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Note from the Editor in Chief

We are happy to inform everyone who seeks to publish their research papers, written in an impartial manner and analyzing the historical past without political bias.

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Kind regards,
Professor Hussein Baghirov
Founder of the Western Caspian University

EUHEMERICS IN EARLY PTOLEMAIC ALEXANDRIA

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Sergei Belozerov

ABSTRACT

The article presents a new view on the circumstances and features of the origin of euhemerism in all its genre diversity – from mythographic utopias, chorographies and mirabilia to pseudoperiples and paradoxography. An in-depth analysis of the sources that have come down to us gives grounds to assume with a fairly high degree of probability that early Ptolemaic Alexandria was its main launch pad and epicenter, and to link it with the activities of Demetrius Phalereus, the founder of the famous Mouseion and the Library in antiquity.

Keywords: Demetrius Phalereus, Euhemerus, Palephatos, Dionysius Scytobrachion, Iambulus, Leon of Pella

1. INTRODUCTION

Until now, the question of the existence of a certain circle of writers in Alexandria during the reign of Ptolemy I Soter—whether at the Library or otherwise — (hereinafter we will refer to them as euhemerics [1]) has apparently never been considered or even seriously raised, especially in connection with Demetrius of Phalerum. But this is not surprising—the details of his Alexandrian (and Egyptian) existence, for reasons difficult to explain, remain outside researchers' attention.

In its pure form, this topic, an attempt to reconstruct euhemerism in a socio-historical context as applied to Alexandria during the time of Demetrius of Phalerum, is our own author's fantasy. However, it appears to be logically justified. Not only by its belonging to the aforementioned chronotope, but also by the almost complete—with rare exceptions—sharing of other essential features.

These include:

a) clear features of a literary utopia, often, by outward appearances, more or less solar;
b) the reinterpretation of myths, including those related to nature and the origins of gods;
c) the genres of travel novels to remote islands, as well as "amazing stories" and "tales of the extraordinary" as either a component or a separate element (the invention of outlandish details about the animal and plant life of the "newly discovered" locales, and the appearance and customs of the tribes inhabiting them);
d) the literary "secrecy" of most authors; they hid behind pseudonyms, sometimes even several at once.

However, isolated attempts (but without reaching any generalizations) to find common ground for the various members of the "circle" cannot go unnoticed.[2]

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[1] "Euhemerists" took root in literature—in particular, in the work of D. O. Torshilov, whom we quote extensively below. But we prefer the "euhemerics". We don't quite understand what, say, the "Socratics" did wrong to the "Pythagoreans" or "Pythagorists".
[2] See, for example, (Brown, 1946, pp. 259–274).

2. MAIN TEXT

2.1. Demetrius of Phalerum, Cassander and the Euhemeric Horizon

Demetrius of Phalerum could have been linked to the theme of Hellenistic utopia even earlier—if we see in Alexarchus's Ouranoupolis not only Cassander's uncharacteristic Kulturträger adventure, but also the intellectual side project of the Athenian ruler, a Peripatetic philosopher, who was faced with the problem of somehow arranging the fate of his fellow citizens, exiled from their hometown by Antipater's census, in the Thracian lands.

This undertaking, completely uncharacteristic for its time and Cassander, is combined in the latter's activity only with the expedition to southern Arabia, on which he allegedly dispatched Euhemerus of Messene (as the Massaliotes had previously sent Pytheas beyond the Pillars of Heracles). A legendary, enigmatic figure occupied a larger place in our understanding of the history of the Diadochi than Alexarchus only because of the mention of him and his treatise “Sacred Inscription” (“Ἱερὰ Ἀναγραφή”) about the “island of the blessed” Panchaia in Diodorus Siculus (Diodorus Siculus, *Bibliotheca historica* 5.42.4–46.7; 6.1.1–11).

We know little about Euhemerus. Even Messene in Sicily is disputed as his birthplace.[3] Euhemerus was considered close to the circle of Cyrenaic philosophers and, like Theodore, an atheist. At least, he is presented in a list of atheists that appeared in the late second century, attributed to Clitomachus of Carthage. Attempts to rationalize myths also link him to Palaephatus. However, there are also areas in which Euhemerus was undoubtedly original. He marked one of the first attempts in the Hellenistic period for Greek philosophy, Greek thought in general, to transcend traditional geography and expand the oecumene within its own consciousness.

This voyage has quite a few superficially plausible reasons to be considered factual. Firstly, Euhemerus himself, as reported by Diodorus Siculus, spoke of being in the service of Cassander. Secondly, had Euhemerus been fortunate, Cassander could have been known as an enlightened monarch and patron of science and research. And by expanding his field of vision and practical interests to the borders of Arabia, he could have hoped, if not to surpass Alexander, who had reached India, then at least to equal him in the audacity of his plans. And perhaps even surpass him, since ***“no man has been able to sail through these parts”,*** as Arrian writes in his “Indica” (Arrian, *Indica* 43.3).

“Paradoxically, in ancient times, not a single attempt to completely circumnavigate Arabia, i.e., along the shores of the Erythraean Sea, was successful, and not a single 'individual' periplus of its aquatoria ever existed. The attempts of seafarers - from Scylax to Alexander's companions - were unsuccessful due to a lack of shipbuilding and navigation skills, and when all the necessary components appeared in the Roman era, this was no longer an “economic” necessity: merchants delivered all the necessary goods using the most direct routes, and gaps in geographical knowledge were quickly filled without such risky undertakings as sailing around Arabia” (Bukharin, 2007, pp. 10–11).

But did this voyage, the antithesis of Alexander's expedition to the Erythraean Sea under Nearchus, actually take place, or was it merely a plot device, the fruit of a rich literary imagination, pure fiction, like so much else in Euhemerus? A kind of literary-political utopia, like Plato's description of Atlantis in “Critias”,[5] Theopompus's digression on Meropia, and Hecataeus of Abdera's “On the Hyperboreans”?

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[3] Also called Tegea and Kos.

[4] We base this on the dates of the appearance of the stories - of Theopompus about Meropia and of Hecataeus of Abdera about Hyperborea- which most likely predate Euhemerus's literary voyage.

[5] This comparison is interesting in itself, but it lies outside our chosen perspective. We will limit ourselves to citing an example of works whose authors impute a view of things that is contrary to ours: (Honigman, 2009, pp. 1–35).

And what, in a more material sense, was the city at the base of the third "finger" of the Chalcidice? Where Xerxes dug a canal to avoid the loss of his fleet in a storm—a fate that befell Mardonius a decade earlier. It's impossible to say with certainty.

2.2. Isocrates, Egypt and the Prehistory of Euhemeric Writing

The list could, if desired, be extended with Isocrates's "Busiris". Atlantis, Meropia and Hyperborea were unfamiliar to the Greeks of their authors' time, from a practical standpoint, and in their minds remained a kind of literary fiction, a simple attempt to invent a "new mythology". Egypt, despite its remoteness from the Balkans, was a real, albeit difficult to access and largely mysterious, land. It seems that it was Isocrates who outlined the components of the "cliché" used by Alexandrian mythographers of the first half of the third century BC. The Egypt whose description the author, the head of the rhetorical school in Athens, conceived of as a mere example of epideictic technique and in no way related to actual history, differed little from the lands conjured up by the imaginations of Plato, Theopompus and Hecataeus. Busiris existed as a character in ancient Greek mythology, a symbol of Egyptian hostility toward foreigners, and a possible eponym for an ancient Egyptian city of a similar name. A city known, like Abydos, if the Palaephatus we mentioned was related to it, as the most ancient center of worship of the fertility god Osiris, is another possible coincidence. But Busiris was unknown in ancient Egyptian mythology! The cities to which the Greeks attributed his name were called differently by the indigenous peoples. For example, the one that stood on the left bank of the Damiet (Sebennyt) branch of the Nile was called Djedu, or Djed, that is, Per User Neb Djedu (Pr-Wsr-nb-Ddw), "the house of Osiris, lord of Djedu", from the name of the column with four crossbars at the top, symbolizing the spine of Osiris! Among the students of Isocrates were Theopompus (with his "Amazing Stories" and especially Meropia) and Ephorus (with a collection of various curiosities in 15 books), whom we will mention below, albeit briefly.

Thus, Isocrates set the following guidelines for Euhemerus and writers of his school:

a) Egypt as a geography in which the action unfolds, or the prototypes of social institutions are located, adapted by euhemerics to suit their needs, and ultimately, as the starting point for the development of the plot or the guiding concept of the work;
b) the civilizing mission of a historical deity – a cultural hero, elevated by merit to the upper tier, where sacred figures dwell;
c) a rationalistic interpretation of established mythologemes;
d) the extreme remoteness of the setting, or better yet, the fictional and literary nature of the "new geography" or "new mythology".

The development of these outlined lines in the spirit of euhemerism occurred in the late 4th – early 3rd centuries BC. The connecting link was Hecataeus of Abdera with his "Aegyptiaca"—a work so revered in antiquity that it became, and this is a virtually established scholarly view, the primary source of inspiration for Diodorus Siculus in compiling the first book of his "Bibliotheca Historica". Diodorus even cites Hecataeus (Diodorus Siculus, *Bibliotheca historica* 1.46.8) when discussing the Theban dynasty (of course, its Egyptian origin). This isn't the only mention of the Abderite historian in the "Bibliotheca Historica"; there's another—II, 47.1—but that one specifically deals with Hyperborea.

It is in Hecataeus, as well as earlier in his older Milesian counterpart, that we encounter elements of rational explanatory interpretation of mythological stories. Should we unconditionally classify him as part of the euhemeric mainstream? He was a genuine and, it seems, a more than serious historian, with his own name and biography. The eastward expansion of the Hellenic oecumene had no time to find its consequences in his works, which were free of entertainment (sometimes self-contained and often fantastical) and an emphasis on descriptions of exotica from abroad. Unlike Euhemerus and his colleagues, the idea of deducing the origin of the gods from the lifetime or posthumous apotheosis of earthly men, primarily kings or heroes, is not new. "Men as gods" predates Hecataeus of Abdera. And sometimes even Isocrates. One could begin with the sophist Prodicus of Keos—a full century ago. Or even earlier—with

Xenophanes the Colophonian. Similar ideas were nurtured after Isocrates by his student, the venerable historian Ephorus of Cyme.

2.3. Euhemerus and the Naming of a Tradition

The phenomenon that so clearly emerged at the turn of the fourth and third centuries BC—namely, a rationalist view of the origin and nature of the gods—came to be named after Euhemerus, although he appears to have been neither a pioneer in his genre nor superior to others in any respect. Besides Hecataeus, Euhemerus was chronologically preceded by Leon of Pella, who may have even "outstripped" Hecataeus himself. In terms of the vividness of his imagination, Euhemerus was inferior to Palaephatus. The most talented members of this imaginary community of interests, as one can judge, were Dionysius Scythobrachion, who mastered various styles and a sophisticated writing technique, and Iambulus. The latter was highly regarded by Lucian,[6] whose taste and aesthetic sense can be trusted. Thomas More and Tommaso Campanella, following Aristonicus (but, of course, in a different way), if the latter's Heliopolitans are no coincidence, were influenced by Iambulus. His narrative of the "Islands of the Sun" alone bore the outward signs of a purely solar utopia. Euhemerus might well have remained unknown, buried beneath the layers of time, even despite Quintus Ennius's Roman translation in the second century BC[7]. However, his current status is not inconsistent with ours. It's a simple euphony. "Euhemerism" sounds better than "Prodicism," "Hecatism," "Leonism," and even more so than "Palaephatism" or "Scytobrachionism." The conflict between Christianity and paganism, which intensified in the fourth century AD, also played a role. The works of Euhemerus, Leon, and other Euhemerics were most welcome to Christians. They provided compelling grounds for criticizing and devaluing pagan polytheism in favor of preaching the one God existing in Christ. It's telling that of the 15 fragments from Leon of Pella's writings that have survived to this day, including what would seem to be a surefire bestseller—a fictitious letter from Alexander the Great to his mother Olympias—11 are excerpts from Christian authors. Lactantius, even copying the list of atheists (in relation to the pagan gods, of course) from Cicero's "De natura deorum" (Cicero, *De natura deorum* 1.42) in his "De ira Dei" (Lactantius, *De ira Dei* 9.1–7), deleted Euhemerus.

Euhemerus was also fortunate in that Diodorus Siculus held similar views, viewing mythology as a kind of historical past, and promoted them in his "Biblioteca Historica". In fact, it is from Diodorus's surviving references to the works of Euhemerus, as well as Iambulus (Diodorus Siculus, *Bibliotheca historica* 2.55–60) and Dionysius Scythobrachion, that we can judge ancient euhemerism. This is based on the fact that Diodorus didn't actually quote, but rather paraphrased. We are forced to perceive them through the personality of the narrator, through his delivery or interpretation.

2.4. Leon, Palaephatus and the Problem of Pseudonymous Authors

In fact, it's difficult to ignore the figure of Leon of Pella, Euhemerus's predecessor, and also a remarkable figure who treated the human origins of the Egyptian gods. He can be added to the three authors mentioned above, who—either voluntarily or involuntarily—lost their authentic biographies. The same applies, incidentally, to Palaephatus with his pseudo-rationalistic explanations of myths and his treatise "Egyptian Theology". Unlike the aforementioned authors, neither of these authors resorted to the genre of travelogues, accounts of heroes, or eyewitness accounts of distant travels.

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[6] ***"Iambulus also wrote many strange miracles of the great sea, which all men knew to be lies and fictions, yet so composed that they want not their delight"*** – (Lucian, *A True Story* 1.3), translated by Francis Hickes.

[7] Franco de Angelis and Benjamin Garstad find Ennius's southern Italian origins and his warm feelings for his fellow countrymen significant – De Angelis, F.; Garstad, B. (2006), 214. Besides Euhemerus, Ennius translated Archestratus of Gela and Epicharmus, whose "Sicilianity" is unquestionable. True, the latter was born on Cos, but this did not prevent him from spending his entire adult life in Sicily.

It's precisely Leon and Palaephatus, their names, and excerpts from their pseudo-periplus or fictitious periageses—coincidentally or not—that we do not find in the fragments of the “Historical Library” we have[8]. The fact that, for example, the first book was entirely devoted to Egypt, while the others were supposed to recount a different geography, should not disturb us. Diodorus was readily interrupting and returning to seemingly well-covered themes and plots. Crete and Sicily wander from his book to book without any established or prearranged order. Plots are repeated and duplicated—the same Euhemerus appears in both the fifth and sixth books (a description of Panchaia itself and a reference to the author of the “Sacred Inscription”, respectively). And so on—any scholar could add dozens more examples of inconsistencies in the structure and composition of Diodorus's work.

A detailed analysis and comparison of the works—primarily “state romances”, as R. von Pöllmann called them—by these authors lies far beyond the scope of our present task. We cannot help but note certain oddities. Oddities that, when viewed from a different perspective, could prompt reflection and reinterpretation.

We know nothing concrete about any of them. The indications of their birthplaces and any possible dating are easily questioned and can be challenged. Even Euhemerus' presence at Cassander's court, for example, seems pure fiction to us. But it does seem so at the level of sensations—for Euhemerus's mention of his service to Cassander seems too much like an auxiliary device, creating a deliberate circumstantial context. [9]

There are serious objections to this assumption. Euhemerus's work, if it were commissioned or written with Cassander in mind, would have to be more “monarchical” than it actually is. The inhabitants of Panara are “the only inhabitants of Panchaia who live by laws they make for themselves”—for the simple reason that they “have no king over them”. The rest “do”, but his prerogatives are limited to merely selecting the best plots of land and receiving a tenth of the produce. And perhaps some nominal representative functions. However, let's not forget that we have only received small fragments—not even of Euhemerus' text, but of Diodorus' exposition of it. We are, of course, unable to corroborate our impressions with documents. Unfortunately, neither is likely to be anyone else. In any case, an outside testimony would carry more weight than the author's own autobiography, pared down to its bare essentials. All of them, it seems, were not averse to pseudonyms or even splitting them into several. Euhemerus is most definitely a pseudonym.[10]

Palephates appears to be a composite figure and, according to the Suda, consisted of four hypostases. Dionysius Scythobrachion had no fewer, and even the priest of the Temple of Helios, the “Cyclogographer” Dionysius of Samos, was one of them.

Perhaps Iambulus was not the real name of the author of “Islands of the Sun”.

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[8] This, however, does not mean they were absent altogether—for example, in the sixth book, which has only partially survived. The sixth book concluded the mythological section of Diodorus' work and paved the way for a review of the historical tradition.

[9] We are not alone in our doubts. With them, we join the authoritative company of Euhemerus specialists—for example, (Holzberg, 1996, p. 626; Winiarczyk, 2002, pp. 1–2).

[10] "And if we recall both the obscurity of Euhemerus’ origins and the extreme unusualness of his name in onomastic terms, one cannot resist the temptation to see in this name a significant pseudonym (whether of Scythobrachion or another mystifier), derived from the key word of the theory. Taken as an adjective, the word εὐ̃η μερος perfectly characterizes life on Panchaea—the pure, ideal result of divine action" – (Torshilov, 1999, p. 101). The translation of Euhemerus's name is "happy", "flourishing", "prosperous".

2.5. Iambulus, Solar Utopia and Chronological Problems

There are suggestions that his name, unusual to Greek ears (most likely Semitic), is explained by his Nabatean origins. However, Iambulus himself is referred to by Diodorus as a Greek and, at the end, seeks to return to Greece. For Iambulus, as stated in the opening of his narrative, initially set out to obtain aromaphores—incense and spices. It was the Nabateans who controlled the caravan routes to Arabia. But then his description of the Erythraean Sea must have included more specific details. The Nabataeans traveled the "incense road" to Arabia through the Negev Desert, where their "stations"—Mamshit, Avdat, Haluzza, Nizzana and others—have survived to this day. Moreover, the road led through Hegra, if it already existed, to the very south of the Arabian Peninsula—to what is now the port of Aden, opposite which lies Socotra, considered one of the most likely locations of Panchaia. Cana, at the western end of the peninsula, apparently did not yet exist as a port. However, Strabo's description of the Nabataean social system in Book XVI of his Geography seems archetypal for Iambulus's account of the Helionesites—a possible analogue of Alexarchus's "sun rams":

"The king is so democratic that, in addition to serving himself, he sometimes even serves the rest of himself in his turn". He often renders an account of his kingship in the popular assembly, and sometimes his mode of life is examined. Their homes, through the use of stone, are costly; but, on account of peace, the cities are not walled. Most of the country is well supplied with fruits except the olive; they use sesame oil instead. The sheep are white-fleeced, and the oxen are large, but the country produces no horses. Camels afford the service they require instead of horses. They go out without tunics, with girdles about their loins, and with slippers on their feet—even the kings, though in their case the color is purple. Some things are imported wholly from other countries, but others not at all so, especially in the case of those that are native products, as, for example, gold and silver and most of the aromatics, whereas brass and iron, as also purple garb, styrax, crocus, costaria, embossed works, paintings, and molded works are not produced in their country" (english translation by H. L. Jones; Strabo, Geographica 16.4.26).

But Leon of Pella (as Arnobius, for example, called him), also known as Leon of Egypt (Tertullian's version), according to Augustine, belonged to the highest-ranking Egyptian priesthood. Naturally, he, like the others, was connected to Egypt in one way or another. We exclude Euhemerus from this list only formally—in Diodorus and Eusebius' renditions of excerpts from the "Sacred Inscription", the name of Egypt is absent, although the social structure of Panchaia described by Euhemerus—a caste system with a dominant priestly class and a collective economy—is very reminiscent of ancient Egyptian (as suggested by M. Rostovtsev, M. Finley and others). The golden column in the Panchaian temple of Zeus Triphylios resembles an Egyptian obelisk-stele: ***"In the middle of the bed rises a huge golden column, inscribed with characters called sacred by the Egyptians, which recount the deeds of Uranus and Zeus, and then the narrative of Artemis and Apollo, added by Hermes"*** (Diodorus Siculus, Bibliotheca historica 5.46.5). Zeus is apparently identified with Amun. After all, the deification of the pharaohs in Ancient Egypt is the first and foremost archetype, an analogy for Euhemerus' constructions.

Iambulus's relationship to Egypt is less clearly traced. An even more complex question concerns the dates of the author's life and the publication of his novel. Scholars have even established a terminus ante quem for "The Islands of the Sun", based on the dating of the revolt of Aristonicus (133–129 BC) in Pergamon. The connection between the Helionesites of Iambulus and the Heliopolitans of Aristonicus (or rather, Gaius Blossius) does not seem improbable. And, for example, as well as André Bonnard and others, are tempted to speculate further: ***"In this case, we encounter Heliopolis and the Heliopolitans in a concrete form in one of the most widespread novels of this period. Are these phenomena in utopian literature not somehow connected with the ideal of a solar state preached to the masses by the descendant of the Pergamene kings? In any case, it is well known that the attempt to establish a social order on new foundations aroused keen interest in certain literary circles sympathetic to social reform. The Stoic Blossius of Cyme,***[11] ***who played no small part in the socio-political aspirations of Tiberius Gracchus, went to Aristonicus after his death. Apparently, he did this not only to find a safe haven from***

his plutocratic enemies in Rome, but also for internal reasons, interested in the idea of social reform sought by the poor" (Pöhlmann, 1910, p. 492).

Pöhlmann and Bonnard are not alone in their view. It has been and continues to be shared by other leading scholars, including J. Ferguson in his book "Utopias of the Classical World" (Ferguson, 1975, p. 144). But this connection is equally ambiguous. The reign of Eumenes III – Aristonicus – offers no substantive analogies with Iambulus's romance, other than the borrowing of "The Sun" for his slogans. Or perhaps we don't know them. Moreover, the social structure of Iambulus' island – which is more of a synoetic type – effectively rejects monarchy, which would hardly have pleased Aristonicus, given his claims to be the successor to the Pergamene royal dynasty. Residents live in communities of 400 people and are subordinate to their elder, whose authority is not hereditary. Whether Aristonicus conceived of the hypothetical Heliopolis as the embodiment of Iambulus's solar utopia is a serious question, the answer to which is not obvious. But even if Pöhlmann is right, this proves nothing. Iambulus could have lived and written his "Islands" much earlier; Aristonicus (or Gaius Blossius) simply happened to come across them at that time. Even the stoicism of Gaius Blossius, "the Hellenic prototype of Marx", as Arnold Toynbee called him (Toynbee, 1939, Vol. 4, p. 180), is an extremely indirect and clearly insufficient argument.

Another argument in favor of placing the date of Iambulus' "periplus" in the mid-second century emerges from an analysis of the concluding part of Diodorus' account of Iambulus' voyage: ***"Iambulus came to a certain village, whose inhabitants brought him to the king at Palibothra, a city several days' journey from the sea. And this king, a lover of Greeks and learning, gave him a warm welcome. Then, finally receiving permission for safe passage, he passed first into Persia, and then arrived safely in Greece"*** (Diodorus Siculus, Bibliotheca historica 2.60.2). This point provokes the critics' objection: ***"It should be noted that before the middle of the second century, the Greeks traveling from India to their homeland didn't need to "escape" from Persis, which was part of the Seleucid Empire and conquered by the Parthian king Mithridates between 170 and 138/37 BC"*** (Gutorov, 1989, p. 235).

A glance at a map of India reveals that Palibothra (also known as Pataliputra), today's Patna in the Indian state of Bihar, of which it is the administrative center, is approximately seven hundred kilometers from the Bay of Bengal. In this stretch, the Ganges receives several fairly large, full-flowing rivers from the right, which are not easy to cross—the Punpan, Folg, Jhena Nadi, Mohane, Harohar and Kiul. And according to Iambulus, this is "a city located several days' journey from the sea"? Can we accept Iambulus' story of how, within a few days, well-wishing residents of a coastal village "brought him to the king in Palibothra" with complete and unconditional faith?

But what if the events described took place (if, indeed, they took place at all) at the end of the 4th century, when Seleucus was only expanding his domains and didn't control the territory as far as Palibothra—in whole or in part? Even after Seleucus's treaty with Sandrocottus (Chandragupta) and the exchange of lands beyond the Indus for 500 elephants, a foreigner's safe passage from Palibothra by land would have been unlikely. Megasthenes, who visited Sandrocottus, had ambassadorial status from Seleucus (and, incidentally, resided in Palibothra), protecting him from unfavorable circumstances. Nabataea, meanwhile, was controlled by Ptolemy, and relations between Seleucus and Ptolemy had experienced periods of cooling and even an alliance against each other (for example, after Seleucus' marriage to Stratonice, the daughter of Demetrius Poliorcetes, in 300 and his rapprochement with her father in defiance of Lysimachus' alliance with Ptolemy). It's difficult to answer affirmatively whether a person from Ptolemaic-controlled territories could have traveled from Palibothra to his own lands, unhindered and unaccompanied, or even escorted, across the entire Indian subcontinent and then the dominions of Seleucus.

[11] An error – apparently, Cumae should be here; its cause, one might assume, lies in the confusion of Cumae with the Aeolian Cyme (the birthplace of Hesiod and Ephorus) opposite the island of Lesbos (now an abandoned and half-submerged settlement in a bay not far from the city of Aliagi), where, at the very beginning of the revolt, Aristonicus was defeated in a naval battle.

Furthermore, in the mid-second century BC, the coasts of the Red Sea and the Persian Gulf did not represent the terra incognita for the Greeks that they had been during the time of the Diadochi and the first Epigoni. We won't claim that the development of the outlying lands had advanced very far by then, but it's unlikely that tales of people with forked tongues and membrane-like valves in their ears, and four-eyed, two-mouthed, but single-stomached turtles, could have provided the necessary narrative entertainment. Alexander's campaigns sparked the need and fashion for tall tales. The peak of colorful inventions of unseen wonders in exotic lands occurred not even in the time of Scylax (or his namesake, with the prefix “Pseudo-”), Ctesias or Nearchus, who were, after all, isolated excesses each, but rather in the time of Megasthenes, Demetrius, Duris, Palaephatus, Euhemerus, Dionysius Scythobrachion and others. Placing Iambulus within this chronology makes more sense.

And, in general, how justified is it to demand scholarly integrity and factual impeccability from this, in R. von Pöllmann's words, “socioeconomic Jules Verne” (Pöhlmann, 1910, p. 321)[12] —a work of fiction full of arbitrary details?

2.6. Dionysius Scytobrachion and Palaephatus in the Alexandrian Context

Researchers also disagree regarding Dionysius Scytobrachion: ***“The traditional dating of Scytobrachion's life was based on the testimony of Suetonius,*** [13] ***which means Scytobrachion lived in the second half of the second century. Thanks to papyrus 2*** (Papyrus Hibeh 2.186, col. 1, ll. 8 ff.), ***still unknown at the time of Jacobi's work, dated by archaeological and paleographic data to 250–220 BC and containing an interpretation, referring back to Scythobrachion, of the fire-breathing bulls of Aeëtes as guardians from the Taurian tribe, as well as a mention of Heracles' stay with the Argonauts in Colchis (which was also mentioned by Scythobrachion), J. Rusten determines the terminus ante quem for the works of Dionysius. He seeks the terminus post quem by comparing the marriage of Basilia and her brother Hyperion in Dionysius's book with the establishment of the cult of the Adelphi Gods in Ptolemaic Egypt around 270. This places Scythobrachion's life in the first half of the 3rd century, and Suetonius was more correct when he doubted Gniphon's acquaintance with him than when he nevertheless accepted his possibility”*** (Torshilov, 1999, pp. 103–104).[14]

Thus, it appears that excluding Iambulus and Dionysius Scythobrachion from the Alexandrian nominees for the Euhemerics would be premature and incorrect. We have no serious grounds for doing so.

And what about the semi-legendary Palaephates, author of histories of Cyprus, Delos, Attica (!), Arabia, and possibly Troy? As well as of “Egyptian Theology” and the famous treatise “On the Extraordinary” (“περὶ ἀπιστῶν”), in which he interpreted many mythological stories in a rationalistic, sometimes allegorical manner? A mythical figure, a pseudonym behind which hid an aesthete and erudite, a man prone to mystification and practical jokes?

We have already mentioned that the Suda contains information about four Palaephates (Suda, π 69–72), who were placed in both the fourth and third centuries. Such a diversity of Palaephates is in itself astonishing due to the unusualness and extreme rarity of such a name, [15] which more closely resembles a pseudonym.

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[12] Pöhlmann goes further and calls Iambulus's account "a description of a voyage in the style of Simbades the Navigator".

[13] M. Antonius Gnipho institutusque Alexandriae quidem, ut aliqui tradunt, incontubernio Dionysii Scytobrachionis; quod equidem non temere crediderim, cum temporum ratio vix congruat; («M. Antonius Gnipho who also studied in Alexandria, as they say, where he was a friend of Dionysius Scytobrachion, which, upon reflection, I would believe, although the timing barely adds up”} — De Gramm. 7 — the author's reference.

[14] The cited author most likely relied on Chapter VI: Dionysius' Date from Rusten, Jeffrey S. (1982), 85–92.

[15] Πάλαι was usually applied to geographical names, denoting the "old age" of the bearer.

One of them claimed to be an Athenian and was an epic poet, another an Egyptian (or Athenian) and a grammarian, and the remaining two were attributed to Hellespontine (Abydos) or near-Hellespontine (Priene) origins. Each of these Palaephates claimed to be the author of a book on extraordinary rarities, [16] suggesting a hypostasis of our own Palaephate consisted of four. According to the Suda, Palaephates from Abydos was considered a friend of Aristotle. The Alexandrian rhetorician Aelius Theon, in his "Progymnasmata", called him a Peripatetic, which seems logical. Therefore, if we assume that the Stagirite's friendship with Palaephates began in Atarneus, not far from Abydos, albeit via the Hellespont, then the latter could theoretically have followed the former to Athens and thus become an "Athenian." He could have reclassified himself as an "Egyptian" if he had become very close friends with Demetrius of Phalerum at the Lyceum and accompanied him to Alexandria.

In fact, this collective Palaephates could have been Egyptian simply by their birthplace. Abydos in Asia Minor, at the narrowest point of the Hellespont, where Xerxes crossed to Europe over a bridge of ships in 480 CE, had a full namesake in Middle Egypt—a long-standing religious center, a place of worship for Osiris, whose head, according to local legend, was buried there. Osiris was one half of Serapis, the syncretic Hellenistic deity in whose invention Demetrius of Phalerum played a very active role (or, to put it simply, was its initiator).

However, the Egyptian origin of our Palaephates is still extremely dubious. We do not know of an old Greek colony (apoikia? katoikia?) or even a merchant trading post until the mid-4th century, when Palaephatus, according to our unverified assumption, should have come into being, so far south from the coast and the main trade routes.

The next unifying feature? Dionysius and Palaephatus also included the Trojan cycle (we simply have no similar information about Leon). Whether Euhemerus had Homer's Scheria and Syra in mind when writing his "Sacred Inscription" or whether this is a coincidence, we are unable to determine for certain. ***"Diodorus recounts two of Scythobrachion's books: "The Campaign of Dionysus and Athena" (the title is provided by the "Suda") and "Argonautica". The existence of a third, about the Trojan War, known from the "Suda," is confirmed by the scholia to the "Iliad", from which it follows that Scythobrachion not only commented on but also interpolated Homer." ЭThe author declared "The Campaign of Dionysus and Athena" to be a retelling of the "Phrygian Poem" by Thymetes, son of Thymetes, son of Laomedon, a contemporary of the Trojan War*** (Torshilov, 1999, pp. 104–105). "Contemporary" isn't quite the right word. More like a character, for according to Vergilius, it was he who, out of hatred for his brother Priam, proposed introducing the horse into Troy (Virgil, *Aeneid* 2.32–34). And Palaephates also distinguished himself with "Arabica", joining Euhemerus and Iambulus, whose characters sailed to certain islands in the Erythraean Sea.

2.7. Common Generic Features: Islands, Mirabilia, and Exotic Geography

The island setting was embodied (following Homer and the same Hecataeus) by Euhemerus, Dionysius, and Iambulus.

And almost all of them invented and described the unusual flora and fauna of exotic locales, appealing to the widespread popular interest in previously unknown geography that sharply increased after the Macedonian army's campaigns in Asia. This need for, in the words of R. von Pöllmann, "ethnographic romanticism" was first responded to by Ctesias of Cnidus, Megasthenes, Onesicritus, Clearchus of Soli and even Duris of Samos, who, unlike the preceding historians, had never actually visited anywhere.

[16] The only difference is the number of volumes. There were either five or just one, which can be assumed to contain an epitome.

Were the works of Euhemerus, Scythobrachion and Iambulus, excerpts of which have been handed down to us by Diodorus Siculus, utopias—utopias from which the bearer of an idea for the reconstruction and improvement of the state and social machinery could glean something useful?

2.8. Utopia, Theology and Historiosophy

Formally speaking, they were certainly utopias. They were literary utopias. ***"Utopias are deeply inherent in human nature; it cannot even exist without them. Man, wounded by the evil of the surrounding world, has a need to imagine, to evoke the image of a perfect, harmonious order of social life. <…> Far from being unrealizable, the vision of a future harmony is the main, indisputable characteristic of utopia. Man lives in a fragmented world and dreams of a whole world. Wholeness is the main characteristic of utopia. Utopia must overcome fragmentation and achieve wholeness"*** (Berdyaev, 1951, p. 158).

But the utopian nature of the narratives of Euhemerus, Scythobrachion, and Iambulus is only the third or fourth layer. This is the opinion, for example, of D. O. Torshilov:

"Neither the social order of Panchaea nor the deification of the monarch are the essence of euhemerism in itself: royal power for the euhemeric deity is merely a means to help it fulfill its mission—to bring civilization and order to the universe... The change wrought by the euhemeric deity is a transition from savagery to culture, from haphazard gathering to agriculture, from impiety and lawlessness to law and piety, that is, ultimately, from social chaos to a social cosmos (of which the utopian order of Panchaea is an example), just as natural chaos is ordered by a traditional god in the cosmogonic process. <…>

Having divided the gods into cosmic and social, euhemerism in fact abandoned the former altogether... Uranus becomes the god of the sky for the euhemerics because he created and spread good and true knowledge about it; The deity, therefore, is no longer the sky itself, but society's knowledge of the sky; not the object, but the social subject's knowledge of it—such is the deity of euhemerism. <…>

The essence of the "Sacred Inscription," therefore, is theology and historiosophy, and only then utopia. The mythographic significance of euhemerism is that, in Euhemerus, mythology becomes theology and historiosophy, or rather, attempts to reclaim these long-lost functions. Logographers rendered mythology a dull sum of information, and poets - a collection of empty fantasies; euhemerism attempts to restore both its fascination and sacred significance, transforming it into a "novel" and "sacred history" (Torshilov, 1999, pp. 99–102).

2.9. Euhemerism as Political Satire and Apotheosis

On the other hand, one can also see in Euhemerus' "Sacred Inscription" a kind of satirical pamphlet.

We take as our starting point a passage in Aristophanes' "Birds" (144-145): ***"But there is… a happy city on the Erythraean Sea"***. In a comedy that caustically mocks the common cliches of contemporary utopian thought, not excluding, incidentally, Hippodamus of Miletus, who deserved it least. The reading public, of course, quickly guessed the address.

However, this may not have been the most significant for the Greeks of that time. Euhemerus' "Sacred history" (as the "Sacred Inscription" was sometimes translated) also had a "double bottom". Let us note such passages in Euhemerus as ***"when Uranus was king of the inhabited earth, he loved to spend time in this place…"*** (Diodorus Siculus, Bibliotheca historica 5.44.5) and about Zeus—***" when he was among men and reigned over the entire oecumene***. (Diodorus Siculus, *Bibliotheca historica* 5.46.3) Euhemerus' cultural hero, honored for his merits with ascension to Triphylian Olympus, is the king.

The lifetime or posthumous apotheosis of Euhemerus' time was not yet the first Ptolemies, but already Alexander, said to have been hated by Cassander with every fiber of his being, and Demetrius Poliorcetes with Antigonus Monophthalmus, the Macedonian king's main immediate adversaries during that period. And, indeed, Philip, who placed his statue next to the twelve Olympian gods at the wedding feast in Aegae. The Antipatrids became the reigning dynasty between 306 and 304—history has left us no less vague a landmark. Naturally, the main target of Euhemerus' pamphlet could hardly have been Nicagoras of Zelea, who imagined himself to be Hermes and dressed in his robes—an episode from the fourth chapter of Clement of Alexandria's "Exhortations to the Pagans". Nor was it Plutarch's character—Menecrates of Syracuse, a physician during the time of Philip, who signed his prescriptions with the name Menecrates-Zeus. Euhemerus' orderer, if we are to believe him (as reported by Diodorus), could have been the Macedonian autocrat. Even more freedom could be given to the imagination—as with Leon of Pella, who composed Alexander's correspondence with Olympias.

It seems Euhemerus did allow himself a caustic allusion to Alexarchus—the detail about a hill rising on the island called the Throne of Uranus. In Alexarchus's Ouranopolis, both Uranus and the elevated landscape were present. However, this could have been a simple coincidence—Mount Uranias towered not far from Carthage. But the deification of man, which for Euhemerus and others was merely the subject of an amusing rhetorical exercise or even, to some extent, a philosophical speculative construct, became imperative for Alexarchus in Ouranoupolis.

2.10. Alexandria, Mouseion and the Possible Euhemeric Circle

Philosophers, writers, and other intellectuals rarely emerge from a vacuum. Being solitary isn't the most natural or desirable state for them. They need occasions, topics, and a forum to express their views, ideas, and concepts, to exchange opinions and, ultimately, debate. In the days before the internet and mass-produced books, communication between professionals and their peers was difficult. Separated by distance and the impossibility of communication, they were forced to simmer within a limited range of topics. Unless, of course, they were united under one umbrella by certain schools, or brought together by the same or roughly the same geography. This is why it's not difficult for us to concede—not to assume, for we lack even the bare minimum of evidence, only implicit associations—that Euhemerus, Leon of Pella, Palaephatus, Dionysius Scythobrachion and Iambulus were not separated by miles and years.

And even Hecataeus. Let's also not forget that he authored a work, "On the Poetry of Homer and Hesiod." It has not survived, and we can only guess whether it emphasized identifying what we would now call utopian motifs, or whether Hecataeus was interested in something entirely different in the work of the pillars of ancient epic poetry. Suda also called him a grammarian. If it is true that he took part in Alexander's campaign to the borders of Syria, he could have discussed Homer with his fellow countryman Anaxicrates, who was credited with mentoring Hecataeus' teacher Pyrrho, and Callisthenes, who are also known to have studied the work of the "great blind man".[17]

It is supposed that Hecataeus spent the rest of his days, approximately until 290 (when Demetrius of Phalerum had already settled in Egypt), in Alexandria with Ptolemy. Euhemerus' work appeared around 280—at least, this is what Jacobi and other researchers believe, based on Callimachus's mention of his name (Callim F 191, 10–11 Pfeiffer). Moreover, it appeared in Alexandria.[18] Scythobrachion, it seems, worked in Alexandria. It's possible that Palaephatus also visited Alexandria. As for Leon of Pella, there's much less doubt about that.

But that's not all. Callimachus also mentioned a certain Amometus, also called a grammarian, like Hecataeus, and also an Alexandrian. Amometus' name also appears in Pliny the Elder, also in association with Hecataeus:

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[17] Although the latter two seem to have been irreconcilably at odds with each other.

[18] An inventory of all proposed dates for the composition of the *Hiera Anagraphe* can be found in Winiarczyk (2013, p. 15). It is also possible that Euhemerus spent a considerable period in Alexandria (Brill's New Jacoby, n.d., "063 Euhemerus of Messene", p. 7).

"Their first river of record is the Psitaras, the next is the Kambari, the third is the Lanos, then the Chryse Peninsula, the Gulf of Kirnaba, the Atianos River, the Gulf of Attacorus, and their people, protected from all harmful winds by mountain peaks exposed to the sun—they live in the same climate as the Hyperboreans; Amometus wrote a separate book about them, just as Hecataeus wrote about the Hyperboreans". An inventory of all proposed dates for the composition of the Hiera Anagraphe can be found in Winiarczyk (2013, p. 15). It is also possible that Euhemerus spent a considerable period in Alexandria (Brill's New Jacoby, n.d., "063 Euhemerus of Messene", p. 7). In Pliny, the Attacori also appear in the vicinity of the Hyperboreans! [19]

We know virtually nothing else about Amometus, although F. Altheim, for example—unlike K. Müller, who limited Amometus' contribution to the Attacori—considered him Pliny's primary source (though via Varro) for the northeastern part of the Oecumene. He was also credited with a certain Nile "periplus." But, of course, our attention is drawn to the fact that Pliny compares Amometus and his Attacori's writings, in terms of genre, to Hecataeus and the Hyperboreans. "Ethnographic romanticism" again? Amometus is a mystery. And his name is atypical. Perhaps Cyrenaic. Or perhaps it is a pseudonym, like Dionysius Skitobrachion, Euhemerus, Palaephates, and, quite possibly, Iambulus.

Even less is known about Timocles, who settled his Ophiocanes, or Ophiophagi (Ophiocane / Ophiophagi)—"snake-eaters." Regarding Timocles, as well as Amometus, Euhemerus, and Iambulus, see Rohde (1960, pp. 219–220)—in roughly the same region of the Oecumene as Amometus. Suda knows of two Timocles, both of whom were comic poets; only one also wrote tragedies (Athenaeus, *The Deipnosophists* 9.407b), while the other contented himself with comedies and belonged, according to most scholars, to Middle Comedy—contrary to Pollux, who classified him as an author of New Comedy. The general consensus now is that these are not two different poets. There is also an epigrammatist with the same name, presumably from the third century, who is attributed, with varying justification, to the Palatine Anthology (§ 12.32), but that is all we have on him.

We omit from this list Theopompus and his Meropia, which clearly suit our topic. Theopompus even died in Egypt – and apparently by a natural death, although there were rumors that ***"Ptolemy, the king of that country, not only did not want to receive the writer, but also almost took his life as a man who constantly interfered in most affairs, if his friends had not interceded on his behalf".*** (Photius, Bibliotheca 176).

In all honesty, let's also recall Theodore the Atheist. He apparently made no mark in the "new mythology" field. However, according to Diogenes Laërtius, he wrote: "On the Gods." It's difficult to say to what extent his atheism, the completeness of which is questioned by many, overlapped with the ideas of Euhemerus and his associates. Nevertheless, we cannot rule out some significant parallels—for Theodore considered the gods to be the products of human settings. Moreover, Theodore was also an Alexandrian during the period we are interested in!

3. CONCLUSION

Was the Alexandrian epicenter of early Euhemerism an accidental and inexplicable coincidence? Could the diversely learned philosophers, historians, and gifted writers just mentioned, all with similar interests, have developed separately and independently, even while living side by side? And could Demetrius of Phalerum have been somehow connected to this hypothetical community, if it actually existed? An unofficial minister of culture at the Ptolemaic court in Alexandria, who, in addition to collecting books for the Library, also gathered brilliant representatives of the Greek scientific and artistic elite around him? A keen connoisseur of Homer and an admirer of extraordinary personalities—regardless of their school or geography?

[19] "Some authors place the Hyperboreans not in Europe, but on the nearer shores of Asia…" (Pliny the Elder, *Natural History* 4.90).

We have no definitive, proven answer to this question. And given the current silence on sources, there can be no such thing. But it suggests itself. The intellectuals of such a "circle", if it did indeed form in Alexandria during the years we're reviewing, were certainly not members of the underground. They could not have managed without access to and affiliation with the Library and the Mouseion, without Ptolemaic "research grants" in one form or another, administered by Demetrius of Phalerum.

It's unlikely that Demetrius couldn't have been personally acquainted with Hecataeus of Abdera, who enjoyed the affections of Ptolemy Soter and who frequented the same corridors of Alexandria at the same time, though likely more rarely. One could, for example, even try to discern in one of the passages of Plutarch's "Table Talk" about Hecataeus a connection to the sumptuary laws of the Phalerean in Athens (Plutarch, *Table Talk* 4.3.1), but this isn't entirely clear as indisputable confirmation of the nature of their relationship. Neither is the above-mentioned hypothesis about Demetrius of Phalerum's close acquaintance with Palaephatus.

The surge of literary "romanticism" in Alexandria at the time—ethnographic (according to Pöhlmann), or any other—botanical, zoological, mineralogical, etc.—all these imaginary chorographies of unknown lands, existing only in the imagination of their authors—can also easily be explained logically, even beyond the expansion of the Hellenic oecumene as a result of Alexander's campaigns. Description, systematization, and cataloging, even if pertaining to mysterious natural phenomena, the customs and social structures of the inhabitants of distant lands, unusual constructions, and the deeds of mythological and legendary figures, is a thoroughly Peripatetic practice, inherent to this philosophical school from its inception. And it was diligently reproduced in the Alexandrian Mouseion by Demetrius of Phalerum and Strato. This line, in its "respectable," unimaginative execution, soon acquired the highly respected name of paradoxography.[20] It included the works of the same Aristotle ("History of Animals", "On the Customs of the Barbarians"), albeit sometimes with the prefix "Pseudo-" ("Stories of Curiosities", "On the Cosmos"), Theophrastus ("Research on Plants", "On Metals", "On Stones", "On Smells", "On Salt, Milk and Alum", "On Water", "On Fossils", "On Darkening", "On the Morals and Intelligence of Animals", "On Biting and Attacking (Animals)", "On Color-Changing [Animals]", "On the Differences in Animals by Habitat", "On Animals Living on Land", "On the So-Called Envious Animals" etc.) and even partly Dicaearchus ("Life of Greece").

The Euhemeric paradoxographers of Alexandria, deliberately and consciously upending traditional, everyday notions in the minds of their readers, simply diluted the Lyceum's descriptive standard with fictional effects, a penchant for entertainment, and sometimes even almost shocking sensationalism.

Our Euhemeric writers weren't the only ones guilty of expositions of various "mirabilia". The craze for inventing unprecedented, exotic curiosities and composing blatant fables about distant and unattainable corners of the world didn't focus on the Ptolemaic capital. It didn't bypass Cnidus (Ctesias), Samos (Douris), Cyprus (Clearchus of Soli), Sigeum (Damastus), Plataea (Deimachus), Chios (Theopompus), Cyme (Ephorus), and other islands and mainland cities in Greece.

And, incidentally, not only in Greece, but also in Thrace. For example, Berga, across the Strymon from Amphipolis, was the birthplace of Antiphanes, the author of the book "Ἄπιστα" ("On the Improbable")—a collection of colorful fictions about unknown lands and peoples, considered one of the founders of the genre.

Demetrius of Phalerum also has "On Antiphanes" in the list of works cited by Diogenes Laërtius. From what we know (or rather, don't know), this Antiphanes could have been either an Athenian (actually a metic, most likely from Rhodes), a renowned author of Middle Comedy, or the aforementioned Bisaltian from Berga. The probabilities are equal, but in the latter case, the version under consideration about the Euhemeric community in Alexandria would take on a more coherent outline.

[20] From the Greek παρὰ δόξαν – against the ordinary.

And perhaps it would have deserved more of a place in the history of the Mouseion and the Library, despite the "anti-monarchism" of their works. If things are different, then Alexandrian "regular" paradoxography must have begun a little later – with the Cyrenians Callimachus and Philostephanus, Bolos of Mendes and the Egyptian Archelaus.[21] But certainly not out of nowhere.

[21] The biography of this epigrammatic poet is full of obscurities. At least regarding his birthplace – a certain Egyptian town named either Chersonissus or Chersonessita. Archelaus has sometimes been placed in the time of both Alexander and the first Ptolemy. But we avoid the temptation to add him to our list of euhemerics, for we find it more reasonable to rely on the point of view and argumentation of Antonius Westermann – Westermann (1839) Παραδοξογράφοι: Scriptores Rerum Mirabilium Graeci, Insunt: (Aristotelis) Mirabiles Auscultationes. Antigoni, Apollonii, Phlegontis Historiae Mirabiles, Michaelis Pselli Lectiones Mirabiles, Reliquorum Eiusdem Generis Scriptorum Deperditorum Fragmenta ; Accedunt Phlegontis Macrobii Et Olympiadum Reliquiae Et Anonymi Tractatus De Mulieribus Etc., Londini., XXII – XXIV. However, Archelaus has even been dated to the time of Ptolemy Euergetes II.

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POLITICAL GOALS UNITING SHEIKH JUNAYD, LEADER OF THE SAFAVID ORDER, AND HASAN BEY BAYANDURLU

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ABSTRACT

To research the history of medieval Azerbaijan, it is important to understand the historical roots of political alliances in the region during that period. This will also help to understand the political processes taking place today, as similar strategic alliances continue to influence global politics. Bearing this in mind, our research examines the political alliances between the Aghqoyunlu leader Uzun Hasan and Sheikh Junayd, the leader of the Safavid order, as an example of strategic alliances in the medieval period. The research utilizes methods such as historical analysis, comparison, and contextual interpretation, relying on reliable primary sources and scholarly research. The results of the research show that although the alliance initially served the purpose of consolidating Uzun Hasan's regional power, it ultimately contributed to the realization of Sheikh Junayd's ideological struggle in the long term and led to the establishment of the Safavid state by Shah Ismail. This research allows for a deeper understanding of the relationship between religious movements and political goals.

Keywords: Hasan Bey Bayandurlu, Sheikh Junayd, Safavid order, Akkoyunlu

1.INTRODUCTION

In the rich fabric of history, particularly during the expansive period of the Middle Ages, the symbiotic relationship between religion and political authority profoundly influenced the formation of states and the trajectory of nations. This influence was subtle and multifaceted, penetrating to varying degrees across diverse geographies and manifesting its effects in diverse and often complex ways. This period is particularly significant due to the central role religion played in political affairs in both the Muslim and Christian worlds.

The second half of the 19th century and the beginning of the 20th century witnessed a significant paradigm shift characterized by the articulation of the principle that religion and state should be separate. However, this assertion obscures the fact that religious ideologies are deeply embedded in the foundations of states and continue to shape contemporary political processes. While the principle of secularism was groundbreaking, it did not completely sever the entrenched links between religious beliefs and political structures, and these links still influence modern governance and societal norms.

Considering the key role played by religion-state relations in the complex fabric of the modern world, our scholarly research undertakes a critical examination of these enduring dynamics. Specifically, we will explore the shared interests that united two powerful forces in Anatolia, Azerbaijan, and the Caucasus region during the 15 th century. At the forefront of this historical alliance were Sheikh Junayd, the wise leader of the Safavid order, who gained widespread support through his religious propaganda, and Hasan Bey Bayandur, a prominent military leader from Anatolia.

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In this article, by examining the relationship between these two important figures of the medieval period, Sheikh Junayd and Hasan Bey, we will attempt to understand how their religious and political ambitions influenced their surroundings and left a lasting mark on history.

As an Azerbaijani historian, my interest in this topic also stems from the necessity of conducting in-depth research into the medieval history of my country. Throughout the medieval period, Azerbaijan was ruled successively by the Baharli (Karakoyunlu), Bayandur (Akkoyunlu), and later the Safavid dynasties. However, the subsequent occupation of Azerbaijan by Tsarist Russia and later its incorporation into the USSR, in accordance with the ideological requirements of the new regime, created obstacles to the thorough study of the region's medieval history, aiming to erase national memory. After Azerbaijan regained its independence, the study of new sources and the opening of archives made it essential to research the obscured pages of our region's past.

In our study, in order to evaluate the relationship between Sheikh Junayd of the Safaviyya order and the Bayandur Bey of Anatolia, Hasan Bey, we took into account the broader political and social context of the period and applied historical analysis methods to conduct a detailed examination of their relationship. For this in-depth analysis, we referred to several Persian-language sources, including *Tarikh-i Alam-Ara-yi Abbasi* by Iskender Bey Munshi (2009), *Kholde Barin* by Muhammad Yusuf Qazvini (1993), and *Gesasul-Khagani* by Valigulu Davudgulu Shamlu (h.1395). All of these sources were written during the Safavid era and offer valuable insights into this period. We also referred to Molla Kamal bin Jalal al-Din Muhammad Manjam's *Tarikh-e Safaviyan* (h.1355). These sources were instrumental in our examination of materials related to Safavid Sheikh Junayd. We have thoroughly and meticulously examined the perspectives on that period presented in these sources.

During our research, we also used a comparative method by consulting sources critical of the Safavids. Among these sources, we examined the work of Ruzbihan Khunci, the court historian of the Akkoyunlu ruler Sultan Yaqub, who was politically opposed to the Safavids. His work, *Tarikhi Alam-Ara-yi Amini*, proved to be a particularly informative source (1987).

Previous researchers have primarily focused on events that took place after the establishment of the Safavid and Akkoyunlu states and have studied the relationships of their rulers with other regional powers. However, there has been limited scholarly attention paid to the earlier period - specifically, Hasan Bey's political struggle to gain power prior to the establishment of the Akkoyunlu state and the activities of the Safavid sheikhs in the region before the founding of the Safavid state. Taking this into consideration, we focused our analysis on these lesser-explored topics within the aforementioned sources. In our study, we considered not only the information provided by primary sources but also local and foreign historiographical works on this period and topic.

Historical studies on the subject prove that although Sheikh Junayd Hasan Bey supported the political ideas of Bayandurlu, he was also able to formulate a new ideology for the future political steps of the sect. His new ideology and the political traditions he created became the means for the Safavid leaders who led the sect after him to achieve greater victories. This process ultimately led to the formation of the Safavid state, which left deep political and ideological traces in the history of the Eastern region, especially Azerbaijan.

2. THE RELIGIOUS AND POLITICAL ACTIVITIES OF SHEIKH JUNAYD AS THE LEADER OF THE SAFAVIYYA SECT

Sheikh Junayd, who led the Safavid order from 1447 to 1460, was a leader who led to the emergence of political tendencies within the order. His attempts to directly intervene in political processes distinguished him as the first Safavid sheikh to express a desire to establish a state. During his leadership, Shiite beliefs also began to manifest themselves in the ideological foundations of the order. Sheikh Junayd's leadership ensured that the Safavid order participated more decisively in political processes, as a sign of a departure from traditional practices.

When the Safavid Order was founded in Ardabil in 1300 by Sheikh Safiyaddin, it was a direction that preached İslam and Divine love, fulfilling the spiritual religious needs of people. Gunel Rahimli writes that “The Safavid Order emerged in its early period as a Sufi-centered structure, uniting diverse religious and ethnic communities around a spiritual center” (Rahimli, 2026, p.17). However, under the leadership of Sheikh Junayd, the direction of the order changed.

Under Sheikh Junayd 's leadership, the Safavid movement underwent a significant transformation. His vision extended beyond the spiritual and religious realms into a relatively unknown political landscape. Sheikh Junayd continued to openly pursue state - building, creating the foundational ideology that would later be implemented by his successors. His commitment to Shia beliefs further solidified the sect's identity and distinguished it from other contemporary religious movements. This strategic alignment won the support of Shia followers and positioned the Safavids as a formidable political force. Sheikh Junayd's leadership thus represents a critical stage in the changing nature of the Safavid order, marking its transition from a purely spiritual entity to a politically ambitious and influential movement.

Sheikh Junayd, with his unique thought process and unique personality, blazed a trail that distinguished him from his predecessors. His leadership ushered in a transformative period for the Safavid order, marking the beginning of a departure from existing norms. This was not just a doctrinal change, but the beginning of a transition from being a mere religious order to a nascent state (Shukurov, 2006, p. 49).

In a short time, Sheikh Junayd gained a large number of supporters and their respect. Realizing the inherent power of the sect, he decided to use this influence and build a strong state. European researcher A. Allouche wrote about the actions of Sheikh Junayd that, after taking leadership, Junayd significantly departed from the way of life adopted by his ancestors. The desire for power, inflamed by new ambitions, began to revive in his dreams. The main goal of the Sheikh was to conquer territories and regions, thereby achieving comprehensive influence and dominance (Allouche, 2001, p.59).

In the *Lubbut-Tawarikh*, a well-known source from this period, the beginning of the foundation of the Safavid state is attributed to Junayd. The text describes this development as follows: "Upon assuming leadership, Sultan Junayd emerged as a contender for global influence, marking the initiation of the Safavid kingdom" (Qazvini, 1984, p. 387). Another source mentions that Sheikh Junayd amalgamated the external and spiritual caliphates, adorning his head with the crown of wealth and kingship, thereby symbolizing the commencement of both external and internal sovereignty (Qazvini, 1993, p. 48).

The Sheikh persisted in expanding his propaganda efforts to further enhance the sect's influence. In the source titled *Tarikh-e Safaviyan*, it mentions Sheikh Junayd, stating that: "with each passing day, the authority of Hazrat in society was growing stronger" (Manjan, h.1355, p. 3). Perspectives indicate that Sheikh Junayd possessed a distinct personality.

During the period when Sheikh Junayd led the Safavid sect, Jahanshah Baharli (Karakoyunlu) held rulership over Azerbaijan. Jahanshah was aware of Sheikh Junayd's political inclinations and the support he had garnered. Recognising Junayd as a significant threat to the Karakoyunlu state, Jahanshah acted to remove the Sheikh from Ardabil and the territories under his influence.

Sheikh Junayd's political tendencies also caused discontent among his uncle, Sheikh Jafar. Sheikh Jafar was a supporter of the continuation of the order as a purely religious and spiritual institution. He was also known for his close relationship with Jahanshah of Karaqoyunlu. Sheikh Jafar's son was married to the daughter of Jahanshah.

The Ottoman historian Müneccimbaşı notes that, in addition to Jahanshah, Sheikh Junayd's uncle, Sheikh Jafar, also refused to recognize him as the leader of the sect. There was a significant disagreement between Sheikh Jafar and Sheikh Junayd regarding the religious orientation of the sect. Although Sheikh Junayd was inclined towards Shiism, Sheikh Jafar advocated preserving the sect's previous Sufi orientation. This disagreement indicates that Sheikh Junayd followed a completely different path, while

Sheikh Jafar adapted to the traditions of his ancestors (Müneccimbaşı, 1979, p.180).

Regarding the relationship between Sheikh Junayd and Sheikh Jafar, the contemporary source *Gesasul-Khagani* recounts: "One day, his uncle Sheikh Jafar entered into dispute with him over the matter of his brother's succession. Mirza Jahanshah, the son of Kara Yusif, the reigning king at that time, became wary of Turkman Sultan Junayid's actions as a ruler. Consequently, he began to support Sheikh Jafar" (Shamlu, h. 1395, p. 31). In Part III of the book "History of Islamic Nations and States," V.C. Brockelman observes that Sheikh Jafar played a pivotal role in inciting Jahanshah Baharli against Sheikh Junayd. One factor that contributed to Jahanshah's alignment with Sheikh Jafar was their familial connection. Specifically, Sheikh Jafar's second son, Sayyid Gasim Khan, married Jahanshah's daughter. Leveraging these familial ties, Sheikh Jafar encouraged Jahanshah, the ruler of the Karakoyunlu dynasty, to engage in hostilities against Sheikh Junayd (Brockelmann, 2002, p. 260). Shahin Farzaliyev asserts that one of the motives behind Jahanshah Baharli's efforts to displace Sheikh Junayd from Ardabil was the conflict between these Safavid sheikhs and the Armenians and Georgians under the Karakoyunlu rule. This struggle involved acts of plundering, which ran counter to Jahanshah's economic interests (Farzalibeyli, 1995, p. 68). Rejected by both Sheikh Jafar and Jahanshah Baharli, Sheikh Junayd realises that he cannot remain in Ardabil. Under the weight of such significant opposition, he is compelled to depart from the dargah.[1]

In 1448 (852 Hijri), Sheikh Junayd left Ardabil and relocated to Anatolia. There were various reasons behind the sheikh's decision to move. One notable factor was the positive relations established between the Safavid sect and the Ottomans from the outset. As previously mentioned, the Ottoman state regularly dispatched donations and assistance to the Ardabil Dargah under the designation of "cherag akcha"[2] (Birdogan, 2001, p. 13). However, this assistance was not dispatched even once during Sheikh Junayd's tenure, prompting him to voice his grievances to the Ottoman Sultan Murad II (1421-1444) (Babinger, 2001, p. 19). Due to this close relationship, Sheikh Junayd turned his attention to Anatolia.

Another factor that contributed to his focus on Anatolia was his awareness of having a substantial number of supporters in the region. Upon his arrival in Anatolia, Sheikh Junayd intensified propaganda efforts among the Turkmen tribes, strengthening their allegiance to the sect and establishing a significant influence over these groups. However, the questiın remains as to whether Sheikh Junayd, the Safavid sheikh, had already embraced the Shia sect by the time he arrived in Anatolia.

Faruk Sumer examined this issue in depth, arguing that although it is difficult to provide a definitive answer to this question, there is some validity to the suggestion that Sheikh Junayd adopted Shiism after arriving in Anatolia. However, sources also suggest that during his travels in Anatolia, he not only assumed the role of a Safavivya sect sheikh but also that of a seyid (sayyid)[3] (Sümer, 1979, p.10). This indicates that if the Sheikh was traveling in Anatolia as a seyid, he likely already harbored Shiite tendencies in his ideology.

One plausible scenario is that Sheikh Junayd arrived in Anatolia as a Sufi and, sensing the Anatolian Turkmens' affinity for the Shia religious ideology, began advocating for this ideology to garner their further support. Given the significant importance he placed on religious gatherings, it is challenging to assert that Sheikh Junayd worked exclusively for faith causes. If Sheikh Junayd had solely championed the Shiite ideology, it seems unlikely that he would have formed an alliance with Uzun Hasan Bayandurlu - who was known for his Sunni inclinations - and gone so far as to marry his daughter.

[1] Dargah: A place where followers of sects gather, worship, and listen to the teachings of their leaders.
[2] "Cherag akcha" was the name given to all the gifts sent to Ardabil by the Ottoman sultans until Yavuz Sultan Selim II, when the great-grandfather of Shah Ismail, the founder of the Safaviyya sect, Sheikh Safiyeddin, and his successors resided.
[3] In the Muslim world, someone who is a descendant of Prophet Muhammad, and specifically whose lineage traces back to his grandson Husayn, is referred to as a seyid (sayyid).

Sheikh Junayd's primary objective was to establish a state by leveraging the influence he had amassed. In this pursuit, he demonstrated an adept strategic use of the opportunities available to him. Sheikh Junayd adeptly cultivated trust among the people of Anatolia through his sagacity, to the extent that they were willing to sacrifice their lives at his command. The disciples who gathered around him exhibited unwavering devotion, considering Sheikh Junayd almost divine and engaging in worship. R. Savory notes that during Sheikh Junayd's time, his followers openly referred to him as God and even as God's son (Sovery, 1980, 195).

While Sheikh Junayd was in Konya, he became embroiled in a dispute with the city's most famous sheikh, Sheikh Abdullatif. The debate culminated in Sheikh Junayd asking Abdul Latif, "Is loyalty to my Companions a crucial requirement, or is it like a child?" The veracity of this statement is debatable. In response, Abdullatif asserted, "In the matter you mentioned, loyalty to the Companions is indeed a vital requirement, as there is a verse in the Qur'an that addresses this issue." Sheikh Junayd retorted, stating, "Were you present when that verse was revealed? In other words, were you with them?" The argument between them escalated to the point where they were both taken by the arm and removed from the scene (Gündüz, 2017, p. 26)

Indeed, through this argument, Sheikh Junayd appears to align with Shia beliefs. He was among those who claimed that certain verses in the Qur'an had been altered over time, and portions related to Hazrat Ali had been removed. During this debate, Sheikh Abdullatif remarked, "With such beliefs, you have essentially adopted disbelief (kafir), and those who adhere to such beliefs will similarly be deemed as disbelievers" (Ekinci, 1997, p. 69-70).

Sheikh Junayd is considered one of the earliest leaders to initiate the Jihad movement in the history of the sect. Upon arriving in Canik, near the Black Sea, Sheikh Junayd organized a campaign against the Trabzon Roman Empire, the only non-Muslim community in the region. His primary objective in this undertaking was to seize power from the Emperor of Trabzon, Kalo Ioannes. According to Shahin Farzaliyev, Sheikh Junayd successfully overthrew the Trabzon Empire and endeavoured to establish a state for himself and his disciples (Farzalibeyli, 1995, p. 61).

The Safavid sheikh's motivation for engaging in this war was the power struggle within the Trabzon Empire. Sheikh Junayd believed that seizing Trabzon in such a context would be opportune in this context, given that the surrounding communities were Christian, and he anticipated minimal objection to the capture. He envisioned establishing his own state in Trabzon in lieu of the Greek Empire, with him assuming rulership over this newly formed state (Hinz, 1992, p. 20).

In order to execute his plans, Sheikh Junayd mobilized soldiers and initiated the formation of an army. However, due to limited resources, he could only muster a few thousand soldiers. In around 1456 CE, Sheikh Junayd launched an attack on Trabzon with the assembled troops, but despite advancing to the capital, the prolonged siege spanning several days yielded no results (Uzunçarşılı, 2011, p. 223; Sümer, 1979, p. 10; Hinz, 1992, p. 21). The governor of Amasya, Khizir Bey, was dispatched to Trabzon by the Ottoman Sultan, Fatih Sultan Mehmet (1451-1481), to prevent Sheikh Junayd from capturing the city. He successfully halted the siege and compelled the Sheikh to retreat.

Two noteworthy aspects emerge from the siege of Trabzon led by Sheikh Junayd. Firstly, until Sheikh Junayd's time, the population of Trabzon was predominantly Turkish and Muslim. The small Christian community, consisting of Trabzon Christians, Georgians, and Cherkezes, had acknowledged Ottoman rule by paying taxes, thus eliminating the need for jihad. However, Junayd's revival of the jihad movement generated enthusiasm among his disciples and kindled a desire for war.

4 Jihad refers to the holy war waged by Muslims against non-Muslims.

Through this conflict, Sheikh Junayd both gauged and intensified the fervour for was among his followers.

Secondly, the Trabzon war enabled Sheikh Junayd to assess the military strength of the sect. It enabled him to identify the deficiencies and weaknesses within his army. Although Sheikh Junayd did not emerge victoriously in this battle, he gained valuable insights into the capabilities of his forces.

3.HASAN BEY BAYANDURLU AND SHEIKH JUNAYD: SHARED INTERESTS AND ALLIANCE

Following the unsuccessful siege of Trabzon, Sheikh Junayd relocated to an area near Diyarbekir. At that time, Hasan Bey of the Bayandurlu dynasty, who ruled Diyarbekir, was actively working to turn his principality into a powerful regional state. Upon arriving in Diyarbekir from Ardabil at the request of Jahanshah, the ruler of the Karakoyunlu (Baharli), Sheikh Junayd discovered common ground with Hasan Bey in their shared political ambitions. Hasan Bey greeted him as an ally. Recognising the mutual benefits of their cooperation, they decided to form an alliance. This collaboration was driven by their need to consolidate power and expand their influence in the region. Both leaders were aware that unity would enhance their ability to face their common adversaries and achieve their political goals. Consequently, Hasan Bey's alliance with Sheikh Junayd was a significant step towards strengthening his position and advancing the interests of the Bayandurlu dynasty. This raised the qıestion: Who was Hasan Bey Bayandurlu?

Hasan Bey, more commonly known as Uzun Hasan, was a prominent figure in the Bayandurlu family, which was part of the Oghuz Turkish dynasty. At the end of the 14th century, the Bayandurlu dynasty successfully established a Turkish principality centered in Diyarbakir under the wise leadership of Qara Yuluq Osman Bey. The rise of this principality and the subsequent establishment of the Akkoyunlu state are closely linked to the name of Hasan Bey, who ruled from 1453 to 1478. Uzun Hasan rose to the position of Diyarbakir Bey in 1453 (Woods, 1993, p. 145). With his strategic and military intelligence, as well as the support of Sheikh Cüneyd, he united Eastern Anatolia, the Iraqi-Arab and Iraqi-Ajami territories, and extended his rule to Khorasan, establishing the Akkoyunlu state in 1468 and turning it into an empire.

During his time as ruler of Bayandur, Hasan Bey came up against one of his main rivals, Jahanshah Karakoyunlu. According to Iskender Bey Munshi (2009, p. 62), the relations between Hasan Bey, who was ruling Diyarbekir at the time, and Jahanshah were consistently strained. The Baharli dynasty, a prominent Oghuz tribe, ruled over extensive territories including Azerbaijan, Anatolia, and Iran, and was the dominant political power in the region. Uzun Hasan, in his role as the Bey of Diyarbekir, staunchly resisted being subjugated by the Baharli dynasty. His refusal to acknowledge their supremacy led to significant tensions and outright hostility between the two factions. The resulting animosity manifested in various ways, such as the closure of key trade routes and increased military skirmishes, which further exacerbated the conflict (Munshi, 2009, p. 62; Ibrahimov, 1958, p. 34). This period of sustained conflict highlighted the fragile nature of regional alliances and the constant power struggles among the ruling dynasties.

Hasan Bey sought to build a coalition to oppose the Karakoyunlu people. He knew that Sheikh Junayd was also in opposition to Jahanshah Baharlu. Hasan Bey Bayandurlu also recognized that Sheikh Junayd held significant influence among the Anatolian Turkmen tribes. After being defeated in Trabzon, Hasan Bey wrote a letter to Sheikh Junayd to offer him friendship. Some sources suggest that Hasan Bey Bayandurlu initially approached Sheikh Junayd in a hostile manner, arresting him. He subsequently released Sheikh Junayd, recognising him as a potential ally in the fight against Jahanshah, and established a close relationship with him (Paşazade, 2003, p. 267). According to Isgender Bey Munshi's account, Hasan Bey welcomed Junayd and his retinue graciously and dignifiedly (Munshi, 2009, p. 62). Faruk Sumer corroborates this information, referencing *Tarixi-aləmara-yi Abbasi,* to attest to Sheikh Junayd's reception with profound respect by Mr. Bayandurlu (Sümer, 1979, p. 11). Hasan Bey Bayandurlu was well aware of Sheikh Junayd's significant influence among Anatolian Turkmen tribes, and he intended to exploit this aspect for political gain.

According to Mehmet Saray, this alliance altered the course of Sheikh Junayd's life and that of his followers completely (Saray, 1990, p. 14). The initial closeness between them evolved into a deep bond of friendship and kinship. Sheikh Junayd solidified this relationship by marrying Hasan Bey's sister, Khadija Beyim. Ayşe Arayancan emphasises that Sheikh Junayd's influence grew significantly after his marriage to Khadija Beyim (Arayancan, 2010, p. 73-74). This union was a significant early political triumph for the Safavid sect, strengthening their strategic alliances and increasing their influence in the region. There are several ways in which the reasons and consequences of Sheikh Junayd's connection to the Akkoyunlu can be explored. Firstly, through this marriage, Sheikh Junayd became affiliated with a powerful future ruler. Secondly, both parties acquired formidable allies in the struggle against Jahanshah Baharli.

Sheikh Junayd's uncle, Sheikh Jafar, had allied himself with the Karakoyunlus and was eager to remove him from Ardabil. Sheikh Junayd had not forgotten what his uncle had done to him and was determined to confront him in the future (Hinz, 1992, p. 27-31). Upon arriving in the Ottoman lands, Sheikh Junayd sought the Ottoman Sultan’s permission to settle there. However, Sultan Murad II (1446-1451) denied his request, stating in a letter that "two sultans cannot coexist within one state". Consequently, although the Ottomans did not grant him permission to settle there, Sheikh Junayd found unrestricted mobility within the Akkoyunlu lands. Moreover, this alliance played a pivotal role in hastening the establishment of the future Safavid state. Mehmet Dağlar and Cevdet Yakupoğlu also note that in their research, the Safavids inherited the legacy of the Akkoyunlu (Dağlar, 2020, p. 1008). Furthermore, the marriage to an Akkoyunlu princess connected him to the ruling line, enabling him to claim that he belonged to a hereditary ruling line for the state he aspired to establish.

The fact that Sheikh Junayd formed an alliance with the Sunni Akkoyunlu, despite being a Shia, demonstrates that his desire to establish a state took precedence over religious considerations. Shahin Farzaliyev, who provided information on this issue, asserts that Sheikh Junayd's acceptance of kinship with Uzun Hasan Bayandurlu highlights the importance of political concerns in his decision-making (Farzalibeyli, 1995, p. 74). The Sunni historian Fazlullah Ruzbihan, who served in the court of Sultan Yaqub, the son of Hasan Bayandurlu of Akkoyunlu, writes about the actions of Sheikh Junayd. He expresses regret that Sheikh Safieddin himself could not guide his children to abstain from worldly affairs, despite keeping his distance from all that is forbidden (haram). Consequently, his children subjected themselves to various humiliations and misfortunes in their pursuit of the throne. Once Junayd became viceroy, he became obsessed with the idea of conquering and capturing other lands and territories (Khunci, 1987, p. 78-79).

Thanks to his alliance with Uzun Hasan Bayandurlu, Sheikh Junayd gained considerable approval from the Bayandurlu and dispatched emissaries throughout the Akkoyunlu territory, thereby expanding his network of supporters. Over approximately three years, Sheikh Junayd successfully assembled a following of around 12,000 supporters through extensive propaganda efforts. In 1459, as tensions between the Bayandurlu and the Ottoman Empire over the issue of Trabzon escalated, Sheikh Junayd returned to Ardabil in a markedly stronger position.

Just as Sheikh Junayd gave new strength to the sect, the future goals of the sect were also determined. Although his untimely death prevented him from carrying out his ideology, the generation that came after him managed to carry out this ideology. First, Sheikh Junayd left three great legacies to his descendants. The first was the spiritual leadership of the sect, the second was the tradition of fighting armed non-Muslims who opposed them, and the third was the kinship with the ruling family to realize the claim to statehood.

4. CONCLUSION

The encounter between Sheikh Junayd and Hasan Bey Bayandurlu led to both leaders gaining powerful allies. This alliance in particular stands out as a major turning point in Safavid history. Their close relationship eventually developed into friendship and kinship, as Hasan Bey married his sister Khadija Bey to Sheikh Junayd. Hasan Bey, who established family ties with Sheikh Junayd, won his struggle against Baharli Jahanshah with the support of the Safavids. He laid the foundation for the Akkoyunlu rule, which encompassed parts of Anatolia, Azerbaijan, and Iran. As a result, the Bayandurlu dynasty became the ruling dynasty in the region.

At the same time, the political changes that took place in the region during Sheikh Junayd's reign led to an increase in the number of Safavid supporters. During this period, Sheikh Junayd played a significant role in the expansion of the order by encouraging nomadic Turkmen tribes to join the Safavids. One of the main reasons for his success was his ability to influence and his deep understanding of the culture and mindset of the social class he targeted. This ability allowed him to gather a strong army of thousands of loyal followers, which was very important for the Safavid movement. In fact, the complex interaction of political processes and Sheikh Junayd 's precise understanding of social dynamics led to the expansion of the Safavid movement and the mobilization of broad support from the Turkmen tribes. This constituted a decisive stage in Safavid history.

In fact, according to research based on Sheikh Junayd and Hasan Bey Bayandurlu, both paved the way for the Safavids to become the dominant power in their region and shaped the course of history for centuries. Together, they changed the foundations of regional governance and developed a new era that flourished with the Akkoyunlu and later the Safavid, as the powerful. The transformative effects of this development lasted for centuries and left a deep mark on the historical development of the region.

Future research on this topic could expand on the following directions:

First, the alliance between the Safavids and the Aghqoyunlu could be analyzed in comparison with other Sufi-political collaborations of the same period. In particular, drawing parallels between the Safavid order and other branches that emerged from the Zahidiyya, such as the Khalvatiya, could provide new scholarly insights.

Second, the marriage between Sheikh Junayd and Hasan Bey’s sister could be examined in relation to other politically motivated marriage alliances in the medieval Islamic world. A comparative study could provide a broader perspective on the political significance of kinship in state-building efforts.

Third, the reactions of other regional powers of the period—such as the Ottomans, Mamluks, and Timurids—to the alliance between Sheikh Junayd and Hasan Bey could be analyzed in a broader geopolitical context. Examining how this alliance affected their political interests would add depth to our understanding of regional dynamics. Research in these areas will contribute to a deeper understanding of political processes and religious ideologies in the medieval East.

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THE BALANCED POLICY OF THE CAUCASIAN STATES IN THE ERA OF RIVALRY OF GREAT EMPIRES (EARLY MIDDLE AGES)

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ABSTRACT

As is known, in the broad chronological framework from the beginning to the end of the 1st millennium (1st century BC - 10th century AD), the Caucasus region, in particular, had the status of a border area and a geopolitical buffer zone between the global empires of Caucasian Albania, Iberia, and Atropatena. The article analyzes this concept in a comprehensive manner and examines the role of the region in the strategic conflicts between the Roman-Parthian, Roman-Sasanian, and Byzantine-Sasanian rivalries, as well as the new power centers of the early Middle Ages: the Caliphate, the Khazar Khaganate, and the Byzantine Empire. The main scientific novelty of the study is that it presents the local rulers and elites of the Caucasus not as passive parties subject to the will of the great empires, but as active political forces directly influencing the processes, and refutes the existing erroneous historical approaches on this subject. On the contrary, in the light of the information of ancient and medieval authors (Plutarch, Tacitus, Ammianus Marcellinus, Musa Kalankatli, and early Islamic sources), it is demonstrated how local elites preserved their internal autonomy and statehood traditions through agile "balancing diplomacy", reconciliation of sovereign status, and inter-ritual maneuvers. Here, the issue of the Caucasus becoming a buffer zone was conditioned not only by military factors, but also by the transformation of local subjects into active diplomatic agents.

Keywords: Caucasus region, balance of power diplomacy, treaties, wars, geopolitical policy

1.INTRODUCTION

The Caucasus region is of strategic importance in terms of both the history of international relations and its geographical position. It is not just a junction connecting Europe and Asia, where trade routes pass. The Caucasus was also a very sensitive and tense political border zone in ancient and medieval times, where huge empires (for example, Rome, Sassanid, Arab Caliphate, Ottoman, and Safavid) faced each other, and different religions and cultures clashed with each other. The military and political strategy of the Roman Empire envisaged a double line of defense to ensure the security of the state. On the one hand, strong fortresses, protective fortifications, and military camps were built along the official borders of the empire, and on the other hand, neighboring states and kingdoms on the very edge of these borders were brought into the sphere of influence of Rome. Rome formed these “dependent kingdoms” as a “buffer zone” between itself and its great enemies so that in the event of any attack, these small states would receive the first blow and no danger would penetrate into the empire.

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For the Parthian and its successor Sasanian empires, located in the Iranian plateau and Mesopotamia to the east, the Caucasus was both a shield for the central cities (such as Ctesiphon) from the nomadic threat from the north, and a military base to prevent the Mediterranean powers from infiltrating the East Eurasian trade routes.

In the tense geopolitical conditions that arose, the Caucasian states, especially the ancient Albanian state, Iberia (Georgia), and Atropatena, which were distinguished by their strategic position, developed a unique border diplomacy to protect their existence. The main essence of this flexible policy was that local rulers did not demonstrate absolute and permanent loyalty to any of the great empires. As the balance of military forces in the region shifted in one direction or another, they immediately changed partners in accordance with their own interests. In order to preserve the internal independence of the state at all costs, they used the official symbols of legitimacy offered to them by rival empires, such as crowns, high ranks, and titles, as well as religious affiliations, as a mere diplomatic maneuver and a political tool to preserve their power. In ancient and early medieval times (1st century BC - 6th century AD), the Caucasus region - especially the states of Caucasian Albania, Iberia, and Atropatena - played the role of a global buffer zone and border area between the Roman (later Byzantine) Empire, representing Western civilization, and the Parthian (later Sasanian) Empire, representing Eastern civilization. In such geopolitical conditions, while the Caucasus region was exposed to diplomatic and military pressure from the Roman-Byzantine Empire on the one hand, on the other hand, the Parthian-Sasanian Empire faced strong political pressure through the systems of serfdom and vassalage. As a result, regional Caucasian subjects located at the intersection of both global powers were forced to pursue a unique "balancing policy" to protect their existence in the face of these two-sided imperial threats and pressures (Shnirelman, V. A. 2001. P. 135).

2. MAIN TEXT

The Caucasus became the focus of global border diplomacy in the mid-1st century BC, at the peak of Rome's eastern expansion. The campaign led by the great general Pompey in 66-65 BC fundamentally changed the foreign policy strategy of the local states.

According to Plutarch and Strabo, the resistance of the Albanian ruler Orois to the Roman army in the battle on the banks of the Kura River in 65 BC was not just a military confrontation, but a response to Rome's attempt to annex the region. Pompey, realizing that he could not completely eliminate the local kingdoms, signed alliance treaties with them.

The Treaty of Randea, signed between the Roman Empire and the Parthian (Arsacid) state in 63 AD, is considered one of the most important examples of geopolitical compromise and "balancing diplomacy" in the ancient world. This treaty was the first major agreement in which two great powers formally made mutual concessions to divide their spheres of influence in the region. The Peace of Randea was important in terms of regulating relations between the empires, realizing that the parties could not eliminate each other by military force. This treaty was the first step in which both great powers established formal rules to maintain peace in the region and began to resolve border problems through diplomacy. According to the treaty:

1. Local claimants to the throne in the region had to be from the Parthian Arsacid dynasty (Eastern factor).
2. The crown of these individuals had to be officially presented and approved by the Roman emperor (Western factor) (King, C. 2008. Pg. 32).

This unique mechanism of compromise between the empires gave local rulers a wide legal basis and freedom of action for diplomatic maneuvers between the two giant powers. Thanks to these formal international rules, the Caucasian states did not fall under the full pressure of one of the empires, but on the contrary, they were able to maintain their internal independence by taking advantage of the legal gaps and the existing situation.

During the reign of the Roman emperor Domitian (81-96), the XII Fulminata ("Twelfth Lightning Legion") legion arrived near Baku (Gobustan) and left a Latin inscription there, which was a means of reviving the eastern borders of the Roman Rhandeia system and psychological pressure against the pre-Sassanid Parthian claims.

With the rise to power of the Sassanids in the 3rd century (224), the "soft" policy of Parthia's vassalage was replaced by aggressive, centralized rule. During the reign of Shapur I (240-270), the "Kabiyi-Zardosht" inscription in Naqsh-e Rustam already lists Albania, Iberia, and Armenia as territories that paid tribute to the Sassanids (Mammadova, F. C., 2006, p. 124). However, the events of the peace treaty of Nasib (Nisibis), signed in 298, changed the course of events again in favor of Rome. This treaty was one of the fundamental agreements signed between the Roman Empire and the Sassanid state and completely changed the system of regional international relations in late antiquity, especially the geopolitical status of the Caucasus. According to the terms of the 40-year peace, the protectorate over Iberia and Armenia passed to Rome, while Albania retained the status of a neutral transition zone between the two empires.

The largest and most strategic diplomatic move of the period in question was related to the complete politicization of the religious factor. The declaration of Christianity as the official state religion in the country by the Albanian ruler Urnair should not be viewed as a mere theological (religious-philosophical) choice of faith. This step was a strong resistance to the policy of the Sasanian shahs to forcibly spread Zoroastrianism in the Caucasus, Persianize the local population, and implement cultural-religious assimilation. By adopting Christianity, Albania created an ideological bond with the Roman Empire, which belonged to the same religion, and tried to form a western-oriented security shield against the Sasanians. In 387, the Byzantine and Sasanian empires carried out the first major division that completely froze the geopolitical picture of the region. As a result of this division:

1. The western part of the Caucasus fell under the direct rule or political influence of the Byzantine Empire.
2. The eastern part of the Caucasus, including Albania and Atropatena, was included in the Sasanian Empire.

After the partition of 387, the Sasanians pursued a policy of limiting internal autonomy in the Caucasus. They introduced the Marzban (military governor) system to the region. The Battle of Avarayr in 451 and the subsequent rebellions led by the Albanian ruler Vache II were manifestations of general Caucasian resistance to the Sasanian policy of religious assimilation.

The greatest diplomatic success of the local authorities during this tense period was the Aluen (Aquen) church council of 488. This council, convened at the initiative of Momin Vachagan III, approved the internal Constitution of the country. The Aquen Code regulated the rights and duties of local nobles, church officials, and ordinary people (Kalankatli, M.2006. p. 85). The adoption of such a legal document and its official recognition by the Sasanian shah, while being part of a colonial empire like the Sasanians, was a great success for the Albanian rulers. This was the result of very clever and secret diplomacy carried out by the Albanian elite to protect the internal independence and integrity of the country. The Dara peace treaty signed in 562 further institutionalized the function of the Caucasus in Byzantine-Sasanian relations. According to the document, Byzantium undertook to pay the Sasanians to protect the Derbent pass defensive walls from northern nomads. This was official proof that the Caucasus was perceived as a civilizational barrier in a global sense.

The fall of the Sasanian Empire in the mid-7th century and the emergence and rapid expansion of the Caliphate brought a completely new dimension to the border diplomacy of the Caucasus. The region became a battlefield for not two, but three great powers: the Caliphate, the Khazar Khaganate, and the Eastern Roman (Byzantine) Empire.

The activities of Javanshir (638-681), the ruler of the Albanian state in the mid-7th century, entered the history of world diplomacy as a classic example of a small state defending its independence in the face of huge global powers:

1. In the midst of intensifying regional competition in the mid-seventh century, the Albanian ruler Javanshir pursued a unique geopolitical maneuvering strategy. In the first stage (in 654), He attempted to create a regional "Christian bloc" by entering into a diplomatic alliance with the Byzantine emperor Constantine II in order to resist the Arab threat from the south. However, seeing the changing balance of power in the region, Javanshir made a quick foreign policy change and in the next stage (in 667) began direct peace negotiations with the head of the Umayyad Caliphate, Caliph Muawiyah I. As a result of Javanshir's pragmatic step, Albania's internal independence was completely preserved, and the amount of taxes the country would have to pay to the Caliphate was reduced to one third (King, C. 2008. Pg. 54)

Moisey Kalankatlı describes Javanshir's geopolitical steps in his work "History of the Albanian Country" with chronological accuracy. Javanshir initially (654) tried to protect the country from Arab raids by forming an alliance with the Byzantine Emperor Constantine II. He was given the high titles of the Byzantine court (Protopatrician). However, after the Umayyad dynasty came to power in 661 and the Caliphate was firmly established in the region, Javanshir made a sharp turn.

Javanshir made trips to the capital of the Caliphate, Sham (Damascus), in 667 and 670.

As a result of negotiations with Caliph Muawiyah I:

- Albania's internal independence and sovereignty were preserved.

- Taxes collected from the country were reduced to one-third (1/3).

- Javanshir undertook to protect the northern borders of the Caliphate (Bunyadov, Z. M. 2007. Pg. 76).

This agreement was the largest diplomatic document ever adopted by a local Caucasian ruler in the heart of the Islamic world.

The Arab-Khazar wars that continued throughout the 8th century turned the Caucasus into a military border zone in the true sense of the word. While for the Arabs this geography was the northern border of the Islamic world, for the Khazars it was a fortress to prevent southern expansion.

The Arab-Khazar wars that lasted throughout the 8th century turned the Caucasus into a military border zone in the truest sense of the word. For the Arabs, this geography was the northern border of the Islamic world, while for the Khazars it was a fortress to prevent southern expansion.

In the early medieval historiography of the Caucasus, the northern expansion of the Islamic Caliphate and the resistance strategy of the Khazar Khaganate further sharpened the borderland character of the region. This military-diplomatic dynamic unfolded around four main historical events:

-Treaty of Derbent in 643 - This agreement, concluded between the commander of the Caliphate army, Suraqah ibn Amr, and the local Sasanian ruler of Derbent, Shahriyar, is a unique example of a compromise practiced in the region. According to the terms of the agreement, the local population of Derbent was exempted from the classical jizya tax levied on non-Muslims, in return for which they assumed the military obligation to protect the northern borders of the Caliphate (the Derbent Pass) from attacks by nomadic tribes. This event proves the ability of local elites to gain privileges within the Caliphate while maintaining their status as military specialists.

-First Battle of Balenjar in 652 - The attack on the city of Balenjar by Arab troops led by Salman ibn Rabi'ah ended in a heavy defeat for the Arabs. The geopolitical result of this battle is that for the first time, Islamic armies were definitively stopped in the North Caucasus, and the de facto border between the parties remained stable for a long time, being strengthened along the Caucasus Mountains.

-Battle of Ardabil in 730 - A large army under the command of the Khazar prince Barjik crossed the South Caucasus via the Derbent Pass and defeated and killed the Arab governor Al-Jarrah near Ardabil, completely upsetting the balance in the region. With the Khazars descending to Southern Azerbaijan, the Caliphate faced the threat of losing its administrative and military control not only in Albania and Iberia, but also in the entire Caucasus region.

-Marwan ibn Muhammad's campaign in 737 - A large-scale counterattack led by the future caliph of the Caliphate, Marwan ibn Muhammad, was the culmination of the Arab-Khazar rivalry. The Arabs, who simultaneously crossed the Derbent and Daryal passes and advanced deep into the Khazar Khaganate (Idil-Volga region), forced the Khazar Khaganate to convert to Islam in exchange for preserving its internal autonomy. As a fundamental historical result of this march, the southward expansion of the Khazars was once and for all halted, and the South Caucasus (the geography of Azerbaijan and Georgia) definitively and irrevocably entered the political-cultural orbit of Islamic civilization.

These four chronological stages, analyzed clearly, show that in the 7th-8th centuries, the Caucasus region was not simply a passive geography that had become a battlefield for two foreign armies from outside. The active diplomatic and military participation of local dynasties and political forces in this struggle (the most obvious example of this is the strategic treaties and agreements around Derbent), as well as the control of important crossings such as Derbent and Daryal, directly determined the course of international relations. As a result, the Caucasus became the largest geopolitical defense zone, determining the trajectory of the global competition between the Arab Caliphate from the south and the Khazar Khaganate from the north, where both sides tried to stop each other.

Thus, against the backdrop of these wars, the diplomacy of local elites was completely fragmented. For example, the feudal lords of Dagestan and the North Caucasus often sided with the Khazars, while the rulers of Arran and Shirvan tried to protect their internal administration, relying on the military power of the Caliphate. In 705, after the Umayyads put an end to the rule of the local Mehranid dynasty in Albania, they established a single military-administrative structure covering the entire South Caucasus - the Emirate of Arran, and chose the city of Barda as its capital. Barda became not only an administrative center, but also a northern trade and military-diplomatic hub of the Islamic world. From here, expeditions against both Byzantium and the Khazar Khaganate were planned, and treaties were signed (Akhundova, N. R. 2011. Pg. 293).

By the 10th century, drastic changes had taken place in the system of international relations in the region. The weakening of the Khazar Khaganate, the protective shield of the northern borders, and the infiltration of a new, destructive military power, Slavic (Russian) groups, into the region from the same direction completely upset the existing geopolitical balance in the Caucasus. In this context, the Barda tragedy of 943 was the final chord (final point) of the old model of inter-imperial border diplomacy characteristic of the Caucasus in antiquity and the early Middle Ages. The Slavic fleet entering the Kura River from the Caspian Sea and destroying Barda, the ancient capital of Albania and the largest commercial metropolis of the region, revealed the helplessness of local rulers. The Sajid and Salarid dynasties, who acted as the successors of the Abbasid Caliphate in the region, were unable to establish an effective military-defense system against this external threat. This collapse of central and regional powers laid the foundation for a new historical stage in the Caucasus: the emergence of local and independent Azerbaijani dynasties (Shirvanshahs, Shaddadids, Ravvadids), which emerged in an environment of feudal disarray. There are important conceptual discussions in modern Western and Azerbaijani historiography regarding the status of the Caucasus in this period:

-Europe- and Russia-centric approach: This approach has been dominant in European and Russian (especially Soviet) historiography for many years. The main essence of this approach is the idea that only huge empires (Roman, Byzantine, Sasanian, Arab Caliphate) ruled the world. According to historians who defend this idea, Caucasian Albania, Atropatena, or Iberia (Georgia) were small units that did not have independent will and simply occupied a place on the map, that is, ordinary provinces. The main goal here is to minimize the independent positions of local states. That is, to form the opinion that "these peoples did not have their own say in history, their own weight, independent foreign policy; empires came, crushed them, and ruled through their successors."

-Modern Azerbaijani historiography: Historians Ziya Bunyadov and Farida Mammadova opened a very strong scientific front against this biased approach. They were based not on mere assumptions, but on original sources written by the most reliable Greek, Roman, Albanian, and Arab authors of ancient times. Azerbaijani historiography revealed that Caucasian Albania and Atropatena were active subjects of international law in antiquity and the early Middle Ages. The relations of these states with the empires were not blindly subordinate. Yes, the empires were powerful, but these states conducted border law diplomacy based on mutual interests.

3. CONCLUSION

The system of border diplomacy and geopolitical relations that developed in the Caucasus region during the ancient and early medieval periods laid the fundamental foundation for the strategic codes of the region that have persisted for centuries and are still relevant today. As shown above, the Caucasus region, especially the geography of Caucasian Albania, Iberia, and Atropatena, has not only been a military training ground for global empires, but also had the status of a dynamic border space where complex diplomatic doctrines were tested.

The entry of Christianity into the region as a political-cultural line during the Roman-Sasanian rivalry, and the subsequent arrival of Islam during the Caliphate-Khazar conflict, left indelible marks on the geopolitical fate of the Caucasus. These religious-ideological transformations turned the region not only into an administrative-political but also into a deep inter-civilizational front line. However, the local subjects of the region did not blindly accept these belief systems, but managed to use them as a diplomatic shield and "soft power" tool against imperial pressure. An important historical and scientific conclusion here is that the local political subjects and elites of the Caucasus were able to preserve their internal autonomy only as long as they correctly calculated the balance of power between the competing global powers, that is, the geopolitical balance point. The internal pillar of this balance was the region's unique legal-political structures. For example, the Aqeun Code, adopted during the reign of the Albanian ruler Momin III Vachagan, was a unique institutional adaptation mechanism that ensured the internal integration of subjects, separating local dynastic loyalty and the internal legal system from imperial legislation. Local elites relied on this internal legitimacy to maneuver in the face of external pressures.

As a result of the research, it was determined that when this historical balance was disturbed due to any external factor, and one of the dominant empires gained unique, absolute hegemony in the region, local statehood traditions faced crises and upheavals. The period of the Marzban regime, which aimed at direct rule of the Sasanians, or the period of the Arran Emirate, which was a manifestation of the centralization policy of the Caliphate, is a clear proof of this. The transformation of the competition of global powers into unilateral absolute dictates, rather than regional consensus or neutrality, accelerated the collapse of local dynasties (for example, the Mehranids) and disrupted the buffer zone mechanism. Thus, two different governance models were applied in the geography of the Caucasus throughout the ancient and early medieval periods, the first of which was the model of dynamic balance (Rhandeia or border diplomacy). Within this model, based on bi- or multi-polar strategic deterrence, formal vassalage agreements, and dynastic marriages, the internal autonomy of regional entities, local legislative systems, and the political status of elites were successfully preserved. In stark contrast, during the period of absolute hegemony (the Sasanian Marzban or the Caliphate of Arran) that emerged in the region, global powers pursued direct administrative control, a centralized tax system, and a policy of unification. As a tragic consequence of this absolute hegemony policy, the local dynasties of the Caucasus were abolished, internal autonomy was completely lost, and regional statehood traditions faced a deep systemic crisis.

In conclusion, it should be emphasized that the experience of border diplomacy of the Caucasus, dating back to the ancient and early medieval periods, plays the role of a fundamental historical and methodological basis for a deep understanding of the internal dynamics of modern Caucasian geopolitics. The search for multi-vectority, attempts to create a balance between regional powers, and the realities of the buffer zone, which are manifested in the foreign policy of the states of the region, especially Azerbaijan, today, actually have centuries-old historical roots. This rich experience, inherited from the past, serves as a strategic navigator (guide) in the correct formation of the regional security system (architecture) of today and the future. Historical inheritance and political tradition clearly prove that even in modern conditions of intensifying global and multipolar geopolitical competition, the most fundamental factors ensuring the strategic independence of the region remain unchanged. These are the flexible diplomatic maneuvers of local states in foreign policy and the internal political, legal, and military stability of the state.

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SELJUK LEGACY IN TURKISH HISTORICAL STUDIES AND THE FORMATION OF STATESMANSHIP TRADITIONS IN AZERBAIJAN

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ABSTRACT

This article examines how the Seljuk heritage is interpreted in Turkish historiography in the context of the formation of state traditions in Azerbaijan. The main aim of the study is to systematize the assessments given to the Seljuk period in Turkish scientific literature, to determine the possible effects of this heritage on the political and administrative development of Azerbaijan, and to reveal the main directions of this issue from the point of view of historiography. The article shows that in modern Turkish historiography, the Seljuk period is no longer analyzed only in terms of military campaigns and territorial conquests, but also in the framework of state-building, political legitimacy, governance model, provincial organization, and regional integration. In this approach, Azerbaijan is presented not only as a border area, but as one of the important pillars of both Turkmen settlement and political and strategic activities carried out in the direction of Anatolia. The article also focuses on such topics as the iqta system, urban and provincial governance, relations with the khaliphate, and the political and administrative stability during the later Atabeg period. Overall, the article concludes that Turkish historiography does not view the Seljuk legacy as a fully established model of statehood traditions in Azerbaijan. Rather, it sees it as a crucial historical stage that accelerated the development of state traditions and laid the groundwork for political culture and governance practices in the region.

Keywords: Seljuks, Azerbaijan, statesmanship tradition, Turkish historiography, political legitimacy, iqta system

1.INTRODUCTION

Seljuk studies in Turkish historiography have evolved through several stages and gradually developed into a more independent, systematic, and specialized field of academic research. In the earlier periods, the history of the Seljuks was primarily explored within the context of the entire Turkic history, Turkic state traditions, and the strengthening of Turkic political influence in the Islamic world. At this stage, the political activity of the Seljuks was mainly presented as a significant direction within the topic of overall Turkic history, while the distinct political, administrative, and cultural characteristics of the period were treated in a relatively general form. Thus, the formation of the Seljuk period as a separate and systematic direction of scientific Research was more clearly completed in the later stages. From this stage, Seljuk history began to be studied not only in terms of military campaigns, conquest processes, and the sequence of political events, but also in terms of state-building, political legitimacy, administrative traditions, the city and provincial system, as well as regional integration issues.

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For this reason, Seljuk history has acquired a broader political, administrative, and institutional context in Turkish historiography (Bunyadov, 2007, pp. 58, 114–117). Within this approach, the position of Azerbaijan in the 11th-12th centuries is of particular importance. In the studies of Turkish historians, Azerbaijan is characterized not just as a captured territory or a transit region for the Seljuks, but as a strategically, politically, and administratively important geography. Azerbaijan held an important place in Seljuk policy, especially in terms of the settlement of Turkmen tribes in the region, the determination of movement routes towards Anatolia, the struggle against Byzantium, and the strengthening of political control in the South Caucasus. In this sense, Azerbaijan was both a military-strategic stronghold and one of the important links of the Seljuk political system in terms of regional governance. Turkish historians also note that Azerbaijan was considered an important strategic area for the Seljuks in the context of the settlement of Turkmens, the transition to Anatolia, and the struggle against Byzantium (Kesik, 2023, p. 342).

In addition, research conducted on provincial and urban administration in the Great Seljuk state shows Azerbaijan, especially centers such as Ganja, as important administrative units. This shows that the region did not function solely as a border zone or military outpost within the empire, but rather was an active and functional space in terms of administration. The integration of Azerbaijani cities into the Seljuk state system in terms of political governance, tax collection mechanisms, military control, trade routes, and local government structures further strengthened the region's role within the empire. From this perspective, Azerbaijan can be viewed not as a peripheral and secondary territory in the Seljuk political geography, but as a region with an important coordinating position between the central government and regional administration.

As a result, in Turkish historiography, Azerbaijan is presented not as a passive border region of the Seljuk political geography, but as one of the important pillars and strategic directions of this system. This approach demonstrates that Azerbaijan occupied a significant place in the Seljuk system of power not only in geographic terms, but also in political-administrative, military-strategic, and cultural dimensions. At the same time, this approach enables the 11th and 12th century phase of Azerbaijani history to be viewed within the context of Turkic statehood traditions. In this regard, the study of Azerbaijan during the Seljuk period holds considerable scientific importance in Turkish historiography for understanding regional political dynamics and for analyzing the formation and development of Turkish statehood practices.

2. INTERPRETATION OF SELJUK LEGACY IN TURKISH HISTORIOGRAPHY

One of the key issues in the analysis of the Seljuk period within Turkish historiography is the matter of legitimacy. In the approaches of Turkish historians, Seljuk rule is not viewed solely in terms of military success and territorial expansion; rather, it is interpreted as a model of statehood reinforced by religious and political foundations. In this context, the research of Ayan Ergin demonstrates that, following the victory of the Seljuks at Dandanakan, the Seljuks' establishment of relations with the Abbasid Caliphate and their formal recognition by the caliph conferred legitimacy upon their rule not only through military power but also through religious and political validation (Ayan, 2012, pp. 29–32). As a result, the Seljuks gained a stronger political position in the Islamic world, and their rule was recognized as a legitimate form of governance in the Muslim East.

At the same time, the position of Azerbaijan in the Seljuk political strategy is of particular importance in Turkish historiography. The geographical and strategic position of Azerbaijan played an important role in the westward expansion of the Seljuk political project. Specifically, prior to the Battle of Malazgirt, Azerbaijan served as one of the principal regions for the settlement and concentration of Turkmen forces, and after the battle, it functioned as a primary launching point for Seljuk expansion into Anatolia (Soofizadeh, 2023, p. 68). From this point of view, Azerbaijan was not only a transitional territory but a strategic center where military-political initiatives were coordinated, Turkic tribes were settled, and regional authority was established. These two directions, namely, the ideological foundations of legitimacy and the geographical-strategic position of Azerbaijan, more clearly illustrate Azerbaijan's role within the Seljuk political system in Turkish historiography (Sharifli, 2013, p. 29, 156–158).

Modern Turkish historians increasingly evaluate the Seljuk legacy through the perspective of state institutions and governance mechanisms. Within this approach, the Seljuk state is presented not simply as a military-feudal formation, but as a developed model of governance in terms of political administration, economic regulation, and military organization. In particular, Goksu emphasizes that the iqta system developed under the guidance of Nizamulmulk refined earlier administrative practices and endowed them with administrative, economic, and military coherence, thereby providing a model for subsequent Turkic Muslim states (Goksu, 2018, pp. 156–159). The iqta system, in addition to strengthening the central government's control over the regions, was an important tool in terms of maintaining military forces, managing land revenues, and connecting the provinces to the state system.

At the same time, it is emphasized that the Great Seljuk city and provincial administration was built on political-military, financial, and religious-legal structures. Positions such as melik, vali, amid, reis, naib, and shahne acted as representative mechanisms of the central government in the regions (Huseynzade, 2010, pp. 81-84). Through these positions, administrative management was ensured, political control over cities and provinces was strengthened, and the connection of local forces with the central government was maintained. From this perspective, the Seljuk legacy in Turkish historiography is explained not only as a past state form, but also as a management practice, legitimacy model, and institutional tradition transmitted to subsequent regional political structures (Kafesoglu, 2014, p. 279).

3. SELJUK HERITAGE IN TERMS OF THE FORMATION OF STATEHOOD TRADITIONS IN AZERBAIJAN

The role played by Azerbaijan in the Seljuk political space also had a serious impact on the subsequent regional statehood experience. The inclusion of Azerbaijan in the imperial system during the Seljuk period not only resulted in the establishment of military-political control here, but also created conditions for the strengthening of administrative institutions, provincial organization, and the concept of legitimate authority. In this sense, the emergence of the state of the Atabeys of Azerbaijan is of particular importance. Huseyn Kayhan shows that Atabey Eldaniz gained strength in Nakhchivan, quickly becoming one of the most influential political figures in the entire region, and later succeeded in creating a stable political structure centered on Azerbaijan (Kayhan, 2018, pp. 45–47). This process shows that the political and administrative experience gained by Azerbaijan during the Seljuk period transformed into a new form of statehood at a later stage.

The emergence of the Atabey state did not occur in an empty political context. The background to its formation was the integration of Azerbaijan into the earlier Seljuk military-political system. The provincial system, military control mechanisms, iqta practice, and local government structures existing in the Seljuk governance model were continued during the Atabey period, adapting them to new conditions. From this perspective, the Atabey state can be assessed as the continuation and development of the Seljuk political heritage in the Azerbaijani environment. Nakhchivan, Ganja and other urban centers of Azerbaijan acted in this process not only as administrative centers, but also as centers where political decisions were made, military forces were organized and statehood traditions were strengthened (Jafarov, 2024, pp. 39–42, 124, 177–180).

In Turkish historiography, this continuity is not explained solely as a transfer of power from one political force to another. The focus here is on the survival of the administrative habits, notions of legitimacy, and institutional mechanisms formed during the Seljuk period in subsequent Turkic-Muslim states. Kelesh notes that Azerbaijan's role as a regional center, military base, and a place where Turkmen settlements were organized during the Seljuk period strengthened the habits of central authority, regional administration, and political control in the region (Kelesh, 2019, p. 302). These factors formed the basis of a political experience that played an important role in the subsequent history of Azerbaijan's statehood. On the other hand, the legitimacy model and governance institutions such as iqta, which emerged from relations with the caliphate, continued to exist in subsequent Turkic-Muslim political structures. From this perspective, the Seljuk heritage influenced the development of statehood traditions in Azerbaijan not only in terms of the form of political power, but also in terms of governance culture, legal and political legitimacy, and regional organization.

Thus, in Turkish historiography, the Seljuk legacy is characterized as a historical and political stage that played an important role in the formation of statehood traditions in Azerbaijan. This approach allows us to evaluate the Seljuk period as one of the main foundation layers of later political institutions in terms of governance practice, legitimacy model, and institutional succession (Burgu, 2018, pp. 84–87).

4.CONCLUSION

Thus, in Turkish historiography, the Seljuk period is characterized as an important historical and political stage in the history of the formation and development of Azerbaijani statehood traditions. In this approach, the activities of the Seljuks in the territory of Azerbaijan are not explained only in the context of military campaigns and conquests, but the political, administrative and ideological consequences of these processes are also brought to the fore. In this context, the focus is on the conquests themselves, as well as the principles of political legitimacy, administrative management structures, provincial organization, military-political control mechanisms, and regional integration model that emerged as a result of them.

In Turkish historiography, Azerbaijan is considered one of the important pillars of the Seljuk political system. In particular, Azerbaijan's geographical position, location on trade routes, development of urban centers, and military-strategic importance led to its special place in the Seljuk state administration. During this period, the strengthening of city-provincial administration, the integration of local government structures into the general imperial system, and the establishment of a certain balance between central government and regional administration had a significant impact on the development of Azerbaijani statehood traditions.

The strategic importance of Azerbaijan within the Seljuk political system, its special position in city and provincial administration, as well as the political and institutional traditions that continued during the Atabey period, prove that this historical heritage had a significant impact on subsequent statehood practice. The formation of the Atabey state also shows that the principles of Seljuk governance lived on in the Azerbaijani political environment and acquired new content in accordance with local historical and political conditions. In this sense, it is possible to evaluate the Seljuk period not only as a transitional stage in the history of Azerbaijan, but also as an important historical foundation that influenced the formation of subsequent political institutions.

Therefore, the Seljuk heritage should not be viewed as a temporary and accidental event in the history of Azerbaijan, but as an important historical layer that influenced the development of statehood traditions, the formation of political thought, and the maturation of administrative practice. The approaches put forward in Turkish historiography on this topic allow us to evaluate the place of the Seljuk period in the history of Azerbaijani statehood within the framework of broader pan-Turkic political traditions. This shows the importance of examining this topic not only from the perspective of political history, but also from the perspective of the idea of statehood, the culture of governance, and issues of historical succession.

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THE ROLE OF GERMANY IN THE UKRAINE CRISIS: ANGELA MERKEL'S MEDIATION DIPLOMACY AND EUROPEAN SECURITY (2014–2016)

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ABSTRACT

The Russia-Ukraine conflict that broke out in 2014 was a very important event for both Germany's relations with Russia within the framework of its Eastern policy and Germany's leadership role in ensuring security in Europe. The conflict between Russia and Ukraine, which began in 2014, has caused a major problem for many experts. This conflict has affected both the EU and Russia, and Germany and Russia. In particular, it has changed Germany's responsibility for European security. Thus, for the first time, Germany took the lead on behalf of the European Union in ensuring security in Europe and took the lead in managing a crisis involving Russia on the EU's direct border for the first time, and acted as the Union's leader. The EU's response to the Ukrainian crisis, led by Germany, proved to be more robust and unified than the approach taken during the 2008 Russo-Georgian war, led by France. This article examines Germany's activities and role in the signing of the Minsk agreements within the framework of the "Normandy format" towards resolving the Ukrainian crisis. At the same time, the article examines the "2016 White Paper on Security Policy", which contains the conceptual foundations of Germany's Eastern policy framework, "the 2016 position paper on Russia" adopted by the Christian Democratic and Christian Socialist Parties, and the 2018 Coalition Agreement, which clearly express the attitude towards Russia and the Ukrainian crisis within the framework of European security. As a result, under Angela Merkel, Germany took on a leadership role in resolving the Ukraine crisis, but was unable to overcome the deepening strategic conflict with Russia.

Keywords: Germany, Ostpolitik, Ukrainian crisis, Angela Merkel, European security, Minsk agreements, 2016 White Paper, defensive realism. Normandy Format

1.INTRODUCTION

Germany's historical and strategic relations with Russia have created the basis for Germany to play a decisive role in the management of modern international crises, especially those related to the Ukrainian issue. Although the "Ostpolitik" (Eastern Policy) doctrine, which has been in place since the late 1960s, is based on dialogue and economic interdependence with Russia, the Ukraine-Russia crisis that began in 2014 severely tested this traditional course. Under the leadership of Chancellor Angela Merkel, the German government has, on the one hand, developed a sanctions mechanism against Russia's violation of international law, and on the other hand, has sought to preserve the European security architecture through diplomatic initiatives such as the "Normandy Format" and the "Minsk-2" agreement.

2. GERMANY'S POSITION ON THE UKRAINIAN CRISIS IN OFFICIAL DOCUMENTS

The "Position Paper on Russia" adopted by the CDU-CSU faction in 2016 marked a significant shift in Germany's Eastern policy, including its relations with Russia. The document states that "Russia, by annexing Crimea and militarily intervening in Donbas, has violated international law and changed the borders that are considered inviolable. It has violated the Charter of the United Nations, "the Paris Charter", "the NATO-Russia Founding Act" and the "Budapest Memorandum", and thereby fundamentally undermined the jointly created European security rules.

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The sovereignty and territorial integrity of states, the inviolability of borders, and the peaceful resolution of disputes are essential elements of the European security rules. In the 1994 Budapest Memorandum, in which Ukraine committed to giving up all nuclear weapons, Russia, as a guarantor power, guaranteed the inviolability of Ukraine's borders in return. The principle of inviolability is also enshrined in the Charter of the United Nations. Unilateral declarations of independence or secession are illegal under international law if they involve the unilateral use of force. This is clearly the case in Ukraine, as the Russian president has already acknowledged Russia's military presence. In addition, Russia has committed numerous serious human rights violations in Crimea and the Donbas. Russia's actions in Ukraine are ideologically supported, among other things, by the so-called "Ruski Mir" ideology, which claims jurisdiction and security for all Russians living outside Russian territory. This ideology instills fear of Russian aggression in neighboring countries, and in their historical memory, the decades of totalitarian Soviet rule still have a strong place. Such justifications for Russian aggression call into question many borders in Europe and thus peace and security on our continent. In the end, the CDU-CSU believes that Europe cannot be stable while Moscow keeps trying to create trouble. However, they still hope for a long-term goal of a cooperative security system that stretches from "Lisbon to Vladivostok." The CDU-CSU's policy from 2016 expresses doubt about Moscow's involvement in regional conflicts, criticizing it not just in Ukraine but also in the South Caucasus and Transnistria. By clearly mentioning Nagorno-Karabakh along with Donbas, South Ossetia, and Abkhazia, the document highlights Berlin's view that Russia uses these ongoing conflicts as tools to create unstable areas between the European Union and its borders. The position paper argues that Moscow's main goal is not to solve these crises, even though it claims to support the Minsk agreements. Instead, it aims to keep the region unstable in order to weaken the independence of Eastern Partnership countries. As a result, the paper describes Russia's influence in these areas as a serious danger to Germany's important security interests, clearly stating that Russia should not be seen as an unbiased mediator in these ongoing geopolitical conflicts. The "White Paper on German Security Policy", adopted in 2016 by the CDU/CSU parties under the leadership of Angela Merkel, "marks a radical transformation of post-Cold War cooperation and clearly presents Russia as a strategic adversary rather than a partner. By violating the territorial integrity of Ukraine, Russia has effectively dismantled the pillars of the European peace and security order. (Bundesministerium der Verteidigung, 2016).

3. GERMANY'S ROLE IN RESOLVING THE UKRAINIAN CRISIS

Prior to the Ukraine crisis, Germany's stance toward the Eastern Partnership was marked by broad approval but a distinct hesitation to assume a leading role. Initially, the initiative fell under the wider European Neighbourhood Policy, which encompassed both southern and eastern nations. Notably, in 2006, the German Foreign Ministry suggested a "European Neighbourhood Policy Plus" strategy to concentrate more attention on its eastern neighbors. Yet, when Poland and Sweden first introduced the concept of an Eastern Partnership in May 2008, Germany preferred to stay behind the scenes instead of actively implementing it alongside them. The European Council subsequently gave formal approval to the policy in March 2009. Although Germany generally backed the framework, it firmly resisted providing any of these nations with a clear route to EU accession. Furthermore, Germany aimed to offset the EU's increasing emphasis on its eastern frontiers by initiating fresh diplomatic engagements with Russia. The primary objective here was to craft a regional strategy that engaged with Russia rather than excluding it (Fix, 2021, p. 121). Following Ukraine's decision not to sign an EU Association Agreement before the November 2013 Vilnius summit, the subsequent Euromaidan demonstrations, and Russia's actions in Crimea and eastern Ukraine, Germany has taken a proactive part in shaping the EU's relationship with Ukraine. Talks regarding an Association Agreement with Ukraine wrapped up in December 2011, only to restart in March 2012. Nevertheless, the formal signing was delayed because of worries concerning Ukraine's adherence to the rule of law and its human rights record. Conversely, Kyiv insisted that the potential for EU accession be explicitly stated within the pact. Berlin, alongside Paris, firmly resisted Ukraine's push for such membership guarantees. The European Union and Germany condemned the trial of ex-Prime Minister Yulia Tymoshenko as selective justice, deeming her freedom a prerequisite for finalizing the deal. Then-German Foreign Minister Guido Westerwelle held multiple meetings with Tymoshenko's daughter, proposing medical care in Germany as a way for the Ukrainian leadership to save face. By demanding Tymoshenko's symbolic release to enable the agreement's signing while underestimating Russia's resolve to obstruct it, the EU effectively halted its Ukraine strategy prior to the Vilnius summit in November 2013. Simultaneously, Moscow intensified its pressure on Kyiv, culminating in a late September proposal of a €750 million loan alongside a one-off reduction in Russian gas prices. By October, new customs rules and trade sanctions were applied to specific Ukrainian exports.

Ten days prior to the Association Agreement's signing, Chancellor Angela Merkel cautioned Russia against meddling in the Eastern Partnership nations' internal affairs, pledging solidarity with Ukraine via expanded market access for its goods and energy support if Moscow retaliated. She stated that if Ukraine fulfilled expectations and the pact was signed, the EU could back Kyiv against any adverse moves or coercion from Russia by broadly provisionally applying the deal. (Bundesregierung-2013). A week prior to the unsuccessful parliamentary vote and the scheduled ratification, Ukrainian President Yanukovych declared during the Vilnius summit on November 28 that Kyiv would decline the Association Agreement and Yulia Tymoshenko would not be relased from prison. Rather than finalizing the pact, he advocated for the trilateral commison invloving Ukraine, Russia, and the European Union to enhance ties. Despite many indicators that things were going badly, Kyiv's sudden withdrawal, along with the immediate outbreak of nationwide protests, caught both the EU and Germany by surprise. (The Wall Street Journal, 2013). Initially, the German leadership took a cautious stance regarding the Euromaidan demonstrations. On December 17, Germany's new Foreign Minister, Frank-Walter Steinmeier, stopped trying to mediate in Ukraine and gave that responsibility to the EU. In his speech, he said Russia was pushing Ukraine too hard, and he also pointed out that the EU wasn't paying enough attention to Ukraine's reliance on Russia. (Die Welt, 2013). Berlin's position and critique of Moscow grew increasingly overt. In a declaration to the Bundestag five days prior to Crimea's formal annexation, Chancellor Angela Merkel sharply rebuked Russia's conduct and proposed a three-pronged crisis strategy: imposing economic penalties on Russia, mediating talks between Ukraine and Russia, and bolstering Ukraine's statehood. This approach was intended to align with the EU and the USA. (Bundesregierung, 2014).

The Ukrainian crisis led to a foreign policy shift in Germany, which assumed a greater responsibility for ensuring security in Europe. During F.W. Steinmeier's tenure as German Foreign Minister, the country's foreign policy agenda was reshaped. In his speech at the 50th Munich Security Conference, German Foreign Minister Frank-Walter Steinmeier clearly stated the urgent need for a peaceful resolution of the Ukrainian crisis and explicitly rejected military force as a possible option. Referring to the volatile situation in Ukraine, he called on President V. Yanukovych to fulfill his commitments to the opposition. Steinmeier also expressed his vision for a pragmatic diplomatic framework with Russia, arguing that peace, security and stability in Europe were impossible without Russia's participation. He stressed the need for close cooperation with Russia in addressing global security challenges such as the nuclear negotiations with Iran and the neutralization of Syria's chemical weapons arsenal. He rejected the idea of a European security architecture designed against Russia and advocated a security architecture that included Russia. However, Steinmeier argued that diplomatic relations with Russia should be reciprocal and that Russia had a fundamental responsibility to identify and pursue mutually beneficial interests with the West (Steinmeier, 2014). In addition, Germany has been a strong advocate for the OSCE from the beginning and, together with the Swiss OSCE Chairmanship, led the efforts to deploy a Special Monitoring Mission to Ukraine in March 2014, which later took over the task of monitoring the implementation of the Minsk agreements. Germany was also closely involved in the Swiss OSCE Chairmanship's shuttle diplomacy to establish a trilateral contact group under the leadership of Swiss Ambassador Heidi Tagliavini in early June 2014, which led to the conclusion of the first Minsk agreements between Moscow, Kyiv and the pro-Russian separatists on 5 September 2014 (Nünlist, 2014).

4. GERMANY'S ROLE IN THE UKRAINE CRISIS

George Friedman, in his article “Germany Emerges,” claims that the Germans played an important role in the downfall of Ukrainian President Viktor Yanukovich's government. Germany played a key role in attempting to reach a deal between Ukraine and the European Union, but Yanukovich turned it down. The Germans backed the demonstrators who were against Yanukovich and had strong connections with one of the leaders of the protests, who is now the Mayor of Kyiv, Vitali Klitschko. He was trained in a program for future leaders that was supported by the Christian Democratic Union, which is Merkel's political party. The Germans criticized Russia for taking over Crimea and for backing the Ukrainian rebels in the east. Germany may not have been the main force behind these events, but it played an important role. As the Germans understood that this situation would not just involve politics but also have a military aspect, they started to step back from taking on a big role. But disengagement was difficult. The Germans adopted a complex stance. They were against the Russians, but they also didn't want to give direct military help to the Ukrainians. Instead, they took part in the sanctions against Russia while attempting to act in a friendly way. Merkel found it hard to take on this very conflicting role, but considering Germany's past, the role made sense. Germany sees itself as a liberal democracy, and this idea is very important to how it understands itself since the end of the war. That is what it must be. So, it was important to help the protesters in Kyiv. Since the end of the Cold War, Germany has felt uncomfortable about taking on a direct military role. It happened in Afghanistan, but not in Iraq. Getting involved in or backing a military conflict in Ukraine brings back memories of past events with Russia that Berlin would rather not face. Therefore, Germany adopted a contradictory policy. Even though it backed a movement that was mostly against Russia and supported sanctions against it, more than any other country involved, it does not want the political situation to turn into a military conflict. Germany will not take part in any military actions in Ukraine, and the last thing the country wants right now is a war on its eastern border. Since Germany was part of the early stages of the crisis and can't distance itself from it, the country also aims to help calm the situation (Friedman, 2015).

Stefan Fröhlich notes in his monograph that the Ukrainian crisis was a serious test for Germany's new geopolitical image in the system of international relations and its leadership potential. Russia's annexation of Crimea undermined the security order that had emerged in Europe after World War II. This event formed the opinion in traditional pro-Russian political circles in Berlin that it was impossible to curb Moscow's increasingly aggressive foreign policy with classical diplomatic maneuvers alone (Hamilton and Meister 2018). According to Stefan Fröhlich, in recent years, Russia has gained leverage over regional actors by rekindling frozen conflicts in the post-Soviet space. This has allowed them to reconsider their integration process into the Euro-Atlantic space. Since 2008, military support for the separatist tendencies of Abkhazia and South Ossetia has led to the Russia-Georgia war. This war showed that Moscow is using hybrid warfare methods in the region it calls its near abroad. The annexation of Crimea and the military intervention in eastern Ukraine were the culmination of this aggressive policy. The collective West was deprived of effective mechanisms of influence in the face of these geopolitical crises for a long time. The fact that Georgia and Ukraine were outside the framework of NATO made it legally impossible to apply Article 5 of the Washington Treaty. This security gap paved the way for Germany, with the consent of the US and France, to emerge as a political leader in the settlement of the Ukrainian crisis. The consensus that emerged within the alliance on the resolution of the conflict exclusively by non-military means accelerated Germany’s assumption of a regional leadership role (Fröhlich S, 2019, s 51). Russia’s military-political motives during this period were also clear: to maintain strategic superiority over the Black Sea Fleet through Crimea, to increase nationalist loyalty at home, and to block Ukraine’s NATO-EU prospects by creating instability in the Donbas. Germany sought to avoid a direct military confrontation between Russia and the Western alliance, therefore believing that preventing the conflict and reducing tensions (de-escalation) was the most practical way to manage the crisis in the region (Mangasarian and Techau 2017). George Friedman argues that, from a geographical and geostrategic perspective, Germany's interest in the eastern border of the European Union appears to be greater than that of France. As Russia's central strategic partner within the Union and a potential adversary for Moscow in determining the future orientation of the Union's eastern neighbors, Germany already played a central role before the Ukrainian crisis, using the instruments of the

European Neighborhood Policy (ENP) and the Eastern Partnership (in which Berlin was the main player). However, for the first time, the country departed from its policy of reconciliation with Moscow, while clearly declaring its willingness to move closer to the EU in the direction of aid recipient countries and demonstrating its willingness to take a leading role within the EU in de-escalating the conflict in eastern Ukraine. In doing so, it also countered reservations and concerns about a German-Russian axis in Europe that have been voiced in recent years not only in the new member states but also in the United States (Friedman, G. 2012).

German political scientist Stefan Birling notes in his book that the Ukrainian crisis clearly demonstrated the strengths and weaknesses of German foreign policy under Merkel: It was a policy of restraint, multilateralism, and de-escalation. The Chancellor acted wisely, seeking compromises and, as in the past, proved to be an experienced mediator. However, Berlin's policy was more focused on process and symbolism than on content; words spoken rightly were not always followed by practical steps. Domestic and economic-political considerations dominated, while questions of strategic and alliance policy sometimes seemed secondary. For the federal government, "leading" meant simply "managing" the process, not giving impetus to projects and ideas in terms of content. S.Birling concludes that whether this approach would be enough to compensate for the declining role of the United States in the Old World (in Europe) and to make the European Union a serious actor in the struggle with Putin for the future

Eastern Europe remains an open question. (Bierling S, 2014. s. 263). The Russian annexation of Crimea in a fraudulent referendum and the violation of Ukraine's territorial integrity have come as a complete shock to German officials and decision-makers, even though experts at the German Institute for International and Security Affairs, which advises the German government, had previously warned that Crimea could become a new conflict zone, especially after the 2008 Russo-Georgian war. Unlike Georgia, which has had a long history of separatism and conflict management problems since the end of the Soviet era, Ukraine had never had a separatist or territorial conflict before Russia intervened in 2014, so there were no existing systems or processes for resolving such situations. This meant creating entirely new systems for crisis management and conflict management at the highest international level in the months ahead. After Russia formally annexed Crimea on March 18 and fighting broke out in eastern Ukraine, the OSCE became the main diplomatic vehicle through which efforts to resolve the conflict were being pursued, with strong German support (R. Lindnern, p. 27–28). From the beginning, Germany strongly supported the OSCE and actively participated in the diplomatic efforts led by the Swiss OSCE Chairman-in-Office Didier Burkhalter to establish an international contact group (Nünlist, p. 44).

5. GERMANY'S MEDIATION ROLE UNDER ANGELA MERKEL'S LEADERSHIP

The political upheaval caused by the 2014 Ukraine crisis changed how Germany approaches diplomacy and its role in European politics. For the first time, Germany took the lead in how Europe responded to Russia's strong actions in the area they both share. Unlike France's brief efforts to mediate during the 2008 Russo-Georgian War, Berlin was able to create a surprisingly strong and united response, encouraging Brussels to move past just making gentle political statements to actually implementing lasting economic sanctions. It's true that Western organizations received a lot of criticism for not seeing that a regular trade deal with Kyiv would lead to a military response from Moscow regarding Ukraine's land rights. Liana Fix notes in her monograph that Germany has shown an unusual example of unity among European countries in managing the Ukrainian crisis. According to L. Fix, what made Germany's leadership during the crisis effective was that Germany, even though it did not hold the EU Presidency during the Ukrainian crisis, had great power in shaping agreements within the EU. This long disagreement occurred in three distinct periods: first, immediately after the Maidan protests, when tensions rose and initial diplomatic efforts were made in early 2014; then, in mid-2014, when separatists, with Russian support and patronage, began military operations in the Donbas and Luhansk regions of eastern Ukraine and imposed significant economic sanctions; and finally, when the Minsk Agreements were adopted as a standard for European policy. It's interesting to look at Germany's earlier position because it shows that their sudden strong approach wasn't just a follow-up to an ongoing commitment to the Eastern Partnership. Instead, it was more of a response to stabilize the situation (Fix L, 2021, ss. 119-121).

The Russia–Ukraine dispute, which erupted in 2014, served as a pivotal moment not just for ties between the EU and Russia, but also for Germany–Russia relations and Berlin's broader standing in Europe. For the first time, Germany took on a primary and mediating position for the European Union during a crisis within its immediate vicinity. Thanks to German leadership, the EU's response to the Ukrainian turmoil was more robust and synchronous than the French-led resolution of the 2008 Russia-Georgia conflict. Throughout the escalation of the Ukrainian situation from 2014 to 2018, Germany's senior officials played a key part in steering European diplomatic efforts. In early 2014, Foreign Minister Frank-Walter Steinmeier, working with French and Polish counterparts, traveled to Kyiv to facilitate a deal aimed at stopping violence between government forces and Euromaidan demonstrators. After Crimea's annexation, Chancellor Angela Merkel emerged as the chief designer of the EU's cohesive strategy, which merged strong condemnation of legal breaches and economic penalties with a steadfast push for diplomatic dialogue. This strategy reached its peak in February 2015, when Merkel and French President François Hollande jointly negotiated the Minsk-2 agreements. (Siddi, 2020, p. 60–61).

Under the leadership of A. Merkel, the settlement of the Ukrainian conflict as a result of German mediation was mainly resolved by two ceasefire agreements. Liana Fix notes in her monograph that from the first Minsk agreement of September 5, 2014, to the second Minsk agreement of February 12, 2015, two different crisis mediation mechanisms were established. The Normandy format, which included Germany, France, Russia, and Ukraine, arose due to the practical needs of the time. In the Normandy format, Germany took a leading role in setting the agenda and got agreement from the EU and other member states to support its efforts in mediating the crisis. In July 2014, the European Council said that member states supported the diplomatic work happening in this format. Germany used this connection with the EU, which helped it by giving it more power and backing from the EU. Germany kept sharing updates with EU institutions and member countries through direct talks about how the negotiations were going. According to Michal Natorski and Karolina Pomorska, this frequent exchange of information helped build trust in the process, making member states feel confident that Germany was being honest and fair. This strengthened Germany's position as a leader in resolving crises, even though it didn't have an official mandate, unlike France did during the Russian-Georgian War when it was leading the Council. France was part of the Normandy format from the beginning, but it didn't have as big a role as Germany. A French official called this situation "leading from behind," meaning Germany was the one that created the plans and set the main topics for discussion. Even though the Minsk agreement was signed in September, large-scale fighting in eastern Ukraine started again by January 2015. For the second Minsk agreement, the Normandy format played an even bigger role: Merkel, Hollande, Poroshenko, and Putin spent a long time in talks to create a "Package of Measures for the Implementation of the Minsk Agreements," which was finally approved by the representatives of the Trilateral Contact Group on February 11, 2015. The thirteen-point agreement required a more detailed and step-by-step plan to fully carry out a ceasefire and local elections, as well as steps toward decentralizing power. Additionally, the four heads of state and government issued a statement supporting these actions. However, soon after the agreement was signed, Russian forces took back a lot of territory during the Battle of Debaltseve and asked Ukrainian forces to surrender, which greatly weakened the second Minsk agreement. This agreement has not been completed to this day. In autumn 2016, Foreign Minister Steinmeier, who was then the OSCE Chairman, proposed a "Steinmeier formula" to figure out the order in which the thirteen points of the second Minsk agreement should be implemented. (L. Fix. 2021. p.128-131). At the 51st Munich Security Conference, Chancellor Angela Merkel highlighted how crucial it is for countries around the world to work together to tackle the problems we are facing. About the Ukrainian crisis, she stated, "We aim to create security in Europe together with Russia, not in against to Russia." She pointed out that Russia had broken the peace agreement that was set up after World War II and emphasized how important this agreement is at the start of her speech. Russia has broken Ukraine's territorial integrity and disrespected the sovereignty of nations, which goes against international law. The Chancellor emphasized that these actions clearly go against the Helsinki Final Act. “We in the EU and our partners across the Atlantic strongly state that any policies that try to violently change borders in Europe are not acceptable in the 21st century.” Angela Merkel stated that no one should want to see Europe divided again, and definitely not to face a situation that could lead to uncontrolled conflict (Merkel, 2015). As a result, Germany began to be recognized as a leading power and its influence extended beyond the European Union to include global crisis management. In short, between 2014 and 2016, FRG took a leading role in shaping the discussions during the negotiations of agreements, and no other member states challenged this position. Unlike the situation during the Russian-Georgian War, no other country put forward different ideas or plans for managing the crisis, even though there were differing opinions among the member states (Forbrig, J. 2015). FRG was able to get agreement from other member states for its efforts to mediate the crisis, working closely with France as its partner. This helped Germany gain trust and recognition for its leadership in the situation. When the EU's policy towards its neighbors and its policy towards Russia came into conflict, Germany chose to support a united EU approach rather than focusing on its own relationship with Russia. (Natorski, M., & Pomorska, K. 2017, p 62).

6.CONCLUSION

The crisis in Ukraine forced Germany to change its approach to its Eastern policy to fit the new situation. Angela Merkel’s skillful leadership in diplomacy was key to maintaining security in Europe, but in the end, it did not fix the deeper issues that existed. Between 2014 and 2016, Angela Merkel’s efforts in mediation diplomacy were an important test for the security of Europe. The research shows that Germany's way of dealing with the crisis was based on two main strategies: encouraging the “Minsk” talks to stop military conflict while also trying to bring Russia into the European security system. The Ukrainian crisis became more of a German crisis management effort than a European crisis management effort. Germany chose its own partners, institutions, and instruments in the management of the crisis in Ukraine. Germany, under Chancellor Angela Merkel, shaped the EU’s intergovernmental Common Foreign and Security Policy and sanctions policy; supported mediation efforts through the OSCE; strengthened crisis diplomacy with informal coalitions; used NATO to win over Eastern European states within the EU; and benefited from the United States as a military supporter in Ukraine. Germany’s leadership was based not on economic interests but on the application of the principles of international law and European security rules. In order to uphold these norms and principles, Germany took on the risk of negative economic consequences that could arise from a conflict with Russia and its traditionally good relations with Russia. In this context, the Federal Republic of Germany increased its legitimacy and credibility in Europe and played an important role in ensuring European unity and security in Europe against Russia. During the Ukrainian crisis, all of Merkel's efforts were aimed at not only regulating the Ukrainian crisis but also ensuring security in Europe, being a strong and responsible and reliable partner in ensuring European security, and using all means to direct Russia to comply with international law and not isolate it from the European security system, but especially considering the important issue of reliance on Russian energy, it was clear that these methods were limited. Finally, we would like to note that Germany's mediation efforts managed to keep the conflict "frozen" but could not prevent Russia from moving away from the European security system. The Ukrainian crisis proved that the balance that Germany, under Merkel's leadership, tried to maintain between its economic and energy needs and security concerns was insufficient in comparison with Russia's changing policy. This situation opened the door for new geopolitical securtiy realities in Europe and in Germany too.

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CONTEMPORARY MIGRATION IN EUROPE: PROSPECTS, CHALLENGES AND POLICY RESPONSES

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ABSTRACT

The aim of this study is to assess the current situation regarding migration in Europe, with a focus on socio-economic challenges, demographic prospects, and the effectiveness of recent policy measures taken at both the national and EU levels. To analyze these factors, the study offers a comprehensive approach based on an examination of current legislative frameworks and existing migration management strategies. The study's findings point to growing polarization: despite the clear economic need for labour migrants to offset demographic decline, policy measures are increasingly prioritizing restrictive border controls and short-term crisis management rather than long-term social integration. The research's scientific novelty lies in its comprehensive assessment of the EU's recently adopted migration framework against the backdrop of changing demographic realities. The findings can be utilized in the development of strategies for a balanced and sustainable migration policy in the future.

Keywords: migration, Frontex, EU policy, socio-economic integration

1.INTRODUCTION

Migration to Europe is one of the most complex phenomena of the modern era. This phenomenon shapes the socio-economic and political landscape of the European Union in the 21st century. Europe is one of the main destinations for migrants from all over the world. This trend is particularly reinforced by increasing globalisation, climate change, and geopolitical instability in the Middle East and Africa. Such historical roots have led to the emergence of a dual system in which there is an interconnection between objective demographic prospects and current social challenges. On the one hand, there is a serious threat to the pension systems of EU countries against the backdrop of a decline in the proportion of the working-age population and the ageing of the native population. In this context, regulated legal migration is a necessity for the economic sector and helps to address the shortage of both skilled and unskilled labour (Vankova, 2020, p. 112).

On the other hand, illegal immigration poses challenges for the system. Such illegal migration places a burden on the host countries' systems, and furthermore, this constant pressure increases social tension and potentially leads to social fragmentation and higher polarization. These processes require the development of fundamentally new policy measures, and the response to this phenomenon has been an attempt by national governments and EU institutions to find a balanced approach between national security concerns and the fundamental principles of protecting individual rights.

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The tightening of external border controls, as well as the drafting of a new EU pact on migration and asylum, reflects a gradual shift towards a more pragmatic approach in this regard. This article aims to provide a comprehensive analysis of the current foundations of European migration and to assess the balance between the economic imperatives of migration and the real threats to the social structure of Europe.

2. THEORETICAL AND INSTITUTIONAL FOUNDATIONS OF EU MIGRATION POLICY

2.1. The Recent Change of the EU Legal Framework: From Dublin III to Securitization

The 2015 migration crisis marked a turning point in the European Union's legal system, prompting a review of asylum provision and border management. The 'Dublin III' Regulation, adopted in 2013, had formed the basis of the pan-European asylum system prior to that period. Under this system, responsibility for a migrant mainly fell to the country whose border they had crossed. Karamanidou and Kasparek argue that such a mechanism was characterised by structural asymmetry. The main burden of migration flows fell on the border countries of Southern Europe, such as Italy, Greece and Malta (Karamanidou & Kasparek, 2022, pp. 1324-1325). Due to their geographical location, these countries' administrative, financial and legal systems were under constant pressure, and by 2015, the strain on national data systems had become excessive.

This has led to operational difficulties within the standard Dublin system. Local border services faced significant difficulties in registering arrivals in a timely manner within the single Eurodac database. These countries were often points of entry into the EU and served as transit points for further migration to countries in Northern and Western Europe. This phenomenon is known as 'secondary migration'. The excessive strain caused by migration flows led to the temporary reinstatement of passport controls by local authorities. This temporarily destabilised the functioning of the Schengen Agreement.

Such management measures are linked to the gradual shift of the European legal framework away from the classical humanitarian approach towards the concept of securitisation. It is important to note that, in the context of migration policy, the securitisation implies a re-evaluation of migration flows. As Bossong and Carrapico point out in their study, migration flows are viewed not as a matter of humanitarian law or a necessity for the labour market, but as a factor that has a direct impact on state security and social stability (Bossong & Carrapico, 2016, p. 45). Whilst integration and the protection of rights were the priorities in the early 2010s, the key objectives in subsequent years were the prevention of irregular migration and the improvement of return procedures. This gradual shift is evident within the changes of official EU documents, whilst the 'European Agenda On Migration', adopted in 2015, sought to balance humanitarian aid for refugees with measures to combat people-smugglers; subsequent documents, such as the Security and Defence Strategy and other directives, have placed the primary emphasis on security (Ciger, 2017, p. 108).

This shift in priorities became even more entrenched in the early 2020s. Following changes in the geopolitical situation on Europe's eastern borders, European institutions introduced new concepts into their legislative frameworks, such as 'hybrid challenges' and 'the instrumentalisation of migration'. The description of migrants in official documents has also changed. Migrants were previously described as people escaping war; such migration flows are now interpreted as a potential tool for political pressure from other countries, with the potential to destabilise the European space. Specifically, this refers to the overburdening of social services or the intensification of internal conflicts. To secure these changes, the European Union has significantly reduced the amount of financial assistance provided to refugees, whereas previously, those arriving were guaranteed a comprehensive package of social support. This approach reduced Europe's appeal to certain groups. Secondly, the processing of migration cases was streamlined. The possibility of filing multiple appeals, which used to prolong proceedings, was restricted. A fundamental change was the acceleration of border procedures. Asylum seekers without legal grounds were rejected immediately. This significantly relieved the burden on the judicial systems of the countries.

From now on, the individuals were sent back before they even entered the legal territory of the European Union (Casolari, 2021, p. 820).

2.2. Institutional Restructuring and the Expansion of Frontex

The shift in the European legislative framework was also accompanied by a profound restructuring of the very institutions responsible for safeguarding the EU's borders. A key step was the transformation of Frontex (the European Border and Coast Guard Agency) into a supranational body with extensive powers.

Frontex was established in 2004, and until 2015 remained an organisation with an extremely limited budget and no operational staff of its own, primarily engaged in analysis and consultation. Whilst border protection remained the responsibility of national governments, the 2015 crisis demonstrated that the protection of national borders by individual states places a strain on their institutional system. As a result, Frontex underwent a series of reforms. These reforms were completed by 2024-2026. Ekelund demonstrates that these changes transformed Frontex into a supranational law enforcement agency (Ekelund, 2019, p. 345). In 2016, following the adoption of new regulations, the organisation adopted its current name and an expanded mandate, along with an increase in its budget. The agency invested in equipment, such as drones, helicopters, vessels, and night-vision systems, and such investments have enabled the organisation to carry out continuous, independent monitoring of border areas. In parallel with the development of its monitoring activities, Frontex also expanded its legal powers, specifically in the area of deporting immigrants. The agency was now authorised to organise and carry out operations to deport individuals present on EU territory without any legal grounds. To this end, charter flights were arranged between Member States. Moreover, Frontex's activities extended far beyond the EU's borders, as the EU signed agreements with the Western Balkan countries and African states. The agency was granted the right to deploy its equipment and conduct border controls on the territory of third countries. This enabled the agency to curb illegal migration at its very inception (Fernández-Rojo, 2020, pp. 91-93).

A further structural change at Frontex was the introduction of a common training standard; specifically, a common core curriculum was developed. This meant that differences in the working methods of border guards from different Member States were minimised, and operational border control was carried out according to standardised procedures. This shift in the agency's structure created an asymmetry in which the focus on deportation and monitoring took precedence over longer-term refugee social integration programmes. This transformed the agency into the primary implementer of European securitisation policy.

Despite the relative effectiveness of the reformed system, in order to maintain the academic neutrality of the analysis, it's important to note that such centralisation of Frontex has faced serious challenges. In academic discourse, alongside the expansion of Frontex's responsibilities, concerns have also been raised regarding the acceleration of border procedures, and critics argue that the accelerated procedures described earlier can sometimes hinder refugees' access to the legal process for the examination of asylum claims. Specifically, there are concerns regarding potential legal complications if an individual's personal circumstances are not properly assessed or considered. Although the strengthening of a unified border control system and the development of modern technological monitoring methods have enabled EU countries to significantly improve the management of illegal migration flows, these innovations have highlighted the need to find a new balanced approach. European institutions therefore faced the challenge of balancing their commitment to fundamental human rights, which have historically formed the basis of European identity, with the practical necessity of ensuring effective protection of the EU's external borders in response to changing geopolitical circumstances.

3. CONTEMPORARY OPERATIONAL MECHANISMS AND EXISTING CHALLENGES OF THE MODERN EU MIGRATION SYSTEM.

3.1. The Digitalization of Migration Control: The ‘Smart Borders’ and Information Systems

In order to strengthen the operational mechanisms for managing migration flows, the EU has set a course for the digitalisation of the system in addition to physical control. In parallel with the expansion of Frontex’s powers and physical measures to control legal and illegal migration, an initiative called ‘Smart Borders’ was launched. This concept has become a key element of modern migration security in the EU countries (Mitsilegas, 2021, p. 275). Simple border controls at airports and land borders were digitized by a unified system with a large-scale database. This digital frame is based on several systems. Each of these systems addresses a specific vulnerability in migration control, allowing the collection, exchange, and analysis of all necessary data that an individual provides as they cross the Schengen Area. Such a system optimises two processes at once. First, for legal migrants, the control process is accelerated, and second, illegal migration is curbed.

One such system is the Entry/Exit System (EES). This system was developed to address a long-standing migration issue in EU countries - overstayers. This problem concerned people who entered EU countries on a legal basis but refused to leave the territory once their stay had expired**.** Under the new system, every time an individual crossed the border, their name, the type of travel document they held, and biometric data were instantly recorded. Specifically, fingerprints and a digital photograph were collected, and if an individual overstayed their authorised period, national law enforcement agencies received special alerts and could take action accordingly. This technology made it possible to identify irregular migrants not during random checks, but in accordance with a new automated algorithm.

Another such system aimed at addressing the existing vulnerabilities of the European system was the European Travel Information and Authorisation System (ETIAS). This mechanism was created on the model of the existing US ESTA system. Prior to the introduction of this system, a significant number of citizens from various countries were allowed to enter the Schengen Area without visas, which meant that European border guards would only receive information about such travellers upon their arrival at the border. This approach increased security risks due to the lack of systematic control, but with the introduction of this system, the approach changed radically. Foreign citizens who had visa-free entry were required to complete a special online form in order to be able to purchase a ticket, after which the system runs the individual’s details through the existing immigration databases of EU countries and Interpol. If no issues are found, the algorithm automatically completes the authorisation process within a few minutes, and in case any violations are detected, the application is sent for a manual review. This modernisation of the system enables the European Union to detect potentially dangerous individuals at the application review stage, which is not the first example of preventive measures to stricter EU security.

It is also important to note that, in addition to the creation of new systems, existing systems have also undergone significant changes. For instance, the EU’s existing biometric database - Eurodac- has tightened its controls. Whilst the database was originally created to collect fingerprints from the age of 14, this age limit was later lowered to 6, and furthermore, a facial recognition algorithm was added to the database’s functions, along with the registration of all migrants crossing the border illegally. These innovations significantly optimized the work processes of local law enforcement agencies, and moreover, local law enforcement agencies had direct access to the updated system. According to Mitsilegas, these changes to the EU's border area have influenced a shift from a purely physical space into a digital ground (Mitsilegas, 2021, p. 275). This not only enabled the system to be standardized but also raised the level of internal security in the EU.

3.2. Existing Challenges of The Modern EU Migration System

The introduction of modernised systems for monitoring migration flows has significantly streamlined security procedures; however, this approach does not resolve the fundamental challenges of socio-economic integration inherent in the very structure of EU countries. These challenges stem from the tension between the existing need for economic integration and the need to ensure social stability within the European area. In the context of an ageing population, the inflow of migrants is considered a necessity for the economies of EU countries. At the same time, chaotic and irregular migrant flows can undermine public security, place a strain on local institutions, and lead to increased social tension.

Social infrastructure, in the form of education, social housing and healthcare, is also under constant pressure in the countries of 'first reception'. Meanwhile, local populations in countries in Western or Northern Europe are frequently dealing with challenges of social disintegration. Furthermore, such crises in existing migration control systems are fuelling the rise in popularity of far-right parties. These parties often offer a return to previous, stricter national borders. The approach offered by this study doesn't mainly focus on an 'open-door' policy or a complete closure of borders, but proposes a shift towards a more pragmatic model that will provide the successful implementation of socio-economic integration, whilst also meeting national security requirements (Campesi, 2018, p. 548).

One of the proposals is to decrease the pressure on the institutions of Southern European countries. It is proposed that specialised centres be established in third countries or transit countries to process asylum applications. This approach will only serve to strengthen the practice of curbing illegal migration at its very inception. It's argued that this will help to reduce the pressure on the social institutions and infrastructure of EU countries. European experts will be granted the right to grant legal status to refugees outside the EU. The second proposal involves addressing the current issue of deportation. In such cases, countries refuse to accept migrants deported from Europe. This effectively leaves them stranded on European soil. It is proposed that trade relations and preferential treatment be made conditional on third countries cooperating on deportation matters, including the issuance of visas. Countries whose citizens are deported from EU member states are proposed to be obliged to take them back, assuming full responsibility in this matter (Slominski & Trauner, 2018, pp. 446-447). This solution could potentially help EU countries transform migration management. A reactive emergency response can be shifted into pragmatic socio-economic integration with a long-term perspective.

4.CONCLUSION

This study provides an analysis of the current migration situation in Europe, taking into account the backdrop of demographic and socio-economic challenges. The previous 'Dublin III' system is often linked with an excessive burden on southern border countries, which led to a gradual shift in European policy from the traditional humanitarian approach towards securitisation, in which migration is mainly perceived as a security threat. The main instruments of control became the expansion of the powers of Frontex. The agency has changed significantly over the last decade, and the digitalisation of borders through the biometric systems, such as EES, ETIAS, and Eurodac. Despite the economic need for labour due to an ageing local population, the focus has primarily shifted towards national security and stricter border controls. For long-term stability, this study proposes a pragmatic approach. The study proposes the establishment of application processing centres in transit or third countries and the linking of trade preferences to other countries' willingness to take back their deported citizens.

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