**Indicating Review - Strategy Course**

**"Bulgaria" Case Study - Dr. Anat Stern**

**Objectives:**

1. Experiencing strategic thinking as an effort to clarify an emerging reality.
2. Mapping difficulties in strategic thinking.
3. Getting an understanding of hedging the different operational levels in the strategy in relation to the various efforts (diplomatic, military, and economic.)
4. Experience using tools to deal with difficulties in strategic thinking.

**Part A: Strategic Scenario**

* The world at the beginning of the 20th century is a multi power world (the Ottoman Empire, the Russian Empire, colonialist England and France, Germany as a rising power.)

**I. The Russian Empire - Hurt and Sensitive:**

1. Failed to capture the straits of the Dardanelles in order to gain access to the Mediterranean Sea.
2. Lost in the Russo-Japanese War of 1904-1905.
3. Political unrest against the Tsarist regime - A popular uprising for social and economic protest against the regime was suppressed, but the situation is unstable.

**II. The Ottoman Empire – A weakening power:**

1. European powers assist the Balkan revolts;

2. Change of government: Young Turks lead reforms:

1. Internal change - reform of the imperial administration and rehabilitation of the military.
2. External change - the return of stolen lands - Bulgaria – small and isolated - looks like an excellent destination to begin restoration.

**III. New Actor - Germany**

1. A new power - did not take territories from the Ottomans.
2. Interested in opening access to the Middle East through the Ottoman Empire to reach Asia and Africa for the purpose of conquering territory and economic development.
3. A rival of Britain and France.
4. A large arms deal between Germany and the Ottomans gives an advantage to the Ottomans against Russia, Britain and France.

**Bulgaria: The Actor**

1. A former Balkan state under Russian and Ottoman rule; Independent since 1908, under Prince Ferdinand.

**2. Conflicts on the Borders:**

1. To the West - against Serbia supported by the Russians.
2. To the North - against Romania supported by the Russians.
3. To the East is the Black Sea.
4. To the South - the Ottoman Empire:

- Border disputes; the Ottomans want to return territories lost in the Balkan wars.

**- The Ottomans control the Straits of the Dardanelles and the Bosporus - if they are closed they will choke the Bulgarian economy.**

**3. Internal Actors:**

* King Ferdinand – the first king of independent Bulgaria.
* Ivan Gashov - Bulgarian Prime Minister and Minister of Defense (in charge of the military)
* Nikola Tudor Zakow - Commander of the Second Army (an artillery officer, known for his courage and willingness to take risks.)

**Part B: Analysis of the Bulgaria Case - First Discussion**

The date is autumn 1911.

You constitute a Bulgarian political-military planning team. The Prime Minister has to recommend to Prince Ferdinand **the most appropriate response to the deteriorating security situation in face of the Ottoman Empire.**

**Threats:**

1. **Political threat** to Bulgaria's independence from the Ottoman Empire.
2. **A strategic military threat** because of the new arms agreement between the Ottoman Empire and Germany.
3. **Routine security military threat:** violent incidents on the borders that could escalate into a war of attrition.
4. **Economic threat:** The Ottomans control the Dardanelles and block them from time to time. The Dardanelles are an essential pipeline to the Bulgarian economy.

**Discussion in couples, followed by a plenary session:**

**What are your recommendations to the Prime Minister - how should he operate considering the threat that is emerging from the south?  
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**Part C: The Russian Proposal**

1. The reduction of Russian transit permits in the Dardanelles over the Ottomans' is a violation of the dignity and economy of Russia.

2. The Tsar wants to conquer the Dardanelles but is afraid:

* Because of the military failure in the past (which cost him in Crimea)
* The unstable political situation in Russia
* Fear of German intervention - so the move should be quick
* Russia has no land access to the crossings.

3. Russia changes its attitude towards Bulgaria:

a. Offers to sell her advanced weapons that will restore balance against the Ottomans.

b. Autumn 1912, A Russian emissary arrives in Bulgaria and offers cooperation against the Ottoman enemy. The Bulgarian government is positively considering the Russian idea**.**

**4. You constitute a Bulgarian political-military planning team. You must propose a strategic method of action and an operational idea that will suit the demands of the political echelon:**

1. To gain access to the Mediterranean for Russia and Bulgaria that the Ottoman Empire could not close in the future.
2. To provide the Russians with a cause they are demanding, that will allow Russian intervention in the region in favor of Bulgaria.
3. The action must reach the **fastest possible outcome** in order to prevent the European powers from intervening in favor of the Ottoman Empire.

**Concerns of the Bulgarian Prime Minister:**

* Whether to believe the Russians in light of the previously troubled relations between Russia and Bulgaria?
* Internal weakness in Russia – It is not stable socially and economically
* The Prime Minister fears that Russia will not honor its promise and Bulgaria will find itself fighting alone - European powers will intervene and impose economic sanctions on the aggressive Bulgaria.
* **The Bulgarian Prime Minister's directive** that the plan of operation includes a situation in which Bulgaria can retreat without its interests being harmed.

**Required Product:**

**As a political-military planning team, recommend strategic action and operational ideas to the Prime Minister.**

**Use, as much as possible, terms learned during the course: hedging of levels of action, genealogy, interests, tensions, affinities, cognitive map.**