelerate works toward the unification of both countries.

The Democratic Party came to power opposing the Park Gyeun-hee policy. The ex-president, the general’s Park Chong-hee’s daughter and member of conservative Saenuri Party, was accused by the left for continuation of her father attitudes, which are called both illiberal and “pro-Japanese”. Even when Park Gyeun-hee criticized Shinzo Abe stances toward the Japans Imperial past¹¹, she was still called as a “collaborator” by Korean progressive journalists. In 2015, Park and Shinzo Abe governments signed an agreement on “Comfort women” which was called by non-Korean media at the time as “breakthrough” and a road toward normalization of bilateral relations¹². The

¹⁰ C.K. Armstrong, *The Origins of North Korean Cinema: Art and Propaganda in the Democratic People’s Republic*, “Acta Koreana” 2002, vol. 5, No. 1, p. 10.

¹¹ C. Arrington, op.cit., p. 11.

¹² ‘Comfort women’ deal: compensation and apology from Shinzo Abe as rivals South Korea and Japan reach landmark deal on wartime sex

deal included the Japanese prime minister's apology and over \$8 million in help for still-living women who were forced to work in military brothels. The politics from Democratic Party protested against the agreement and referred to it as "selling the case for a few pennies"¹³.

When in power, the progressive government started reviewing the "1965 system". The current crisis started in November 2018, when the Korean Supreme Court sentenced two Japanese companies, Nippon Steel & Sumitomo Metal Corp and Mitsubishi Heavy Industries for using slave laborers during war. The court ruled that the first company have to pay 100 million won (\$830 000) to each living victim, and the second to pay between 80 million won and 150 million won (\$68,000-\$127,000)¹⁴. Both companies refused to pay and Japan government complained. The idea of re-negotiation of the 1965 agreement and another apologies for "Comfort women" was treated as a dishonorable breach of the signed treaties. Shinzo Abe, as well as many Japanese people, believe that their country has fulfilled its moral and financial obligations toward Korea. The Democratic Party pushed several ideological campaigns in the country. In the largest Korean province, Gyeonggi, a law was passed that mandates the labeling of products of Japanese origin in schools with the singe: "This product is made by a Japanese war criminal company". Almost 300

slaves, <https://www.scmp.com/news/asia/east-asia/article/1895536/comfort-women-deal-compensation-and-apology-shinzo-abe-rivals> [Accessed: 27.09.2019].

¹³ Kim Kyu-nam, *Ch'umiae Teilbone Trwianbut' Hyöpchông Chae-hyöpsang Yoguhaetta'te* [Chu Mi-ae: I request the renegotiation of the 'comfort women' agreement], <http://www.hani.co.kr/arti/politics/assembly/798774.html> [Accessed: 25.09.2019]

¹⁴ J. Lee, *South Korean forced labor victims to seek Japan's Mitsubishi asset sale*, <https://www.reuters.com/article/us-southkorea-japan-laborers-mhi/south-korean-forced-labor-victims-to-seek-japans-mitsubishi-asset-sale-idUSKCN1UB0HO> [Accessed: 25.09.2019].

companies were on the list, including Mitsubishi, Panasonic and Sony. The accusations on both sides were joined by economic sanctions. Tokyo removed Korea from the “whitelist” of trusted trading partners, that is, countries enjoying privileges in trade procedures. In response, Korea also removed Japan from its “white list”. Both countries also warned their citizens to travel to each other¹⁵.

The other crucial point which makes deepen the hostility between both sides is the issue of North Korea. The renewal of so-called sunshine politics (*haetpyötchöngch’aek*), which seeks to involve the DPRK in cooperation, especially at the sociocultural level, and to a limited extent also in the economic field is important project for new president of South Korea. Moon, the longtime proponent of the politic of engagement, joined big politics as manager of the election campaign of Roh Moo-hyun. As the chief of staff of the presidential administration during the reign of Roh (2003–2008) he held numerous functions related to civil matters, engaging in particular in the sunshine policy. He was responsible for the organization and promotion of the second Korean Summit, during which Roh Moo-hyun met the leader of DPKR, Kim Jong-il. He supported sending aid to North Korea, the value of which during his office was twice the amount which was sent during the presidency of Kim Dae-jung¹⁶.

The issue of unification of Korea has had an important ideological function since the beginning of Moon’s political career. Of all three progressive presidents, he seems to be the most determined. Unlike his predecessors, Moon grew up in

¹⁵ S. Maslow, P. O’Shea, *There Will Be No Winner in the Japan-South Korea Dispute*, “The Diplomat”, <https://thediplomat.com/2019/08/there-will-be-no-winner-in-the-japan-south-korea-dispute/> [Accessed: 25.09.2019].

¹⁶ A. Bober, *Korea zjednoczona – szansa czy utopia?*, Skarżysko-Kamienna 2013, p. 203.

real poverty. He was born in a refugee camp to North Korean parents. The family theme returned during the election campaigns and served to emphasize that as human rights activist he treats the struggle for rapprochement with the North personally. This theme is one of the leading in his public activity. He proposed several visions of confederation between both states¹⁷. In 2015, together with k-pop stars, he recorded a music video entitled “One Dream, One Korea”¹⁸. In his interviews, he recalls that the last will of Kim Dae-jung, whom he met on his deathbed, was a request to continue his unification efforts¹⁹. Change of the front toward the Democratic People’s Republic of Korea (DPRK) alarmed the most important players in the region like United States, China (PRC) and especially Japan.

Tokyo is worried about Kim’s regime for different reasons. The North Korean propaganda is extremely hostile toward Japan and demands payment for colonialism. The DPRK’s nuclear and missile programs has potential to harm the country and is considered as one of the biggest international threats. Tokyo also raises the question of abducted citizens. It is estimated that between 1970s and 1980s, North Korea kidnapped approximately 100 Japanese citizens, but the exact number is unknown. Although few of them were able to return to Japan, from the Japanese perspective the problem remains unresolved. The fears were not unfounded. While Japan was a part

¹⁷ C. Chang, “*Mun Jae-in shidae chaebusang*” ‘koryöyönbangje’rül ash-immnikka?, iryoshisa [“Moon Jae-in time is back”. Do you know what is Koryo confederation?], <http://www.ilyosisa.co.kr/news/articleView.html?idxno=129264> [Accessed: 10.08.2019].

¹⁸ J.I. *JTBC taesönt’oron, munjaein ‘najün tan’gye yönbangjenün kukkayönhap kwa pyöl ch’aiga öpta* [Moon Jae-in in JTBC presidential debate: ‘lower federal system is no different from the Union’], <http://www.munhwanews.com/news/articleView.html?idxno=51179> [Accessed: 10.08.2019].

¹⁹ A. Bober, *Korea...*, op.cit., p. 20.

of six Party Talks with U.S., China, Russia, Japan, and both Koreas in August 2003, which were set to address the nuclear crisis, in recent rapprochement of North and South Korea, Japan was completely omitted from summits and talks²⁰. ROK also uses North Korea to exert further pressure on Japan. During Moon Jae-in's first meeting with Kim Jong-un, there was no shortage of threads related to the Dokdo, disputed territory between both countries. The island appears on the unification flags of Korea which is presented whenever both Koreas are meeting²¹. The topic of the island also come during summit joint meals. Japan protested against these actions calling them "provocation" as well as severally accusing South Korea of breaking international sanction for Kim Jong-un dictatorship²². It is important to add that the current North-South alliance, when it is important for Moon Jae-in policy, for the DPRK it may be a matter of survival²³.

Uncertain Future

In the presidency of Moon Jae-in, the idea of nation enemy has shifted. Japan replaced the place of North Korea. Currently, the Korean society engage in No Japan boycott and several other initiatives. On August 15, on the 74th anniversary of Korea's liberation (Liberation Day is celebrated on both sides of the border), thousands of Koreans protested against Japan. Pro-

²⁰ R. Blomquist, D. Wertz, *An Overview...*, op.cit.

²¹ R. Husarski, *Słoneczna polityka 2.0.: wyzwania i zagrożenia polityki zjednoczeniowej Moon Jae-ina*. [The Sunshine policy 2.0. Challenges and threats to Moon Jae-in's unification policy], Warsaw 2019.

²² Yonhap, *Nambukchöngsanghoedam 'tokto tijöt'üë tto t'üjip't'rae maek pulp'iryo' ttanji*, <http://www.yonhapnews.co.kr/bulletin/2018/04/27/0200000000AKR20180427112200073.HTML> [Accessed: 10.08.2019].

²³ N. Levi, *Can North Korea Exist Without Unification with South Korea?*, "Foreign Policy Journal" 2010.

unification slogans and those aimed at Abe's policy dominated during manifestations. The protesters even used anti-Japanese North Korean propaganda posters. It would not be possible few years ago as it would be considered of breaking the National Security Act. The president promised full unification in 2045, in the hundredth anniversary of the liberation of the Peninsula from Japanese occupation.

However, it will be hard for the current government to go beyond the slogans. The DPRK nuclear problem remains unresolved and there are no signs of the change. International sanctions do not allow both Koreas to engage in serious economic exchange. This all shows that in the current political climate pragmatism is giving a way to the ideological sentiments. Especially that as a result of recent changes both economies of Japan and South Korea start to suffer. The neighbouring countries are also worrying as the further conflict might badly affect the whole region. Although Kim Jong-un's regime might appear as an important ally for present South Korean government, there will be more pressure in the future from countries like China and USA to reassure dialogue with Japan. Until today the bilateral meetings with aim to ease the diplomatic conflict failed. The question of normalization of the bilateral relations between Japan and South Korea will remain one of the most crucial one until the end of Moon Jae-in's term and will be an important topic in the next South Korean elections.

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Abstract

The aim of this article is to show that the current South Korean economic and diplomatic clash with Japan is primarily the result of local ideological conflict on the Peninsula. President Moon Jae-in and the ruling Democratic Party came to power in 2017 under accelerated elections and mass protests against ex-president Park Geun-hye. Despite the fact that in 2015 Japan signed with South Korea agreement on sexual slaves for Japanese troops during World War II (i.e. “Comfort women”) that was at the time enthusiastically called by media as a “breakthrough”, the new government came with a new revisionism of the past. The article argues that today’s conflict was inevitable, as the ruling party shapes its politics by opposing the laws introduced during Park Geun-hye and her father, general Park Chung-hee and by warming its relations with North Korea, Japan’s main foreign enemy.

Keywords: Japan-South Korea Relations, Moon-Jae-in, Shinzo Abe, Sunshine politics, the unification of Korea, nuclear threat

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Digital Media in Communication and Education of the Polish and Korean Youth. Comparative Analysis¹

Introduction

Social media (e.g. Facebook, Blogger, Twitter, Flickr, YouTube, Second Life and alike) as well as the places where they function are more complex in terms of the code, icon, symbol, construction and function. Social media also refer to the contemporary models of economic and social systems. They can be described as comprising all web-based and mobile networks which offer a free access with interactive connection. The unrestricted access (the free connectivity) allows a single user to browse, comment on and modernize the content for other users in different parts of the network and communicate with other users about this medium or the presented content.

¹ This work was supported by the Hankuk University of Foreign Studies Research Fund of 2019 as well as by the Silesian University of Technology.

The Internet is regarded rather as a new social environment, social network, space of global communication, educational and scientific space or a space for leisure activities such as playing computer games with other users. In the popular communication, functions of the Internet such as e-mailing, instant messaging, blogging and chatting, serve adolescents basically for co-constructing their own environments. Hence, cultural theories, such as those from linguistic anthropology or conversational analysis that emphasize co-construction become very relevant². Thus, we see the Internet as a new cultural tool or even as a cultural tool kit, because it is shared and within it norms are developed, and these norms (e.g. communication norms³) are transmitted to new generations of users, even as the new users with greater access and technological innovation create new norms. The Internet is a tool kit because it is an infinite series of applications, each with its own use.

Methods and Procedures

The purpose of the presented research is to look at how digital media affect communication and education of the youth from the East-South Asian country (such as South Korea) and in the European country (such as Poland), with considering the role of culture in education.

In the qualitative paradigm of the theoretical research we want to look at personal interactions in digital media and effective indirect communication between youth, media and education. According to Stanisław Juszczuk⁴, qualitative re-

² A. Duranti, *Linguistic anthropology*, Cambridge 1997.

³ P.M. Greenfield, K. Subrahmanyam, *Online discourse in a teen chat room: New codes and new modes of coherence in a visual medium*, "Journal of Applied Developmental Psychology" 2003, vol. 23, pp. 713–738.

⁴ S. Juszczuk, *Badania jakościowe w naukach społecznych. Szkice met-*

search does just that; researchers attempt “to make sense of, or to interpret, phenomena in terms of the meanings people bring to them”. We have used the phenomenology paradigm that originates from philosophy⁵. It seeks to find the meaning of human experience with a focus on a certain phenomenon while K. Richards describes phenomenology as a way to thematically describe and capture the essence of human experience⁶. The analysis has been done in the critical theory framework, which can be defined as a social theory where issues of concern focus on the idea of power and justice and the ways that notions such as race, class, ideologies, education and cultural dynamics interact and how we can better understand these interactions to create justice for all involved⁷. The study attempts to provide a better understanding of how the Korean and Polish students interact with their education and how culture and media impact education in these countries. In the research we have analyzed the chosen published opinions on the influence of digital media on the communication and education, the selected published results of the empirical research conducted by different authors in this subject, the results of our interviews with students, their teachers and the own observations conducted in the classmates on different levels of learning in both countries.

This hermeneutical analysis of the scientific publications allowed us to construct a model of the digital media influence on the communication and education of the youth in Poland and South Korea.

odologiczne [Qualitative research in social sciences. Methodological sketches], Katowice 2013, p. 8.

⁵ M.D. LeCompte, J.J. Schensul, *Designing and conducting ethnographic research* (vol. 1), Lanham 1999.

⁶ K. Richards, *Qualitative inquiry*, New York 2003.

⁷ J.L. Kincheloe, P.McLaren, *Rethinking critical theory and qualitative research*, [in:] *Handbook of qualitative research* (2nd ed.), eds N.K. Denzin, Y.S. Lincoln, Thousand Oaks 2000, pp. 279–313.

Characteristics of the Generation “Z”

Generation ‘Z’ that cannot function without a mobile phone (commonly referred to as *handphone* in Korea) is a generation born after 1995. The characteristics of Generation ‘Z’ were found earlier among the Korean, Japanese or Chinese (e.g. Hong Kong) youth, than among the Polish one, and these characteristics are the following: the head being leaned over the screen/display of a smartphone at school, on the bus, on the underground, in a tearoom or at a restaurant, not looking in their peers or adults’ eyes being in their environment⁸, using an esoteric youth language, taciturnity, articulation problems, problems with the logical structure of a sentence, more often posting on social forums or writing short messages on Messenger, using abbreviations and acronyms derived from English⁹. They have their friends rather online who they find via the social media, rather than in the real world (we observe in their case the difference between the online and offline worlds is fading away between which worlds they move their activity easily, and they move their offline behavior to the online world and vice versa); they communicate with their friends, but not develop relations – the number of acquaintances struck up in the real world is consistently decreasing, as are face-to-face meetings and conversations. They are self-contained, having problems expressing their emotions, addicted to acquaintances

⁸ S. Juszczyk, S. Kim, *The Polish and Korean Youth in the World of Digital Media: Communication and Interests. A Comparative Analysis*, “The New Educational Review” 2018, vol. 52, No. 2, pp. 124–136, DOI: 10.15804/tner.2018.52.2.10.

⁹ S. Juszczyk, Y.D. Kim, *Social media and changes in the language of Polish and Korean Youth*, “Culture and Education” 2015, No. 4 (110), pp. 89–104

on the Internet, sitting in their rooms, keeping their eyes fixed on their smartphones, isolated, they know what is going on the Internet, and are not interested in the real world or their own environment. They take their phones everywhere with them, touching the screen, checking on what is going on online, always analyzing if they got new notifications. They are posting photographs, videos on social networking sites: Facebook or YouTube and continuously checking if somebody liked this information. They are not talking about their educational or life aspirations, the approval of activity on the Internet, activity which often is intriguing, unusual, and even shocking, being a sort of online exhibitionism, is becoming the most important for them. They are spending their so-called free time on the Internet, they are not getting bored there, they are up to date with what they friends are doing. They cannot function without being online, they are becoming addicted to it. Such a behavior is similar for the Polish and Korean youth, regardless of cultural differences of both societies and the specific nature of education¹⁰.

The Impact of Cyber-Communication on Today's Youth

Communication via digital media influences on youth in a few domains: personal, social, and emotional¹¹. Cyber-communication¹² influences in the **personal domain**, because it offers

¹⁰ S. Juszczuk, Y.D. Kim, *Confucian thought affecting education in South-East Asian countries vs. Socratic education philosophy in Western countries*, "Athenaeum. Polish Political Science Studies" 2017, vol. 56, pp. 97–110; S. Juszczuk, Y.D. Kim, *Impact of Culture on Education in Poland and South Korea. A Comparative Analysis*, "The New Educational Review" 2017, vol. 48, No. 2, pp. 132–143.

¹¹ S. Juszczuk, *Fields of impacts of social media on youth – methodological implications*, "Acta Technologica Dubnicae" 2015, vol. 5, No. 2.

¹² S. Juszczuk, *Media społeczne w procesie komunikacji i edukacji –*

opportunities for valued learning, responsibility and independence. Students can learn to manage time and resources effectively, master the art of accessing and processing skills gained in a meaningful context, and communicate this information clearly to the intended audience. Integrating the Internet with communication allows students to share personal perspectives, knowledge, and experiences, and structure discussions for debate¹³.

The negative side of cyber-communication is the access to personal information, the user can find out where someone lives, a phone number, even directions to someone's house. Thus, it is becoming increasingly hard to protect children from unsafe access to their personal information. Research carried out in USA reveals that one in five youth ages 10 to 17 received unwanted sexual advances online¹⁴.

Communication through the Internet influences also the **social domain**. Youth are actively using the Internet as an important form of social interaction¹⁵. Social media sites such as Facebook and MySpace offer multiple daily opportunities for connecting with friends, classmates and people with shared interests. A social circle is not limited to geographical locations, since young people, geographically remote, disabled or house-bound due to illness, may find online chat (social media) an important form of communication¹⁶. This type of communication

dialog i konektywizm, [in:] *Spoleczne i kulturowe wymiary komunikacji*, eds M. Wawrzak-Chodaczek, J. Kowal, H. Żeligowski, Wrocław 2013, pp. 9–22.

¹³ M.A. Wakefield, C.J. Rice, *The impact of cyber-communication on today's youth*, American Counseling Association, Professional Counseling Digest (ACAPCD-14), 2008.

¹⁴ S. Olsen, *Keeping kids safe on social sites*. Retrieved November 2006 from CNET News.com.

¹⁵ T.W. Brignall, T.V. Valey, *The impact of Internet communication on social interaction*, "Sociological Spectrum" 2005, vol. 25, pp. 335–348.

¹⁶ M. Fleming, D. Rickwood, *Teens in cyberspace*, "Youth Studies Australia" 2004, vol. 23, No. 3.

helps children who might not otherwise be confident to communicate to do so quite well over the Internet. Due to increased use of cyber-communication, a feeling of being autonomous also exists. However, there is less direct human contact thus social isolation for adolescents and the impact on family relations is a concern¹⁷. Social media sites allow teens to accomplish online many of the tasks that are important to them offline: staying connected with friends, making new friends, sharing pictures and exchanging ideas. Social media participation also can offer adolescents deeper benefits that extend into their view of self, community and the world¹⁸. Social media sites cause growth of ideas from the creation of blogs, podcasts, videos, and games, and foster of one's individual identity and unique social skills¹⁹.

There is increasing freedom to harass and use put-downs because there are no repercussions personally. Because of their limited capacity for self-regulation and susceptibility to peer pressure, children and adolescents are at some risk as they navigate and experiment with social media. This creates cyber-bullying²⁰, cyber-stalking, cyber-harassment conversa-

¹⁷ L. Littlefield, *Psychosocial aspects of mobile phone use among adolescents*, The Australian Psychological Society, Melbourne 2004.

¹⁸ M. Ito, H. Horst, M. Bittani, *Living and learning with new media: Summary of findings from the digital youth project*, IL: John D., and Catherine T. MacArthur Foundation Reports on Digital Media and Learning, Chicago 2008; D. Boyd, *Why youth (heart) social network sites: the role of networked publics in teenage social life*, [in:] *MacArthur Foundation Series on Digital Learning Youth, Identity, and Digital Media Volume*, ed. D. Buckingham, Cambridge 2007.

¹⁹ D. Boyd, *Taken Out Context: American Teen Sociality in Networked Publics*, Berkeley 2008.

²⁰ J.W. Patchin, S. Hinduja, *Bullies move beyond the schoolyard: a preliminary look at cyber-bullying*, "Youth Violence Juv Justice" 2006, vol. 4, No. 2, pp. 148–169; A. Waligóra-Huk, *Diagnosis of aggressive behaviours among students as a sign of pathology in the rural environment with recommendation for preventive measures*, "The New Educational Review" 2012, vol. 29, No. 3, pp. 68–81.

tions, clinic-forming, and sexual experimentation or “flaming” a public personal attack, where people demonstrate verbal aggression. Other observed differences include the open display of group norm violations such racism, sexism (sexting)²¹, and homophobia²². Other problems that merit awareness include Internet addiction and concurrent sleep deprivation²³.

Influences in the **emotional domain** realized in issues related to anything from abuse to self-help. Many students access health resources like suicide hotlines, supports groups, information on medical conditions, and contact with appropriate organizations. This interaction helps to give them a support system outside of their immediate environment to assist in dealing with emotional issues²⁴. On the negative side, this ability to find resources regarding the emotional domain can be harmful. There are hemlock (suicide) societies online. There is information on how to build bombs, self-mutilate, be sexually active, use drugs and many other illegal and illicit activities.

Researchers have proposed a new phenomenon called “Facebook depression”, defined as depression that develops when preteens and teens spend a great deal of time on social media sites, such as Facebook, and then begin to exhibit classic symptoms of depression²⁵. Acceptance by and contact with

²¹ A. Lenhart, *Teens and Sexting*, Washington 2009.

²² T.W. Brignall, T.V. Valey, *The impact of Internet communication on social interaction*, “Sociological Spectrum” 2005, vol. 25, pp. 335–348.

²³ D.A. Christakis, M.A. Moreno, *Trapped in the net will internet addiction become a 21st-century epidemic?*, “Arch. Pediatr. Adolesc. Med.” 2009, vol. 163, No. 10, pp. 959–960.

²⁴ A. Lenhart, L. Rainie, O. Lewis, *Teenage life online: The rise of the instant – message generation and the internet’s impact on friendships and family relationships*, Washington 2001.

²⁵ M.H.W. Selfhoud, S.J.T. Branje, M. Delsing, T.F.M. ter Bogt, W.H.J. Meeu, *Different types of Internet use, depression, and social anxiety: the role of perceived friendship quality*, “J. Adolescents” 2009, vol. 32, No. 4, pp. 819–833.

peers is an important element of adolescent life. The intensity of the on-line world is thought to be a factor that many trigger depressions in some adolescents. As with offline depression, preadolescents and adolescents who suffer from Facebook depression are at risk for social isolation and sometimes turn to risky Internet sites and blogs for “help” that may promote substance abuse, unsafe sexual practices and aggressive or self-destructive behaviors.

In such situations we can see in USA a big role of pediatricians. They are in a unique position to educate families about both the complexities of the digital world and the challenging social and health issues that online youth experience by encouraging families to face the core issues of bullying, popularity and status, depression and social anxiety, risk-taking, and sexual development²⁶.

Digital Media Used by South Korean Youth

From the beginning of the XXI century Southern Korea has become one of the most powerful players in the global digital media space. Since 2002, it has been ranked first in the ITU's Digital Opportunity Index (<http://www.itu.int/ITU-D/ict/doi/index.html>), which shows that it is fully saturated in most information communication technology (ICT) sectors, including games, mobile media, new media production and the Internet. In 2007, 77% of Koreans used the Internet on a daily basis while young people under 30 made up the majority of Internet users, with a usage ratio of 99%²⁷. Korean Internet users primarily access the Internet from home computers (96.3%)

²⁶ G.S. O’Keeffe, K. Clarke-Pearson, *Clinical report the impact of social media on children, adolescents, and families*, “Pediatrics”, March 28, 2011.

²⁷ National Information Society Agency (NIA), 2008.

or from work (33.1%). Commercial sites as *PC bang* (which literally means, PC room, a Korean form of Internet café) follow, as 20.9% of users frequent these sites (NIA, 2008). One can say, that youth digital media culture in Korea is deeply integrated into the existing commercial entertainment industry, which has actively incorporated digital media devices to expand its conventional venues. J. Jung, Y. Kim, W. Lim and P.H. Cheong²⁸ showed that Koreans use the computer mostly to find entertainment-related information, play games and use e-mail box. Gaming is indeed the predominant online practice among Korean youth (44.6%)²⁹.

The mobile phones, with the use of Internet, one can treat as the main tool, driving force, which transforms Korea to the digital era. The youth mobile phone culture, which is centered on the use of text messaging and play culture, became the icon of young people. Text messaging is still the most preferred mode of communication among Korean youth. Yet the silent use of other mobile phone features – mobile phone imaging, sharing, and MMS messaging – is redefining the culture of *Eomjijok*, (the Korean version of “Thumb Tribe”), which is another name for *N Generation*³⁰.

²⁸ J. Jung, Y. Kim, W. Lin, P.H. Cheong, *The influence of social environment on Internet connectedness of adolescents in Seoul, Singapore and Taipei*, “New Media & Society” 2005, vol. 7, No. 1, pp. 64–88.

²⁹ Korean Game Industry Promotion Agency, 2005; Korean Game Development and Promotion Institute, Seoul 2008; Korean Game Whitepaper, Seoul 2008.

³⁰ S. Lee, *Mobile phone use: Relationship between voice call service and text message service*, “Korean Journal of Journalism & Communication Studies” 2003, vol. 47, No. 5, pp. 87–114.

Comparison of the Chosen Features of the Korean and Polish Education Systems

The culture of South Korea and Poland are influenced by society. The culture of Korea is mostly collectivistic with large influences from Confucianism³¹, so being humble, having strong interpersonal interactions (in class and with peers) and having an education were pushed in the society. Education in Korea is mainly based on testing and competition for high test scores among secondary students. In college, students tended not to participate due to cultural effects of “face” and being humble³².

In Poland dominates an individualistic culture, in which people look after themselves and their immediate family. Values are in persons and there is more explicit, verbal communication. Poland is under the influence of monotheistic religious system, mainly Christianity. People in this country believe that there is an absolute and indivisible truth. South Korea belongs to high scoring countries, in which Buddhism is practiced, and people believe that truth depends on time, context and situation. Very characteristic social feature in Korea is of how parents view formal education and extracurricular activities, their involvement in learning activities at home (improving homework habits), and their willingness to be involved in extracurricular activities in school (in enhancing student achievement, reducing absenteeism and dropout rates)³³.

³¹ J.K. Lee, *Hankuk-Yuhaksaryak (A Brief History of Confucianism in Korea)*, Asia-Moohwasa, Seoul 1986; S.S. Yun, *Confucian Thought and Korean Culture*, [in:] *Koreana: Korean Cultural Heritage*, vol. II, ed. J.W. Kim, Seoul 1996.

³² Ho Sui Chu, *The nature and impact of social capital in three Asian educational systems: Singapore, Korea, and Hong Kong*, “International Journal of Educational Policy, Research and Practice” 2000, vol. I, No. 2, pp. 171–189.

³³ *Ibidem*, p. 172; Lam Chi-Chung, Ho Ester Sui Chu, Wong Ngai-Zing,

But in both studied countries we can find a high power-distance cultures, in which everybody has his/her rightful place in society, it means that old age is respected and social status is important. It causes that between teachers and students is a clear hierarchy, and students always show respect to teachers and avoid disagreeing with them as much as possible. These differences and similarities affecting on the leadership and organizational culture of the education systems in Poland and the Korean Republic.

However, in Poland dominates the learner-centered education³⁴ and in Korea the teacher-centered education, in both systems the courses are heavily lecture-based, meaning that teachers unilaterally transfer information to students³⁵. While the teacher is talking, students are taking meticulous notes, trying to write as much down as they can. But in both countries one can find the teachers who try to stir up discussions among the students, but most do not put much emphasis on participation. Even if a teacher asks a question, students shy away from answering them as they are embarrassed of speaking in front of their classmates or afraid of getting the answer wrong. In schools of both countries, students are made to memorize their lessons, especially definitions, rules, procedures, facts, and concepts. The reason of such situation are examinations (with the use of tests) after finishing different levels of education. If the students obtain a test with multiple choice questions, the

Parents' beliefs and practices in Education in Confucian Heritage Cultures: the Hong Kong case, "Journal of Southeast Asian Education" 2002, vol. 3, No. 1, pp. 99–114.

³⁴ S. Juszczuk, *Education system in Poland*, [in:] *European Education (and Training) Systems*, S. Juszczuk (ed.), Toruń 2014, pp. 267–294; S. Juszczuk, Y.D. Kim, *Social media and changes in the language of Polish and Korean Youth*, "Culture and Education" 2015, No. 4 (110), pp. 89–104, DOI: 10.15804/kie.2015.04.05.

³⁵ Y.L. Kim, *Educational system in Korea*, [in:] *Asian Education System*, ed. S. Juszczuk, Toruń 2016, pp. 73–92.

choices are not chosen well, leading to too obvious answers or to confusing answers. However, in both countries students and parents give a big importance on scores and school ranking, and test results. Especially in Korea, many students have tutors waiting for them at home to review their lessons for the day and to study in advance for the coming lessons at schools. This phenomenon, called a “shadow education system” is a big social problem in Korea, because numerous Korean students enroll in private academies after school, where there are teachers who teach the same material taught at school and the parents pay for privately provided additional tuition³⁶.

The youth prefers the mobile phone because it allows informal, personal, and unregulated communication³⁷. Korean youth become savvy mobile phone users in the early stages of their life. According to research by mobile phone carrier³⁸, Korean adolescents (aged 12–18) own first mobile phone comparatively earlier than those in Japan, China, India, and Mexico, and 80.6% of Korean adolescents have their own mobile phone (compared to Japan, 77.3%; Mexico, 64%; China, 48.9%; and India, 30.6%). The mobile phones are treated as mobile screen media. Watching downloaded content (TV, dramas, animation, and movies) or browsing TV programs through a mobile TV service during their commute or down time is typical pattern of mobile screen use³⁹.

³⁶ M. Bray, *Confronting the Shadow Education System: What Government Policies for What Private Tutoring?*, UNESCO International Institute for Educational Planning, Paris 2009.

³⁷ H.W. Park, J.P. Biddix, *Digital media education for Korean youth*, “The International Information & Library Review” 2008, vol. 40, pp. 104–111.

³⁸ National Information Society Agency (NIA). (2008, 2007). National Informatisation Whitepaper. Seoul, Korea; S. Park, E.-M. Kim, E.-Y. Na, *Online activities, digital literacy, and networked individualism of Korean youth*, “Educational Media International” 2015, vol. 47, No. 6, pp. 829–849, <https://doi.org/10.1177/0044118X14561008>.

³⁹ H. Ok, *Screens on the Move: Media convergence and mobile culture*

The role of auto-education (self-education, self-improvement) and digital media as well as indirect communications is increasing in both countries, which contributes to preparing and developing open education, flexible learning, open educational resources and social learning⁴⁰. Let us characterize these terms and discuss their meaning in the contemporary world.

Open education is an idea for the way in which people can produce, share and construct their knowledge. Enthusiasts of open learning believe that each individual should have access to high-quality educational resources, bibliographical resources and barriers to accomplish this objective should be eliminated. The following can be acknowledged as barriers: specific manufacturing (editing and publishing) costs of such resources, the existence of outdated resources, and also legal standards that hinder cooperation of learners with teachers. Cooperating and making available are becoming the most characteristic qualities of open education because education is making knowledge available, exchanging information with others. Which can cause constructing new knowledge, gaining functional skills, ideas and understanding the evolving world.

A synonym of open education is flexible learning, containing: the so-called blended learning, e-learning, open and distance learning⁴¹, personalized learning and web-based learning. Such types of learning play an important role in expanding educational opportunities of people from different parts of the

in Korea, Doctoral dissertation, Los Angeles, CA 2008; H. Ok, *New media practices in Korea*, "International Journal of Communication" 2011, vol. 5, pp. 320–348.

⁴⁰ S. Juszczyk, Y.D. Kim, *Are open Education and flexible forms of learning a civilisation requirement or a technological obligation?*, "The New Educational Review" 2016, vol. 46, No. 4, pp. 163–173, DOI: 10.15804/tner/2016.46.4.14.

⁴¹ S. Juszczyk, *Distance Education. Codification of ideas, rules and processes*, Toruń 2002; UNESCO Open and Distance Learning Trends, Policy and Strategy Considerations, Paris 2002.

world. Directly, they can broaden access to higher-level education, enhancing the effectiveness of learning by working and learning in a social group.

Social learning assumes that our understanding of content is socially constructed through discussions on this content as well as through fundamental interactions with others, around the problem and/or undertaken activities. Learners focus their understanding not on what they learn, but how they learn⁴². In the opinion of John S. Brown and Richard P. Adler⁴³, the crux of social learning is in opposition to the traditional, Cartesian look at knowledge and learning that dominated in the last century. In the Cartesian perspective, it is assumed that knowledge is a type of matter, while teaching concerns searching for the best method for transferring this “matter” from the teacher to learners as a result of the use of different methods of teaching (in more detail: pedagogical strategies). In the Cartesian (traditional) education system learners can spend many hours learning a specific subject. Starting from the Cartesian principle “I think, therefore I am”, we arrive at social learning that is included in the saying: We participate, therefore we are. Perceiving the social aspect of learning in this manner shifts our attention from the content of the subject of learning to learners’ activity connected with the process of learning and human interactions the context of the subject of learning.

Conclusions

Contemporary young people, both in Poland and in Korea, download and upload files, surf the Internet, talk on chats,

⁴² J.S. Brown, A. Collins, P. Duguid, *Cognition and the culture of learning*, “Educational Researcher” 1989, vol. 18, No. 1, p. 18.

⁴³ J.S. Brown, R.P. Adler, *Minds of fires. Open education, the long tail and Learning 2.0*, “EDUCASE”, January/February 2008.

blogs, post on social forums and are not parted from their mobile phones. The age of the youth's initiation into the Internet is dropping every year and nobody will successfully decrease the youth's willingness to function in cyberspace, therefore we should promulgate media education not only at school, but also in a family.

Analyzing similarities and differences, difficulties and positive features of the education systems in Poland and South Korea, we can wonder how Korea can so quickly rise up and continue to have one of the most successful education outcomes in the world. Polish education rises up from a year to year, but our development is not as strong as in Korea.

By increasing the literacy rate, the Polish and Korean populations are more equipped to make better decisions about societal changes. By increasing accessibility to education, our societies would be able to have the knowledge of the various fields that support the countries. In our countries we pay a greater attention to "critical thinking", "problem-solving", and "creativity", which may be understood as reflecting the influence of "Western" approaches to learning, or/and a result of economic developments in our countries.

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Abstract

The purpose of the presented research is to look at how digital media affect communication and education of the youth from the East-South Asian country (such as South Korea) and in the European country (such as Poland), with considering the role of culture in education. In the research we have analyzed the chosen published opinions on the influence of digital media on the communication and education, the selected

published results of the empirical research conducted by different authors in this subject, the results of our interviews with students, their teachers and the own observations conducted in the classmates on different levels of learning in both countries. This hermeneutical analysis of the scientific publications and own empirical studies allowed us to construct a model of the digital media influence on the communication and education of the youth in Poland and South Korea.

Keywords: digital media, communication, education, Poland, South Korea

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Elections to the House of Representatives in Thailand in 2019 – Selected Issues

The last elections to the House of Representatives in Thailand took place on March 24, 2019. This has been the first election after five years of military junta rule, which took over power in Thailand as a result of the coup d'état on May 24, 2014. Even though the military junta has tightened human rights regulations, including those that affect the implementation of the election campaign, it can be said that the elections attracted a great deal of interest from the Thai people. Moreover, the campaign period and the elections provided sudden twists and surprises. The aim of this article is to discuss the elections to the House of Representatives in Thailand in 2019. To ensure that these deliberations are not made in a vacuum, it seems equally important to clarify the political, social and economic situation, as well as the circumstances that had led to the military taking power in 2014. The article is divided into three parts. The first point presents the political, social and economic situation in Thailand before the elections. The second point covers the most important issues concerning the electoral law, and the third one provides an overview of the campaign and the conduct of the elections.

Thailand on the Eve of the 2019 Parliamentary Elections

In May 2014 a *coup d'état* took place in Thailand. The reasons for this are primarily due to the conflict between two camps,

i.e. the United Front for Democracy against Dictatorship, known as the “Red Shirts”, and the People’s Alliance for Democracy, known as the “Yellow Shirts”.

This group of “Reds” are the supporters of Thaksin Shinawatra. Initially, they were mainly villagers (due to Shinawatra’s promises – some of them moved to the cities), but also some groups of students, left-wing activists, and even those businessmen who saw the greatest threats to democracy in the activities of the richest social groups living in cities, as well as the army. Earlier, they would vote for the TRT party (Thai Rak Thai), and after its dissolution – for Pheu Thai¹. They voice populist opinions. The so-called “Yellow Shirts” remained in opposition to the “Red Shirts”. They included mainly royalists, ultra-nationalists and the middle class, living in large cities².

In order to understand the political situation in Thailand and the source of this conflict, it is worth recalling the events from the beginning of this millennium. At that time there was another economic collapse in Thailand, and thus the dissatisfaction of citizens increased. Therefore, it should come as no surprise that in the 2001 elections the leader of the populist party Thai Rak Thai (translated as Thai Loves Thai) – Thaksin Shinawatra – won.

He is an extremely controversial figure in Thai politics. The multimillionaire (he made his fortune by setting up one of the largest mobile phone companies, among other things) has announced an imminent “reconstruction of the country”. He has initiated numerous economic projects, however, as it has soon turned out, their implementation was to serve only his own interests. All criticism was severely suppressed. Shinawatra supported the fight against drugs, in practice getting

¹ <http://www.bbc.com/news/world-asia-pacific-13294268> [Accessed: 14.03.2016].

² *Ibidem*.

rid of many political opponents. Nevertheless, he won the next election. He was able to win part of the society over through his effectiveness when Thailand was hit by the tsunami. He skillfully manipulated an uneducated group of people, often buying their votes. He also tried to resolve the conflict in the south of Thailand, but to no avail³.

In 2006, a scandal broke out, related to Thaksin Shinawatra forcing a law that allowed foreign investors to hold 49% of shares in Thai telecommunications companies. He was supposed to earn money from this law. Therefore, mass demonstrations against his government were increasingly frequent. He was gradually losing public support⁴.

Moreover, the 2006 parliamentary elections were declared invalid by the Constitutional Court because he was proved to have bought the votes⁵. Consequently, there was another military coup d'état and Thaksin Shinawatra was deprived of power. However, the part of the population that saw him as their savior (mainly villagers) demanded that he should remain in power. The TRT party was dissolved and its leader was banned from engaging in political life for another five years. Changes were announced to put an end to his rule⁶. One of them was the adoption of a new constitution in 2007⁷.

However, Thaksin Shinawatra did not intend to withdraw from politics. In the following years, Samak Sundaravej, leader

³ E. London, *Thailand Condensed 2000 Years of History*, Singapore 2008, pp. 52–53.

⁴ Ibidem; G.J. Ungpakorn, *A coup for the rich Thailand's political crisis*, Bangkok 2007, pp. 16–18.

⁵ *Thai court rules election invalid*, <http://news.bbc.co.uk/2/hi/asia-pacific/4983600.stm> [Accessed: 6.10.2019].

⁶ C. Schafferer, *Parliamentary election in Thailand*, December 23, 2007, <http://www.fule.at/research/Thai07.pdf> [Accessed: 6.10.2019].

⁷ *Thailand Constitution*, <http://www.asianlii.org/th/legis/const/2007/> [Accessed: 6.10.2019].

of the new party (PPP), founded by Shinawatra's supporters, became prime minister. Sundaravej was just an ordinary puppet in the hands of Thaksin Shinawatra. And when Shinawatra was summoned by the court for suspected corruption, he left Thailand. There were further protests on the streets of Thailand, and people demanded Samak's resignation⁸. In the end, Samak was removed from office.

Thaksin Shinawatra's supporters continued to work to enable him to return to politics. They criticized the new government and even helped him to register another political party. In 2010, the Supreme Court ruled that a large part of Thaksin and his family's assets had been acquired illegally and that Thaksin had abused his power⁹.

In 2011 Yingluck Shinawatra, Thaksin Shinawatra's younger sister, became Prime Minister. The man's opponents, fearing his return, organized mass protests against her government in 2012. There were further riots as Yingluck Shinawatra tried to push through an amnesty law that would allow her brother to return to the country without any criminal responsibility¹⁰. In result, this led to the dissolution of parliament and early elections on February 2, 2014. Pheu Thai, the party led by Yingluck Shinawatra was selected as the winner of the elections. They were disrupted in some areas of Bangkok and in the south of the country by protesters¹¹. Therefore, no official election results were given, although it can be assumed that the Pheu

⁸ G.J. Ungpakorn, *op.cit.*

⁹ S. Mydans, T. Fuler, *Thai Court Seizes \$1.4 Billion From Ex-Premier*, http://www.nytimes.com/2010/02/27/world/asia/27thai.html?_r=0 [Accessed: 6.06.2016].

¹⁰ *Yingluck keeps low key in day of chaos*, <http://www.bangkokpost.com/news/local/382584/pm-not-going-to-south-africa-and-keeps-low-profile> [Accessed: 1.12.2013].

¹¹ J. Head, *Thailand election disrupted by protests*, <https://www.bbc.com/news/world-asia-26003995> [Accessed: 7.10.2019].

Thai party would have won. However, on March 21, 2014 the Thailand's Constitutional Court ruled the elections invalid¹².

At the beginning of May 2014 Yingluck Shinawatra stepped down after a court found her guilty of abusing power¹³. Almost at the same time an army-appointed legislature formally impeached her, resulting in a five-year ban from politics. It also launched a legal case against her¹⁴. In September 2017 Yingluck Shinawatra was found guilty of criminal negligence and sentenced in absentia to five years in prison¹⁵.

Eventually, this situation was taken advantage of by the army, which, as has already been mentioned, took over power in May 2014. The military plays a huge role in Thai politics. It has almost always been treated as a special group, aimed at preserving and uniting the spirit of the nation¹⁶. Its recent coup was also explained as the need to "maintain law and order"¹⁷.

From that moment, Thailand has undergone a comprehensive regime change with the military junta enacting an interim charter that replaced the 2007 constitution, and what the NGO Thai Lawyers for Human Rights described as the "constitutionalization of absolutism"¹⁸.

¹² *Thai court rules general election invalid*, <https://www.bbc.com/news/world-asia-26677772> [Accessed: 7.10.2019].

¹³ K. Hodal, *Thai prime minister Yingluck Shinawatra forced to step down*, <https://www.theguardian.com/world/2014/may/07/thai-prime-minister-yingluck-shinawatra-steps-down> [Accessed: 10.10.2019].

¹⁴ *Profile: Yingluck Shinawatra*, <https://www.bbc.com/news/world-asia-pacific-13723451> [Accessed: 11.10.2019].

¹⁵ *Yingluck trial: Thai ex-PM sentenced to five years in jail*, <https://www.bbc.com/news/world-asia-41410047> [Accessed: 11.10.2019].

¹⁶ <http://www.gsdr.org/document-library/thailand-military-rule-there-and-back-again/> [Accessed: 14.03.2016].

¹⁷ <http://www.bbc.com/news/world-asia-27483816> [Accessed: 14.03.2016].

¹⁸ Thai Lawyers for Human Rights, "The State of Human Rights in Thailand: Four Years Under the National Council for Peace and Order", https://www.tlhr2014.com/?wpfb_dl=100 [Accessed: 12.10.2019].

A provisional constitution was adopted, which legitimized the power of the army in the country. In accordance with section 44 of this document the army actually gained unlimited legislative, executive and judicial power. The new constitution entrusted vast powers to the newly established National Council for Peace and Order (NCPO), an organization formed by the military junta to run the country¹⁹. Moreover, not only was there no mechanism to control the actions of the army in the provisional Constitution, but it was also guaranteed to avoid responsibility for the actions taken²⁰.

Works were also initiated on a new basic law to prevent parties such as Thai Rak Thai or Pheu Thai from entering parliament and exercising power²¹. A new, military constitution, maintaining a strong position of the army, was adopted in 2017²².

At the same time, the army tightened the law on the implementation of human rights and freedoms, in particular freedom of speech, association and assembly. Among them, it is worth to mention NCPO Announcement 97/2014, prohibiting the “criticism of the work of the NCPO” and forbidding the dissemination of “information that could harm national security, cause confusion, or incite conflicts or divisions in the country”²³, NCPO Announcement 103/2014 banning the publication of news “inten-

¹⁹ *Constitution of the Kingdom of Thailand (Interim)*, B.E. 2557 (2014), http://constitutionnet.org/sites/default/files/constitution_of_the_kingdom_of_thailand_2014-present.pdf [Accessed: 15.10.2019].

²⁰ *Thailand's Constitution of 2014*, https://www.constituteproject.org/constitution/Thailand_2014.pdf?lang=en [Accessed: 7.06.2016].

²¹ P. Chachavalpongpun, *Thailand in 2015: A Year of Political Stagnation*, <http://thediplomat.com/2015/12/thailand-in-2015-a-year-of-political-stagnation/> [Accessed: 7.06.2016].

²² *Constitution of The Kingdom of Thailand*, [http://constitutionnet.org/sites/default/files/2017-05/CONSTITUTION+OF+THE+KINGDOM+OF+THAILAND+\(B.E.+2560+\(2017\)\).pdf](http://constitutionnet.org/sites/default/files/2017-05/CONSTITUTION+OF+THE+KINGDOM+OF+THAILAND+(B.E.+2560+(2017)).pdf) [Accessed: 10.10.2019].

²³ <https://prachatai.com/english/category/ncpo-announcement-no-972014> [Accessed: 15.12.2019].

tionally distorted to cause public misunderstanding that affects national security or public order". Other legal enactments also continue to significantly restrict freedom of expression in Thailand, including the Computer Crime Act, the Public Assembly Act, as well as a number of articles of the Criminal Code. Section 112 of the Criminal Code contains "lèse majesté law", which is a major threat to freedom of expression, i.e. a crime of offence of majesty, punishable as treason of the state (Penal Code, section 112). This crime is committed by "anyone who defames, insults or threatens the King, Queen or heir to the throne". It is punishable by imprisonment from three to fifteen years²⁴. Moreover – Section 116 imposes sanctions for sedition, and Sections 326 to 333 address the offense of criminal defamation²⁵.

Organizations such as Amnesty International or Human Rights Watch also emphasize other human rights violations, including: violations of the right to a fair trial, arbitrary detention, violation of migrants' rights or human trafficking²⁶. High levels of corruption can be a serious threat to Thailand (according to Transparency International, in 2019 Thailand was ranked 101st out of 180 countries)²⁷. The continuing unresolved conflict in southern Thailand between Buddhists and Muslims also has a social and political dimension²⁸.

At the same time, it is worth noting some social, economic and cultural conditions. The Thai society is rather homoge-

²⁴ *The Librarian of Bangkok Prison*, <http://freesomyot.wordpress.com/lese-majeste-in-thailand/> [Accessed: 11.06.2013].

²⁵ *Thailand Penal Code Thai Criminal law*, <https://www.samuiforsale.com/law-texts/thailand-penal-code.html> [Accessed: 15.10.2019].

²⁶ <https://www.amnesty.org/en/countries/asia-and-the-pacific/thailand/report-thailand/> [Accessed: 13.10.2019].

²⁷ <https://www.transparency.org/country/#THA> [Accessed: 10.12.2019].

²⁸ J. Bajoria, C. Zisis, *The Muslim Insurgency in Southern Thailand*, <http://www.cfr.org/thailand/muslim-insurgency-southern-thailand/p12531> [Accessed: 13.10.2018].

nous from the ethnic (95.9 % are the Thai, 2% the Burmese and the rest make up 2.1 %) and religious point of view (the Buddhists – 93.6 %, the rest are the Muslims – 4.9 %, the Christians 1.2 %, other or atheists – they make up in total 0.3 %) ²⁹. According to statistic data from 2016 – 51.1 % of the population lives in urbanized areas. However, one can notice a visible increase of migration from rural areas. As an example, in 2010 31.2% of population lived in towns or cities ³⁰. However, recently poverty has decreased (as an example – in 2000 it affected about 21% of the society, and in 2012 – 12.6% ³¹, then disproportions between the rich and the poor is very high – according to Gini Index, in 2011 it was 48.4 ³².

According to 2019 statistics, 50.5% of the population lives in urbanized areas. However, there is a significant increase in migration from rural areas. For example, in 2010 cities were inhabited by 29.47% of the population ³³.

The vast majority of Thai society can read and write. The greatest number of such people can be found in the 15–24 age group (98.24%), and the lowest in the 65 and more age group (93.07%) ³⁴. The level of education of the society is also increasing, although the quality of education is sometimes criticized.

²⁹ CIA, The World Factbook, <https://www.cia.gov/library/publications/resources/the-world-factbook/geos/th.html> [Accessed: 12.10.2016].

³⁰ *Worldometers*, <http://www.worldometers.info/world-population/thailand-population/> [Accessed: 12.10.2016].

³¹ About Thailand, UNDP, <http://www.th.undp.org/content/thailand/en/home/countryinfo.html> [Accessed: 13.10.2016].

³² The index includes 145 countries, Thailand is on 24. position, so it is among the countries with the biggest disproportion between the rich and the poor), <https://www.cia.gov/library/publications/the-world-factbook/rankorder/2172rank.html> [Accessed: 15.10.2016].

³³ <http://www.worldometers.info/world-population/thailand-population/> [12.03.2016].

³⁴ <http://www.uis.unesco.org/DataCentre/Pages/country-profile.aspx?code=THA§or=lit> [Accessed: 12.03.2016].

What is more, despite numerous changes enabling the largest possible group of people to obtain secondary or tertiary education, paid from the state budget, it should be noted that for many of them, living in areas far away from educational centers and coming from poorer families, education at a higher than primary level, if only due to the cost of transport, is still beyond reach³⁵.

In recent years there has been a decline in poverty. For example, in 2000 it affected around 21% of the population and in 2012 – 12.6%³⁶. People living in rural areas experience problems in accessing social infrastructure or health services³⁷. In 2019 the unemployment rate was 1,2%³⁸.

Thailand has chosen to focus on agriculture, tourism as well as industry – mainly electronics and cars. The country is quite rich in mineral deposits (tin ore, tungsten, tantalum, lead, gypsum, natural gas, lignite, some oil, fluorite), has some good-quality soils (mainly rice, cassava, corn, caoutchouc, jute, sugar cane, soya, coconut palm, tobacco, fruit and vegetables are grown). Animal production is dominated by cattle, pig and poultry farming, fishing is also well developed³⁹.

Thailand is seen as an average income economy, which in 2014 amounted to 6041 USD per capita (calculated using the exchange rate methodology). In 2014, the economy was estimated at USD 404.8 billion (Thai data). According to economic analysts, the Thai economy exhibits features typical of the East

³⁵ <https://www.oecd.org/dev/asia-pacific/Thailand.pdf> [Accessed: 13.03.2016].

³⁶ <http://www.th.undp.org/content/thailand/en/home/countryinfo.html> [Accessed: 13.03.2016].

³⁷ Ibidem.

³⁸ <https://www.th.undp.org/> [Accessed: 15.12.2019].

³⁹ <http://www.informatorekonomiczny.msz.gov.pl/pl/azja/tajlandia/> [Accessed: 10.05.2016].

Asian model, where the state interferes in economic processes, has extensive bureaucracy and depends on exports⁴⁰. According to the World Bank, in 2017 the Gross Domestic Product was 455.2 billion USD⁴¹.

Electoral System – Selected Issues

Electoral issues were regulated in the aforementioned Constitution of 2017 and such legal acts as: The 2017 Organic Act on the Election Commission, The 2017 Organic Act on Political Parties, The 2018 Organic Act on the Election of Members of the House of Representatives, The 2018 Organic Act on the Installation of Senators⁴².

According to the Constitution, Thailand has a bicameral parliament. While the Senate is an unelectable house, The House of Representatives consists of five hundred members, as follows: three hundred and fifty members elected on a constituency basis; one hundred and fifty members from party lists of political parties (section 83).

In the new system, under the new Constitution of 2017, referred to as “mixed-member apportionment”, each voter uses a single vote for both the constituency and the party list, in a variant of the mixed-member proportional system. The 350 constituency seats are won by first-past-the-post voting as in previous elections. However, the 150 party list seats act as leveling seats, and are allocated so as to give each party a total num-

⁴⁰ Ibidem.

⁴¹ <https://www.worldbank.org/en/country/thailand/overview> [Accessed: 12.12.2019].

⁴² *The 2019 Thai General Election: A Missed Opportunity for Democracy*, <https://anfrel.org/anfrel-2019-thai-general-election-mission-report/> [Accessed: 2.01.2020].

ber of seats proportional to the nationwide number of votes they received⁴³.

The choice of such a system was to impact the Pheu Thai Party first and foremost, as well as enable the following:

- Total MPs match votes share;
- Parties represented even if no constituencies won;
- Smaller parties will cause gridlock;
- Increases chance of military interference⁴⁴.

Candidates are nominated by the individual parties under section 87 of the Constitution. A person holding the following qualifications may exercise active suffrage: being of Thai nationality, provided that a person who has acquired Thai nationality by naturalization must hold the Thai nationality for not less than five years; being not less than eighteen years of age on the election day; having his or her name listed in the household register in the constituency for not less than ninety days up to the date of the election. A voter who resides outside the constituency in which his or her name appears in the household register, or whose name appears in the household register in the constituency for a period of less than ninety days up to the date of the election, or who has a residence outside of the Kingdom may register to vote outside the constituency at the place, and according to the date, time, procedures and conditions prescribed by the Organic Act on the Election of the Members of the House of Representatives. A voter who fails to vote without notification of a reasonable cause under the Organic Act on the Election of Members of the House of Representatives may be subject to a restriction of certain rights as provided by law (section 95).

⁴³ *Explainer: New rules for the House of Representatives*, <https://www.bangkokpost.com/thailand/politics/1605898/explainer-new-rules-for-the-house-of-representatives> [Accessed: 10.12.2019].

⁴⁴ *Ibidem*.

The Constitution of 2017 also defines persons who are deprived of the right to active suffrage. Under section 96 prohibited from exercising the right to vote is a person: being a Buddhist monk, Buddhist novice, ascetic or priest; being under revocation of the right to vote, whether or not such case is final; being detained by a warrant of the Court or by a lawful order; being of unsound mind or of mental infirmity.

On the other hand, a person having the following qualifications: has the right to stand for an election of Members of the House of Representatives, being of Thai nationality by birth; being not less than twenty-five years of age up to the date of the election; being a member of any and only one political party for a consecutive period of not less than ninety days up to the date of the election; however, in the case where the general election is conducted due to the dissolution of the House of Representatives, the period of ninety days shall be reduced to thirty days, may exercise passive suffrage. Moreover, a candidate in an election on a constituency basis shall also have any one of the following qualifications: having his or her name appear in the household register in the Changwat where he or she stands for election for a consecutive period of not less than five years up to the date of applying for candidacy; being born in the Changwat where he or she stands for election; having studied in an educational institution situated in the Changwat where he or she stands for election for a consecutive period of not less than five academic years; having served in the official service or performed duties in a state agency, or having had his or her name appear in the household register in the Changwat where he or she stands for election, as the case may be, for a consecutive period of not less than five years (section 97).

At the same time, the Constitution of 2017 defines the persons who may not apply for a seat in the House of Representa-

tives. Under section 98 a person under any of the following prohibitions shall be the person who is prohibited from exercising the right to stand for election in an election of Members of the House of Representatives: being addicted to narcotics; being bankrupt or having been dishonestly bankrupt; being the owner of, or a shareholder in any newspaper or mass media business; being a person under the prohibitions from exercising his or her right to vote under section 96, 1), 2) or 4); being under temporary suspension of the right to stand for election, or being a person whose right to stand for election has been revoked; being sentenced by a judgement to imprisonment and imprisoned by a warrant of the Court; having been discharged for a period of less than ten years up to the date of election after being imprisoned except for an offence committed through negligence or a petty offence; having been dismissed from official service, a state agency or a state enterprise on the grounds of dishonest performance of duties or being deemed as having committed dishonest acts or wrongful conducts in the official service; having been ordered by a final judgement or order of the Court that his or her assets shall vest in the state on the grounds of unusual wealth, or having been sentenced by a final judgement to imprisonment on the grounds of committing an offence under the law on prevention and suppression of corruption; having been convicted by a final judgement for committing: a malfeasance in public office or in judicial office; an offence under the law on wrongdoings of officials in a state organization or agency; an offence against property committed in bad faith under the Penal Code; an offence under the law on the borrowing of money amounting to public fraud; an offence of being a producer, importer, exporter or seller under the law on narcotics; an offence of being a banker or a proprietor under the law on gambling; an offence under the

law on the prevention and suppression of human trafficking; or an offence of money laundering the law on the prevention and suppression of money laundering; having been sentenced by a final judgement for committing a dishonest act in an election; being a government official holding a permanent position or receiving permanent salary except a political official; being a member of a local assembly or a local administrator; being a senator or having been a senator whose membership has terminated for less than two years; being an official or an employee of a government agency, state agency, or state enterprise or other state official; being a judge of the Constitutional Court, or holding a position in an Independent Organ; being currently under the prohibition from holding a political position; having been removed from office on the grounds under section 144 or section 235 paragraph three.

It is also worth taking a closer look at the Election Commission, consisting of 7 members, elected for a period of 7 years. Under Section 224 of the Constitution, its duties and tasks include: to hold or arrange for the holding of different types of elections, to control and supervise those elections and selections, to proceed in an honest and just manner, and control and supervise the holding of a referendum to proceed in a lawful manner. Moreover, for this purpose, it shall have the power to investigate or inquiry as necessary or as deemed appropriate. Other duties: to supervise the operation of political parties to be in accordance with the law.

Elections to the House of Representatives in 2019

77 political parties took part in the elections, including 13310 candidates. Such a large number of political parties and candidates is not uncommon in Thailand. In the end, 27 parties

entered the House of Representatives. The number of people eligible to vote in this election is about 51 million people⁴⁵. Turnover was 74,69%⁴⁶.

In general, three camps can be distinguished among the political parties that take part in the elections, namely:

- Pro – regime, led by the Palang Pracharat Party,
- Anti – regime, led by Pheu Thai and Future Forward,
- Fence-sitting, led by the Democrat Party and Bhumjaithai⁴⁷.

As has been claimed by Duncan McCargo and Saowanee T. Alexander, “The pro-military Palang Pracharat Party was created as a vehicle to allow junta members to continue in office beyond the elections, and succeeded in taking away millions of votes from the long-standing conservative and royalist Democrat Party”⁴⁸. The party was tied to the National Council for Peace and Order, the military junta that ruled the country after the 2014 coup. It was established by Chuan and Suchart Jantarachotikul in 2018⁴⁹. The party’s ideology can be defined as: conservatism, pro-military, Thai nationalism⁵⁰.

⁴⁵ *Fraud, irregularities and dirty tricks a report on Thailand’s 2019 elections*, <https://forsea.co/wp-content/uploads/2019/05/FORSEA-Election-Report-2019.pdf> [Accessed: 3.01.2020].

⁴⁶ Ibidem.

⁴⁷ P. Kongkirati, *Overview: Political Earthquakes*, “Contemporary Southeast Asia” 2019, vol. 41, No. 2, https://www.academia.edu/40192470/Thailands_2019_Elections_Political_Earthquakes [Accessed: 2.01.2010].

⁴⁸ D. McCargo, S.T. Alexander, *Thailand’s 2019 Elections A State of Democratic Dictatorship? Special Essay in Asia Policy 14.4*, <https://www.nbr.org/publication/thailands-2019-elections-a-state-of-democratic-dictatorship/> [Accessed: 2.01.2020].

⁴⁹ T. Charuvastra, *New Party Wants to Recruit Prayuth*, <https://www.khaosodenglish.com/politics/2018/03/12/new-party-wants-to-recruit-prayuth/> [Accessed: 10.12.2019].

⁵⁰ S. Khidhir, *Major players in Thailand’s election*, <https://theaseanpost.com/article/major-players-thailands-election> [Accessed: 10.12.2019].

On the other hand, the Pheu Thai Party is another party formed by the supporters of Thaksin Shinawatra. The previous ones – the People’s Power Party (PPP) and the Thai Rak Thai Party (TRT) were dissolved. The Pheu Thai Party is a party that voices populist and economic liberalism⁵¹.

The Future Forward party remains in a similar trend. This is a new grouping, founded by Thanathorn Juangroongruangkit, a former Vice President of Thai Summit Group, a rich businessman and Piyabutr Saengkanokkul, a legal scholar, in March 2018. After the last elections, the party became the third political force in Thailand. It owes its success primarily to the youthful and fresh image of its leader as well as effective use of social media (mainly Facebook, Instagram and Twitter) and virtual campaigning. The party was voted for mainly by young people under 40 years of age, as well as those who participated in the elections for the first time. This center-left party bet on progressivism and social democracy⁵².

However, the Democrat Party is the oldest party in Thailand. It was founded as a conservative and royalist party and at present upholds a conservative-liberal and classically liberal pro-market position. It has never won an outright parliamentary majority⁵³. And last but not least – Bhumjaithai Party (Thai Pride Party). Bhumjaithai, founded in 2008, has a populist platform, drawn from Thaksin’s populist Thai Rak Thai party, and the People’s Power Party. The party’s ideology can be described as populist and conservative⁵⁴.

⁵¹ Ibidem.

⁵² A. Chattharakul, *Social Media: Hashtag # Futurista*, “Contemporary Southeast Asia” 2019, vol. 41, No. 2, https://www.academia.edu/40192470/Thailands_2019_Elections_Political_Earthquakes.

⁵³ <http://cald.org/member-parties/the-democrat-party/> [Accessed: 5.10.2019].

⁵⁴ <https://www.globalsecurity.org/military/world/thailand/political-party-trt.htm> [Accessed: 5.10.2019].

One of the most important problems of these elections was to define the principles. In the 2019 elections Thailand applied a “mixed-member apportionment” system (MMA). Voters could directly select 350 lawmakers from single-seat constituencies. The ballots that they cast would count as both votes for the candidates in those races and simultaneously votes for those candidates’ party in the allocation of party list seats. The total number of votes that a party received nationwide via such single vote would determine the number of party-list members of parliament allocated to each party. The minimum threshold of 71,065 votes needed to be secured by parties that were eligible to gain party-list seats in the first round of calculation. The threshold is a sum of dividing the total of 35.53 million valid votes by the number of 500 MPs. However, parties that had already won more constituency seats than the number for which this first calculation made them eligible would not be allocated more party-list seats, as in the case of the Phuea Thai Party in this election. The 150 party-list seats would then be distributed among parties according to the proportion of the votes that they received. Article 127 of the Organic Law on Elections stated that the ECT would announce the election results when the returns from at least 95 per cent of constituencies were ready⁵⁵.

On May 6, the ECT finally endorsed the majority of results in March 24 national ballot, but warned that it was still investigating allegations of wrongdoing that might affect the final counts. If there were reported electoral fraudulence in any constituency, the votes from that constituency would be subtracted from the party’s proportional representation total and the ECT would organize a new election. Votes gained in

⁵⁵ P. Sirivunnabood, *Dilemmas in the new electoral system*, “The Nation”, November 25, 2017 <http://www.nationmultimedia.com/detail/opinion/30327564/> [Accessed: 7.05.2019].

this new re-election would be used to re-calculate the allocation of party-list seats, and, according to Articles 130 and 131 of the Organic Law on Elections, the ECT could repeatedly re-calculate the allocation of party-list seats for up to one year after the contests of March 24. Some incumbents holding party-list seats might therefore be replaced by new parliamentarians as a result of the re-calculation process. On May 8, Thailand's Constitutional Court ruled that the contentious condition related to the formula to allocate party-list seats in the Organic Law on parliamentary elections did not violate the country's 2017 charter. The inclusion of small parties has decreased the threshold from one party-list seat per 71,065 votes to one seat per approximately 30,000 votes⁵⁶.

None of the three camps won a majority in the elections to the House of Representatives. The winners of the elections are: the Palang Pracharat and the Future Forward. The biggest defeated in the election is the Democrat Party. The popularity of the pro-Thaksin Pheu Thai party was decreased thanks to the efforts of Thailand's ruling junta. Below the election results are presented.

Table 1. Results

Party	Votes	% Votes Share	Constituency Seats	Party List Seats	Total Seats
Palang Pracharat	8441,274	23,74	97	19	116
Pheu Thai	7881,006	22,16	136	0	136
Future Forward	6330,617	17,80	31	50	81
Democrats	3959,358	11,13	33	20	53
Bhumjaithai	3734,459	10,50	39	12	51
Seri Ruam Thai	824,284	2,32	0	10	10
Chart Thai Pattana	783,689	2,20	6	4	10
New Economics	486,273	1,37	0	6	6
Prachachart	481,490	1,35	6	1	7

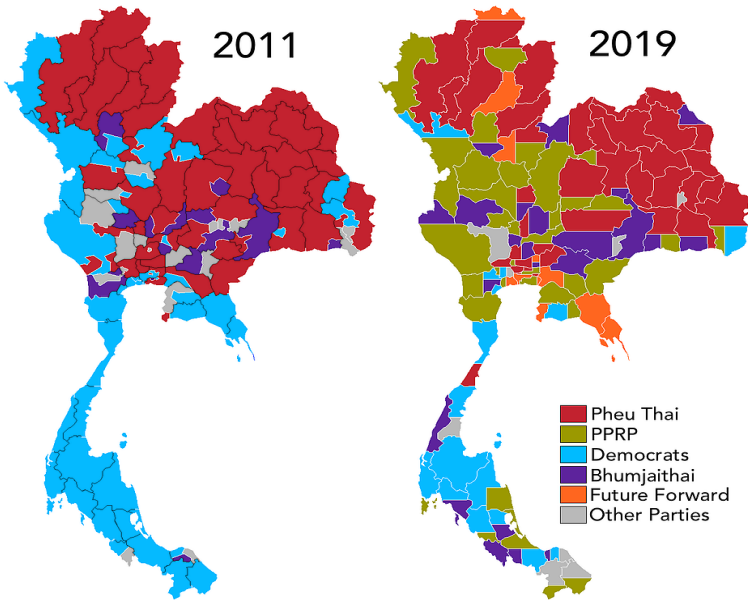
⁵⁶ https://www.iseas.edu.sg/images/pdf/ISEAS_Perspective_2019_44.pdf [Accessed: 10.12.2019].

Pheu Chat	421,412	1,19	0	5	5
Action Coalition	415,585	1,17	1	4	5
Chart Pattana	244,770	0,69	1	2	3

Source: D. McCargo, S.T. Alexander, *Thailand's 2019 Elections A State of Democratic Dictatorship? Special Essay in Asia Policy 14.4*, <https://www.nbr.org/publication/thailands-2019-elections-a-state-of-democratic-dictatorship/> [Accessed: 2.01.2020].

The figure shows who the inhabitants of the respective provinces voted for in the 2011 and 2019 elections.

Figure 1. Regional Voting: Comparing 2019 to 2011



Source: <https://www.thaidatapoints.com/post/regional-voting-comparing-2019-to-2011> [Accessed: 12.12.2019].

The Upper North is still solidly Pheu Thai with 25/31 constituencies in total. Winners in other constituencies were junta's Palang Pracharat party (PPRP) and The Future Forward

Party (FF). On the other hand, until then, in The Lower North the Democrats would win. However, this time The Democrats have been replaced by PPRP and to a small extent – Bhumjaithai. Then, The Northeast (Upper and Central) is of great importance to Pheu Thai, and has been its most consistent supporter. This continued in the 2019 elections, though it lost a few seats to PPRP and Bhumjaithai. However, the Lower Northeast is the heartland of Bhumjai Thai. Finally, the Central (excl. Bangkok) region is its usual patchwork of a few parties. As far as Bangkok is concerned, the fight has been between the Democrats and Pheu Thai, and in the last elections the PPRP joined them. The Democrats lost. PPRP took most of the seats (14/30), with Pheu Thai and FF splitting the remainder (8 each). PPRP also took 6/7 seats in neighboring Samutprakan. The capital region was clearly PPRP's stronghold in these elections. And last but not least, the south of the country, which has been the heartland of Democrat support for decades. However, both PPRP and Bhumjaithai secured some seats during last elections⁵⁷.

Undoubtedly, the biggest surprise of the election was the announcement that a Thai princess was nominated as a candidate for prime minister in the March 24 elections, for a party linked to the Shinawatra political clan. It was the Thai Raksa Chart Party that nominated the 67-year-old Ubolratana Rajakanya, the elder sister of King Maha Vajiralongkorn. Her nomination breaks the long-standing tradition of Thai royalty staying out of politics. Even though she had officially lost her royal status by marrying an American in 1972 and consequently, treated herself as a commoner, in practice she continued to be widely regarded as a member of the royal family. The king later issued a rare statement opposing the move, saying it was

⁵⁷ <https://www.thaidatapoints.com/post/regional-voting-comparing-2019-to-2011> [Accessed: 10.11.2019].

“inappropriate” for members of the royal family to enter politics. In the statement he said that “All members of the royal family have to abide by the principle of being above politics and politically neutral”, adding that “Any attempt to involve a high-level member of the royal family in the political process, by whatever means, would be tantamount to breaching time-honored royal traditions, customs and national culture. Such action must be deemed transgression and most inappropriate”. This way, she was prevented from participating in the elections. The results of the elections of March 24, 2019 were not made public until May, after the coronation of Prince Maha as the King of Thailand.

* * *

Thailand’s first election in five years were treated as a successful country’s return to democracy. However, the allegations of systemic rigging, irregularities in voting, questionable rulings by the military-appointed election commission and a lengthy delay in announcing final tallies indicated that the military would be trying to maintain its position. Even though the opposition has won most seats it looks set to miss out on government. The final results of the March election give an absolute majority to no party and suggest that political divisions will still continue if not intensify.

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Abstract

The last elections to the House of Representatives in Thailand took place on March 24, 2019. This has been the first election after five years of military junta rule, which took over power in Thailand as a result of the coup d'état on May 24, 2014. Even though the military junta has tightened human rights regulations, including those that affect the implementation of the election campaign, it can be said that the elections attracted a great deal of interest from the Thai people. Moreover, the campaign period and the elections provided sudden twists and surprises. The aim of this article is to discuss the elections to the House of Representatives in Thailand in 2019.

Keywords: House of Representatives, Thailand, elections

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The Asian Part of the Commonwealth – the Problematic Case of the Maldives

Introductory Remarks

The Commonwealth of Nations, with its almost 90-year history, constitutes a very unique but at the same time one of the most recognizable subjects of international law. Its origins are deeply rooted in the history of the British Empire which – in terms of its territorial scope and political position – was undoubtedly the greatest empire in the political history of the world (“the empire on which the sun never sets”). As an evolutionary outgrowth of the British Empire¹, modern Commonwealth occupies a special place in the collective memory of the British nation. Even though its today’s position is neither politically nor economically significant, it reminds the British of the power and international position their country once had.

From the perspective of international law, the uniqueness of the Commonwealth means that it may not be perceived as a classical international organization, mainly because it was not founded by signing and ratifying an international agreement or any other document of that kind. It has no constitution or bylaws. It also does not have organizational structure or own separate institutions (apart from Secretariat based in

¹ <https://www.britannica.com/topic/Commonwealth-association-of-states> [Accessed: 17.09.2019].

London) – most decisions are simply made at regularly held meetings of the heads of government of its member states².

Is therefore Commonwealth definitely more a loose association or an institutionalized form of cooperation of a group of sovereign states?³ This group comprises today's United Kingdom of Great Britain and Northern Ireland as well as a number of former British colonies and dependencies and additionally some countries that have no historical connections with the British Empire. All of them have full legal autonomy – they can sign international agreements, make their own law, conduct their own foreign and domestic policy, as well as are members of international organizations and maintain diplomatic relations with other countries. What makes them a part of this unique Commonwealth is – on a historical or political and symbolic basis – the British monarch (recognized either as the head of state or simply the head of the Commonwealth) and on more practical grounds – economic ties and interdependencies, as well as a legal system based on the common law.

Nevertheless, all the member states of the Commonwealth are expected to respect and apply in practice a number of shared values and principles that are enshrined in different declarations and other documents adopted by them during the various meetings and summits that have been held since the establishment of the Commonwealth. These principles and values may be enforced which means that the failure to comply with them may lead to the suspension or even expulsion of a member state of this organization. Such penalties have already been imposed several times. There were also situations in which a member state of the Commonwealth – for various

² These meetings are called: Commonwealth Heads of Government Meetings (CHOGM).

³ For the sake of simplicity, the Author of the article uses the term 'organization' when relating to the Commonwealth.

reasons – decided to resign from the membership on its own request.

The aim of this article is to describe, analyze and assess the latest case of that kind, namely an extremely interesting case of the Maldives which in October 2016 withdrew from the membership in the Commonwealth but two years later applied to re-join it. These two opposing decisions were driven by political and constitutional crises that hit the Maldives. The Author's goal is to analyze this particular case and also to show it in the broader context of the Asian members of the Commonwealth which – as relatively young democracies – for similar reasons sometimes find it difficult to comply with Commonwealth's membership criteria. In addition, on the example of the Asian part of this organization, the thesis that Commonwealth governing bodies sometimes use double standards when assessing their members will be proven. To address the research problem both the historical analysis method and the institutional and legal analysis method are used.

The Commonwealth and its Asian Part

The history of the Commonwealth dates back to 1931 when the Statute of Westminster was adopted, though it is worth remembering that the sovereignty of the British dominions was already announced in the Balfour Declarations issued in 1926 at the Imperial Conference. The Statute of Westminster legally formalized this decision, officially establishing the British Commonwealth of Nations. The gradual collapse of the British Empire began much earlier – the first dominion status was given to Canada in 1867. Granting more and more autonomy to the most valuable colonies was motivated by Empire's desire to maintain its sphere of influence in these areas. Remember-

ing the loss of the American colonies, the British simply did not want to make the same mistake once again⁴. So, the idea that lied behind the establishment of the Commonwealth was the desire to define a new type of relationship between Great Britain and its former colonies.

The present name of the organization – the Commonwealth of Nations – was adopted in 1949 when the London Declaration was signed. That document is said to have marked the birth of the modern Commonwealth which became an association of decolonized nations – without the reference to ‘Britain’ in its name and without the allegiance to the British crown in its statute (though the British monarch remained the head of the Commonwealth). The London Declaration also stressed the freedom and equality of all its members – both in their relationship to the Head of the Commonwealth (defined as a “free association of independent nations”) and in their cooperative “pursuit of peace, liberty and progress”⁵.

Currently there are 53 members of the Commonwealth out of which 3 are located in Europe, 19 in Africa, 7 in Asia, 11 in the Pacific and 13 in the Caribbean and Americas. As many as 31 of the members are classified as small states (with a population size of less than 1,5 million people) though some of them – like Canada and Australia – are amongst the world’s largest countries in terms of territory or population. Altogether the Commonwealth is home to 2,4 billion people which con-

⁴ To explore the history of the British Empire, see for example: N. Ferguson, *Empire. How Britain Made the Modern World*, London 2003; T. Lloyd, *Empire. The history of the British Empire*, London–New York 2001; H. Duncan Hall, *Commonwealth. A History of the British Commonwealth of Nations*, New York 1971.

⁵ *London Declaration*, Issued at the Commonwealth Prime Ministers Meeting, London, United Kingdom, April 22–27, 1949, <https://thecommonwealth.org/sites/default/files/inline/London-Declaration.pdf> [Accessed: 12.09.2019].

stitutes approximately 1/3 of the world population. From the point of view of economic development, the member states are also very diverse – ranging from the richest to the poorest countries in the world⁶.

As already mentioned, the vast majority of these countries are former British colonies and dependencies that decided to remain in close political relations and to maintain practical cooperation with the United Kingdom. Out of 53 members, 16 are the so-called Commonwealth realms as they remain in the personal union with the United Kingdom which means that they treat the British monarch (who is at the same time the Head of the Commonwealth) as their head of state⁷. Five other members are monarchies ruled by their own monarchs (Brunei Darussalam, Eswatini, Lesotho, Malaysia and Tonga) and the remaining 32 are republics.

The core values and principles that unite the Commonwealth and are supposed to be respected and applied in practice by all the member states are inscribed in the “Charter of the Commonwealth”⁸. Simplifying they might be called the membership criteria and include: democracy, human rights, international peace and security, tolerance, respect and understanding, freedom of expression, separation of powers, rule of law, good governance, sustainable development, protecting the environment, access to health, education, food and shelter, gender equality, importance of young people in the common-

⁶ <https://thecommonwealth.org/member-countries> [Accessed: 12.09.2019].

⁷ The Commonwealth realms are: Antigua and Barbuda, Australia, The Bahamas, Barbados, Belize, Canada, Grenada, Jamaica, New Zealand, Papua New Guinea, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Solomon Islands, Tuvalu, and the United Kingdom.

⁸ *Charter of the Commonwealth*, Signed by Her Majesty Queen Elizabeth II, Head of the Commonwealth, Commonwealth Day 2013, <https://thecommonwealth.org/sites/default/files/page/documents/CharteroftheCommonwealth.pdf> [Accessed: 12.09.2019].

wealth, recognition of the needs of small states, recognition of the needs of vulnerable states, the role of civil society⁹.

These criteria have been shaped, altered and strengthened by a series of difference documents (declarations, communiqués, etc.) that have been adopted since 1931. Among them, apart from the Statute of Westminster and the London Declaration, the following ones are worth mentioning: Declaration of Commonwealth Principles (1971), the Harare Declaration (1991), the Millbrook Commonwealth Action Programme on the Harare Declaration (1995), Promoting Shared Prosperity: Edinburgh Commonwealth Economic Declaration (1997), Aso Rock Declaration on Development and Democracy: Partnership for Peace and Prosperity (2003) or Kampala Declaration on Transforming Societies to Achieve Political, Economic and Human Development (2007). The most important political principles enshrined in all these declarations refer to such fundamental values as democracy, human rights, civil liberties or good governance.

The Asian part of the Commonwealth includes seven countries: Bangladesh, Brunei Darussalam, India, Malaysia, Pakistan, Singapore and Sri Lanka. Four of them are located in South Asia and the remaining three in South-East Asia. Around 70% of the Commonwealth's citizens live in South Asia. None of these countries is a Commonwealth realm, two of them are monarchies with their own individual monarch (Brunei Darussalam is a sultanate and Malaysia is a kingdom), the remaining ones are republics¹⁰ – predominantly the parlia-

⁹ Ibidem.

¹⁰ In fact, India was the first republic in the Commonwealth. It joined this organization in 1947 but two years later announced its transformation into a republican form of government. This situation forced Commonwealth heads of government to adjust its membership rules to these new circumstances. This way India paved the way for other republics to apply for the membership in the Commonwealth.

mentary republics with the only exception of Sri Lanka which may be classified as an example of a presidential republic where the president assumes the role of the head of government.

It is relatively easy to prove that not all Asian countries belonging to the Commonwealth are fully eligible for membership in this organization – especially in terms of the level of democracy, the rule of law or the protection of human rights. According to the latest report published by the Freedom House only India is classified as a ‘free’ country, 5 of them are classified as ‘partly free’, and Brunei is classified as ‘not free’¹¹. It is in relation to this country that one may have the most serious reservations and doubts when it comes to meeting the membership criteria of the Commonwealth.

Brunei, as an absolute monarchy where a sultan exercises executive power, is the only Asian member of the Commonwealth without a multiparty system and no elected representatives at the national level. Civil liberties – including the freedom of speech, freedom of the press or the freedom of the assembly – are in this country significantly restricted. Corruption in Brunei reaches all levels of government, including the judiciary. Furthermore, the Freedom House warns that in March 2018 a bill was approved by the sultan that may lead to the implementation of the second phase of Sharia penal code. That in turn would mean the imposition of very harsh penalties for violations of law, such as amputations and death by stoning¹².

Until recently there was another Asian member of the Commonwealth, namely the Maldives. However, in October 2016 it decided to withdraw from this organization thus showing

¹¹ *Freedom in the World 2019. Democracy in Retreat*, Freedom House, https://freedomhouse.org/sites/default/files/Feb2019_FH_FITW_2019_Report_ForWeb-compressed.pdf [Accessed: 12.09.2019].

¹² <https://freedomhouse.org/report/freedom-world/2019/brunei> [Accessed: 12.09.2019].

its disapproval of international criticism that has fallen on this country for alleged corruption and human rights violations.

The Case of the Maldives

The political history of the Maldives is relatively short. This Asian mini-state, that in terms of the size of the territory and the number of inhabitants is the smallest state on the whole continent, was in the colonial period initially captured by Portugal, then by the Netherlands and finally became part of the British Empire. The Maldives gained full political independence from the United Kingdom in 1965. In 1982 – already as a republic – it decided to join the Commonwealth. For the first 3 years it had a status of a special member¹³, but in 1985 it gained full membership.

The post-colonial history of this former sultanate was full of political and constitutional unrest with lots of successful or unsuccessful coup attempts. Irrespective of that between 1978 and 2008 this presidential republic was ruled by president Maumoon Abdul Gayoom – accused by many of undemocratic practices and dictatorial style of leadership. Finally, in 2008, after the adoption of a new constitution, first direct multiparty presidential elections were held. They were won by the leader of the Maldivian Democratic Party (MDP) – Mohammed Nasheed and marked the end of this 30-year repressive and autocratic rule of Gayoom.

Another turning point in the modern history of the Maldives was the year 2012 when a new phase of political and constitutional crisis began. After a series of protests (which started yet in late 2011) Nasheed – quite unexpectedly – decided to resign as the president of the Republic of the Maldives. The protests were led by the supporters of the former president Gayoom and

¹³ Such status meant limited rights and responsibilities resulting from the membership in the Commonwealth.

were triggered for several reasons. Officially they were caused by rising prices and poor economic situation in the country, but their main wave began after Nasheed had ordered the military to arrest one of the top criminal court judges on corruption charges. The judge was said to be Gayoom's political ally so the decision to arrest him was interpreted as politically motivated. It is also worth emphasizing that Nasheed was widely criticized by opposition parties for being anti-Islamic whereas in recent decades the Maldives have been subject to rapid Islamization as various conservative groups and movements began to build their increasingly strong political position to gain social support and significance¹⁴.

The presidential election, widely regarded as suspicious, was won by Abdulla Yameen Abdul Gayoom from the Progressive Party of the Maldives (PPM). The new president, privately Maumoon Abdul Gayoom's half-brother, defeated Mohammed Nasheed in the second round of voting, receiving over 51% of all votes. Between 2013 and 2018 the Maldives experienced a serious democratic backsliding as most of the democratic gains were at that time rendered void. The opposition leaders were persecuted and imprisoned, the judiciary and other independent institutions were politicized, civil liberties were restricted and the political and social life became more and more Islamized. Repercussions imposed by the new authorities affected even the former president Mohammed Nasheed – in 2015 he was sentenced to 13 years' imprisonment under the Anti-Terrorism Act of Maldives¹⁵.

¹⁴ J. Burke, *Mohammed Nasheed resigns as Maldives president*, "The Guardian", <https://www.theguardian.com/world/2012/feb/07/mohamed-nasheed-resigns-maldives-president> [Accessed: 17.09.2019].

¹⁵ This conviction was severely criticised by both Amnesty International and the US Department of State. Nasheed received political asylum in the United Kingdom and in 2018 – on his return home – the Supreme Court cancelled his conviction ruling that he had been wrongfully charged.

The scale of political persecution, harassment and retaliation was so huge that it could not escape the attention of the international community, including leaders of the Commonwealth countries. The actions taken by the Maldives government were severely condemned by the Commonwealth Human Rights Initiative (CHRI) – an independent NGO that works for the observance and practical realization of human rights in the countries of the Commonwealth. In the report submitted on 18 September 2016 to the Commonwealth Ministerial Action Group (CMAG) – Commonwealth’s democracy watchdog – CHRI accused the Maldives government of seriously violating the Commonwealth Charter and other international commitments emphasizing “further evidence of curbing fundamental rights, targeted persecution of opposition leaders, misuse of state institutions (including the judiciary, legislature and the police) to restrict, crush and punish dissent, stifling political debate, and crippling independent institutions”¹⁶.

On 23 September 2016 CMAG placed the Maldives on its formal agenda and warned suspension from the Commonwealth in March 2017. It was already the third official warning and at the same time the third attempt to convince the Maldives authorities to make substantial progress to resolve the persistent political crisis in the country. The government was given 6 months to address concerns including the detention of opposition leaders, meddling with the judiciary and undermining democratic institutions¹⁷.

¹⁶ *Submission to the Commonwealth Ministerial Action Group. Maldives*, Commonwealth Human Rights Initiative, September 18, 2016, <https://www.humanrightsinitiative.org/download/1474271150CMAG%20Final%20submission%20-%20Maldives%20-%20CHRI%2018%20September%202016.pdf> [Accessed: 17.09.2019].

¹⁷ M. Safi, *Maldives quits Commonwealth over alleged rights abuses*, The Guardian, October 13, 2016, <https://www.theguardian.com/world/2016/oct/13/maldives-quits-commonwealth-over-alleged-rights-abuses> [Accessed: 17.09.2019].

Three weeks later – on October 13, 2016 – the Maldives announced the decision to quit the Commonwealth over alleged unfair and unjust treatment, interference in domestic affairs, and threats to sovereignty and independence. This decision was made by president Abdulla Yameen Abdul Gayoom and endorsed by the parliament (The People’s Majlis) – MPs voted 39–19 to support the president. The parliamentary Committee on National Security accused the CMAG of taking “unfair and unjust” actions against the Maldives since 2012 and of attempting to “meddle in domestic policies and exert influence on the Maldivian state’s sovereignty and independence”¹⁸. In a special statement the Commonwealth Secretary-General Patricia Scotland expressed her sadness and disappointment at this decision and at the same time the hope that “this will be a temporary separation and that Maldives will feel able to return to the Commonwealth family and all that it represents in due course”¹⁹.

The political atmosphere in the Maldives changed profoundly in September 2018 when president Abdulla Yameen Abdul Gayoom failed to secure his second 5-year term. In the presidential election he was defeated by Ibrahim Mohamed Solih from the Maldivian Democratic Party (MDP) who had become the joint candidate of all opposition parties. Solih’s result (over 58% of the vote) and victory were highly unexpected. As the one who replaced Abdulla Yameen he was in a way forced to start a new chapter in Maldivian politics. To

¹⁸ *Maldives parliament endorses decision to quit Commonwealth*, Maldives Independent, October 19, 2016, <https://maldivesindependent.com/politics/majlis-endorses-quitting-commonwealth-127319> [Accessed: 17.09.2019].

¹⁹ *Secretary-General statement on Maldives decision to leave the Commonwealth*, October 13, 2016, <http://thecommonwealth.org/media/news/secretary-general-statement-maldives-decision-leave-commonwealth> [Accessed: 17.09.2019].

this end, soon after assuming his office, he established a special commission to release political detainees and restore constitutional order in the country.

The Solih's priorities in foreign policy were also utterly different than in case of his predecessor. One of the priority issues turned out to be the membership in the Commonwealth of Nations. On November 26, 2018 the government announced its will return to its status as a member state of the Commonwealth and a formal application to rejoin this organization was submitted on December 10, 2018. The government's decision was backed by the parliament – MPs approved it unanimously with 62 votes. What is interesting among them were also the lawmakers who two years earlier had voted in favor of the decision to withdraw the Maldives from the Commonwealth. During these two years the former president of the Maldives was criticized – both at home and abroad – for breaking ties with the Commonwealth in order to consolidate and secure his more and more dictatorial power. Irrespective of politics, the membership in the Commonwealth has always brought a lot of benefits to the Maldives – mainly when it comes to trade, commerce, travel, education or sports²⁰.

The decision of the Maldives government was also upheld after the parliamentary elections that took place on April 6, 2019. Their result was a landslide victory of the Maldivian Democratic Party which secured 65 out of 87 seats in the People's Majlis. In order to rejoin the Commonwealth, the government has to prove that it complies with the core values listed in the Commonwealth Charter. The whole procedure is based on informal assessment undertaken by the Commonwealth

²⁰ *Maldives parliament endorses decision to rejoin Commonwealth*, Maldives Independent, December 5, 2018, <https://maldivesindependent.com/politics/maldives-parliament-endorses-decision-to-rejoin-commonwealth-143069> [Accessed: 17.09.2019].

Secretary-General. The final decision requires consultation with other member states and their unanimous agreement. If it happens the Maldives will be given the green light to submit a formal application. The next meeting of the heads of government of the Commonwealth of Nations is scheduled for July 2020 (The Commonwealth Heads of Government Meeting 2020) and will be held in Rwanda. The Maldives issue will probably be one of the main points on the agenda.

Conclusions

In almost 90-year history of the Commonwealth of Nations, this organization has already faced several similar problematic cases to one of the Maldives. What is interesting, but basically not very surprising, the background of the problem was almost always the same.

For now, only Ireland left the Commonwealth for good. It happened in 1949 after it gained full independence from the United Kingdom and became the Republic of Ireland (on the basis of the Republic of Ireland Act passed by the Irish parliament in 1948). However, several other countries – mainly the African ones – faced either suspension or temporary expulsion from the Commonwealth though there were also some member states that decided to withdraw from this organization at their own request.

The case of South Africa is probably the best known. This country was expelled from the Commonwealth in 1961 for racial segregation policies and was allowed to rejoin in 1994, after the fall of apartheid and the election of the first democratic parliament. Nigeria's membership was suspended in 1995 when the military regime sentenced to death some opposition activists and dissidents. The suspension was lifted in

1999. Another African country – the Gambia – left the Commonwealth in October 2013 accusing it of neo-colonial practices. The formal application to rejoin the organization was submitted in January 2018, two years after the election of Adama Barrow as the Gambia's president. The country rejoined the Commonwealth one month later. Zimbabwe in turn was suspended temporarily in 2002, after elections which observers said were marred by violence and intimidation. One year later the suspension was extended for an indefinite period of time. In response to that president Robert Mugabe withdrew Zimbabwe from the Commonwealth. This situation lasted for 15 years – in 2018 Mugabe's successor Emmerson Mnangagwa submitted the application to rejoin the Commonwealth. Zimbabwe's application is still pending.

As for Asian countries, it is worth paying attention to the history of the Commonwealth's relations with Pakistan. It left the organization in 1972 (when other member states decided to recognize Bangladesh) and rejoined after 17 years – in 1989. Pakistan was also twice suspended as a member state of the Commonwealth during the military rule of president Pervez Musharraf – in 1999 (suspension was lifted in 2004) and in 2007, following Musharraf's decision to declare a state of emergency and dismiss some important members of the judiciary. This second suspension was lifted in 2008 which enabled Pakistan to rejoin the Commonwealth once again.

Similar problems in the Commonwealth were experienced by an island country located in the south-western part of the Pacific Ocean, namely the Fiji. The relationship between the Commonwealth and Fiji has always been very complicated. The country was expelled from the Commonwealth in 1987 (after two military coups) but rejoined 10 years later – in 1997 – when democracy was restored and a new constitution adopted. It was also suspended as a member for one year and

a half in June 2000 (after another coup). The 2006 Fijian military coup d'état led to another suspension of Fiji in the Commonwealth. In September 2009, after the refusal of the military government to call election by 2010, this suspension became full. Eventually the suspension was lifted in September 2014 when the Commonwealth re-instated the Fiji as its full member in recognition of the democratic elections held one week earlier – the elections which resulted in the assumption of office by a democratically elected government.

The given examples show clearly what kind of problems the Commonwealth has to deal with its member states. As in the case the Maldives these were the typical problems of the former British colonies – relatively young democracies – to comply with the rules of democracy and other principles of the Commonwealth Charter.

The Asian part of the Commonwealth seems relatively more politically stable than, for example, the African members, which after gaining independence were more susceptible to various crises of political or constitutional nature. Nevertheless, the instability of democratic processes seems to be the common denominator of all former colonies. The case of the Maldives only shows that sometimes an alternation of power – even in a democratic way – can lead to undermining democracy and cause a serious disturbance in the functioning of the basic institutions of the political system. That is simply the nature of politics in unconsolidated democracies.

After the latest presidential and parliamentary elections in the Maldives, it seems that democratic backsliding has been reversed and the political and constitutional crisis has been resolved. The return of the Maldives to the Commonwealth also seems to have already been decided and all the early indications suggest that it will take place as soon as possible from a formal point of view. However – having in mind what was

happening in this country over the past several years – in principle nothing can be ruled out and making clear predictions for the future can be risky.

The analysis of this case, however, confirmed the thesis put forward at the beginning of the paper that the Commonwealth authorities sometimes use double standards when assessing their member states. When it comes to the Asian members, this apparent lack of consistency is evident mostly in relation to Brunei, which still enjoys the status of a full member of the Commonwealth of Nations. The country is an absolute monarchy in which civil liberties and other basic principles of democracy are undermined and violated on a day to day basis. So far, this has not been met with any serious reaction from the leaders of the member states of the Commonwealth or its governing bodies.

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Abstract

The article is devoted to one of the Asian Commonwealth member states, namely the Maldives. Over the past decade, the country has been torn apart by many social tensions, as well as political and constitutional crises. One of their consequences was its suspension as a member state of the Commonwealth, which led to the Maldives leaving this organization at their own request.

The goal of the article is to describe and analyze this particular case, as well as to show it in the broader context the Asian members of the Commonwealth which – as still relatively young democracies – sometimes find it difficult to comply with Commonwealth's membership criteria that are enshrined in the Commonwealth Charter. The Author tries to prove a thesis that although the case of the Maldives definitely deserved a response, Commonwealth governing bodies sometimes use double standards for judging their members. In order to address this research problem, both the historical analysis method and the institutional and legal analysis method are used.

Keywords: Commonwealth, Maldives, Asia, democracy, Commonwealth Charter

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Islamist Strategies in the Context of “Bottom-Up Islamization” in Selected Middle Eastern Countries

Introduction

A factor that shaped the political and social character of the Middle East was the presence of Western powers in the region resulting in the transformation of local societies in the 20th and 21st centuries. The period of colonial rule did not last long, but its effects were of cardinal importance for the evolution of Muslim identity and the role of Islam as a political ideology. An important moment of this period was the creation of a secular nation state in the region, which was to reflect the Western pattern, and which was accepted by most Muslims as a manifestation of modern political evolution¹. Until then, Islam guaranteed the unity of the *ummah*, but in the new conditions of the nation-state, which was secular, as a legitimizing factor and state-forming element it was rejected or remained only one of its components². After the fall of the Ottoman Empire, the Arab world was shaped by forces and tendencies unfamiliar to Islam, imposing European legal and administra-

¹ Sh.A. Jackson, *Islamic Reform between Islamic Law and the Nation-State*, [in:] *The Oxford Handbook of Islam and Politics*, eds J.L. Esposito, E. El-Din Shahin, Oxford–New York 2013, p. 43.

² J. Danecki, *Arabowie*, Warsaw 2001, p. 370.

tive frameworks on traditional Muslim socio-political organization³. Religion has lost its significance due to modernization of the state. Reform programmes were based on modern Western models in the sphere of education, state administration or the political system⁴. Under these conditions, anti-Western and pro-Islamic attitudes were born as a response to foreign domination, opposition to values and norms incompatible with Islam. Muslim political sovereignty has been the object of dispute between supporters of Islamic universalism and secular nationalist ideas and political order based on a common language, territory, and history. Both these trends help explain the circumstances of Islamic revival and the emergence of modern Islamism as a new form of Muslim policy⁵. At the same time, Islamism is interpreted as a form of anti-colonial or anti-Western ideology and a tool for mobilizing the Arab world in conditions caused by external and internal factors⁶. Its modern genesis is associated with Hassan al-Banna and Abul A'la Maududi, who inspired Islamists over successive few generations, contributed to the emergence, in the late 1950s and at the beginning of the 1960s, of a new generation of ideologists, including Sayyid Qutb, the founder of the basis for the intellectual evolution of Islamism along with its military aspect⁷. The period of their activity included the rule of secular regimes in Arab countries, which for half a century, from the end of Euro-

³ F. Halliday, *Bliski Wschód w stosunkach międzynarodowych. Władza, polityka i ideologia*, Kraków 2009, p. 96.

⁴ J. Zdanowski, *Państwo na Muzułmańskim Bliskim Wschodzie. Procesy genezy i czynniki trwania*, Kraków 2014, p. 263.

⁵ P. Mandaville, *Islam and Politics*, London–New York 2014, p. 64.

⁶ K. Hroub, *Introduction*, [in:] *Political Islam. Context versus Ideology*, ed. K. Hroub, London 2010, pp. 15–16; J.L. Esposito, *The Islamic Threat: Myth or Reality?*, New York 1992.

⁷ P. Mandaville, *op.cit.*, p. 97.

pean colonialism in the 1950s, had control over the countries in the region. Islamist attitude fluctuated then between rejection of those regimes, confrontation with them, or acceptance of the status quo, but until the end of the 1990s, these regimes remained a decisive political force in the Middle East, controlling Islamist participation in the politics of their countries⁸.

An important issue of the political discourse of contemporary Muslim thinkers and activists is the relationship of the modern nation-state with Islam, and the place of Islam in contemporary societies and states. Although the concept of an Islamic state implies Islamist aspirations in many Middle Eastern countries, the tendency to place Islam at the heart of the political order is not typical for the entire Middle East. Respecting shariah and demanding it as the basis or condition of a Muslim state in general are completely different Muslim attitudes, just like trying to confront sharia with the norms and conditions of a modern secular state and proclaiming the absolute discrepancy between the two⁹. Proponents of Islamization may differ in methods and even purpose, as some will strive to “shari’ah-ization” of selected sectors of the law, while others will seek complete Islamization on a local or global scale¹⁰. In the modern Muslim world, models of implementing Islam are different, not always associated with the state, coexisting in some regions, while competing in others, it is “some type of inter – and intra-ideological civil war not only between Islamists and secularists but even inside each camp”¹¹.

⁸ T. Osman, *Islamism. What it Means for the Middle East and the World*, New Haven–London 2016, p. 14.

⁹ Sh.A. Jackson, op.cit., pp. 42–43.

¹⁰ P. Mandaville, op.cit., p. 74.

¹¹ M.A. Fattah, *Islam and Politics in the Middle East*, [in:] *The Oxford Handbook...*, op.cit., p. 290.

The main objective of the article is to discuss those models that are part of the so-called “bottom-up Islamization” observed since the 1990s, represented mainly by Islamist formations that are in opposition to political power, an indication of how Islamism influenced the internal policy of selected countries but also changed under its control¹². The auxiliary objective is to indicate the different level of political involvement of Islamists and the method with which they competed or fought with the power of secular states trying to integrate into the political sphere. Referring to these objectives, one can hypothesize that the nature of “bottom-up Islamization” depends on the specificity of the country (e.g. allowed Islamist activities), on the strength of Islamist formations, flexibility of policy (the so-called contextual Islamization), often resulting in modification or even profound changing of strategy (in particular its de-radicalization). The validity of this claim requires a historical approach that will allow to draw conclusions about the variability of Islamist strategies in the context of the socio-political changes of the region in the mid-20th and 21st centuries. The comparative analysis applied to various Islamist formations on the one hand, and the various countries on the other hand, is equally important because of the heterogeneous nature of the Middle East region in terms of the state relation to religion, as it implies different models of actions of Islamist formations, different programmes of Islamist political parties and a different attitude toward the state as such. The conclusions obtained on the basis of historical comparative and critical analysis of sources creates the opportunity to verify the hypothesis.

¹² A. Zasuń, *Polityczny islam. Między religią polityczną a instrumentalizacją religii w polityce*, Częstochowa 2018, pp. 476–495.

The Attitude of Middle Eastern Countries to Islam

Islam defines the cultural nature of the Middle East, but its place in politics and societies of particular countries is diverse. Only a few countries are considered to be Muslim states (e.g. Saudi Arabia, Iran, Islamic Republic of Pakistan, Sudan, Malaysia), where Islam lies at the root of their constitutional law, plays a fundamental role in governing and shaping political institutions, the legislative process and foreign policy¹³. The governments of most Middle East countries are secular in nature and directly or with the help of administration tools combat the activity of Islamist groups and parties¹⁴. Some countries maintain a parallel judicial system, and others have a utilitarian approach, use the support of Islamism or its symbols in accordance with their own interests (e.g. Egypt during the times Anwar Sadat, or Gamal Abdel Nasser, or Iraq during the dictatorship of Saddam Hussein)¹⁵. Considering this diversity, Moataz A. Fattah has identified several strategies in the relations between the Middle East countries and Islam. The first is the apolitical strategy that limits Islam to faith and morality, supports the separation of religion and state, rejects the idea (among others Hassan Abd Allah al Turabi) that Islam is “religion, government, constitution and law”¹⁶. This strategy supports openness to the influence of modern civilizations and release from the brakes of tradition¹⁷. It is represented by secular parties (e.g. in Morocco, Algeria, Turkey, Jordan, Kuwait, Egypt

¹³ P. Mandaville, *op.cit.*, p. 206.

¹⁴ *Ibidem.*

¹⁵ *Ibidem*, p. 203.

¹⁶ M. Mozaffari, *What is Islamism? History and Definition of a Concept, “Totalitarian Movements and Political Religions”* 2007, vol. 8, No. 1, p. 17.

¹⁷ M.A. Fattah, *op.cit.*, p. 291.

or Libya), but also by apolitical religious groups that depart from relations with the state, although the state often supports their activities¹⁸. The ecumenical Islamic strategy is also represented by apolitical intellectuals, *ulama*, who emphasize the importance of Islam as the basis for all Muslims, above political and social divisions. They strive for a union that embraces the entire Islamic world, emphasizing a common basis of all Muslim and Islamist programmes and the need to renew Islamic civilization¹⁹.

The utilitarian (secular-religious) strategy is represented by the political elites of Algeria, Egypt, Iraq, Jordan, Kuwait, Libya, Morocco or Tunisia, where Islam is a tool of legitimacy and a source of symbols. Elites accept Islam in public space because of its importance for the identity of Muslims. In most Middle Eastern countries, the ruling elites respect the values of Islam (but not Islamism), acting as its representatives, even if they do not formally share its beliefs or include religious principles in the scope of political decisions²⁰. Islam is a religious facade, which is to strengthen the position of power, and the effectiveness of this strategy is based on controlling *ulama*, obtaining support from apolitical Muslims operating at mosques and schools, limiting or fighting the activities of Islamists who keep anti-regime policy²¹.

The next three types of strategy can be associated with the tendency current in the Middle East at the beginning of the

¹⁸ Ibidem.

¹⁹ Ibidem, pp. 303–304. An example is the International Union of Muslim Scholars (IUMS). Such organizations can be a facade for Islamist activities, in the case of IUMS it is reported that it was created in 2004, in particular by members of the Muslim Brotherhood – <https://www.reuters.com/article/gulf-qatar/islamist-group-rejects-terrorism-charge-by-states-boycotting-qatar-idUSL8N1O12V8>.

²⁰ M.A. Fattah, op.cit., p. 293.

²¹ Ibidem, p. 294.

last century to abandon European development models, reject the idea of a secular state and the defeat of the elites on the ground of economic modernization, which led to significant Islamization of political discourse in the region in the second half of the 20th century²². Each of them refers to the Islamization of Muslim society, although implemented in a different political conditions and with different results.

The strategy of radical Islamists is represented by groups seeking to change the current political order, which they consider anti-Islam or non-Islamic. The ideology of these groups is based on a narrow and literal interpretation of Islam, including such concepts as: *kafir* (infidels), *takfir wal-Hijra* (excommunication and exodus), and *jihad* in their radical meaning²³. Formations representing this strategy differ in their scope of operation (local, global), acceptance or rejection of violence. Some seek revolutionary and armed change, whereas others believe in a gradual change of Muslim ummah. In some Middle East countries, the process of de-radicalizing Islamist formations has been observed in recent decades; some Islamists abandon violence on the path to achieving political goals. Armed Islamist groups in Egypt, Algeria, Saudi Arabia, Iraq, Libya, Yemen and Jordan can be used as examples. The process of de-radicalization does not mean renouncing Islamist politics, only abandoning an armed form of action²⁴.

The strategy of armed Islamist resistance relates to the formations leading the national opposition to foreign occupation, or the prevailing regimes. They consider Islam as a tool of mobilization in their combat. Typical examples are Hezbollah and Hamas, as well as formations in Iraq or Somalia.

²² J. Zdanowski, op.cit., p. 263.

²³ J. Danecki, *Podstawowe wiadomości o islamie*, Warsaw 2011, p. 158; M.A. Fattah, op.cit., p. 295.

²⁴ M.A. Fattah, op.cit., p. 297.

Violence and armed activities are territorially limited and directed toward specific goals, and they are not rejected even when Islamists gain access to parliaments. They often combine political, military, social, including charitable activities with terrorist actions. They run in elections, and they sometimes get a majority in the government. Some their electoral gains can be attributed to an extensive network of social services. Their activities are supported equally by nationalist and religious aspects. They use Islamic symbols to legitimize their actions and mobilize the ummah²⁵.

The party strategy is implemented by Islamists, often referred to as “moderates”, who abandon violence and create political parties seeking opportunities to win the majority in parliaments. Their political programmes are based on social, economic and political aspects enabling them to launch more long-term actions. Tarek Osman writes that the gradual democratization, partial opening of political systems of some regimes (Hosni Mubarak in Egypt and Zine El-Abidine Ben Ali in Tunisia), and demand for free elections, improvement of political conditions and human rights put forward by social organizations created circumstances for Islamists to mobilize and achieve their political goals²⁶. For Islamists, the lack of possibility of real action, and often the persecution of traditional Islamist parties, was the reason for seeking new political strategies²⁷. The beginning of the 1990s was marked by Islamist participation in elections in many countries of the region, but often as independent candidates because activities of religious parties were banned (e.g. Egypt). It was not until the first half of the 21st century (earlier in 1979, in Iran) that

²⁵ Ibidem, p. 298.

²⁶ T. Osman, *Islamism. What it Means for the Middle East and the World*, New Haven–London 2016, p. 15.

²⁷ P. Mandaville, op.cit., p. 127.

Islamists could implement their project in Turkey after 2002, when power was taken over by the Justice and Development Party (Adalet ve Kalkınma Partisi, AKP; founded in 2001 by Reçep Tayyip Erdoğan), followed by the Arab Spring in Egypt and Tunisia in 2011²⁸. M.A. Fattah points out that the attitudes of the current regimes toward Islamist policy took various forms. The first is partial assimilation along with partial elimination without clearly defining which part of their policy is accepted or rejected. Thus, participation in elections did not guarantee Islamist freedom of political action, in particular after obtaining the majority of votes (e.g. Egypt)²⁹. The second form is legal assimilation and political neutralization when Islamists function legally, but in political practice they have no means, they cannot rule over the affairs of the ummah, because they are blocked by the regime. This form is represented by monarchies, e.g. Jordan (until the 1990s political parties could not operate here, their legalization took place only in 1992), Morocco, Kuwait, Algeria or Sudan³⁰. The third form is the autocratic exclusion of Islamists, their elimination occurs with the help of legal, political and police coercion, as in Tunisia, Syria, Libya (before the Arab Spring). Islamists lack legal and political space there³¹. The last form is secular democratic assimilation, such as in Turkey, where Islamist groups are recognized and included in the political sphere as long as they adhere to the rules of a secular and democratic state³².

In addition to the above, M.A. Fattah mentions strategy of Islam in power represented by three regimes: Saudi Ara-

²⁸ J. Zdanowski, *Historia społeczeństw muzułmańskiego Bliskiego Wschodu w XX wieku*, Warsaw 2013, pp. 307–308.

²⁹ M.A. Fattah, op.cit., p. 299.

³⁰ Ibidem.

³¹ Ibidem, pp. 299–300.

³² Ibidem, p. 300.

bia, Iran and Sudan, which officially declare themselves to be Muslim states, refer to Islam in domestic and foreign affairs, recognize sharia in relation to the individual and official law, and their ruling elites based their legitimacy on Islam³³. And also a lobbying Islamic strategy among groups of organized and spontaneous movements striving for short-term goals through demonstrations, manifestations and social pressure. They come from various environments and may occasionally enter into a coalition on the path to common micro-goals. The interests of these groups may coincide with the views of Islamist formations, but such cooperation is not considered ideal for either party. "For Islamists this is the minimum, the secularists are afraid of the spirit of theocracy, and it exerts pressure on the state, with which it must cope either through coercion or through dialogue"³⁴.

Not all of these strategies refer to the "bottom-up Islamization" or Islamist activities in general. Some have an apolitical nature (apolitical and ecumenical strategy), others concern rather the ruling elites and the importance of Islam for power (utilitarian strategy), or Muslim countries (strategy of Islam in power), which represent rather the model of "top-down Islamization". Important for the process of "bottom-up Islamization" are the strategies that relate to the context of the secular national state, in which democratic political activity is allowed at least to some extent, where Islamists have the opportunity to act in the political sphere, try to achieve their goals on a non-military path, strive to significant participation in the socio-political system, are heading for long-term changes, apply for political participation in regular political parties and participate in elections, gaining seats in parliament in order to gradu-

³³ Ibidem, pp. 300–302.

³⁴ Ibidem, p. 302.

ally introduce elements of Islamist doctrine and reform, and build-up social support, often with pro-Islamic propaganda or by putting pressure on the authorities. These strategies are represented by Islamist formations which strive for social acceptance and avoid rhetoric of the sharia law. Instead, they refer to the principles of democracy, human rights and the rule of law³⁵. They are also often involved in providing social support, thanks to which they gain credibility and endorsement of various social classes constituting an important factor in the increase of their range and popularity³⁶.

Varieties of “Bottom-Up Islamization” in the Middle East

Peter Mandaville called “bottom-up Islamization” – “Muslim democracy”, which is represented by groups pursuing secular and pluralistic goals in cooperation with a wide range of political groups, although they derive their ideas from religious norms³⁷. Such Islamists are sometimes referred to as “new Islamists” or “moderate Islamists”, often including the Muslim Brotherhood (MB) or Turkish AKP. Overlooking the problem, whether democracy is possible in Muslim countries, and whether striving to introduce sharia as the only source of legislation while supporting democracy, can be described as “Islamic democracy”³⁸, “bottom-up Islamization” refer primarily to the party strategy, because first of all it concerns the

³⁵ P. Mandaville, *op.cit.*, p. 130.

³⁶ A. Karam, *Transnational Political Islam and the USA: An Introduction*, [in:] *Transnational Political Islam. Religion, Ideology and Power*, ed. A. Karam, London 2004, p. 7.

³⁷ P. Mandaville, *op.cit.*, p. 122.

³⁸ J. Wójcik, „Umiarkowani” islamisci, islamska „demokracja”, <https://euroislam.pl/umiarkowani-islamisci-islamska-demokracja/> [Accessed: 10.10.2019].

functioning of Islamist political parties. To a limited extent, it will also be a strategy of radical Islamists, but in the context of the de-radicalization of their actions, and a strategy of armed Islamist resistance, in relation to the non-military activity of Islamist formations. The process of “bottom-up Islamization”, on the one hand, is associated with democracy, because it concerns the legitimate and constitutional rise of Islamist political parties to power. On the other hand, the implementation of Islamic order, even if through gradual reforms, guides all Islamists, including radical ones. The deficit of democracy in the Middle East and authoritarian tendencies are conditioned by the culture of the region, and more specifically by Islam³⁹. The Islamists’ attitude toward democracy is diverse, as Abdelwahab El-Affendi writes, some of them accept it and try to prove its compatibility with Islam, some reject it as an idea foreign to Islam, and others accept the principles of democracy to a limited extent, and want to adapt it to Islamic law. According to El-Affendi, this is the most numerous group identified with major Islamist organizations⁴⁰. They supported key elements of democracy, such as political pluralism and human rights, but always in confrontation with sharia, which is a key component of their political programmes.

Debates on Islam and democracy developed gradually on the background of the struggle against colonialism and the emergence of new states in the region. They were also associated with the development of nationalism and the processes of modernization and westernization. Events in the Middle East and in the international arena, such as the Israeli-Palestinian conflict, the Iranian revolution in 1979, the collapse of the So-

³⁹ K. Czajkowska, A. Diawoł-Sitko, *Systemy polityczne wybranych państw Bliskiego Wschodu*, Warsaw 2012, p. 116.

⁴⁰ N. Hashemi, *Islam and Democracy*, [in:] *The Oxford Handbook...*, op.cit., p. 73.

viet Union and Western interventions in the region, also had influence on this debate⁴¹. Arab countries relied for a long time on authoritarian rule, power belonged to an individual ruler, and bringing in democratic order remained in the sphere of declarations and was directly rejected as imported and foreign to Islam, or limited to ostensible activities. Political parties were eradicated, and although they were allowed to remain active, only one political option representing the interests of central government usually had any genuine impact. Elections were controlled by the government, so there was little that the political opposition could do⁴². In the 1990s, there was greater economic liberalization, political reforms strengthened the role of the parliament through general elections, political parties were allowed to be more active and the constitutions took into account the division into legislative, executive and judicial power⁴³. In fact, however, the situation in many countries has not changed much in terms of executive power, and the coexistence of political freedoms and repression remained a characteristic aspect of the Middle Eastern political systems⁴⁴. Under these conditions, Islamists in many countries did not have many opportunities for real participation in power, nor did they form free political parties. Mehdi Mozaffari points out, that the Muslim political scene was, and still is, a place where two tendencies, authoritarianism of power and Islamism, are fighting, and only after the Iranian revolution did the second actually begin to matter. It should be noted that for over 50 years, until the revolution in 1979, Islamism was rather an “agglomeration of latent and dispersed extremist movements, always operating in opposition to their national

⁴¹ Ibidem, pp. 73–74.

⁴² K. Czajkowska, A. Diawoł-Sitko, *op.cit.*, pp. 126–127.

⁴³ Ibidem, p. 129.

⁴⁴ Ibidem, p. 128.

regimes”⁴⁵. However, the revolution did not translate into the political success of Islamist groups. Some of them were either not interested in politics or had no real possibilities. In most countries, Islamist groups lacked or had a marginal impact on governance, and participation in elections or low percentage winnings prevented real power until 2011⁴⁶. In many Middle Eastern countries, Islamist groups have attempted to overcome this situation on a non-military basis, using a strategy typical of “bottom-up Islamization”, and created political parties to participated in parliamentary elections, formed coalitions even with secular groups to gain greater chances of coming to power and implementing the programme of Islamization.

A good example of the “bottom-up Islamization” is Egypt and the political activity of the Muslim Brotherhood (MB). Pursuant to the provisions of the 1971 constitution, religious parties were banned in Egypt. In a country with a presidential regime and dominated for years the National Democratic Party, the opposition and political opponents were persecuted, so the authorities had no serious competitors. The exception was the MB who did not have an official status in the country but enjoyed social support⁴⁷. At the end of the 1980s, MB definitely advocated the concept of *hazbiyya* (i.e. becoming a party), that involved joining political activity at national level. However, attempts to obtain permission to function as an independent political party during the presidencies of Sadat (1970–1981) and Mubarak (1981–2011) failed, because the government blocked the possibilities of many political opposition parties⁴⁸. These

⁴⁵ M. Mozaffari, *Islamism. A new totalitarianism*, London 2017, p. 77.

⁴⁶ K. Pędziwiatr, *Przemiany islamizmów w Egipcie i Tunezji w cieniu Arabskiej Wiosny*, Kraków 2019, p. 19.

⁴⁷ P. Mandaville, op.cit., pp. 137–138.

⁴⁸ J. Zdanowski, *Współczesna muzułmańska myśl społeczno-polityczna. Nurt Braci Muzułmanów*, Warsaw 2009, pp. 110–111.

parties in Egypt had unequal access to state media with little airtime, and opportunity to reach potential voters on a mass scale⁴⁹. To participate in the elections, MB changed their attitude toward other Egyptian groups and parties, even the secular ones, which allowed them to build political alliances (e.g. an alliance with the Al-Wafd party in the 1984 elections, with the Hizb al-Amal party in 1987)⁵⁰. Obtaining the status of a political party would allow the MB to gain a place in parliament and seek Islamization of the legislation, as well as to change the constitution and closely link it to Muslim law⁵¹. However, government effectively limited political competition by tightening the electoral law. In 1990, it resulted in boycott of the elections by the MB and other groups, whereas in 1995, because the government feared strengthening of Islamist position, the MB was banned as a political party. The situation changed in 2005 when the support for the movement increased significantly and in the elections Islamists won 20% of the seats. In spite of their success, MB were still not recognized as an official political party. They boycotted the elections more than once, accusing the authorities of electoral fraud and difficult access to the state media. The Freedom and Justice Party (FJP), formed by the MB, which later created the Democratic Alliance for Egypt with 28 other Egyptian parties, participated in the 2011–2012 elections⁵², after the Egyptian revolution, which removed Mubarak from the government. The candidate of FJP, Mohammed Mursi, became the president and the Supreme Military Council dissolved the

⁴⁹ Arabska Republika Egiptu, <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=//EP//NONSGML+COMPARL+PE-374.396+01+DOC+PDF+V0//PL&language=PL> [Accessed: 05.10.2019].

⁵⁰ J. Zdanowski, op.cit., p. 111.

⁵¹ Ibidem, p. 116.

⁵² *Democratic Alliance for Egypt*, <http://www.jadaliyya.com/pages/index/3160/democratic-alliance-for-egypt> [Accessed: 23.01.2020].

parliament and announced a constitutional declaration, under which they granted themselves greater rights in legislation and security, limited opportunities of the president, which was considered a “constitutional coup” by members of the MB⁵³. Hizb An-Nur and Hizb al-Wasat also took part in these elections. Hizb al-Wasat was constituted by former members of the MB who, after leaving the association, implemented a moderate form of Islamism. Their programme involved not only Muslims, but also other communities, referring more to the modernist version of Islam than to the literal meaning of sharia⁵⁴. Only Hizb An-Nur participated in the 2015 elections, gaining little support, while Hizb al-Wasat boycotted the elections by opposing current regulations that do not provide fair representation and declaring the election process unfair⁵⁵.

The MB is often a point of reference in the context of the political activity of Islamists as part of “bottom-up Islamization”, also observed in other countries. Tunisia is a good example in this respect. When in 1981 President Habib Bourguiba allowed the legalization of political parties other than the ruling The Socialist Destourian Party (Parti Socialiste Destourien, PSD), the secret till then Islamic Al-Jama’a al-Islamiyya announced the creation of the legal political party the Islamic Tendency Movement (Mouvement de la Tendance Islamique, MTI), known since 1988 as Hizb an-Nahdah⁵⁶. The party has

⁵³ M. Sobczak, *Mohammed Mursi: kim jest nowy prezydent Egiptu?*, <http://www.politykaglobalna.pl/2012/06/mohammed-mursi-kim-jest-nowy-prezydent-egiptu/2/> [Accessed: 5.10.2019].

⁵⁴ P. Mandaville, *op.cit.*, p. 131.

⁵⁵ *Egypt election committee to announce date for parliamentary poll Sunday*, <http://english.ahram.org.eg/News/138976.aspx> [Accessed: 5.10.2019].

⁵⁶ M.J. Willis, *Islamic Movements in Algeria, Morocco, and Tunisia*, [in:] *The Oxford Handbook...*, *op.cit.*, p. 533; K. Izak, *Leksykon Organizacji i Ruchów Islamistycznych*, Warsaw 2016, pp. 255–256.

clear links with the MB and is relatively moderate. Its goal was to reconcile democracy with Islam⁵⁷. Until 2011, Tunisia was a presidential republic and the political system was based on strong presidential power. Despite official political pluralism and liberalism in the country, the freedoms of citizens were frequently violated⁵⁸. The Tunisian regime allowed the legalization only of certain parties, so when Islamists openly revealed their political ambitions, Hizb an-Nahdah was not only refused legalization, but its leaders were imprisoned. Bourguiba adopted the Western political orientation instead of the Islamic identity of the country, he also excluded religion from public life by blocking the activities of parties with Islamic ideological foundations⁵⁹. In this respect, the Bourguiba regime made more attempts to remove Islam from the political sphere and public life, even though the Tunisian constitution declares that Islam was the state religion of Tunisia. During the presidency of the abovementioned Zine El-Abidine Ben Ali (1987–2011), party leaders were released, and attempts were made to create a more pluralistic political system in Tunisia⁶⁰. In fact, however, both the Bourguiba regime and the rule of Ben Ali were a period when the Tunisian state maintained strict control over Islamists, “the government denied Islamist activists passports and revoked their identity cards. It prevented them from gaining employment, acquiring legal counsel, and even using public telephones. The government also restricted the wearing of ‘sectarian dress, which included the hijab, beards and *qamis* (long garb for men), despite the constitution pro-

⁵⁷ A.C. Larroque, *Geopolityka fundamentalizmów muzułmańskich*, Warsaw 2015, p. 57.

⁵⁸ K. Czajkowska, A. Diawoł-Sitko, op.cit., pp. 227–228.

⁵⁹ J. Cesari, *The Awakening of Muslim Democracy. Religion, Modernity, and the State*, New York 2014, p. 43.

⁶⁰ K. Pędziwiatr, op.cit., p. 97; M.J. Willis, *Islamic...*, op.cit., p. 533.

viding for Islam as the official religion of the state”⁶¹. Each Tunisian political party had to apply for legal recognition from the state, but the possibility of legalizing Islamist political parties was excluded, because no party had the right to appeal in its principles, action or programme to religion⁶². MTI tried to comply with the requirements of the act, which is why it changed name to Hizb an-Nahdah. However, it was not accepted as a legitimate political party, and its members stood for elections as independent candidates. Until the Arab Spring, not only in Tunisia, but also in Morocco or Algeria, Islamist movements posed a real threat to prevailing regimes that effectively blocked their political activity by using various forms of exclusion and repression. The emergence of governments led by Islamist parties in Tunisia and Morocco at the end of 2011 marked the beginning of a new era for the participation of Islamic movements in political processes in the region⁶³.

These examples relate to the party strategy, where “bottom-up Islamization” concerns not only the activities of Islamist political parties on the political scene, but the Islamization of political and cultural institutions as well. Although Islamists did not receive access to government institutions, they did, however, participate in elections, won seats in parliament, gained access to many professional organizations, and also conducted extensive social, cultural and educational activities. Examples of some countries also show, that it is the lack of space in politics, and often the persecution of Islamist formations, that became the factor which let them gained social trust and support. As Konrad Pędziwiatr writes, Islamists gained support precisely because they were perceived as free

⁶¹ J. Cesari, *op.cit.*, p. 43.

⁶² M.J. Willis, *op.cit.*, p. 534.

⁶³ *Ibidem*, p. 542.

from regimes' corruption, so after the removal of Mubarak or Ben Ali from power, important places in the Egyptian and Tunisian policy fell to those who were sentenced to prison during their rule⁶⁴. As a result of the free elections in these countries in 2011, power was taken over by Islamists emerging from the shadow of the political opposition. These examples also show, that Islamists have become the dominant political opposition despite many years, when their formations had the illegal status. They also became an example of political mobilization in a non-military way.

An example of the party strategy is also provided by Jordan, which is the area of activity of the MB and Hizb ut-Tahrir (Party of Liberation). Political parties in Jordan are insignificant and for many years the only Islamist party with electoral success was the political wing of the MB, a moderate Islamic Action Front (IAF) formed in 1992. It may be due to the fact that in that year, democratic reforms led to the legalization of political parties⁶⁵. Although political parties were banned, social and especially charitable activities of Islamist formations was possible as long as they supported the monarchy and remained loyal to the king. A typical feature of the actions of Jordanian Islamists was that they allowed cooperation with the government, supported development of the country, various social sectors, ran for local government elections. At the same time some of them rejected any form of cooperation with the government or parties that did not correspond to the Muslim model and did not intend to establish Muslim state structures⁶⁶. The turning point in Jordan's policy were the parliamentary elections in 1989. Candidates, including those from

⁶⁴ K. Pędziwiatr, *op.cit.*, p. 98.

⁶⁵ K. Czajkowska, A. Diawoł-Sitko, *op.cit.*, pp. 261, 265.

⁶⁶ A. Wąs, *Bracia Muzułmanie w Jordanii. Doktryna i organizacja bractwa na przełomie XX i XXI wieku*, Lublin 2006, p. 80.

the MB, stood for the elections as independent candidates and gained such support that they became the largest block⁶⁷. Part of the MB, who gained real political influence after elections, could implement the social programme by being included in the government of Mudar Badran, where they took over the relevant ministry of education, justice, Awkaf (institutionalized Muslim alms), social affairs, and health. At the same time, however, taking advantage of this situation, the radical wing, aimed at radicalizing international policy, often referring to jihad and, as a result, deteriorating relations of the association with the monarchy⁶⁸. The next elections in 1993, mainly due to a change in the electoral law, which limited the presence of the Islamist movement in parliament, brought the MB a much worse result, in spite of the fact that they formed a coalition with other opposition groups. Introducing changes in the electoral law was a frequent tactics of the government applied to limit the presence of the Islamist bloc in parliament, and thus to avoid the progressive political opening and block implementation of the Islamist projects. The situation did not change in the subsequent elections in 1997, when the monarchy refused to change the electoral law, causing a boycott of the elections by the Islamists⁶⁹. In fact, Jordan's policy has followed this path since the beginning of the 1990s, i.e. on the one hand, there was the continuing process of democratization aimed primarily at gaining public favor, but on the other hand, the influence of Islamist parties was limited by preserving the electoral system that was detrimental to them⁷⁰. For these reasons, the Islamic opposition boycotted the elections in 2010 and 2013,

⁶⁷ Ibidem, p. 82.

⁶⁸ Ibidem, pp. 82–83.

⁶⁹ K. Bokhari, F. Senzai, *Political Islam in the Age of Democratization*, New York 2013, p. 54.

⁷⁰ K. Czajkowska, A. Diawoń-Sitko, op.cit., p. 260.

each time referring to the manipulation of electoral law and the support given to selected candidates.

Jordanian MB underwent a transformation that corresponds to the implementation of “bottom-up Islamization”, and they became a political organization which formed the “method of political pragmatism and a system of achieving its goals without resorting to violence”, which referred on the one hand to support of the monarchy, and on the other to active participation in the process of co-creating the parliamentary system⁷¹. Though, wherever there were opportunities to increase social support for the MB, they were also able to oppose the monarchy, as it was, among others, in 1996 when the government decision to reduce subsidies for basic food products met with severe criticism of the MB, and their attitude was considered by the king as important in controlling the difficult economic and political situation in Jordan⁷². However, the basic problem of the MB, which stood in the way of their political success, was the lack of unity between the radical and moderate fractions, which weakened the position and reduced the chance not only to develop a common strategy, e.g. in elections, but also resulted in the blockade of the government in the face of radical slogans and tendencies of parts of the MB, among others cooperation with Hamas, recognized as a natural element of Islamist aspirations to create a Muslim state, rejected by a moderate fraction as an obstacle to the democratic process⁷³. The Islamist strategy in Jordan was therefore based on balanced cooperation with the monarchy, legal activities and loyalty to the existing political system, which was a condition of any political activity, and remained essentially unchanged for a period of about 60 years. An important aspect

⁷¹ A. Wąs, *op.cit.*, p. 83.

⁷² *Ibidem*, p. 85.

⁷³ *Ibidem*, p. 87.

of this strategy was the *dawah* system (from Arab *dawa*, a “call to Islam”), which referred to the ideology of proselytism, which over time evolved into a tool of political propaganda, spreading views of dynasties, then regimes, or as a method of recruiting religious or political supporters⁷⁴.

An example of combining the party strategy with the Islamist resistance and de-radicalization is the Lebanese Hezbollah. Since its inception in 1982, the Party of God (Hizb Allah), being a tool of Ayatollah Khomeini working for the revolution in Lebanon, advocated the introduction of Shi’ite theocratic rule in the country following the Iranian pattern⁷⁵. Hezbollah’s original character was determined by the Israeli occupation of Lebanon; hence it is a typical example of armed Islamic resistance. Hezbollah is a nationalist formation which has developed armed wings mainly to fight the occupier, and although it also declares hostility toward the US, NATO and France for the misfortunes that fell on Muslims⁷⁶, its activity is concentrated primarily within the territory of the country, hence it is also a typical example of Islamization on a local scale. The ideology of jihad is only one of the dimensions of the movement’s activity, besides, Hezbollah strives to political power through the law, seeking social recognition as a legal political entity, which is why it is also an example of “bottom-up Islamization”. Armed struggle is justified mainly by the occupation of Lebanon and aspirations for national liberation, but to implement the Islamist programme on the political scene, Hezbollah’s actions are compliant with applicable law. By following the principles of legislative policy, the movement has

⁷⁴ D.F. Eickelman, J. Piscatori, *Muslim Politics*, Princeton 1996, p. 35.

⁷⁵ G. Kepel, *Jihad. The Trail of Political Islam*, London–New York 2016, p. 127.

⁷⁶ K. Dziedzic, *Ideologia Hezbollahu i jej ewolucja w latach 1982–2009*, “Krakowskie Studia Międzynarodowe” 2010, vol. VII, No. 1, p. 54.

significantly improved its image not only in Lebanon. Initially, the movement was based on a double function: as an armed factor in the radicalization of the Shi'ite community and as a non-military Iranian political tool⁷⁷. Hezbollah is extremely complex. The scope of its activity includes political, economic, military, issues, and its social activity covers a significant percentage of the Lebanese community gaining greater efficiency than the government of that country⁷⁸. At the beginning of the 1990s, the movement evolved into a legitimate political party, in 1992 it took part in the parliamentary elections, winning a seat in the Lebanese parliament. However, the position of the movement in the country or on the international arena is largely determined by the military potential, which allows shaping its own interest on the political stage of Lebanon and official speaking on behalf of the state⁷⁹. Hezbollah identified itself with the idea of a united, sovereign Lebanon, especially in the face of the Israeli occupation, and the establishment of an Islamic republic is also an important aspect of its policy, although the party did not explicitly include such information in the official documents (the 1985 political document and the 2009 political manifesto)⁸⁰. The movement election programmes from 1992–2005 show that Hezbollah has changed the approach and methods of implementation of its goals, using rhetoric of conciliation and convincing about the uniqueness of Islam, from which they derive the principles of democracy and human rights⁸¹. The political aspect of Hez-

⁷⁷ G. Kepel, *Święta wojna. Ekspansja i upadek fundamentalizmu muzułmańskiego*, Warsaw 2003, p. 131.

⁷⁸ R. Ożarowski, *Hezbollah w stosunkach międzynarodowych na Bliskim Wschodzie*, Gdańsk 2011, p. 73.

⁷⁹ Ibidem, p. 78.

⁸⁰ Ibidem, p. 82.

⁸¹ K. Dziedzic, op.cit., p. 61.

zbollah activities, including their foreign contacts, relates to their functioning as a party, but it is not detached from the military aspects of the movement, because the central element of their policy is the issue of Israel or US intervention in the Middle East, which are the basis for justifying the necessity of maintaining the armed forces⁸² and continuing the resistance movement in Lebanon as long as the “Zionist unit” exists⁸³. Hezbollah is not a typical party, and despite the clearly emphasized social and political features of activity, both aforesaid documents mention the significance of the military potential of the movement, define enemies of Lebanon and the whole ummah, and the three pillars of the movement – Islam, jihad and *wilayat al-faqih* (leaving the highest state power in the hands of a lawyer). Announced before the 2009 elections, the election programme⁸⁴ was dominated however by the spirit of understanding and dialogue, building the state and strengthening the unity of the nation, emphasizing the most desirable issues for the nation such as stabilization and peace, a state based on the principles of law and powerful institutions, justice and unity of citizens, as well as inviolability and hostility toward Israel⁸⁵. It shows the flexibility of the Hezbollah strategy and a comprehensive approach to the Lebanon issue. The military dimension of the movement’s activity is as important as reforms that would allow to build a state based on equality of citizens, fair parliamentary representation with modern electoral law, modern institutions and public administration, capable of fighting corruption and injustice, in which the emphasis is on social and economic development, employment

⁸² R. Ożarowski, *op.cit.*, pp. 73–74, Annex 3.

⁸³ K. Dziedzic, *Ideologia...*, *op.cit.*, p. 62.

⁸⁴ On June 4, 2009, Hezbollah’s political programme was presented by Mohammed Ra’ad (R. Ożarowski, *op.cit.*, pp. 209–217, Annex 2).

⁸⁵ *Ibidem*, p. 211.

and education⁸⁶. Socially relevant problems, i.e. the reformulation of the goals of the movement into more pragmatic ones, long-term social work and commitment to social assistance, healthcare and education, decided about the support that Hezbollah gained in the society, and were also an important factor of its success⁸⁷. In particular, it concerns the results of the military operations in 2000 and then 2006 and war damages. The society needed a guarantee to meet basic needs, financial assistance, and reconstruction of the country. Hezbollah has become the main pillar of this reconstruction. Social support enabled the formation to achieve political success, from 1992 when Hezbollah gained a seat in the parliament, until 2009 it managed the opposition bloc⁸⁸. Similarly, the skillful building of a coalition with Amal, which has enjoyed public trust in Lebanon for years, has gained 30% support in the 2018 elections. Comments on these events speak of the crushing victory of Hezbollah, which became a state within state, and after this election some websites wrote "Lebanon is Hezbollah"⁸⁹.

Contextual Islamization and a similar strategy apply to Palestinian Hamas as well. Political and military conditions are also similar, it is the conflict with Israel, the desire to establish a Muslim state on its current territory, and on the West Bank and the Gaza Strip, as well as rivalry with the secular Palestine Liberation Organization (PLO)⁹⁰. Hamas also adapts its strat-

⁸⁶ I. Moussawi, *The Making of Lebanon's Hizbullah*, [in:] *Political Islam. Context...*, op.cit., p. 222.

⁸⁷ G. Denooux, *The forgotten swamp. Navigating political Islam*, [in:] *Political islam. A critical reader*, ed. F. Volpi, London–New York 2011, p. 75.

⁸⁸ K. Izak, op.cit., pp. 241, 245.

⁸⁹ *Wybory w Libanie: zwycięstwo Hezbollahu*, <https://www.polsatnews.pl/wiadomosc/2018-05-07/wybory-w-libanie-zwyciestwo-hezbollahu-zginela-co-najmniej-1-osoba/> [Accessed: 5.10.2019].

⁹⁰ M. Levitt, *Hamas. Polityka, dobroczynność i terroryzm w służbie dżihadu*, Kraków 2007, p. 11.

egy to political conditions, combines ideological and pragmatic aspects, social change, religious propaganda, political participation and military involvement with the *dawah* system⁹¹. The key change in the strategy of the movement was brought by 2006 and the electoral success of the Palestinian Legislative Council, when the movement gained 56% support. Hamas has become the key player in the Palestinian political scene, and in addition to an effective pro-Islamic campaign, an important aspect of this success was large-scale social, health and public service⁹². Hamas enemy rhetoric toward the West has also become more moderate, and their reluctance to the PLO turned into readiness to cooperate. Many of these changes took place at the expense of concessions and redefinition of the current ideology of the movement. One can say that success of Hamas was the result of their rational analysis of political options, consideration of non-religious possibilities or alliances, and at the same time the process of legitimacy, which included political choices and decisions with religious frame, so as to make them acceptable to the supporters and voters of Hamas⁹³. Hamas demonstrates the unique ability to blur the boundaries between politics, charity and terrorist activities, to use its services for military actions and at the same time for social and helpful ones⁹⁴. Hamas flexible strategy was also evident in the political clash with Fatah, the main PLO force that has ruled the West Bank since 1967. To form a government of national unity, Hamas several times undertook a dialogue with Fatah, including in 2007, in 2014 or in 2017 (signing of the agreement in Cairo)⁹⁵, assessed by the world

⁹¹ K. Hroub, *Hamas: Conflating National Liberation and Socio-Political Change*, [in:] *Political Islam. Context...*, op.cit., p. 174.

⁹² M. Levitt, op.cit., pp. 1–2.

⁹³ K. Hroub, op.cit., p. 178.

⁹⁴ M. Levitt, op.cit., p. 8.

⁹⁵ P. Scham, *Hamas-Fatah Reconciliation? The Implications*, <https://www>.

media as an extremely difficult or even unreal move. Matthew Levitt pointed out that support for Hamas in Palestinian society (especially in 2006) is a peculiar phenomenon, given the phantom of terror that has repeatedly affected civilians. Although the specificity of Hamas in the context of “bottom-up Islamization” concerns its political and social wing, it still functions as an integral part of the terror apparatus. Levitt wrote about “the myth of disparate wings”, in fact Hamas “benefits from an ostensible distinction drawn by some analysts between its ‘military’ and ‘political’, or ‘social wings’ (...). The evidence regarding the integration of Hamas’ political activism, social services, and terrorism demonstrate the centrality of the group’s overt activities to the organization’s ability to recruit, indoctrinate, train, fund, and dispatch suicide bombers to attack civilian targets”⁹⁶. However, the success of Hamas in the process of “bottom-up Islamization”, and in particular in the 2006 elections, is above all a response to the urgent need for social benefits among Palestinians, acting as an Islamic opposition to the secular Palestinian National Authority, in view of its administrative and economic neglect and the resulting dramatically low living standards⁹⁷. Hamas with its activities is part of the model of contextual Islamization. It is characterized by an unusual ability to satisfy the most urgent social interests and extensive charity activities, while blurring the boundaries between them and their political and terrorist activities⁹⁸.

The indicated party strategies of Islamist movements operating in countries such as Egypt, Tunisia, Jordan, Lebanon and Palestine, do not exhaust examples for the “bottom-up Islam-

mei.edu/publications/hamas-fatah-reconciliation-implications [Accessed: 30.09.2019].

⁹⁶ M. Levitt, *op.cit.*, p. 3.

⁹⁷ *Ibidem*, pp. 7–8.

⁹⁸ *Ibidem*, p. 8.

ization”, but they can be considered as the most representative and explicit. In many countries, Islamists wanting to implement an Islamization programme must consider far-reaching compromises or alliances. For various reasons, Islamists in many countries did not have many opportunities to shape the reality of their countries, either because of their small strength or the context in which they functioned. For example, in Pakistan, Islamic political parties like the Jama’at-e Islami (Muslim Party of Pakistan), Jamiat Ulema-e-Islami (Assembly of Islamic Clerics), and Jamiat Ulema-e Pakistan (Assembly of Pakistani Clergy) have the chance to enter parliament only due to alliances and the development of common interests because they are weak. Fragmentation of Islamist political forces in Pakistan gives them little chance for electoral success. Over the years 1990–2018, only once, in 2002, a coalition consisting of the conservative, Islamist and far-right parties of Pakistan – *Mut-tahida Majlis-e-Amal* (MMA, founded in 2002 as an opposition to the policy of President Pervez Musharraf) managed to get 19% support in parliamentary elections, and none of the other parties exceeded 5% support. The MMA decided to build an alliance also in the 2018 elections, however, it did not repeat the success of ten years ago⁹⁹. Some of these parties, e.g. the moderate Jama’at-e Islami, followed its founder, Abul A’la Maududi, proclaimed slogans of “top-down Islamization” and the Islamic revolution, more or less for these reasons some party supporters opposed participation in parliamentary elections. Over the past decade, the Jama’at-e Islami has been the largest religious organization in Pakistan, and as a political party is rather part of a lobbying strategy as one of the Pakistani pressure groups, organizes seminars, conferences, rallies

⁹⁹ <https://www.thenews.com.pk/latest/255683-religious-parties-announce-revival-of-mma-after-a-decade> [Accessed: 5.10.2019].

and demonstrations, controls the network of mosques, and has followers in national media¹⁰⁰. Similarly, Jamiat Ulema-e Pakistan party acting rather as a pressure group, did not achieve any major political success.

The most difficult situation of Islamist parties is in Turkey. In the constitution, there is no reference to Islam, no sharia influence on Turkish national law, but this does not mean that it does not play a significant role in the Turkish society and politics. Moreover, the state elites use Islam as a tool for national homogenization¹⁰¹. In this respect, Turkey is part of the utilitarian strategy of M. A. Fattah to some extent. After the creation of Turkey as a nation-state, the phase of political and social westernization was initiated by Kemal Atatürk, seeking to secularize and, in consequence, control Islam by the state. Atatürk's policy removed Islam from the public sphere but did not create the basis for a clear separation of state and religion. As a result, we are dealing with "unique laicism in which religion is not part of public life but it is still controlled and reshaped by state policies"¹⁰². One of the largest pro-Islamic parties in the Turkish parliament was The Welfare Party (Refah Partisi, RP), which did not implement a radical Islamist programme but supported the extension of military-industrial cooperation with Israel and limitation of religious education. It has run in parliamentary elections since 1991, and in 1995 it became the most important parliament party. In 1996, the leader RP Necmettin Erbakan was appointed the Prime Minister, which, due to his pro-Islamic sympathies, caused resistance among Atatürk's policy supporters, similarly

¹⁰⁰ <https://www2.memri.org/polish/ideolog-dzamaat-e-islami-profesor-churszid-ahmad-w-kwestii-palestynskiej-niechaj-bedzie-rozwiazanie-jednego-panstwa-syjonisci-i-sila-militarna-ktorzy-kontroluja-nie-powinni-tam-is/1649> [Accessed: 15.10.2019].

¹⁰¹ J. Cesari, op.cit., p. 45.

¹⁰² Ibidem.

to RP intention in parliament. As a result, in 1997, the parliamentary coalition which supported Erbakan, including RP, was forced by the army to dissolve, and the Prime Minister was forced to resign¹⁰³. The following year, by virtue of a judgment of the Constitutional Tribunal in Turkey, the party was annulled for violation of the constitution, in particular the principles of Turkish secularism. Erbakan and many party members were deprived of the right to actively participate in politics for five years, and party funds were transferred to the state treasury¹⁰⁴. On the one hand, these events raised questions about Turkish democracy, and on the other, increased the tension in Turkey between supporters of a greater participation of religion in public life, and those for whom any departure from strict secularism is a violation of the basic principles governing the country¹⁰⁵. In spite of that, Islamists in Turkey ran in elections, either as independent candidates, or trying a more flexible strategy, focusing on gaining support, even at the expense of giving up some assumptions as long as they are not in line with mainstream national policy. This was the case in the early elections in 1999, in which Virtue Party (Fazilet Partisi, FP) won 20% support. It was created as a result of the restoration of former RP, which supported, among others, Turkish aspirations for membership of the European Union and made democracy their major political goal¹⁰⁶. The attitude of the Turkish establishment toward pro-Islamist parties did not change significantly, the activities of subsequent parties were consistently inhibited, and so did FP, which was also suspended by the Constitutional Tribunal on the

¹⁰³ G. Kepel, *op.cit.*, p. 339.

¹⁰⁴ http://news.bbc.co.uk/2/hi/middle_east/48001.stm [Accessed: 17.10.2019].

¹⁰⁵ *Ibidem.*

¹⁰⁶ G. Kepel, *op.cit.*, p. 355.

charge of violating the constitutional principle of secularism of the state¹⁰⁷. Other parties were created in their place, maintaining the character of the predecessor's ideology. In this way, the mentioned AKP was founded. It is not a typical Islamist party, although its large part is made up of former members of RP and FP¹⁰⁸. The strategy of the new movement was based mainly on a thorough change of the party's identity and programme – e.g. the party statute no longer referred to religion but to universalism of human rights, rule of law, the importance of civil society and political pluralism, as well as the integration of the Turkish economy with the European Union – which would allow not only to win elections, but also to survive in the conditions of Kemalist regime and the principles of the Constitutional Tribunal¹⁰⁹. Since 2002, the AKP has been running in the elections immediately gaining 66% support, which remained slightly hesitant until 2018. The ability to compromise, servitude to the public and openness to progress related to the Western world, and over time also demands to strengthen Turkey's rank in the region, all contributed to the party's success and strengthened its political base. These factors place the Turkish case among the examples of “bottom-up Islamization”. The party has often been attributed a hidden goal, which was the pursuit of power to Islamize Turkish society and politics. Although there are no such premises in the AKP programme, and party representatives publicly refuse to use Islam as a political tool, some explain that these fears arise from a special understanding of secularism. The so-called “passive secularism”, which means the neutrality of the state toward religious practices and enables the existence

¹⁰⁷ K. Bieniek, *Turecka Partia Sprawiedliwości i Rozwoju (AKP) – na drodze ku „nowej Turcji”*, “Cywilizacja i Polityka” 2017, No. 15, p. 126.

¹⁰⁸ P. Mandaville, op.cit., p. 132.

¹⁰⁹ K. Bieniek, op.cit., pp. 127–128.

of religious symbols in the public sphere. This vision of a neutral state attitude toward religion is supported by the AKP¹¹⁰.

Conclusions

The presented examples of strategies in relations between Islam and the state do not exhaust the model of “bottom-up Islamization”, but they justify the hypothesis that its nature depends on a network of various factors, is dynamic not only because of the context of the region, but it is also changeable in time. Majority of the invoked Islamist formations, represented by the new generation of “pragmatic Islamists”, while in opposition to political power, have developed new political strategies. In this way, some of them gained support significantly enough to actually take over the power and thus have a real impact on changes in their countries (e.g. the Turkish AKP); some, despite being outlawed, created new structures, participated in free-elections or joined in broader coalitions even with secular formations (e.g. MB in Egypt). Others, however, through partial de-radicalization, strengthened social and aid aspects in their programmes and, making use of local crises, created a base for rebuilding the country and thus achieved success (e.g. Palestinian Hamas).

The context of the region is an important element of “bottom-up Islamization”. Many Middle East countries declare Islam to be their official religion, and at the same time do not admit its institutional control or control of legal and judicial processes. Meanwhile, regardless of the state formula, Islam is an integral aspect of the identity of the Middle East societies, Islamism is based on this relationship, hence many Islamist for-

¹¹⁰ <http://www.nouvelle-europe.eu/en/turkey-akp-s-hidden-agenda-or-different-vision-secularism> [Accessed: 17.10.2019].

mations, despite the policies of their countries, did not give up these foundations, others remained with a symbolic reference to Islam, and little gave up looking for support in religion at all. Considering the strategies discussed as part of “bottom-up Islamization”, Islamists gained public support by choosing several paths: propaganda activities aimed at gradually changing social attitudes and beliefs, including keeping distance from the prevailing regimes, creating a platform for dialogue and referring to morality and conscience in society (*dawah*), building civil institutions or non-governmental organizations, creating formal political movements, establishing political parties and participating in elections. The last of these predominates in the countries that allow Islamists to become politically active in public life. But even in such cases, the level of access to equal political participation is quite varied, e.g. in Egypt, obtaining majority of votes in elections by the MB did not guarantee freedom of political activity, in Jordan, even after legalization of Islamist activity or any opposition at all, it was blocked by the regime, and finally in Turkey, where any activity was excluded by legal means, or legalized but on the secular foundations. The diverse level of political involvement of Islamists has therefore complex causes, which are not only the result of differences between Islamist formations – because they have rather a common purpose – the context of the region has a much greater impact.

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Abstract

The paper discusses the models of “bottom-up Islamization” observed since 1990s, represented by Islamist formations that are in opposition to political power. Islamism influenced the internal policy of selected countries but also was changed under its influence. The author analyzes the political involvement of Islamists and the methods by which they tried to join the political sphere. She also hypothesizes that the nature of “bottom-up Islamization” depends on the specificity of the country, on the strength of Islamist formations, flexibility of policy, often resulting in a modification or even a profound change in strategy. The historical approach adopted in the paper makes it possible to show the variability

of Islamist strategies in the context of the socio-political changes of the region in the mid-20th and 21st centuries. However, a comparative analysis of various Islamist formations and selected Middle Eastern countries, taking into account various forms of state relation to religion, justifies the contextual assumption on the nature of “bottom-up Islamization” and its changeability over time.

Keywords: Islamism, „bottom-up Islamization”, Islamic formations, religion, politics, Middle East, power

***Clear Light of Day:*
National Division and Self-Transfiguration
According to Anita Desai**

1. The Partition of India and Indian Literature

Written records about the Partition appeared already in the 1950s, yet it was not until the 1990s that the “Partition narratives”¹ gained scholarly attention. The first texts that took the Partition as their subject matter were mainly historical accounts in the form of personal memoirs written by the survivors of the event. However, due to the controversial nature of these texts, which exposed the violence and brutality of the Partition, they were systematically disregarded and ignored by the official line of Indian historiography. Nevertheless, in spite of the authority’s distrust, this trend of non-fictional accounts remained present in Indian culture and its culmination was manifested by the release of *Stories about the Partition of India* written by Professor Alok Bhalla in 1994².

With regard to the fictional accounts called “Partition fiction”³ these transpired around the same time as the personal

¹ P.R. Dube, *Partition Historiography*, “The Historian” 2015, vol. 77, No. 1, p. 75.

² A. Bhalla, *Understanding Politics Through Literature*, Vimeo, <https://vimeo.com/13162630> [Accessed: 4.03.2016].

³ P.R. Dube, op.cit., p. 75.

memoirs; however, they were much more fiercely suppressed by the governments of both India and Pakistan. The most prominent writer of Partition fiction, who paved the way for later authors of that genre, was Saadat Hasan Manto⁴. He started off as a journalist and literary translator only to take up writing fiction as a response to the struggle for independence and later the division of the subcontinent. His novels and short-story collections (the most prominent one being *Kingdom's End and Other Stories*) were inspired by truthful accounts of the survivors of the Partition and caused such a controversy that Manto was persecuted for his works six times in a court of law⁵.

A string of other literary works about the Partition ensued after Manto's. These were most notably written in the languages of Hindi (*This is Not That Dawn* by Yashpal, *The Divided Village* by Rahi Masoom Reza, *The Broken Mirror* by Krishna Baldev Vaid), Urdu (*The Weary Generations* by Abdullah Hussein, *Basti* by Intizar Hussain), and also in Muslim (*Khaak aur Khoon* by Nasim Hijazi, *Bano* by Razia Butt). Whereas the majority of these novels often comprised the fictionalized accounts of what indeed happened in reality, some of the texts were obtrusively biased, due to their emphasis on assigning blame for the tragedies to particular religious groups. Moreover, they often contained very few references to the historical context, ambiguous allusions to politics and focused on the effects of the division rather than on its causes, inciting in this manner only hatred and prejudice against the communal minorities⁶.

⁴ P. Kumar, *Testimonies of Loss and Memory: Partition and Haunting a Nation*, "Interventions: International Journal of Postcolonial Studies" 1999, vol. 1, No. 2, p. 213.

⁵ R.K. Shivpuri, *Social and Political World-View of Saadat Hasan Manto*, Kashmir Sentinel, <http://www.panunkashmir.org/kashmirsentinel/feb2003/14.html> [Accessed: 2.03.2016].

⁶ P.R. Dube, op.cit., p. 74–75.

The first Partition fiction in English was published in 1956. Kushwant Singh's *Train to Pakistan* was the first work providing a balanced viewpoint on both the causes and the effects of the Partition and how it affected the lives of ordinary citizens. In the example of a fictional village Mano Majra, the author provides the image of peacefully co-existing Muslim and Sikh communities until the division of the subcontinent, which changes them and incites to violence, proving in this way that the responsibility for the atrocities is equal on all sides⁷. The critically acclaimed novel, still popular in India due to its 1998 film adaptation, initiated the trend of highly successful novels about the Partition written by Indian authors in English. As a result, well-known works following *Train to Pakistan* were created such as Manohar Malgonkar's *A Bend in the Ganges* (1964), Anita Desai's *Clear Light of Day* (1980), Salman Rushdie's *Midnight's Children* (1981), Bapsi Sidhwa's *Cracking India* (1988), and Shauna Singh Baldwin's *What the Body Remembers* (1999).

Evidently, the list of the mentioned titles is far from complete for there is a great number of texts about the troubling subject written in English, as well as other Indian languages; however, these already enumerated serve as a way of orientation within the wide canon of Partition narratives⁸.

2. *Clear Light of Day* (1980)

Written by an eminent Indian novelist, Anita Desai, *Clear Light of Day* is her first novel and it was shortlisted for the Booker Prize. Set in the neighborhood of Old Delhi and re-

⁷ P. Roy, *Partition's Other Avatars*, "Postcolonial Studies" 2009, vol. 13, No. 3, p. 367.

⁸ O. Harenda, "Git-mit, git-mit talk": A Woman's Perspective on the Partition of India in Shauna Singh Baldwin's *What the Body Remembers*, "TransCanadiana: Polish journal of Canadian studies" 2017, vol. 9, p. 257–259.

flecting the experiences of growing up during the times of the Partition, Anita Desai considers this novel to be her most autobiographical piece. Furthermore, the book is recognized for focusing on such universal themes as the unity of family, the passage of time, nationwide accidents coinciding with personal tragedies, and the status of women in a patriarchal society. The novel is “four-dimensional” in its structure⁹; meaning that it has shifting perspectives which cover various stages of the characters’ lives in respective sections of the text. In addition, the book is written in a heavily descriptive manner, with occasional poetic interjections.

Clear Light of Day chronicles the history of the Das family, four siblings: Bim, Tara, Raja, and Baba, their parents, and the children’s caretaker Mira Masi, throughout the periods around the Partition, its immediate aftermath, and India of the 1980s. The novel begins with a conversation between two sisters, Bim and Tara, at their family house in Old Delhi. Bim is an accomplished history teacher who lives at the house along with her mentally challenged brother Baba. Tara, however, is married to an Indian ambassador to the USA and leads a successful life while touring the world. The purpose of Tara’s visit is a family affair connected with the sisters’ other brother, Raja. After the Partition, he left the family house to move to Hyderabad in order to marry the daughter of their Muslim landlord and currently he organizes a wedding for his own daughter. However, Bim is not very enthusiastic about reuniting with Raja after all the years of separation. She shows to Tara an unintentionally insulting letter from Raja in which the brother informs her that he has now become the new landlord of their old house and he will keep the same rent for Bim and Baba, though he

⁹ A. Desai, *Tremendous Changes*, India Today, <http://indiatoday.intoday.in/story/clear-light-of-day-is-about-time-as-a-destroyer-as-a-preserver-anita-desai/1/410288.html> [Accessed: 11.03.2016].

“shall never think of raising it or of selling the house”¹⁰. In the subsequent chapters, Bim engages into reminiscing about the siblings’ childhood years when they were still together in the house and how they grew apart later on. In the final section of the novel, Bim reaches the conclusion that she cannot be really mad at Raja and forgives him, as her unconditional love for her siblings is her own redemption from bitterness and alienation.

2.1. *The Image of the Partition in Clear Light of Day*

In view of the abundance of symbolism in the novel, what should be of primary interest is unmistakably the reflection of the event of the Partition itself. Surprisingly, in contrast to vivid imaginings of the event in, for instance, *Midnight’s Children* (1981) and *What the Body Remembers* (1999), Anita Desai places the Partition in the far background as a phenomenon not directly experienced by the protagonists of the novel, yet extremely significant in their lives. Due to the story’s non-linear structure, the event is repeatedly mentioned in the section focusing on the characters’ adolescence, then the socio-political background is provided in the chapter devoted to their childhood, only to cut to the effects of the aftermath in present times.

The first instance in which the Partition is mentioned in the novel is in the concluding part of the first chapter. During the conversation between the sisters, Bim talks reminiscently of Mira-masi (their mother’s distant cousin) and admits that she still feels the presence of the long-dead caretaker which reminds her of the summer 1947. “Only I was not at any extremity like those explorers in the icy wastes who used to see ghost figures. [...] After you married, and Raja went to Hyderabad, and Mira-masi died, I still had Baba. And that summer I got my job at the

¹⁰ A. Desai, *Clear Light of Day*, London 2001, p. 27.

college and felt so pleased to be earning my living”¹¹. Then, the sisters discuss that fateful summer. Bim quite poetically elaborates that the summer 1947 was certainly one of the “crashes”, “momentous events” which act like a “flood” that disrupts the stillness of daily life¹². The woman also adds an unexpected nostalgic undertone that it was also “the great event of our lives. What would our youth have been without it to round it off in such a definite and dramatic way?”¹³. Tara, however, recalls the tragic times with evident dread and fear. She feels immensely relieved that it is over and that the siblings can never be young again, thus contradicting the ambiguous nostalgia of Bim. After a brief moment of silence, Bim eventually reaffirms her sister’s views by saying: “Yes, I’m glad too, it is over – I never wish it back. Terrible, what it does to one – what it did to us – and one is too young to know how to cope, how to deal with that first terrible flood of life. One just goes under – it sweeps one along – and how many years and years it is before one can stand up to it, make a stand against it’ – she shook her head deeply. ‘I never wish it back. I would never be young again for anything”¹⁴.

Both sisters agree that the division of the subcontinent was like a “crash”, an unexpected “flood”, yet their perceptions of it differ significantly. Tara, as a diplomat’s wife, regards the Partition more holistically. To her, it was a flood “for everyone in India”, “for every Hindu and Muslim”¹⁵, hence, her views embrace the historical understanding of the event. Whereas Bim, contrastingly, associates the event not just with the widespread atrocities, but also with the end of childhood, the completion of the coming of age period. By no means does Bim long for

¹¹ Ibidem, p. 42.

¹² Ibidem, p. 42–43.

¹³ Ibidem, p. 43.

¹⁴ Ibidem.

¹⁵ Ibidem.

the violence and brutality of those times for, as her life story is gradually revealed in subsequent chapters, the readers can understand that she perceives the summer 1947 in microcosmic terms. That is to say, the Partition did not only divide India, but also the Das family. This is why Bim “never wishes it back” and “would never be young again for anything”, because personal tragedies from that period had a profound impact on her and shaped her present character of an independent, yet unsympathetic and reclusive woman.

The beginning of the novel’s second chapter, following immediately the sisters’ conversation, transports us *in medias res* of the 1947 events: “The city was in flames that summer. Every night fires lit up the horizon beyond the city walls so that the sky was luridly tinted with festive flames of orange and pink, and now and then a column of white smoke would rise and stand solid as an obelisk in the dark. Bim, pacing up and down on the rooftop, would imagine she could hear the sound of shots and of cries and screams, but they lived so far outside the city, out in the Civil Lines where the gardens and bungalows were quiet and sheltered behind their hedges, that it was really rather improbable and she told herself she only imagined it. All she really heard was the ceaseless rattling of frogs in the mud of the Jumna and occasionally a Tonga horse nervously dashing down the road”¹⁶.

This fragment serves as an evidence for the distance between the unfolding of the Partition and the lives of the protagonists. First of all, members of the Das family were Hindus living in India, thus, they did not have to participate in the dangerous migration flow. Additionally, they lived on the far outskirts of Delhi, so far that young Bim had to imagine “the sound of shots and of cries and screams”. The peaceful, almost silent, neighborhood of Old Delhi, inhabited primarily by middle-class Hin-

¹⁶ Ibidem, p. 44.

dus, contrasts greatly with the center of New Delhi in which the political leaders proceed with the handover of power and the religious groups collide with themselves. In consequence, the Partition is, quite literally, pushed into the background.

Afterwards, the chapter presents the socio-political implications of the Partition through the character of Raja. Suffering from tuberculosis, all that he is worried about during the summer are the Das' neighbors, the Hyder Alis. Raja fears that they could have been attacked by the Hindus, because their house appears to be abandoned, however, Bim calms him down by saying that they must have escaped in advance. Interestingly, Raja displays such a strong affinity for the Muslim family, due to the generosity which Hyder Ali Sahib, head of the family, showed to him in preceding years. It was because of the Muslim patriarch that Raja became engrossed in Urdu poetry by studying the plentiful volumes in Sahib's library. Eventually, Raja started participating in the neighbors' daily existence by visiting them nearly every day and attending special evening parties. The teenager grew so fond of the Muslims that he even wanted to apply to Jamia Millia University, the center of Islamic studies in New Delhi, however, his father objected. "I'm talking about the political situation. Don't you know anything about it? Don't you know what struggle is going on for Pakistan? How the Muslims are pressing the British to divide the country and give them half? There is going to be trouble, Raja – there are going to be riots and slaughter [...] you will be torn to bits, you will be burnt alive", the father warns the disbelieving son¹⁷.

In this way, a clear division is drawn between the houses of the Dases and the Hyder Alis. Raja is momentarily startled by his father's response, because both parents were never really present in their children's lives. Mr. and Mrs. Das were primarily

¹⁷ Ibidem, p. 52.

occupied with their personal entertainment, travelling between the father's insurance company and the Roshonara Club to play games of bridge, leaving Mira-masi to take care of the children. Consequently, due to their "policy of neglect"¹⁸ Raja thought of their house as "dismal", "dusty", "uncharming"¹⁹, whereas the Hyder Alis' household was always full of life, the air thick with culture and hosting famous personas. It is because of that atmosphere, that special treatment as if Raja were Sahib's son, that the boy wants to study Urdu poetry at the best university. Nevertheless, Mr. Das quite rightly refutes the son's pleadings, because the times have changed. "If you have asked me a few years ago, I would have said yes at once", the father stated, whereupon he forcefully enrolled Raja at a Hindu College.

Even though that seemed a safe choice at first, this decision also has its repercussions on Raja. The institution is already highly politicized, with many Hindu students formed into extremely radical, or even, terrorist groups. Not aware of the boy's associations with the Muslims, they treat him as a perfect new recruit for their cause. Nevertheless, Raja remains distant to them, still striving to visit the Hyder Alis. Yet, the atmosphere of the house changes there as well. The patriarch is still kind to Raja, but the Muslim guests are not so fond of him: "It was [Hyder Ali's] friends who seemed to fall silent when [Raja] came and to ostentatiously change the subject of discussion. The awkwardness did not last. Glasses of whisky were passed around, some poetry quoted, and soon they forgot Raja, or Raja's Hindu presence, and picked up the subject they had dropped on seeing him – Pakistan, as ever Pakistan. Raja listened silently as they spoke of Jinnah, of Gandhi, of Nehru, of Mountbatten and Attlee and Churchill, because he knew this was not a matter in which

¹⁸ Ibidem.

¹⁹ Ibidem, p. 49.

he should express an opinion, but he listened and he began to see Pakistan as they did – as a possibility, very close to them, palpable and real”²⁰.

In result, despite his Hindu identity, Raja embraces the idea of creating a separate state for Muslim majorities. Needless to say, his fellow colleagues begin seeing him as a “traitor” and state angrily that they are against the partitioning of India “no matter what Gandhi said or Nehru did”²¹. Even when Raja is sick with tuberculosis they invade his house and persistently urge him to join their cause. Only when Raja threatens that he will report them to the police, do they leave. However, it is the extremists who warn the authorities about Raja by calling him a “Muslim sympathizer”²².

In consequence, Raja becomes paradoxically the oppressed victim of Hindu fundamentalism. For his sympathy toward the Muslims next door he is ostracized and subjected to surveillance by the policeman lurking outside the house every day. The example of his character shows that not even politically engaged individuals can be affected by the changing times. Being under the influence of poetry, Raja has always imagined himself as a “hero”, a freedom fighter who takes part in a glorious battle. Ironically, he started reading Lord Byron during his studies and Bim began regarding her brother as a Byronic hero. Even friends for the neighborhood, the Misras, began calling Raja “Lord Byron”²³. Nevertheless, Raja is not actually fighting for India or Pakistan, because he is stuck in bed with his illness. He is rather an egoist who, in spite of the love and care received from Bim, eventually leaves his own family to the Hyder Alis, choosing in this way his own national group.

²⁰ Ibidem, p. 56–57.

²¹ Ibidem, p. 57.

²² Ibidem, p. 59.

²³ Ibidem, p. 55.

In contrast to Raja's viewpoint, Desai also provides the perspective of young Tara. When the couple started seeing each other, Bakul has already been offered his first diplomatic post in Ceylon. Not familiar with events happening outside of New Delhi, Tara asks her boyfriend about the departure of the British colonizers. Bakul responds: "Well, we are all waiting – for the date to be set – for partition, for independence. It will come any day now"²⁴ and he reassures the girl that nothing bad will happen, because the authorities have prepared refugee camps, special trains and the army. Upon the question about the safety of the Hyder Alis, the ambassador remarks that the Muslims acted wisely by leaving on their own. Yet, Bim who listens to the conversation appears not to be convinced: "Bim shook her head and was silent while Bakul went on about measures taken by the government, about Mountbatten's goodwill and integrity, about Nehru's idealism and integrity, about Jinnah and Pakistan – but Bim felt she was listening to banal newspaper articles being read aloud"²⁵. This contrast between Tara's naivety, Bakul's infallible confidence and Bim's skepticism indicates the contradicting attitudes of Indian people toward the Partition.

2.2. Parallelism between the Division of India and of the Das Family

Apart from the aforementioned illustrations of the Partition period in the novel, another interesting aspect taken up by Anita Desai is the theme of time as a destroyer and time as a preserver, inspired by T.S. Elliot's *Four Quartets* (1943). As observed by Nazmus Saqueeb Kathon in his analysis of the du-

²⁴ Ibidem, p. 70.

²⁵ Ibidem, p. 71.

ality of time in the novel, there is a strict relation between the development of the protagonists' story and that of the Partition²⁶.

In the first place, time plays the role of a destroyer. That faithful summer 1947 is actually an extent of time that encompasses the personal tragedies which affect the Das family. At first, there is the problem of Raja's education; soon after this, Mrs. Das unexpectedly falls into a coma and dies, whereas Mr. Das is killed in a car accident. Moreover, Raja is discredited at school and becomes ill, whereas Mira-masi, unable to cope with the burden of responsibilities, turns to alcohol, leaving only Bim to take care of her siblings. It is only when India's division takes place that the string of misfortunes finally ceases, leaving, however, a psychological scar on Bim's character.

In other words, along with the partitioning of the subcontinent there also occurs the partitioning of the family. Shortly after independence, Tara leaves the house due to marrying Bakul and journeys with him to Ceylon. With the arrival of the new year, the assassination of Mahatma Gandhi by a Hindu fundamentalist in January 1948 marks the departure of Raja. As the brother recuperates from his illness, he shies away from assuming the role of the family's breadwinner by inheriting the father's insurance business. He therefore establishes mentally challenged Baba as the company's new owner, and then he himself leaves for Hyderabad to reunite with the Hyder Alis. Last but not least, Aunt Mira dies from alcohol abuse, which seals the destruction of the family. "I'm the head of the family now, am I? [...] Modern times. Modern India. Independent India"²⁷, says Bim to Bakul ironically commenting on the situ-

²⁶ N.S. Kathon, *Duality of Time in Anita Desai's Clear Light of Day*, "American International Journal of Research in Humanities, Arts, and Social Sciences" 2015, vol. 11, No. 3, p. 210.

²⁷ A. Desai, op.cit., p. 81.

ation she has found herself in. Similarly to India itself, Bim has to learn how to function as an independent entity.

The second role time plays in the story is that of a preserver. With the passage of several decades, Bim has achieved the status of an independent woman, but her mentality changed in the process. From the active and outgoing student of her adolescence, often romanticizing about being a heroine, she has turned into a disillusioned spinster devoid of any social life and focused on her job as a history teacher. "Now I understand why you do not wish to marry. You have dedicated your life to others"²⁸, said Dr. Biswas, Raja's physician, who tried courting Bim back in the past. Indeed, Bim devotes herself to others, but doing so pushes her into bitterness and seclusion. As an adult, she feels humiliated by Raja's letter about the rent, she reacts critically to whatever Tara says during her visit, and she does not feel comfortable in the company of her neighbors, the Misras. Bim perceives her siblings as ungrateful, because she has sacrificed herself for them and yet they have abandoned her for the sake of their ambitions²⁹: "They had come like mosquitoes [...] only to torment her and, mosquito-like, sip her blood. All of them fed on her blood, [...] it must have been good blood, sweet and nourishing. Now they were full, they rose in swarms, humming away, turning their backs on her"³⁰.

Nevertheless, as Kathon notices, "certain things continue to exist despite the ravages of time"³¹. As Bim meditates and reflects upon the past, she reminds herself of some positive aspects of her life. Her sacrifice for Baba over the years reminds her of Mira-masi's sacrifice for the children, when the aunt ba-

²⁸ Ibidem, p. 97.

²⁹ S. Sunitha, *Bimla, The New Woman of Anita Desai in Clear Light of Day*, "Research Journal of English Language and Literature" 2014, vol. 2, No. 4, p. 69.

³⁰ A. Desai, op.cit., p. 153.

³¹ N.S. Kathon, op.cit., p. 210.

sically replaced the siblings' absent mother. Bim and Raja frequently dreamt about being heroes, whereas Tara always desired to become a mother. To a certain extent, Bim embodies these two imaginings. She has become a heroine of her own life and a mother for Baba. By reviewing the past, the female protagonist finally realizes the true nature of her feelings: "She saw how she loved [Baba], loved Raja and Tara and all of them who had lived in this house with her. There could be no love more deep and full and wide than this one, she knew. No other love had started so far back in time and had had so much time in which to grow and spread. They were really all parts of her, inseparable, so many aspects of her as she was of them, so that the anger or disappointment she felt in them was only the anger and disappointment she felt at herself. [...] Although it was shadowy and dark, Bim could see as well as by the clear light of day that she felt only love and yearning for them all, and if there were hurts, these gashes and wounds in her side that bled, then it was only because her love was imperfect and did not encompass them thoroughly enough, and because it had flaws and inadequacies and did extent to all equally"³².

In consequence, the "clear light of day" signifies Bim's perfect realization of her love for her siblings. She understands that she is unable to live without them and that she has to see beyond the dismal past, and simply forgive their thoughtless actions³³. Bim's love serves as a bond uniting them all for the simple fact that they share common origin³⁴. Therefore, time serves as a preserver of that feeling of love³⁵. Upon skimming through the *Life of Aurangzeb*, a biography of the seventeenth-century Mughal Emperor, and reading his dying words "Strange that I came with

³² A. Desai, op.cit., p. 165.

³³ S. Sunitha, op.cit., p. 69.

³⁴ N.S. Kathon, op.cit., p. 211.

³⁵ Ibidem, p. 211.

nothing into the world and now go away with this stupendous caravan of sin.”³⁶, Bim experiences a complete catharsis and her feelings become amplified³⁷. She tears to pieces Raja’s insulting letter, apologizes to Baba after verbally attacking him, and in the end tells Tara that she will not attend the wedding but awaits Raja at the house: “Bring him back with you Tara. [...] Tell him I’m – I’m waiting for him”³⁸.

Unexpectedly, Bim’s sudden change of attitude has its immediate effects because, right before leaving for the wedding, Tara begs Bim for forgiveness: “When I married – and left – and didn’t even come back and help you nurse Mira-masi, Bim – whenever I think of that – how could I?”³⁹. Eventually, the two sisters reconcile and fulfil the message of the novel’s epigraph borrowed from T.S. Elliot⁴⁰ about not staying anchored to the past and moving forward, accepting a new “transfiguration”. Anita Desai stated herself that “[the novel] is about what the bondage of time does to people”⁴¹ and “although time appears to damage, destroy, and extinguish, one finds instead that nothing is lost, nothing comes to an end”⁴². She adds that “time has freed Bim from the grip of fear and loneliness and she is ready to continue her journey through life”⁴³.

³⁶ A. Desai, op.cit., p. 169.

³⁷ S. Sunitha, op.cit., p. 69.

³⁸ A. Desai, op.cit., p. 175–176.

³⁹ Ibidem, p. 174.

⁴⁰ “See, now they vanish, The faces and places, with the self which, as it could, loved them, To become renewed, transfigured, in another pattern”. Ibidem, introduction.

⁴¹ A. Desai, op.cit. *Tremendous Changes*, “India Today”, <http://indiato-day.intoday.in/story/clear-light-of-day-is-about-time-as-a-destroyer-as-a-preserver-anita-desai/1/410288.html>, [Accessed: 11.03.2016].

⁴² N.S. Kathon, op.cit., p. 211.

⁴³ M. Vilamadevi, *Bim’s Unfailing Strength in Anita Desai’s Clear Light of Day*, “Language in India” 2011, vol. 11, No. 3, p. 412.

In the ending of the novel, Bim and Baba attend a music event organized by the Misras. As they listen to the singing of the old guru and his young disciple, Bim suddenly recalls the “Time the destroyer is time the preserver” phrase and reaches the conclusion that their house is the ground that connects them together and gives them the possibility of starting anew, of looking forward to the future. Therefore, time as a preserver reunites the family and casts the shroud of the Partition into the shadows.

2.3. Indira Gandhi as an Embodiment of New India in Clear Light of Day

Moving away from the discussed images of the Partition in the novel and its significance in the family’s life, there is one more interpretation that has surfaced during my reading of the *Clear Light of Day*; that is to say, I approach the representation of Indira Gandhi in the novel as a personification of post-Partition India. What inclines me toward this understanding is a number of subtle references to Mrs. Gandhi in the story. Indeed, the novel was written in 1980, 4 years before her assassination; however, it was the year of her glorious comeback to the post of Prime Minister, thus the overwhelming popularity of Indira Gandhi at that time could have influenced Anita Desai to allude to her figure in the novel.

In the first chapter of the novel, Tara at one point tries to write a letter to her daughters; yet instead, she resorts to reading a dusty book entitled *Letters to a Daughter* (1929) by Jawaharlal Nehru, in which the father attempts to outline history of the world to a 10-year-old Indira. Apart from the outright irony of the situation, the mother consulting letters of another parent, there is also another hint about the passage of time,

“a book from the drawing room bookshelf that had been there even when she was a child”⁴⁴. Even though we are not given Tara’s views on the book, the presence of the book itself may indicate the correspondence between the childhood of the siblings and of Indira Gandhi. To be specific, young Indira also had a very lonely upbringing, due to the fact that her parents were repeatedly arrested by the British and that she was forced to co-habit with the servants in Anand Bhavan, the Nehrus’ family house.

Another reference comes within the same chapter, during the conversation between Bim and Bakul. This time it is more direct and with a negative overtone. Bim questions Bakul on how he addresses the issues of Indian politics abroad, to which he responds that he does not do that at all, but instead promotes the greatness of India: “I choose to show them and inform them only of the best, the finest. The Taj Mahal – the Bhagavad Gita – Indian philosophy [...] But why talk of local politics, party disputes, election malpractices, Nehru, his daughter, his grandson – such matters as will soon pass into oblivion? These aren’t important when compared with India, eternal India”⁴⁵. Through this short statement, Desai illustrates the rotten state of Indian politics of the 1970s that eventually led to the state of emergency. Bakul exposes the strategy of India’s international propaganda of speaking only about its merits, not internal affairs. However, all of the merits belong to pre-colonial India, whereas the contemporary reality very much contradicts his belief that the Nehru-Gandhi family “will soon pass into oblivion”. Decades have elapsed since the passing of Nehru and his daughter and they are still popular in India, not mentioning their descendants who are still key po-

⁴⁴ A. Desai, *op.cit.*, p. 20.

⁴⁵ *Ibidem*, p. 35.

litical players. In this contemporary reading of Desai's novel, we can see not only a critique of Nehru-Gandhi's India, but also the prevalence of it over the country's cultural heritage.

Lastly, there is also a correlation between the figure of Indira Gandhi and the character of Bim Das. In the second chapter of the novel, the physical similarity between the two women becomes uncanny: "[It] took [the doctor] a few minutes to understand what she had asked him and to notice that her face was drawn and colorless and that her lank, untidy hair had a distinct streak of grey in it"⁴⁶. This reminds us about a white streak of hair which Mrs. Gandhi made her most recognizable physical feature. Also, during her adolescence, she often had lank hair and pale complexion⁴⁷. Consequently, it can be suggested that through experiencing personal tragedies and undergoing the process of becoming independent, Bim actually stands metaphorically for Indira Gandhi. Similarly to the case of the Partition as a background for the lives of the Dases, Bim is a microcosmic reflection of Indira, because both women transform into mothers. Bim becomes a mother-like figure for her siblings, whereas Indira was regarded as *Mother India* at the height of her political popularity.

Significantly, Indira Gandhi may be perceived as the symbol of the Republic of India in the *Clear Light of Day*. With the country consumed by religious prejudice, Hindu nationalism, corruption, and the political fight for supremacy as direct results of the Partition, the figure of Mrs. Gandhi manifests these failures but also epitomizes its triumphs: the struggle of the colonized for independence, establishment of a post-colonial country, and its successful defense in the Indo-Pakistani War of 1971.

⁴⁶ Ibidem, p. 67.

⁴⁷ P. Jayakar, *Indira Gandhi: A Biography*, New Delhi 2000, p. 155.

3. Conclusions

In view of the presented material, it is now apparent that the Partition gains a more metaphorical dimension in fiction. That is to say, it constitutes an important background which correlates with the hardships of oppressed individuals. As a result, Anita Desai's *Clear Light of Day* (1980) provides a parallelism between the division of India and of the traditional Indian family, thus indicating the significance of time that is responsible for rebuilding relations between relatives, which can lead India into a better future.

The Partition of India has been an extremely influential subject, constantly inspiring literary and cinematic reinterpretations. Nevertheless, some still resort to remember only about its political significance, confirming the national metanarrative, whereas others focus mainly on ethnic violence. It should be remembered that the Partition of India is the embodiment of both phenomena and constitutes a dramatic example of how things may spiral out of control even in spite of the goodwill and cooperation of political leaders. It is most certainly a positive trend that the Partition is remembered through the works of literature and cinema and hence illustrated from various perspectives, because it provides an opportunity for the modern recipients to form their own opinion. Also, in the modern world of constantly growing tensions on the grounds of religion and ethnicity, the example of the Partition, especially through the framing of Anita Desai, might remind how important it is to ensure that clashes between people representing different concepts of self-rule should be avoided.

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Abstract

The paper examines the way in which the historical event of the Partition of India on August 15, 1947 was presented by an Indian-born writer Anita Desai in her critically acclaimed novel *Clear Light of Day* (1980). In order to conduct this analysis, the paper firstly focuses on a brief description of the Partition event in relation to literary discourse to indicate its importance for the shape and development of newly independent India. Next, the novel's plot is summarized to correctly establish its correlation with the colonial history of India. Finally, the novel is analyzed through the perspective of its main protagonists: Bim, Raja, and Tara, the three siblings who constitute the Das family and who retrospectively reflect at the tragic event from the post-colonial viewpoint. The analysis aims to show that the image of the Partition of India is still culturally important, over 72 years after India's independence. The methodological approach used for the purposes of this analysis is postcolonial criticism. The article aims to provide an evaluation of how the event was represented in the literary sphere and thus its relevance in the contemporary contexts.

Keywords: colonialism, literature, India, the Partition of India, *Clear Light of Day*, Anita Desai

Abstrakt

Artykuł bada sposób w jaki historyczne wydarzenie Podziału Indii zostało zaprezentowane przez pisarkę indyjskiego pochodzenia, Anitę Desai, w jej uznanej przez krytyków powieści *Clear Light of Day* (1980). W celu przeprowadzenia tej analizy, najpierw zostają przedłożone informacje wstępne dotyczące wydarzenia Podziału w dyskursie literackim w celu ukazania wpływu tego wydarzenia na kształt i rozwój niepodległości Indii. Następnie, artykuł przytacza fabułę powieści w celu podkreślenia jej korelacji z kolonialną historią Indii. Na koniec, artykuł przechodzi do pełnej analizy powieści w perspektywie jej głównych postaci: Bima, Rajy oraz Tary, rodzeństwa z rodziny Dasów, które wspomina tragiczne wydarzenie z postkolonialnego punktu widzenia. Celem analizy jest ukazanie, że obraz Podziału Indii jest nadal ważny 72 lata po uzyskaniu niepodległości Indii. Podejście metodologiczne użyte w analizie to krytyka postkolonialna. Artykuł ma za zadanie zgłębnienie jak wydarzenie zostało zaprezentowane w sferze literackiej oraz jakie jest jego znaczenie w kontekstach współczesnych.

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Nizami and Sadi (Based on Nizami Ganjavi's "The Treasury of Secrets" and Sadi Shirazi's "Bustan" Poems)

The great Iranian poet Sadi Shirazi wrote the "Bustan" (often referred to as "Sadinama") in 655 Hijri. For centuries, "Bustan" has been taught in schools and madrasas as a basic textbook, has been published many times in Iran and abroad, and has been translated into many foreign languages. This indicates the power of the work¹. There are some similarities between Nizami Ganjavi's "The Treasury of Secrets" and the "Bustan" poems of Sadi Shirazi. We can sort them as follows:

1. Both works are written in Persian;
2. Both are genre poems;
3. Both are written in Aruz, in the form of a *mesnevi*;
4. Both are religious-philosophical and didactic-moral works;
5. Both begin with the definition of God;
6. Both contain the praise of the Prophet Muhammad;
7. Both praise the existing rulers;
8. Both have titles indicating the reason behind writing them;

¹ S. Şirazi, *Bustan, be tashih və touzihe-doktor Qulam-Hüseyn Yusifi*, Tehran 1359, p. 613.

9. Both are divided into chapters and each chapter has its own name;

10. Both have more than a hundred Azerbaijani-Turkish words.

As mentioned, the “Treasure of Secrets” begins with the definition of God. The first couplet, beginning with “Bismillahir-rəhmanir-rəhim” in the name of “Forgiving and Merciful God” sounds as follows²:

بسم الہ الرحمن الرحیم
ہست کلید در گنج حکیم

(Bismillahir – Rəhmanir – Rəhim

The key to the wisdom’s door).

(Translated by I. Guliyev)

The three names of God mentioned above are: “Rəhman – Forgiving”, “Rəhim – Friendly”, “Həkim – Wisdom” in the Quran.

“Bustan” begins with the same definition of God. The Arabic expression “Bismillah” in Nizami’s “in the name of God” is given in Persian in the same sense as “Be nam-e Xoda”³:

به نام خدایی که جان آفرید
سخن گفتن اندر زبان آفرید

(In the name of that god who created his soul,

Created speech in the language).

In the first verse Nizami mentions two names of God as “Forgiving” and “Merciful”. Sadi also refers to God as “Creator” and “Learn to speak”.

Nizami emphasizes that when God existed, there was no higher heaven, or “Heaven” and “flat” or “Earth”. He then de-

² N. Külliyyatı-Xəmsə, *Cavidan*, Tehran 1374, p. 3.

³ S. Şirazi, op.cit., p. 33; G. Nizami, *Sirlər xəzinəsi*, Bakı “Elm” 2014.

clares that when there are no these two, that is, on the Day of Judgment, God will come again⁴:

بود و نبود آنچه بلند است و پست
باشد و این نیز نباشد که هست

(While he was tall and flat, he was still there,
He will exist when the present system of things is gone).

Regarding the matter, Sadi Shirazi writes that God holds the heavens and the earth, and holds the Day of Judgment⁵:

به قدرت نگهدار بالا و شیب
خداوند دیوان روز حسیب

(He keeps his hands high, his strength,
He is the God of the couch on the day of reckoning).

In the section titled "Praise of God", Nizami recorded 117 and Sadi 97 bits. These are also figures close to each other.

Nizami believes that God is:

1. The beginning of the thought and the end of the word;
2. It exists before all that exists;
3. It exists after all the rest;
4. He is the first leader of a world without beginning;
5. Enables all sources of generosity;
6. Inventor of all things;
7. The pearl of the sun;
8. Decorating the earth and its waters;
9. Unveiling the curtain of the curtain;
10. Keeping the veil of those who know the curtains;
11. He is the tutor of those who feed the gut;
12. The day is open to those who eat;

⁴ N. Külliyyatı-Xəmsə, op.cit., p. 4.

⁵ S. Şirazi, op.cit., p. 34.

13. The pearl is made straight to the gentle handle of the mind;
 14. Bringing light to the eyes that see the mind.
 15. Packing your forehead on the forehead;
 16. Giving the throne to those who sit on the wood;
 17. Baking the baked measures;
 18. Accepting the excuses of the wrongdoers;
 19. He who fears the dung;
 20. Solution of the actions of the connoisseurs;
 21. The body and the attributes are eternal;
 22. The Creator and Sustainer of the Universe;
- Sadi is pleased with the fact that God is:
1. Creating a soul;
 2. The language teaching to speak;
 3. Forgiving and blessing;
 4. Generous - Failure to Forgive;
 5. Owner of Honor;
 6. The king of the kings of Ad-san;
 7. Infinite;
 8. Covering faults;
 9. The God of the heavens and the earth;
 10. Provider;
 11. Rich;
 12. Lawful;
 13. The Most High and the Great;
 14. Crown to those who sit on wood;
 15. Aware of all things;
 16. Eternal;
 17. Encompassing all things in His knowledge.

Apparently, the images of God in the writings of Nizami and Sadi are almost identical. The descriptions of God given by both poets stem from the Quran.

The next title in both poems is called "The Praise of the Prophet". Both poets call it as a "blessing". In both works, the

Prophet Mohammed describes the characteristics, the virtues, the countenance of God, his good behavior, and his message. Nizami and Saadi's reputation and love for the Islamic prophets is evident in every instance of this title.

Here's a quote from it. Nizami points to the Prophet Muhammad's noble and beautiful speech, emphasizing that he is superior to the Prophet Adam and Jesus, the Messiah⁶:

امی گویا بزبان فصیح
از الف آدم و میم مسیح

(He did not study with his eloquent language,
But he received "alphabet" from Adam, and "mim" from Christ).

Let us take a look at one of the 30 bits that Sadi dedicated to the Prophet's praise. The poet calls him the leader of the Prophets, the forerunner of the religion, the person whom God trusted and came to Gabriel⁷:

امام رسل ، پیشوای سبیل
امین خدا، مهبط جبرئیل

(The leader of the apostles, the leader of the religion,
Goddess, Jabrayil's interlocutor).

The next title is the definition of the rulers whom both books are dedicated. Nizami dedicated this work to a ruler named Fakhraddin Bahramshah bin Dawud. This definition is 29 bits. Sadi wrote his book in the name of a ruler named Abu Bakr bin Sa'd bin Zangi, whose name is 47 bit. The sites are still close.

"The reasons for writing the book" explains why Nizami has taken control of the poem in the title "Dər məğam və in name".

⁶ G. Nizami, op.cit., p. 10.

⁷ S. Şirazi, op.cit., p. 35.

The poem of this section, numbering 43, speaks of the poet himself⁸:

من که سراینده این نو گلم
باغ توراً نغمه سرا بلبلم

(I am the singer of this fresh flower,
I am the night-light of your garden).

Sadi explains the “The reasons for writing the book”, in his 30-bit essay “Dər səbəbe-nəzme-kebab” and then, as Nizami himself says⁹:

در اقصای گیتی بگشتم بسی
بسر بردم ایام با هر کسی

(I traveled all over the world,
I ended up with everyone at the same time).

It is interesting that both poets bear their nicknames in these titles. Let’s look at the Nizami¹⁰:

پیش نظامی به حساب استند،
او دگر است، این دگران کیستند

(They stand up for the report,
I am different, who are these?)

Sadi sings his nickname on this website¹¹:

گل آورد سعدی سوی بوستان
به شوخی، فلفل به هندوستان

(Sadi brought bouquet of yellow flowers
It was as if it brought pepper to India).

⁸ N. Külliyyatı-Xəmsə, op.cit., p. 24.

⁹ S. Şirazi, op.cit., p. 37.

¹⁰ N. Külliyyatı-Xəmsə, op.cit., p. 25.

¹¹ S. Şirazi, op.cit., p. 38.

We can note that Nizami divides his work into 20 chapters, calling them “məqalət”. Sadi divides his into 10 chapters and calls them “bab”. These words in Arabic are synonymous expressions because they mean “chapters”.

Chapter 1 of the “Treasury of Secrets” is called “Dər afərineşe-Adəm”, and tells the story of the creation of Adam. Sadi did not name a chapter the same. Chapter 2 of this work is entitled “Dər ədl və negəhdariye-ensaf”, that is, “Fair and just”. Nizami says in this chapter:

1. Man is the king of living things;
2. The king must create the country;
3. Man is responsible for all affairs of the Shah country;
4. Let not man be anxious for the world;
5. Man must be humble;
6. Man must be connected to God;
7. Man must do good;
8. The king must be just and kind;
9. The king must keep the country and his troops well;
10. The king should not oppress;
11. The king must rule the country with justice;
12. In every business, you must expect dignity.

As Nizami devoted the first chapter of his work to justice beginning from the creation of Adam, Sadi thinks the first chapter of his poem as fair, calling it “Dər ədl, tədbir və rəy”, that is, “Justice, Action and Opinion”. What Nizami calls “honest” means “action and opinion”.

Sadi writes:

1. The king must keep records of the poor;
2. The king must keep his people well;
3. The king should not offend his people;
4. The king must eradicate oppression;
5. The king must expect justice everywhere;
6. The king must put on the straight men;

7. The king must remove the wicked;
8. The king must protect the trade and the merchants;
9. It is not necessary to offend travelers and visitors in the country;
10. The generous person must be generous.

As one can see, Nizami and Sadi's views on the principle of justice coincide.

Nizami places emphasis on justice among human values. In his view, the mind is not free from cunning, that is, the mind is a home of human values, but no human value is superior to justice¹²:

گردن عقل از هنر آزاد نیست
هیچ هنر بهتر از داد نیست

(The neck of the mind is not free from skill,
No craft is better than justice).

Nizami's concept of justice coincides with the opinion of the ancient Greek philosopher Siseron. 13 centuries before Nizami was celebrated by Siseron¹³:

Justice is the highest of all virtues.

The German philosopher I. Kant (1724-1804), like all other philosophers, ascribed great value to justice¹⁴:

“When justice disappears, nothing remains that could add value to people's lives”.

While promoting Nizami's principle of justice, the king – the country – boasts a triptych of troops. The writer correctly states that if the king is a benefactor of the country and troops,

¹² G. Nizami, op.cit., p. 61.

¹³ A. Yu. Kozhevnikov, G.B. Lindberg, *Афоризмы античных мудрецов*, Moscow 2010.

¹⁴ Ibidem, p. 198.

they are the good of the king. So, the country depends on the head of the country, the population and the army¹⁵:

شهر و سپه را چو شوی نیکخواه
نیک تو خواهد همه شهر و سپاه

(If you are a benefactor of the land and of your troops,
The whole country and the army also want the best).

The Saudi triad - the country of justice - does not neglect Sadi. He considers that the king must be a merchant, a supporter of trade. Otherwise doors to the country and its neighbors should be closed¹⁶:

شهنشه که بازارگانرا بخت
در خیر بر شهر و لشکر بیست

(The king is angry with the merchant,
Close the door to the country and the troops).

According to Nizami and Sadi, the principle of justice is violated when the Shah's people are hurt. They both advise the ruler not to do so. Thus, Nizami says¹⁷:

راحت مردم طلب، آزار چیست؟
جز خجلی حاصل این کار چیست؟

(Ask for the comfort of the people, what is the pain?
What else is there other than shame?)

Sadi emphasizes that if the king succeeds, he will not have to sympathize with the people, that is, he will not hurt his people but if he will, his power will be cut off¹⁸:

¹⁵ G. Nizami, op.cit., p. 53.

¹⁶ S. Şirazi, op.cit., p. 43.

¹⁷ G. Nizami, op.cit., p. 53.

¹⁸ S. Şirazi, op.cit., p. 42.

مکن تا توانی دل خلق ریش
وگر میکنی ، میکنی بیخ خویش

(The wounding of the people,
If you do, you can cut off the roots).

Nizami and Sadi share the view that doing good, holding hands, means waiting for justice. If a person does good, she will be pleased with the Creator, says Nizami¹⁹:

عمر به خشنودی دلها گذار
تا ز تو خشنود شود کردگار

Translated by R. Aliyev²⁰.

(Spend your life satisfying hearts -
May the Creator be pleased with you too).

Supporting this, Sadi encourages doing good, which will reward one according to what one did, when the Divan and the Judgment will come²¹:

کرم کن که فردا که دیوان نهند
منازل به مقدار احسان دهند

(Crap, if tomorrow sofa,
Rates will be matched for good).

When we look at these two quotations we see that both of them have the first verse is a condition, and the second is the result. Nizami's phrase "Let the creator be pleased with you" is the synonym for the context of Sadi's who says: "They will give their degrees well".

¹⁹ G. Nizami, op.cit., p. 56.

²⁰ Ibidem, p. 112.

²¹ S. Şirazi, op.cit., p. 56.

Nizami and Sadi think that if the king collects wealth, he will not be able to defend justice. Nizami shows that Firudin and Sam possessed the wealth of the ancient Iranian kings, but could not carry anything with them²².

زین گهر و گنج که نتوان شمرد
سام چه بر داشت ، فریدون چه برد؟

(This is beyond the pearls and treasures
What did Sam take, and what did Firudin bring?)

Sadi, who advised not to collect such things, thinks that the king must be generous – benevolent – forgiving, just as God has bestowed on him a kingdom²³:

جوانمرد و خوش خوی و بخشنده باش
چو حق بر تو پاشد تو بر خلق باش

(Be generous, kind, forgiving,

The truth has come to you, and you must do it to the people).

This means that the king, advised by Sadi and Nizami not to collect the treasures, would not collect the treasure, to be the person of the generosity of the generous-benevolent triad described by Sadi.

One of the names of God mentioned in the Quran is “Ancient”. Its meaning is: “If there were no living and inanimate beings, they would exist”. Both Nizami and Sadi address it. Nizami writes that God is the forerunner of the ancient world, the pearl around the pen, that is, the pencil²⁴:

²² G. Nizami, *op.cit.*, p. 56.

²³ S. Şirazi, *op.cit.*, p. 45.

²⁴ N. Külliyyatı-Xəmsə, *op.cit.*, p. 3; G. Nizami, *op.cit.*

سابقه سالار جهان قدم
مرسله پیوند گلوی قلم

(God) Ancient of the world leader,
There is a pearl and necklace around the pen.

Sadi, who gives God the name “Ancient”, concludes that God is honored by the exaltation that His existence is ancient and rich²⁵:

مر اورا رسد کبریا و منی
که ملکش قدیم است و ذاتش غنی

(His greatness and reasonableness are His,
Because its existence is ancient and rich).

When we look at it, we see that Nizami’s “ancient world”, meaning “cahan-e ġədim”, is in the form of “molkeş ġədim”. So, Nizami’s definition of “ancient world” is the same as Sadi’s conception of “existence is ancient”.

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²⁵ S. Şirazi, op.cit., p. 34.