

MUNLawS 2023  
Historical committee  
*Cuban crisis*

# Table of Contents

- 1 INTRODUCTION..... 4
- 2 HISTORICAL BACKGROUND ..... 5
  - 2.1 COLD WAR ..... 5
    - 2.1.1. The “Big Three” Conferences and End of WW2 ..... 6
    - 2.1.2 Division of Germany and the Berlin Blockade..... 7
    - 2.1.3 Yugoslavia and Eastern Europe ..... 11
    - 2.1.4 NATO and Warsaw Pact..... 12
    - 2.1.5 Cold war hotspots ..... 14
  - 2.2 CUBA..... 20
    - 2.2.1 Pre-Columbian era ..... 20
    - 2.2.2 Colonisation ..... 20
    - 2.2.3 Republic of Cuba (1902 – 1959)..... 22
    - 2.3.5 Castro’s Cuba..... 25
  - 2.3 SOVIET UNION AND UNITED STATES ..... 27
    - 2.3.1 Soviet Union ..... 27
    - 2.3.2 United States ..... 29
    - 2.3.3 Relations ..... 31
- 3 THE CUBAN MISSILE CRISIS..... 35
  - 3.1 American actions against Cuba..... 35
  - 3.2 Missile gap..... 36
  - 3.3 Castro – Khrushchev agreement..... 37
  - 3.4 Missile launch facilities construction..... 39
  - 3.5 U-2 SPY plane images ..... 41
  - 3.6 Cuban naval quarantine ..... 42
  - 3.4 SECURITY COUNCIL ..... 44
    - 3.4.1 The role of the United Nations in the Cuban Missile Crisis ..... 44
    - 3.4.2 UN as the intermediary ..... 45
- 4 APPLICABILITY OF THE EXPECTED UTILITY HYPOTHESIS ..... 46
  - 4.1 Introduction ..... 46
  - 4.2 Theory of choice ..... 46
  - 4.3 Expected utility in an international conflict ..... 48
    - 4.3.1 Alternatives..... 48
    - 4.3.2 Phase 1..... 49
    - 4.3.3 Phase 2..... 50
    - 4.3.4 Phase 3a..... 50
- 5 ISSUES TO ADDRESS..... 51

6 CONCLUSION ..... 52

7 SOURCES AND FURTHER READING ..... 53

    7.1 Sources..... 53

    7.2 Further reading..... 63

# 1 INTRODUCTION

*“Within the past week, unmistakable evidence has established the fact that a series of offensive missile sites is now in preparation on that imprisoned island. The purpose of these bases can be none other than to provide a nuclear strike capability against the Western Hemisphere. [...] Acting, therefore, in the defense of our own security and of the entire Western Hemisphere, and under the authority entrusted to me by the Constitution as endorsed by the resolution of the Congress, I have directed that the following initial steps be taken immediately: [...] To halt this offensive buildup, a strict quarantine on all offensive military equipment under shipment to Cuba is being initiated. [...] It shall be the policy of this Nation to regard any nuclear missile launched from Cuba against any nation in the Western Hemisphere as an attack by the Soviet Union on the United States, requiring a full retaliatory response upon the Soviet Union.”<sup>1</sup>*

1. The world watched stunned in October of 1962 as the President of the United States spoke these words in a televised address from the Oval Office. What was feared to come since the bombing of Hiroshima in 1945, seemed imminent. Surely enough, none of the parties involved were pleased to proceed with sabre-rattling on the scale of all possible Armageddon – but being trapped in a game of chicken, none seemed prepared to blink first either.
2. As the 61<sup>st</sup> anniversary of the Cuban Missile Crisis approaches, it does not only seem sufficient to remember the timeline of events but also comprehend its causes and critically evaluate its eventual, as well as other viable solutions. As much as studying this guide is recommended, the delegates for the 2023 MUNLawS Historical Committee are urged to conduct further research, being provided with additional sources.
3. We face ongoing disputes in Ukraine, Israel, Taiwan and elsewhere, the dimension and consequences of which are still uncertain. We salute soldiers who fight for the purpose

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<sup>1</sup> John F. Kennedy Library, “Officials of the Kennedy Administration”, *John F. Kennedy Library*, <https://www.jfklibrary.org/learn/about-jfk/life-of-john-f-kennedy/fast-facts-john-f-kennedy/officials-of-the-kennedy-administration>. (accessed July 12, 2023).

of their lands and their people and yet more we appreciate peacemakers who fight for the purpose of humankind.

## 2 HISTORICAL BACKGROUND

### 2.1 COLD WAR

4. Cambridge dictionary defines the term “cold war” as a state of extreme unfriendliness existing between countries, especially countries with opposing political systems, that expresses itself not through fighting but through political pressure and threats<sup>2</sup>. What is interesting is that the term itself was rarely used before 1945, certain newspapers used it along with the term “hot peace” to define the European stage immediately before World War 2.<sup>3</sup> But on 19 of October 1945 George Orwell’s essay "You and the Atomic Bomb" was published in the British magazine *Tribune* in which Orwell plays around with a thought of permanent stalemate between two great nuclear powers that become (in his words) “unconquerable”. He described this position as a “cold war”, an end to all large-scale wars at the cost of prolonging indefinitely a “peace that is no peace”.<sup>4</sup> The world that followed, was not far from his prediction.
5. Cambridge Dictionary also states that the term is usually used to describe the relationship between the US and the Soviet Union after the Second World War.<sup>5</sup> Even though the United States, UK and Soviet Union cooperated during World War 2, the tensions between them never really stopped. As the old saying goes the enemy of my enemy is my friend, the cooperation was still seen as the best option to defeat their common enemy, but after the defeat of The Third Reich and Japan, the old tensions quickly flared up and the world was divided on the communist East block led by the Soviet Union and capitalist West block led by United States and other western

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<sup>2</sup> Meaning of cold war in English, Cambridge Dictionary, <https://dictionary.cambridge.org/dictionary/english/cold-war>, (accessed July 10, 2023).

<sup>3</sup> For example: The Chattanooga News, “Nine Million Men Now Under Arms!(1939)”, *The Chattanooga News*, , <https://www.newspapers.com/article/94789630/nine-million-men-now-under-arms1939/> (accessed July 10, 2023).

<sup>4</sup> The Orwell Foundation, “You and the atom bomb”, *The Orwell Foundation*, <https://www.orwellfoundation.com/the-orwell-foundation/orwell/essays-and-other-works/you-and-the-atom-bomb/> (accessed July 10, 2023).

<sup>5</sup> Meaning of cold war in English, Cambridge Dictionary, <https://dictionary.cambridge.org/dictionary/english/cold-war> (accessed July 10, 2023).

democracies. Cold War engulfed all aspects of life, with the space race and new proxy wars there were more and more concerns that cold war may turn hot. The Cold War reached its peak during the Cuban missile crisis, where during the 13 days the United States and the Soviet Union clashed head to head in a political and military standoff.

6. The curious geopolitical situation between the two major powers will be discussed more in a later part of this study guide.

### **2.1.1. The “Big Three” Conferences and End of WW2**

7. During the course of World War II, three significant conferences were held by the leaders of the major Allied powers - the Soviet Union, the United States, and the United Kingdom. The first of these meetings took place in Tehran, Iran, from November 28 to December 1, 1943, and it marked a crucial turning point in the war. After German failures in 1942 and 1943, the time has come for the Allies to take charge of the war.
8. At the Tehran Conference, the leaders, Joseph Stalin, Franklin D. Roosevelt, and Winston Churchill, reached a consensus on the importance of opening a second front against Germany. This decision aimed to put more pressure on the German forces from multiple directions. Additionally, discussions were held about the fate of Eastern Europe and Germany after the war.<sup>6</sup>
9. The second conference, held in Yalta from February 4 to the 11, 1945, came at a time when the defeat of the German army was only a question of time. However, the situation in the Pacific theatre was less certain, and the United States and the UK wanted to secure Soviet participation in the war against Japan. The Yalta Conference also focused on determining the future of Germany, Eastern Europe, and the establishment of the United Nations. The Allied leaders agreed that the post-war governments of Eastern European nations bordering the Soviet Union should maintain friendly relations with the Soviet regime. In return, the Soviets pledged to allow free elections in all territories liberated from Nazi Germany. However, this conference marked the beginning of tensions within

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<sup>6</sup> Office of the Historian, Foreign Service Institute United States Department of State, “The Tehran Conference”, 1943, *Office of the Historian, Foreign Service Institute United States Department of State*, <https://history.state.gov/milestones/1937-1945/tehran-conf> (accessed July 10, 2023).

the Alliance, as none of the leaders left completely satisfied with the outcomes, especially concerning the postwar status of Poland.<sup>7 8</sup>

10. The Potsdam Conference was held at Potsdam, Germany from July 17 to August 2, 1945, and it was the last of the three major war conferences. At this conference, Harry S. Truman represented the United States, following the death of President Roosevelt in April 1945, shortly after the Yalta Conference. Potsdam conference expanded on the points that were agreed upon in Yalta and established a Council of Foreign Ministers representing the five principal powers (Union of the Soviet Socialist Republics, China, France and the United States) with a goal to determine peace treaties with Germany's wartime allies Italy, Bulgaria, Hungary and Romania - and its co-belligerent Finland.<sup>9</sup>
11. While in Potsdam, Truman told Stalin about the United States' "new weapon" (the atomic bomb) that it intended to use against Japan. Stalin, on the surprise of Truman, showed 'no unusual interest'. This was undoubtedly because the Soviet dictator already knew of its existence through his spies in the West.<sup>1011</sup> On July 26 Potsdam Declaration was issued from the conference to Japan, demanding unconditional surrender and threatening heavier air attacks if it did not. After Japan had rejected this ultimatum, the United States dropped atomic bombs on Hiroshima and Nagasaki.<sup>12</sup>

### **2.1.2 Division of Germany and the Berlin Blockade**

12. After the Potsdam conference, Germany was divided into four occupied zones: Great Britain in the northwest, France in the southwest, the United States in the south and the Soviet Union in the east. Berlin, the capital city situated in Soviet territory, was also

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<sup>7</sup>History, "Yalta Conference foreshadows the Cold War, This Day In History", *History*, <https://www.history.com/this-day-in-history/yalta-conference-foreshadows-the-cold-war> (accessed July 10, 2023).

<sup>8</sup>Encyclopedia Britannica, Yalta Conference, *Encyclopedia Britannica*, <https://www.britannica.com/event/Yalta-Conference> (accessed July 10, 2023).

<sup>9</sup>Imperial War Museums, "How The Potsdam Conference Shaped The Future Of Post-War Europe", *Imperial War Museums*, <https://www.iwm.org.uk/history/how-the-potsdam-conference-shaped-the-future-of-post-war-europe> (accessed July 11, 2023).

<sup>10</sup>U.S. Department of energy, "Potsdam and the final decision to use the bomb, The Manhattan Project", *U.S. Department of energy*, [https://www.osti.gov/opennet/manhattan-project-history/Events/1945/potsdam\\_decision.htm](https://www.osti.gov/opennet/manhattan-project-history/Events/1945/potsdam_decision.htm) (accessed July 11, 2023).

<sup>11</sup>Dr. Matin Zuberi, "Stalin and The Bomb, Strategic Analysis: A Monthly Journal of the IDSA October 1999 (Vol. XXIII No. 7)", *Strategic analysis*, [https://ciaotest.cc.columbia.edu/olj/sa/sa\\_99zum03.html](https://ciaotest.cc.columbia.edu/olj/sa/sa_99zum03.html) (accessed July 11, 2023).

<sup>12</sup>Truman Library Institute, "Marching to victory: The Potsdam Declaration", *Truman Library Institute*, <https://www.trumanlibraryinstitute.org/wwii-75-marching-victory-17/> (accessed July 11, 2023).

divided into four occupied zones. The Allies issued a statement of aims for their occupation of Germany: demilitarization, denazification, democratization, decentralization, dismantling, and decartelization. Germany also lost a territory east of the Oder and Neisse rivers, which fell under Polish control, as agreed on Yalta Conference. This was a compensation for the Polish territories that had been occupied by the Soviet Union at the beginning of the war, according to the Molotov-Ribbentrop Pact, a non-aggression agreement between Nazi Germany and the Soviet Union that was later violated by Germany.<sup>13</sup> Millions of ethnic Germans living in this territory were forced to leave, suffering terrible conditions during their expulsion. Many froze or starved to death on over-crowded trains, while others were subject to forced labour camps under Polish and Czechoslovakian governments.<sup>14</sup>

13. But one of the biggest rifts between the Soviet Union and the rest of the occupying nations formed around the issue of war reparations. One of the reasons that the German economy collapsed after World War I was that it had to pay billions of dollars in reparations, demanded by the Treaty of Versailles. The British, French and Americans wanted to avoid that mistake, but the Soviet Union, whose own economy was heavily damaged by the Germans during World War II, wanted Germany to pay up.<sup>15</sup>
14. What happened was a stalemate, agreements made at Conferences were supposed to be temporary solutions, but since the war was over, the previous disagreements were now brought to light and further negotiations on the status of Germany were not advancing. A stalemate between the United States and the Soviet Union implied the division of Europe, with Germany itself divided between East and West, neither side willing to accept the position of the other.<sup>16</sup>

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<sup>13</sup> Piotr Eberhardt, "The Curzon line as the eastern boundary of Poland: The origins and the political background", *Geographia Polonica* Volume 85, Issue 1, pp. 5-21, <http://dx.doi.org/10.7163/GPol.2012.1.1>, [http://rcin.org.pl/igipz/Content/28362/WA51\\_46563\\_r2012-t85-no1\\_G-Polonica-Eberhardt.pdf](http://rcin.org.pl/igipz/Content/28362/WA51_46563_r2012-t85-no1_G-Polonica-Eberhardt.pdf) (accessed 11 July, 2023).

<sup>14</sup> Service, Hugo. "Reinterpreting the Expulsion of Germans from Poland, 1945–9." *Journal of Contemporary History* 47, no. 3 (2012): 528–50. <http://www.jstor.org/stable/23249005> (accessed July 11, 2023).

<sup>15</sup> Wagner, R. Harrison. "The Decision to Divide Germany and the Origins of the Cold War." *International Studies Quarterly* 24, no. 2 (1980): 155–90. <https://doi.org/10.2307/2600199>, <https://www.jstor.org/stable/2600199> (accessed July 11, 2023).

<sup>16</sup> *Ibid.*



15. The divided Germany was weak and dependent on the allies for goods, which was the reason that by 1948, the Western Allies began the project of pulling their occupation zones together for the sake of rebuilding - a project that the Soviet Union, still worried about a Germany threat to its security, wished to prevent. Although the Western Allies made frequent suggestions for the terms under which the country might be reunified, usually involving the introduction of free and democratic elections and German autonomy for conducting its own foreign policy. These proposals were never made in terms that the Soviet Union would consider accepting, so the continued division of the country was in many ways inevitable.<sup>17</sup>
16. On 28 July 1946, the United States proposed a plan for economic unification of the occupied zones. Faced with the refusal of France and the Soviet Union, the British and Americans decided to unite their zones economically and, in December of the same year, created the Bizone. On 1 August 1948, the French occupation zone joined the Bizone (officially in April of 1949), which then became the Trizone.<sup>18</sup> In the spring of 1948, the Western occupying powers in Germany decided to take action due to deteriorating economic conditions in the occupied zones and the Soviet refusal to permit free multiparty elections throughout the whole of Germany. They were concerned about the burden on their own countries and feared a resurgence of political extremism among the Germans. To address this, they extended American economic aid (the Marshall Plan), to their occupation zones. Additionally, they implemented a currency reform, replacing the heavily inflated Reichsmark with a new, stable currency called the Deutsche Mark (DM). This reform led to a swift improvement in Western Germany's economy as previously unavailable goods became accessible with the new currency.<sup>19</sup>
17. What followed was one of the first major international crises of the Cold War, the Berlin Blockade. Soviets blockaded the new reforms as they saw them as an attack on their position in Germany as a whole. After the currency reform passed, the Soviet occupation forces in eastern Germany began a blockade of all rail, road, and water communications

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<sup>17</sup>U.S. Department of State: Archive, "Allied Occupation of Germany, 1945-52", *U.S. Department of State: Archive*, <https://2001-2009.state.gov/r/pa/ho/time/cwr/107189.htm> (accessed July 12, 2023).

<sup>18</sup> CVCE, "The division of Germany", CVCE, <https://www.cvce.eu/en/education/unit-content/-/unit/55c09dcc-a9f2-45e9-b240-eaef64452cae/5d3b421b-9a4b-46fc-a041-fab64325d6a6> (accessed July 12, 2023).

<sup>19</sup> Encyclopedia Britannica, "The era of partition", *Encyclopedia Britannica*, <https://www.britannica.com/place/Germany/The-era-of-partition> (accessed July 15, 2023).

between Berlin and the West. On June 24 the Soviets announced that the four-power administration of Berlin had ceased and that the Allies no longer had any rights there. But the Soviets couldn't block Allied airspace, so U.S. and U.K. forces took to the skies to get supplies to the Allied sectors.<sup>20</sup> On June 26, the U.S. launched Operation Vittles, which the U.K. later joined. It was the biggest aerial resupply mission ever embarked upon. During the entire airlift, the U.S. and U.K. delivered more than 2.3 million tons of food, fuel and supplies to West Berlin via more than 278,000 airdrops. American aircrews made more than 189,000 flights, totalling nearly 600,000 flying hours and exceeding 92 million miles.<sup>21</sup> Airlift was initiated in an effort to gain time for negotiations by supplementing the food and fuel stocks of the city, only very slowly was it understood that it could surmount the winter and be continued indefinitely. Soviets harassed the planes and aviators in many different ways even with flaks and extremely close flying manoeuvres, but on May 12, 1949, the Soviet Union lifted the blockade. The airlift can be described as a “miracle” as almost the entire city was resupplied by air alone. On the other hand, as the months went by, the Soviets had found themselves in an increasingly embarrassing position of appearing to the world to be trying to starve two million people into submission, while the airlift demonstrated Western determination, competence, and technical superiority. Consequently, the population of West Berlin (And of Western Germany) stood firm.<sup>2223</sup> In the coming years Millions of East Germans escaped to West Germany from East Germany, and Berlin became a major escape route. This led to major-power conflict over Berlin that lasted at least from 1946 until the construction of the Berlin Wall in 1961.<sup>24</sup>

18. In September 1949 a Parliamentary Council of 65 members chosen by the democratically elected parliaments of the Länder (States) began drafting a constitution for a West German government. The Council completed its work in the spring of 1949,

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<sup>20</sup> Spencer, Robert. “Berlin, the Blockade, and the Cold War.” *International Journal* 23, no. 3 (1968): 383–407. <https://doi.org/10.2307/40200006>. <https://www.jstor.org/stable/40200006> (accessed July 15, 2023).

<sup>21</sup> U.S. Department of Defense, “The Berlin Airlift: What It Was, Its Importance in the Cold War”, *U.S. Department of Defense*, <https://www.defense.gov/News/Feature-Stories/story/Article/3072635/the-berlin-airlift-what-it-was-its-importance-in-the-cold-war/> (accessed July 16, 2023).

<sup>22</sup> *Ibid.*

<sup>23</sup> Spencer, Robert. “Berlin, the Blockade, and the Cold War.” *International Journal* 23, no. 3 (1968): 383–407. <https://doi.org/10.2307/40200006>. <https://www.jstor.org/stable/40200006> (accessed July 16, 2023).

<sup>24</sup> *Ibid.*

and the Federal Republic of Germany (Bundesrepublik Deutschland), commonly known as West Germany, came into being in May 1949 after all the Länder except Bavaria had ratified the Grundgesetz (Basic Law).<sup>25</sup>

19. As an answer to West Germany, the German Democratic Republic was established soon after on 7 October 1949 in the territory encompassing Soviet occupation zone. With this the formal division of Germany that lasted till the fall of the wall was formally completed.

### **2.1.3 Yugoslavia and Eastern Europe**

20. At the 1945 Yalta Conference, Soviet leader Joseph Stalin pledged to hold free and fair democratic elections in eastern European countries that the Red Army had liberated. Rather than carrying out this promise, occupying Soviet forces supported takeovers by local communist parties and the restructuring of eastern European governments and economies according to the Stalinist model. Eastern European countries that were not included in USSR had varied levels of independence, with USSR maintaining high oversight and varying degrees of direct and indirect control over bloc members. With the United States implementing Marshall Plan as a way to resurrect European industrialization and also as a way to curb the spread of communism, the Soviets decided to launch their own so-called Molotov Plan. The Plan was a series of signatures of bilateral trade treaties between the USSR and Eastern Europe. This marked the beginning of the processes that led to the foundation of Council for Mutual Economic Assistance (Comecon) in 1949.<sup>26 27</sup>

21. Yugoslavia was a curious case in Europe, as the Partisans (Yugoslav communist forces) liberated almost the whole country themselves, with Allied material support and limited Soviet military support in liberation of Belgrade. Yugoslav Partisans were led by Tito, who became a strong political figure during the war. Tito and the Partisans fought with fervour with the goal of establishing communist regime in Yugoslavia after the end of the War, also fighting against the remains of Yugoslav Royal Army – the Chetniks led by

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<sup>25</sup> Encyclopedia Britannica, “The era of partition”, *Encyclopedia Britannica*, <https://www.britannica.com/place/Germany/The-era-of-partition> (accessed July 15, 2023).

<sup>26</sup> Roberts, Geoffrey. “Moscow and the Marshall Plan: Politics, Ideology and the Onset of the Cold War, 1947.” *Europe-Asia Studies* 46, no. 8 (1994): 1371–86. <http://www.jstor.org/stable/152768>. <https://www.jstor.org/stable/152768> (accessed July 19, 2023).

<sup>27</sup> “Molotov on the Economic Aid Plan.” *Current History* 13, no. 72 (1947): 105–107, *University of California Press*, <http://www.jstor.org/stable/45309299> (accessed July 16, 2023).

General Mikhailovich. Stalin doubted that there was no way that Partisans could establish a united national front with remaining anti-Hitler elements in the Yugoslavia and did not agree with the view that Yugoslav government forces were collaborating with the invaders. Stalin was also not happy with AVNOJ's decision in 1943 to denounce the government-in-exile, and forbidding King Peter's return to the country. After the war, the disagreements only worsened, with Yugoslavia not being content with being just a satellite state of USSR. Although the two countries signed a friendship treaty, Stalin did not agree with Yugoslavia's foreign policy, viewing their territorial claims as unreasonable. He also disapproved of Yugoslavia's support for Greek communist forces during the Greek civil war and their aspiration to integrate Albania into the country. These differences led to strained relations between Yugoslavia and the Soviet Union, eventually resulting in the Yugoslav Communist Party being expelled from the Cominform, the international Communist organization, with Yugoslavia pursuing its own independent form of socialism, separate from the Eastern Bloc and the Western Bloc during the Cold War.<sup>28 29 30</sup>

#### **2.1.4 NATO and Warsaw Pact**

22. The North Atlantic Treaty Organization (NATO), an international military organisation currently made up of 31 countries, with Sweden anticipated to become the 32<sup>nd</sup> member. United States, Canada, Belgium, Denmark, France, Iceland, Italy, Luxemburg, the Netherlands, Norway, Portugal, and the United Kingdom signed the North Atlantic Treaty in April 1949 and agreed to consider an attack against one an attack against all, along with consultations about threats and defence matters. With the prospect of further communist expansion, the United States decided to abandon their policy of isolationism and be more present in the international stage.<sup>31</sup>

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<sup>28</sup> Ulam, Adam B. "The Background of the Soviet-Yugoslav Dispute." *The Review of Politics* 13, no. 1 (1951): 39–63. <http://www.jstor.org/stable/1404636> (accessed July 19, 2023).

<sup>29</sup> Banac, Ivo. *With Stalin against Tito: Cominformist Splits in Yugoslav Communism*. Cornell University Press, 1988.

<sup>30</sup> Moša Pijade, *Priča o sovjetskoj pomoći za dizanje ustanka u Jugoslaviji*, (Beograd: Borba, 1950).

<sup>31</sup> Kaplan, Lawrence A. "The United States and the Origins of NATO 1946-1949." *The Review of Politics* 31, no. 2 (1969): 210–22. <http://www.jstor.org/stable/1406020> (accessed July 16, 2023).

23. After the relationship between the Western allies and USSR quickly soured, the Western European countries felt that they were in a great danger and that they themselves alone could not stand up against USSR. After the Czechoslovak communist coup, which was supported by the Soviets and the Berlin blockade, five Western nations - the United Kingdom, France, Belgium, the Netherlands, and Luxembourg - organized the Western Union (later Western European Union) in Brussels and pledged to mutual defence and economic cooperation. Later it was determined that only a transatlantic security agreement with the United States is going to reach the goals of deterring USSR aggression in Western Europe. With military cooperation in works, further cooperation on economic and political grounds also became possible. <sup>32 33</sup>

24. On 14 May 1955 Soviet Union, Albania, Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, and Romania signed a security pact called Warsaw Pact as a response to NATO and especially the inclusion of West Germany into NATO. At its inception, the Warsaw Pact appeared to be mainly a Soviet political propaganda rather than a serious effort to integrate the military activities, as the USSR forces were clearly expected to carry the brunt of the military burden, including garrisoning Eastern Europe. But towards the end of the 1950s, and by the summer of 1961, changes in the Soviet conception of the role of the Warsaw Pact, forces began gradually to appear for it was in this period that the Soviet Union embarked upon a series of moves that seriously upgraded the Warsaw Pact in public terms of the common defence of the Communist camp. The change in the role of Eastern European countries may have come because of events in Hungary and Poland in 1956. Where the government of Imre Nagy declared the withdrawal of Hungary from the Warsaw Pact, with Soviet forces being forced to crush the revolt. Later, tighter military integration of Soviet satellite countries also had the goal to forestall further dissent. <sup>34 35</sup>

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<sup>32</sup> Ibid.

<sup>33</sup> NATO, "A SHORT HISTORY OF NATO", NATO, [https://www.nato.int/cps/en/natohq/declassified\\_139339.htm](https://www.nato.int/cps/en/natohq/declassified_139339.htm) (accessed July 16, 2023).

<sup>34</sup> History today, "The Warsaw Pact", *History today*, <https://www.historytoday.com/archive/months-past/warsaw-pact> (accessed July 16, 2023).

<sup>35</sup> Wolfe, Thomas W. "The Warsaw Pact in Evolution." *The World Today* 22, no. 5 (1966): 191-98. <http://www.jstor.org/stable/40393859> (accessed July 16, 2023).

### **2.1.5 Cold war hotspots**

25. During the Cold War, the world witnessed numerous conflicts that had the potential to escalate into full-scale global warfare. This era became notorious for its proxy wars, where the Western and Eastern blocs provided support to belligerents in conflicts that aligned with their respective interests. Some of the notable conflicts during this period include: the Blockade of Berlin, the Greek Civil War, the Iran Crisis of 1946, the Chinese Civil War, the Communist takeover in Czechoslovakia, the Korean War, the Vietnam Crisis, the Congo Crisis, the Revolution in Cuba, Cuban Missile Crisis and many others.
26. These conflicts were part of a larger ideological struggle between the two superpowers, the United States and the Soviet Union, as they sought to expand their influence and counter each other's actions around the world. Proxy wars allowed them to compete without engaging in direct military confrontation but also contributed to regional instability and prolonged conflicts.

#### **2.1.5.1 China**

27. The Chinese Civil War remains, to this date, officially unresolved, with no armistice signed between the warring factions: the Nationalists (Kuomintang) under Chiang Kai-shek and the Communists under Mao Zedong. The first phase of the civil war started in 1927, and lasted until 1937, when KMT (Kuomintang) and CCP (Chinese communist party) formally established the Second United Front to fight a common enemy: The Japanese. Even though both parties have decided to fight together, skirmishes between the two still happened.<sup>36</sup>
28. After the Japanese capitulation the leaders of both camps met for a series of talks on the formation of a post-war government that were led by United States General George C. Marshall. The talks fell through, and the civil war was again in full swing in the year 1946. The civil war started as it had previously ended with KMT having the upper hand, but by 1947, the tide had turned and the CCP forces were conducting successful

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<sup>36</sup> Jennifer Lynn Cucchisi, "The Causes and Effects of the Chinese Civil War, 1927-1949", 2002, Seton Hall University  
<https://scholarship.shu.edu/cgi/viewcontent.cgi?article=3416&context=dissertations> (accessed July 16, 2023).

counterattacks. CCP forces were strengthened by Soviet transfers of weapons that they captured from the Japanese in Manchuria, with the United States providing aid to KMT forces. On 1 October 1949 Mao proclaimed the establishment of the People's Republic of China with the remaining KMT forces retreating to Taiwan.<sup>37 38 39</sup>

### 2.1.5.2 Korean War

29. After the collapse of the Japanese empire after the second world war, Korea did not have a native government or a colonial regime waiting to return, since they were a Japanese protectorate since 1895 and part of Japan since 1910. For that reason, after the Japanese surrender, the Soviet Union and the United States agreed on a purely practical division of Korea into two zones across the 38<sup>th</sup> Parallel. The country was this cut in half with the expected quick solution to the Korean question, but the developing conflicts between the former allies, put negotiations on hold. In 1947 the Assembly set up a Temporary Commission (UNTCOK) to supervise free elections "throughout Korea" so that a "National Government of Korea" might be set up. In 1948, the Republic of Korea (South Korea) was established in the southern zone, with Syngman Rhee as its first president. On the other hand, the Democratic People's Republic of Korea (North Korea) was established in the northern zone, under the leadership of Kim Il-sung.<sup>40 41 42</sup>
30. Soviet Union and the United States at first withdrew their forces from both countries but the years before the start of the war were in no way peaceful with multiple skirmishes on the border and communist insurgency in South Korea. In 1949, North Korea,

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<sup>37</sup> Ibid.

<sup>38</sup> Cheng, Victor Shiu Chiang. "Imagining China's Madrid in Manchuria: The Communist Military Strategy at the Onset of the Chinese Civil War, 1945-1946." *Modern China* 31, no. 1 (2005): 72-114, *Sage Publications*, <http://www.jstor.org/stable/20062601> (accessed July 16, 2023).

<sup>39</sup> Encyclopedia Britannica, "Nationalist collapse and the establishment of the People's Republic of China (1949)", *Encyclopedia Britannica*, <https://www.britannica.com/event/Chinese-Civil-War/Nationalist-collapse-and-the-establishment-of-the-Peoples-Republic-of-China-1949> (accessed July 17, 2023).

<sup>40</sup>Office of the Historian, "Foreign relations of the United States: diplomatic papers, 1945, the British Commonwealth, the Far east, Volume VI", *Office of the Historian*, <https://history.state.gov/historicaldocuments/frus1945v06/d771> (accessed July 18, 2023).

<sup>41</sup> Gupta, Karunakar. "How Did the Korean War Begin?" *The China Quarterly*, no. 52 (1972): 699-716. <http://www.jstor.org/stable/652290> (accessed July 18, 2023).

<sup>42</sup> Korea Institute of Military History, "The Korean War Volume 1", *Korea Institute of Military History*, [https://www.imhc.mil.kr/user/imhc/upload/pblicitn/PBLICTNEBOOK\\_202303310234112240.pdf](https://www.imhc.mil.kr/user/imhc/upload/pblicitn/PBLICTNEBOOK_202303310234112240.pdf) (accessed July 19, 2023).

supported by equipment from the Soviet Union and Korean veterans who fought for the Chinese Communist Party during the Chinese Civil War, prepared for an attack on South Korea. Reports are still not sure whether Stalin and Mao agreed with the final move, but on June 25, the North Koreans struck across the 38th parallel. The offensive was at first very successful with the Korean People's Army (KPA) entering Seoul in the afternoon of June 28, but the North Koreans did not accomplish their goal of a quick surrender by the Rhee government and the disintegration of the South Korean army. Truman administration was at first reluctant to authorize a complete commitment of U.S. ground forces, but General MacArthur's report indicating that only U.S. troops could regain lost territory led to a decision to send American troops to defend South Korea. The United States did not act alone, with United Nations quickly passing resolutions to provide military assistance to South Korea and establishing United Nations Command (UNC). UNC was put under unified command of the United States, which meant that the commander-in-chief of the UNC became Douglas MacArthur. The bulk of UNC forces constituted South Korean and American units, but units from other countries of the UN were also included.<sup>43 44</sup>

31. First United States task forces on Korean ground suffered defeats at the hands of the KPA. These defeats were partly attributed to the general unpreparedness of the United States for the conflict and a lack of modern equipment in the U.S. Army, which had been impacted by defence budget cutbacks in the post-World War II period. Even though KPA was pushing Koreans and Americans further south, capturing city after city, the U.S. task force's primary goal was met as they successfully bought time and delayed the rapid advancement of the North Korean forces.<sup>45</sup>
32. In August and September UNC troops established the "Pusan Perimeter" behind the port of Pusan, which stopped the North Koreans from capturing the entire country. With new UNC troops and equipment arriving through the port of Pusan, the balance of power

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<sup>43</sup> Ibid.

<sup>44</sup> Matray, James I. "America's Reluctant Crusade: Truman's Commitment of Combat Troops in the Korean War." *The Historian* 42, no. 3 (1980): 437–55. <http://www.jstor.org/stable/24445970> (accessed July 19, 2023).

<sup>45</sup> CPT Connor McLeod, "Death on the Road to Osan: Task Force Smith", *Lessons from the Past*, <https://www.moore.army.mil/infantry/magazine/issues/2022/Spring/PDF/LessonsFromThePast.pdf> (accessed July 19, 2023).



shifted, and MacArthur decided on an amphibious landing deep behind enemy lines to force the enemy to withdraw from the Perimeter. Landing took place on 15 September next to the city of Incheon with the goal of quickly capturing Seoul and at the same time began the breakout from the Pusan Perimeter. KPA units were suffering heavy attrition, especially because of UNC air attacks and destroyed supply lines, so the breakout was a success and the UNC forces began to pursue the KPA, capturing Seoul on 25 September.

<sup>46</sup> <sup>47</sup>

33. After recapturing Seoul, the UN approved new mission goals: to destroy the KPA and unify the Korean Peninsula under President Rhee. Only a fragment of the KPA army managed to return north of the 38<sup>th</sup> Parallel, with many of the soldiers being captured by the UNC forces. In October 1950, the UNC forces crossed the 38<sup>th</sup> Parallel and on the 19 October, they have already captured Pyongyang. UN forces rapidly continued their approach north, and with the defensive lines disintegrating Kim Il Sung asked China to intervene in the war and save North Korea. China has already warned the world that they would intervene if the UNC forces crossed the 38<sup>th</sup> Parallel and on 19 October Mao Zedong ordered Chinese troops organized under the new name People's Volunteer Army (PVA) to enter Korea. PVA was moving very carefully and under strict secrecy, to surprise advancing UNC troops. On 25 October the PVA launched the first attacks on South Korean and US troops, but the first attacks are made only to probe the UNC forces, with UNC forces underestimating the number of Chinese forces on the ground. UNC still tried to push forward with the goal being to defeat KPA as soon as possible, but on 25 November the Chinese forces executed their second phase offensive and inflicted heavy losses on the UNC forces who were caught unprepared for major Chinese intervention. UNC forces retreated to the 38<sup>th</sup> Parallel and the PVA and KPA again captured Seoul on 4 January 1951. After the capture of Seoul, PVA run into attrition problems and the war again turned in the favour of the UNC forces with them being able to reorganize and exploit their air superiority. UNC again recaptured Soul on 7 March, after successful

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<sup>46</sup> United Nations Command, "History of the Korean War", *United Nations Command*, <https://www.unc.mil/History/1950-1953-Korean-War-Active-Conflict/> (accessed on July 19, 2023).

<sup>47</sup> Defense POW/MIA Accounting Agency, "Pusan Perimeter", *Defense POW/MIA Accounting Agency* <https://dpaa-mil.sites.crmforce.mil/dpaaFamWebInPusan> (accessed on July 19, 2023).

Operation Killer and Ripper expelled the overextended and exhausted PVA and KPA. PVA tried to regain ground with another offensive, but the attacks ended in a failure.<sup>48 49</sup>

34. From then until the end of the war in 1953, both sides were caught in a stalemate with no significant territorial gains. Ground actions continued, but on July 27, 1953, the Korean Armistice Agreement was signed, achieving a complete cessation of hostilities. The war is still officially ongoing as the peace agreement was never signed.<sup>50</sup>

### **2.1.5.3 Evolution of nuclear weapons**

35. Atomic bomb, is a weapon with great explosive power that results from the sudden release of energy upon the splitting, or fission, of the nucleus of a heavy element such as plutonium or uranium.<sup>51</sup>

36. The Manhattan Project was a secret military project created in 1942 to produce the first US nuclear weapon. Fears that Nazi Germany would build and use a nuclear weapon during World War II triggered the start of the Manhattan Project. US physicist Robert Oppenheimer and General Leslie R. Groves served as directors of this project, which recruited some of the best US and European scientists, engineers and mathematicians.<sup>52</sup> The first nuclear explosion in history took place in New Mexico, at the Alamogordo Test Range, in the test named Trinity. Manhattan Project ultimately produced two atomic bombs Little Boy and Fat Man, that were used against Japan in August 1945.<sup>53</sup>

37. Soviets were many years behind the United States on developing the atomic bomb, with American intelligence estimates suggesting that the Soviets would most likely produce an atomic weapon in 1953. This turned out to be wrong, as the Soviets detonated their

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<sup>48</sup>Korea Institute of Military History, "The Korean War Volume 2" *Korea Institute of Military History*, [https://www.imhc.mil.kr/user/imhc/upload/pblicitn/PBLICTNEBOOK\\_202303310233492010.pdf](https://www.imhc.mil.kr/user/imhc/upload/pblicitn/PBLICTNEBOOK_202303310233492010.pdf) (accessed on July 19, 2023).

<sup>49</sup>United Nations Command, "History of the Korean War", United Nations Command, <https://www.unc.mil/History/1950-1953-Korean-War-Active-Conflict/> (accessed on July 19, 2023).

<sup>50</sup> Korea Institute of Military History, "The Korean War Volume 3", *Korea Institute of Military History* [https://www.imhc.mil.kr/user/imhc/upload/pblicitn/PBLICTNEBOOK\\_202303310233258330.pdf](https://www.imhc.mil.kr/user/imhc/upload/pblicitn/PBLICTNEBOOK_202303310233258330.pdf) (accessed on July 19, 2023).

<sup>51</sup> Encyclopedia Britannica, "Atomic bomb", *Britannica*, <https://www.britannica.com/technology/atomic-bomb> (accessed on July 19, 2023).

<sup>52</sup> Nuclear Files, "Manhattan Project", *Nuclear Files*, <http://www.nuclearfiles.org/menu/key-issues/nuclear-weapons/history/pre-cold-war/manhattan-project/index.htm> (accessed on July 21, 2023).

<sup>53</sup> Nuclear weapon archive, "The Manhattan Project (and Before)", <https://nuclearweaponarchive.org/Usa/Med/Med.html> (accessed on July 21, 2023).

first Nuclear bomb named RDS-1 on 29 August 1949.<sup>54</sup> Later it was revealed that the Soviets ran an elaborate espionage mission during the Manhattan Project, where they extracted much of the info that they needed for constructing the Atom bomb.<sup>55</sup>

38. United States and USSR began a new race to develop a new nuclear weapon – the hydrogen bomb. Unlike atomic bombs, hydrogen bombs utilize nuclear fusion reactions and have the potential to release exponentially greater amounts of energy. On 1 November 1952, the United States successfully tested its first hydrogen bomb, code-named "Ivy Mike," marking a significant advancement in nuclear weaponry. Not to be outdone, the Soviet Union exploded its first thermonuclear device, on August 12, 1953, the difference being that the Soviets bomb was smaller, but actually deliverable as opposed to the American one. These tests were followed by further tests, namely Castle Bravo in 1954 and a series of nuclear tests called Operation Redwing in 1956.<sup>56</sup> Soviets decided to test the limits with the creation of Tsar Bomba, which became the largest nuclear weapon ever constructed or detonated. The bomb, which was tested on the island of Novaya Zemlya, yielded 50 megatons which is equivalent to about 1,570 times the combined energy of the bombs that destroyed Hiroshima and Nagasaki. The bomb was actually designed for a 100-megaton yield, but the test of such magnitude was rejected because of extremely high radioactive contamination.<sup>57</sup>
39. An important milestone in the Cold War arms race was the development of ballistic missiles capable of delivering nuclear warheads over vast distances, spanning thousands of kilometres. This breakthrough in missile technology revolutionized the strategic landscape, as it enabled the superpowers, particularly the United States and the USSR, to project their nuclear capabilities far beyond their borders.<sup>58</sup>

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<sup>54</sup> Holloway, David. "Entering the Nuclear Arms Race: The Soviet Decision to Build the Atomic Bomb, 1939-45." *Social Studies of Science* 11, no. 2 (1981): 159-97. <http://www.jstor.org/stable/284865> (accessed on July 21, 2023).

<sup>55</sup> Atomic Heritage Foundation, "Soviet Atomic Program – 1946", *Atomic Heritage Foundation*, <https://ahf.nuclearmuseum.org/ahf/history/soviet-atomic-program-1946/>. (accessed on July 21, 2023).

<sup>56</sup> Atomic archive, "Advanced Soviet Superbombs", *Atomic archive* <https://www.atomicarchive.com/history/hydrogen-bomb/page-21.html> (accessed on July 22, 2023).

<sup>57</sup> Big Ivan, "The Tsar Bomba ("King of Bombs")", *Nuclear weapon archive*, <https://www.nuclearweaponarchive.org/Russia/TsarBomba.html> (accessed on July 23, 2023)

<sup>58</sup> Gibson, Jane, Kenneth G. Kemmerly, Air Command and Staff College, and Space Research Electives Seminars. "Intercontinental Ballistic Missiles." *AU-18 Space Primer*. Air University Press, 2009. <http://www.jstor.org/stable/resrep13939.25>.

## 2.2 CUBA

### 2.2.1 Pre-Columbian era

40. Approximately 5000 B.C., prehistoric people migrated from Central America to the uninhabited island of Cuba. Followed by further waves of migration, primarily from Yucatan, the Guanahatebey culture evolved. Some two millennia later, native inhabitants of South America settled across the Caribbean region. Having split through the process of ethnogenesis, three separate subcultures of the Taino emerged, the two inhabiting Cuba being Classic (central) and mostly Western Taino. By the time of Columbus's landing on the island of Cuba during his renowned expedition in 1492, the Tainos predominated the eastern part of the island and the Guanahatebeys were mostly present on the western coast.<sup>59</sup>

### 2.2.2 Colonisation

#### 2.2.2.1 Spanish rule

41. At first, the island, having been divided into nine provinces, each managed by its governor, had a joint capital of Baracoa, soon-to-be moved to the newly established Santiago de Cuba, as the provinces united into a centralized colony. In a matter of decades, the natives were mostly reduced to slavery, yet unimpressed by their performance and hindered by high mortality rate (particularly due to contagious diseases), the conquistadors began to import African slaves, contracted primarily by Portuguese and illicit traders. A substantial portion of the slavery force were also non-African condemned slaves. Transatlantic slavery had not been abolished until the late 19<sup>th</sup> century.<sup>60</sup>

42. Rich in natural resources, especially tobacco and sugarcane, Cuba was being repeatedly besieged by buccaneers, such as French Corsair, which succeeded in ruining the city of

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<sup>59</sup> Kimber Clarissa, "*Aboriginal and peasant cultures of the Caribbean*", Yearbook: Conference of Latin Americanist Geographers Vol. 17, No. 18 (University of Texas Press: 1991), 153-163.

<sup>60</sup> Landers Jane, "*Slavery in the Spanish Caribbean and the Failure of Abolition*", Review Vol. 31, No. 3 (Research Foundation of State University of New York: 2008), 343-371.

Havana in 1538. In the 18th century, British forces struck several times, most famously in 1760 as an effort during the Seven Years' War.<sup>61</sup>

### **2.2.2.2 Struggle for Independence**

43. As the foreign colonial attempts to conquer Cuba in late 1800s had ceased, there was an internal unrest emerging. Irritated by the Spanish rule, the progressive fractions advocated for Cuban independence in an ever more public manner. In 1868, the Ten Years' War erupted. The rebels counted on a support from the United States, but President Grant was unwilling to get involved in an external conflict only few years after the tumultuous Civil War. The uprising was suppressed, as well as another effort – the Little War of 1879.<sup>62</sup>

44. Inspired by the return of long-time exiled dissident and influential literate of his time Jose Marti, local guerilla fighters in Santiago de Cuba rebelled against the government in 1895. The insurgency spread rapidly and pressured by the United States, Spain's Prime Minister Sagasta considered expanding Cuban autonomy. However, the mutineers refused to negotiate, demanding full independence. The United States, aware of its expansionist opportunity and provided the pretence of high moral ground, did not hesitate much. After an explosion of a nearby Maine battleship in circumstances, aspects of which remain uncertain, Congress authorized armed intervention, proposed by President McKinley in April of 1898. Spanish forces capitulated in a matter of months and by signing the protocol providing Cuban independence, the war officially came to an end on August 12 of the same year. The Spanish-American War soon expanded to the Philippines and Puerto Rico. Spanish forces capitulated in a matter of months and by signing the Treaty of Paris on December 10, a provisional American government in Cuba was installed. However, Cuba was never annexed to the United States, as foresworn by the Teller Amendment.<sup>63</sup>

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<sup>61</sup> Ballou Maturin Murray, *History of Cuba: Or, Notes of a Traveller in the Tropics beling a political, historical, and statistical account of the island, from its first discovery to the present time*, (Boston: Phillips, Sampson and Company, 2010).

<sup>62</sup> Smith Roy C. and Ingo Walter, "Understanding a Cuban Transition". *The Independent Review* Vol. 20, No. 4 (Independent Institute: 2016): 531-546.

<sup>63</sup> Thruher Maria Daniela, "World of 1898: International Perspectives on the Spanish American War", *Library of Congress*, <https://guides.loc.gov/world-of-1898> (accessed July 18, 2023).

## 2.2.3 Republic of Cuba (1902 – 1959)

### 2.2.3.1 Platt Amendment

45. Passing the Platt Amendment in 1901, the United States announced withdrawal of their forces and government from Cuba, granting it the status of an independent state but reserved the right to intervene militarily, if necessary to preserve Cuba's independence and fundamental rights of its citizens.<sup>64</sup> The amendment has ever since been subject to great dissension. While some scholars interpret it as “a keystone in the arch of Cuban relations with the United States, guaranteeing Cuban independence, sovereignty and freedom”, others believe it is “a bond of Cuban servitude to the United States”. Regardless of interpretation, it certainly marked the constitution of the (Second) Republic of Cuba, being widely recognized as a sovereign state for the first time in centuries.<sup>65</sup>
46. Article VII of the Amendment established a legal ground for the United States to request a sell or lease of the Cuban land in order to use it for the coaling or naval purposes. Based on the given provision, the 1903 Treaty of Relations was signed, providing the United States an exclusive right to use a landmass in the Guantanamo Bay together with its corresponding coastline as a naval base. Renewal of the Treaty in 1934 provided the agreement “shall continue in effect in the same form and on the same conditions [...] as long as the United States shall not abandon the said naval station at Guantanamo or the two Governments shall not agree to a modification”. In fact, no later modification has been made, meaning that the United States “exercises complete jurisdiction and control” as defined by the Treaty to these days. On the other hand, Cuba receives an annual rent, the rate of which is determined by the revalorisation of initial sum totalling two thousand dollars.<sup>66</sup> However, since 1959, Cuban Government has refused to accept the rent.<sup>67</sup>

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<sup>64</sup> Brian Loveman, “The Platt Amendment”, *San Diego State University* <https://loveman.sdsu.edu/docs/1903PlattAmendment.pdf> (accessed July 18, 2023).

<sup>65</sup> Capo-Rodriguez Pedro, “*The Platt Amendment*”. *The American Journal of International Law* Vol. 17, No. 4 (Cambridge University Press, 1923): 761-765.

<sup>66</sup> Lazar Joseph, “*Legal Status of Guantanamo Bay*”. *The American Journal of International Law* Vol. 62, No. 3 (Cambridge University Press, 2017): 730-740.

<sup>67</sup> Leopold Jason, “Will Cuba Now Cash 55 Years' Worth of Guantanamo Rent Checks?”, *Vice*, <https://www.vice.com/en/article/zm5db5/will-cuba-now-cash-55-years-worth-of-guantanamo-rent-checks> (accessed on July 18, 2023).

### **2.2.3.2 Revolts and interventions**

47. In 1906, merely four years into the self-governance, an armed rebellion arose. Liberal element of the Cuban army countered conservative president Estrada Palma, which requested – and was granted – support of the United States naval forces. Theodore Roosevelt negotiated with the two parties. After failed negotiations, Palma resigned and the United States appointed provisional government, serving until 1909 through the era, known as the second military occupation of Cuba. Conflicts continued and the United States had to intervene several more times to repress the uprising attempts or solely to monitor various elections. Another episode of the crisis came in the early 1930s as President Machado declared martial law and was later overthrown. United States declined to intervene, having imposed diplomatic sanctions only. After a series of political rochade Fulgencio Batista, long-time military leader, amassed enough power to form a stable government and pass the new constitution in 1940.<sup>68</sup>

### **2.2.3.3 The dictatorship of Fulgencio Batista**

48. Having been previously replaced by San Martin in 1944, Batista launched a successful coup d'état in 1952 and throned himself president. Unlike during his first tenure, he failed to deal with the rising problem of corruption but rather gave in to it. Hugh Thomas argues he became inattentive about the challenges facing his country and “rather played canasta with his officers”. Furthermore, he accumulated himself an enviable fortune and made use of the ever more radical measures to prevent inevitable – being thrown out at some point in time.<sup>69</sup>

49. Relations between the Batista government and the United States were complex, to say the least. On one hand, he had a strong backing in the highest circles in Washington and was even provided with a limited amount of weapons to hold on to power. Yet there were simultaneous efforts to soften Bautista’s reign of terror and later persuade him to resign, especially since the revolutionary movement scored a series of partial successes and the

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<sup>68</sup> University of Central Arkansas, “Cuba”, *University of Central Arkansas*, <https://uca.edu/politicalscience/home/research-projects/dadm-project/western-hemisphere-region/cuba-1902-present/> (accessed on July 18, 2023).

<sup>69</sup> Thomas Hugh, “Cuba: The United States and Batista, 1952-1958”, *World Affairs* Vol. 149, No. 4. (Routledge: 2003), 169-175.

rule seemed to slip through his fingers.<sup>70</sup> All in all, the relationship redeemed the marriage of convenience since Batista was willing enough to provide a suitable climate for American companies and their business ventures and proved himself supportive of the United States' Cold War objectives. But then again – he was left on his own in the crucial stages of the revolution.<sup>71</sup>

#### **2.3.3.4 Cuban Revolution**

50. In 1953, a group of student demonstrators led by Fidel Castro performed a sabotage on the Cuban army outpost at the Moncada barracks near Santiago de Cuba. Although the attempt failed and resulted in the imprisonment of Castro, the attempt marked the beginning of the Cuban Revolution. The movement, mobilised by the event, was known as the 26<sup>th</sup> of July Movement – a homage to the date of the respective attack. Certainly not the first one on the turbulent island, it proved to be perhaps the most consequential. Soon after having been released from prison, Castro struck again. With approximately 80 guerilla fighters on his side, he clashed with the army at the western part of an island. Executing ambush attacks, they disarmed several patrol units and gradually strengthened control over the mountainous regions of the land. Synchronously, an insurgent newspaper *El Cubano Libre* was issued and gained a substantial following, helping to recruit new fighters. Desperate, Batista launched brutal Operation Verano targeting Castro's forces in the Sierra Maestra. Disgusted and already tired of the revolutionary struggle which seemed to have stalled in a quagmire, the Eisenhower administration cut off the material support to the Cuban army by proclaiming an arms embargo, opening a window of opportunity for the partisans. Furthermore, the State Department withdrew recognition of the Cuban government in December 1958, causing Batista to flee the country on New Year's Eve.<sup>72</sup>

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<sup>70</sup> Ibid.

<sup>71</sup> Rodríguez Raúl and Harry Targ, "US Foreign Policy towards Cuba: Historical Roots, Traditional Explanations and Alternative Perspectives", *International Journal of Cuban Studies* Vol 7, No. 1. (2015), 16-37.

<sup>72</sup> Paul Christopher, Colin P. Clark and Beth Grill and Molly Dunigan, "Cuba, 1956-1959" in *Paths to Victory: Detailed Insurgency Case Studies*, (Washington D.C.: National Defense Research Institute, 2013).



## 2.3.5 Castro's Cuba

### 2.3.5.1 New Government

51. On January 1, 1959, Castro's forces entered Havana, occupying the presidential palace of fled Batista and executing hundreds of his allies. In February, Manuel Urrutia was appointed president, nominally becoming head of state. However, Fidel Castro, now serving as a prime minister, was a true powerhouse of the new system, even forcing Urrutia to resign and replacing him with Osvaldo Torrado. Fidel's brother Raul Castro served as the Minister of Defense and famed revolutionary Che Guevara oversaw the central bank. The year of 1959 was also marked by a political purge within the revolutionary movement itself. Most notably, Hubert Matos, a close ally to Castro, was deposed of his role in the government and later arrested. The pattern continued for years to come. 1960 saw further tightening of the grip of power by establishing the Committees for the Defense of the Revolution, which functioned both as secret police and a propaganda institute.<sup>73</sup>

### 2.3.5.2 Reforms

52. By signing the Agrarian Reform Act, Castro's government expropriated massive portions of the land and, much to the anger of the Americans, banned land ownership of the foreign citizens. The move signalled recalibration of the economic policy towards socialism and was followed by the nationalisation of the banks, including those headquartering in the United States. Several Cuban and foreign companies were also communised, and the property rights were restricted significantly.<sup>74</sup> It is notable, however, how have mentioned reforms disclosed ideological discrepancies among the revolutionary movement. While the radical portion avidly advocated their execution, the more moderate members had to either accept them with some hesitation or were replaced by new reformists, known also as the "left-wing" moderates.<sup>75</sup>

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<sup>73</sup> American Experience, "Post-Revolution Cuba", PBS, <https://www.pbs.org/wgbh/americanexperience/features/post-revolution-cuba/> (accessed July 19, 2023).

<sup>74</sup> Ibid.

<sup>75</sup> O'Conner James, "Political change in Cuba, 1959-1965", Social Research Vol. 35, No. 2 (The Johns Hopkins Univeristy Press:1968), 312-347.

### **2.3.5.3 Exodus**

53. Talking about the exodus of migrants from Cuba in the wake of the Cuban revolution, the distinction between two groups is to be emphasized. Primarily, we acknowledge the political migrants – counterrevolutionaries, political dissidents and other opponents of the regime. This type of migration is particularly characteristic of communist regimes, into which the liberation movement gradually evolved. Yet the vast majority of Cubans who fled their country and mostly migrated to the United States, were economic migrants. It is a matter of perception whether to attribute it to the nationalisation and other Marxist-oriented reforms, twice imposed trade embargo by the United States or centuries of the exploitation of the labour force and natural resources, most scholars agree that the state of social welfare in 1960s Cuba worsened or did, at least, not improve.<sup>76</sup>
54. Between 1959 and 1962, at least 215 thousand Cuban citizens left Cuba for the United States, arriving and (most of them) settling in Miami, Florida. There were predominantly highly educated, wealthier citizens, sceptical of Castro’s left-leaning regime and more importantly, able to afford traveling abroad. However, in the southern state of Florida, they were subject to racial discrimination and scrutiny, marginalized from mainstream society some of them became hardened criminals or even terrorists.<sup>77</sup> Known as “Operation Peter Pan”, the Eisenhower administration also transferred some 14 thousand Cuban children to the United States via visa waivers and provided them foster care.<sup>78</sup>

### **2.3.5.4 Bay of Pigs Invasion**

55. In 1960, President Eisenhower authorized the Central Intelligence Agency to frame a creation of the paramilitary force, consisting of the anti-Castro dissidents, exiled to the United States and referred to as the Cuban program. The guerilla fighters were supposed to execute actions against the Government of Cuba. Later, the plan was extended from

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<sup>76</sup> McCaughan Ed, “*Causes of Immigration from Socialist Cuba*”, Contemporary Marxism Vol. 3, No. 2 (Social Justice/Global Options: 1982), 44-47.

<sup>77</sup> Torres Maria de los Angeles, “*The 1960s: Entrance, Backlash, and Resettlement Programs*” in *In the Land of Mirrors: Cuban Exile Politics in the United States*. (Ann Arbor: The University of Michigan Press, 1999).

<sup>78</sup> Blakemore Erin, “The Secret Cold War Program That Airlifted Cuban Kids to the U.S.—Without Their Parents” *History*, April 29, 2019, <https://www.history.com/news/cold-war-refugee-operation-peter-pan-cuba-eisenhower> (accessed on July 19, 2023).

the guerilla action to the conventional invasion, for which the United States would provide weaponry, as well as material and tactical support. Eisenhower had left the office before the personnel was sufficiently prepared and the newly elected president Kennedy was reluctant of the operation. However, as the strike was finally approved for the April 17, 1961, it went terribly wrong. By the time of two days past the landing in the Bay of Pigs, most of the brigade were lost, and the remainder was taken hostage by the Cuban Army.<sup>79</sup> It was only after the missile crisis that the prisoners were returned to the United States as an exchange for partially lifting the trade embargo. Lack of success was generally attributed to the “gaps in intelligence plus some errors in ship loading, timing and tactics” and posed a severe blow to the credibility of the Kennedy administration as well as to the already fragile relations between Cuba and the United States.<sup>80</sup>

## **2.3 SOVIET UNION AND UNITED STATES**

### **2.3.1 Soviet Union**

#### **2.3.1.1 The geopolitical situation of the Soviet Union**

56. Despite its long history of tsarism, prevailing conservatism and religiousness, the First World war has hit Russian Empire hard enough to prompt first successful communist revolution in Europe, questioned by counterrevolutionary movement in the Russian Civil War but eventually triumphal with Treaty on the Creation of the Union of Soviet Socialist Republic that integrated Russian, Ukrainian, Belorussian and Transcaucasian Republic into a federal entity, later extended and reorganised.<sup>81</sup>

57. Advocating an internationalistic geopolitical approach, the reformatory Marxism overreaching claimed geographical determinism since its very beginning. As Miro Cerar (University of Ljubljana) conceptualises the respective theory of State: “Marx’s ideal of state or his very state (which he strives to establish) is a democracy which contains realistic, substantial unity of the people and the state, the matter and form, the governing and governed. [...] is Marxist democracy, an objectivity that contains varying aspects of existence and enables qualitative leap to the community with no state. To

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<sup>79</sup> Sandman Joshua H, “*Foreign Policy Crisis Situations: The Bay of Pigs*”, *Presidential Studies Quarterly* Vol. 16, No. 2 (Wiley: 1986), 310-316.

<sup>80</sup> Torres Maria de los Angeles, “*The 1960s: Entrance, Backlash, and Resettlement Programs*” in *In the Land of Mirrors: Cuban Exile Politics in the United States*. (Ann Arbor: The University of Michigan Press, 1999).

<sup>81</sup> Pipes Richard, “*Kratka zgodovina ruske revolucije*”. Translated by Seta Knop. (Ljubljana: Beletrina, 2013).

achieve that, the state must first be reformed from an authority above the community itself into a subordinate body.<sup>82</sup> On the other side of the spectrum, there is a Third Rome theory. Moscow is in that regard perceived as a successor to the Roman and Byzantine Empires, carrier of a God-given mission, destined to become an everlasting empire. Despite side-tracking religion, the Communist revolution has – also boasted by 19<sup>th</sup> century pan-Slavism – never fully broken with that notion but rather incorporated it into a Marxist theory. Had it not been so, nowadays Russian nomenclature would perhaps not exploit it extensively to promote territorial expansion.<sup>83</sup>

58. May it be for purposes of ideology or else, the Soviet Union led an expansionistic foreign policy before, during and even more so after World War 2. In the latter instance, the Soviets capitalized on their crucial role in a joint effort against Nazi Germany, being the ones to have conquered Berlin. Instead of seeking to annex its European neighbours as referenced by the Molotov-Ribbentrop Pact, the Soviets used their sphere of influence and built a bloc of dependent, in many instances satellite states. As the 1949 revolution unfolded, China became the second epicentre of Marxism. While mothered by the Soviet Union, it was destined to gradually outgrow it due to a substantially larger population and enormous possibilities for the economic growth. Close partnership with Beijing was indubitably crucial to export communism into the southeast Asia and fill the void of decolonization. Yet the presence of prominent power in the mainland Asia somehow undermined the protestation of Russian Eurasianism “which spreads through steppes from Transylvania to Manchuria”, as prominent historian Trubetzkoy stated.<sup>84</sup>

### **2.3.1.2 Khrushchev Government**

59. As Stalin was dying in April of 1953, the transitional government was set. Malenkov succeeded him as the prime minister and Secretary General of the Communist Party, but Voroshilov was appointed nominal head of state.<sup>85</sup> However, Nikita Sergeyeovich Khrushchev gradually strengthened his position in the Party structures, becoming

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<sup>82</sup> Cerar Miro, Aleš Novak and Marijan Pavčnik, “Uvod v pravoznanstvo”: Učbenik in gradivo za predavanja, seminar, vaje. (Ljubljana: Uradni list Republike Slovenije, 2021).

<sup>83</sup> Šeligo Primož, “Razvoj geopolitične misli in geopolitike v Ruski federaciji”: magistrsko delo. (Ljubljana, Univerza v Ljubljani; Fakulteta za družbene vede, 2010).

<sup>84</sup> Ibid.

<sup>85</sup> Montefiore Simon Sebag, “Stalin: Na dvoru rdečega carja”. Translated by Jolanda Blokar and Danica Križman. (Ljubljana: Cankarjeva založba, 2014).

Secretary of the Central Committee and thus *de facto* state leader. He finally cemented his grip on power in 1958 by being designated Prime minister.<sup>86</sup>

60. Second Khrushchev's government was formed in April of 1962, following the legislative elections earlier that year where the Communist Party of the Soviet Union ran as a sole ballot.<sup>87</sup> Anastas Mikoyan, Aleksei Kosygin and Dmitri Ustinov were first deputy chairmen, while Andrei Gromyko served as Minister of Foreign Affairs.<sup>4</sup> Valerian Zorin represented the Soviet Union at the United Nations Security Council, which he also presided over at the time.<sup>88</sup>

## 2.3.2 United States

### 2.3.2.1 The geopolitical situation of the United States

61. Being unencumbered by the remains of feudal particularism and rich with natural resources, for the United States of America, the stage was set to adopt the purest form of evolving capitalism in the late 18<sup>th</sup> century and thus become one of the leading powers for generations to come. The American Whigs have – as much as Marxist revolutionaries in 1917 – perceived the War of Independence as an existential struggle that breaks with an established order, embodied by (prototypical) British monarchism. States' liberal foundation, well characterised through the very first modern constitution, was met with an overwhelming sense of American Exceptionalism, much present until these days. Symptomatically, Anders Stephanson of Columbia University has drawn a stark ontological distinction to the leading player of the East regarding the prospects of the United States in the aftermath of World War 2: "While the Soviet Union, which itself claims to be a penultimate stage in the evolution of human history, is being intricately into the dialectic struggle for the liberation of humankind, the United States *is* this very liberation. It indeed represents the ultimate stage, a world empire with no equivalent counterpart."<sup>89</sup>

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<sup>86</sup> Armstrong John A., "*Ideology, Politics, and Government in the Soviet Union*". (Lanham, University of Wisconsin, 1978).

<sup>87</sup> Ibid.

<sup>88</sup> Elisanet, "Government Chrushtshov 2", *Elisanet*, <https://web.archive.org/web/20110716153010/http://www.elisanet.fi/daglarsson/dokumentit/sov.htm#CHRUSHTSHOV%202> (accessed July 11, 2023).

<sup>89</sup> Anderson Perry, "*Ameriška zunanja politika in njeni snovalci*". Translated by Marjana Karer and Seta Knop. (Ljubljana: Sophia, 2017).

62. A century earlier, author and diplomat John O’Sullivan stated in his famous Manifest Destiny: “The time has come for everyone to stop thwarting our policy and hampering our power, limiting our greatness and checking the fulfillment of our manifest destiny to overspread the continent allotted by God for the free development ...”<sup>90</sup> Along the way of territorial expansion through mainland America, the focus shifted to the mercantile buildout. Recalibration of foreign policy resonated well with the American public which established an increasingly critical attitude towards foreign military interventions. Furthermore, a substantial fraction of the electorate had advocated isolationism deep into the 20<sup>th</sup> century, even up to the Pearl Harbor. Getting attacked on the home soil for the first time since 1812 prompted a united response, however, and reinstated the vision for the nation of “the infinite privilege of fulfilling her destiny and saving the world”, as described by Woodrow Wilson and nonchalantly dismissed home and abroad only few decades earlier.<sup>91</sup>

63. While most Western historians assess the American role in the Cold War as a predominantly defensive stance with occasional preventive interventions, Perry Anderson denies ceasing the worldwide spread of communism as its primary mission. It was “only an act of wider and continuing pattern of strength projection,” he claims. Even President Truman is said to have expressed concern regarding the Truman doctrine of economically supporting democracies against possible revolutionary threats, stating that “the whole matter resounds an investment prospect.” Overall, the present course of the foreign policy contradicted the bedrock of the Monroe Doctrine, deeply rooted in the collective continuousness of the Americans, relinquishing any involvement in the “European affairs”. An excuse was to be found in the reciprocal concept of the doctrine – the United States had pledged to act in such a manner that would prevent potential hostile acts of European (Soviet this time) neo-colonists towards the Western Hemisphere.<sup>92</sup>

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<sup>90</sup> Thompson Carol L., “*America’s Manifest Destiny*”, *Current History* Vol. 15, No. 88 (University of California Press, 1948), 342-345.

<sup>91</sup> The American Presidency Project, Woodrow Wilson: “Address at the Princess Theatre in Cheyenne, Wyoming”, *The American Presidency Project*, <https://www.presidency.ucsb.edu/documents/address-the-princess-theater-cheyenne-wyoming> (accessed July 12, 2023).

<sup>92</sup> Anderson Perry, “*Ameriška zunanja politika in njeni snovalci*”, Translated by Marjana Karer and Seta Knop. (Ljubljana: Sophia, 2017).

### 2.3.1.2 Kennedy Administration

64. In the 1960 United States presidential election, the Democratic senator of Massachusetts John Fitzgerald Kennedy narrowly defeated an incumbent vice-president in the Eisenhower administration, Richard Milhouse Nixon. Kennedy's running mate, Lyndon Baines Johnson, became vice-president and long-time State Department official Dean Rusk<sup>93</sup> was appointed Secretary of State. While Robert McNamara served as Secretary of Defence at the Pentagon, Kennedy chose a political heavyweight and twice presidential nominee Adlai Stevenson to represent the United States at the United Nations Security Council. Harvard scholar McGeorge Bundy was a National Security Advisor to the President at the time.<sup>94</sup>
65. During the Cuban crisis, Kennedy has repeatedly convened Executive Committee of the National Security Council (ExComm) to consult him on an ongoing situation in Cuba and draft analysis of possible retaliatory responses. In addition to named officials, it also included President's brother Robert F. Kennedy (Attorney General), Douglas Dillan (Secretary of the Treasury) John McCone (Director of the Central Intelligence Agency), Maxwell D. Taylor (Chairman of the Joint Chiefs of Staff) and several others.<sup>95</sup>
66. The Democrats enjoyed a comfortable majority in both chambers of Congress (Senate and House of Representatives) at the time, yet mid-term elections of 1962 were only a week or two away.<sup>96</sup>

## 2.3.3 Relations

### 2.3.3.1 Cuba – United States relations

67. Former United States ambassador to Cuba Philip Bonsal recognises two contradicting perspectives on the two states' relationships prior to the 1959 Cuban revolution. The first holds that "the United States consistently played a benevolent role, showering moral and material benefits on an often unappreciative, ungrateful and sometimes

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<sup>93</sup> The Editors of Encyclopaedia Britannica. Dean Rusk: "United States secretary of state", *Britannica*, <https://www.britannica.com/biography/Dean-Rusk> (accessed July 12, 2023).

<sup>94</sup> John F. Kennedy Library, "Officials of the Kennedy Administration", *John F. Kennedy Library*, <https://www.jfklibrary.org/learn/about-jfk/life-of-john-f-kennedy/fast-facts-john-f-kennedy/officials-of-the-kennedy-administration>, (accessed July 12, 2023).

<sup>95</sup> Bundy McGeorge and James G. Blight, "October 27, 1962: Transcripts of the Meetings of the ExComm", *International Security* Vol. 12, No. 3 (1988): 30-92.

<sup>96</sup> US Government Printing Office, "Statistics of the presidential and congressional election of November 8, 1960", [https://clerk.house.gov/member\\_info/electionInfo/1960election](https://clerk.house.gov/member_info/electionInfo/1960election) (accessed July 12, 2023).

badly behaved small neighbour.” The claim clearly depicts American self-righteousness, yet it is undeniable the American military intervention has provided Cubans their independence from Spain’s colonials. On the other hand, the influence of the United States in Cuba could be interpreted as a neo-colonial extension, particularly for the latter’s dependence on sugar export to the States. While acknowledging that notion, Bonsal labels it as revisionism. Further, he admits that the American representatives used their influence to secure their country’s business interests and disregarded efforts to constitute an alternative to Bautista’s regime.<sup>97</sup>

68. Contrary to widespread belief, the relationships between Castro movement and the United States government were not hopeless from its very beginnings. Americans were aware of almost unanimous support for the revolutionary cause in the immediate aftermath of the revolution and were, seemingly, open for a constructive dialog with new leadership. In early 1959 Castro paid a visit to Washington, meeting the Secretary of State and even vice-president Nixon. However, the agrarian reform had estranged relations in May, and many incidents followed, including shooting down of an aircraft flown by a now exiled Cuban aviator, dropping anti-Castro leaflets. At the same time, Castro swung between tying with Moscow and avoiding alienation of the anti-communist fractions within his revolutionary movement. As American refineries declined to refine imported Soviet crude oil at the request of the Cuban government in 1960, it took them over, prompting the extension of 1958 embargo on all types of goods but medicines. Castro answering with nationalizing American privately-owned sugar mills marked another stage in downward spiral of the two countries’ relations.<sup>98</sup>

69. Behind the scenes, the strategy of the Eisenhower (and later Kennedy) administration shifted from seeking cohabitation with Havana to engaging in efforts aimed at toppling evermore communist regime by arming anti-Castro guerilla bands. The most notable of attempts, as noted, was the Bay of Pigs invasion of the Cuban exiles in 1961. Despite having failed miserably, it established the perception of the United States as an existential threat to Cuba and certainly precluded future missile crisis. Relations deteriorating further, Cuba was even dismissed of its membership in the Organisation of

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<sup>97</sup> B Bonsal Philip W, “*Cuba Castro and the United States*”, *Foreign Affairs* Vol. 45, No. 2 (1967): 260-276.

<sup>98</sup> *Ibid.*



American States at the request of the United States.<sup>99</sup> Jorge Domínguez (Harvard University) exposes the American government to criticism regarding insufficient usage of diplomatic channels in the events leading up to the missile crisis, seemingly rejecting or disregarding American authorities' claims of Cubans themselves having been disengaged from diplomacy and even having demanded the drastic reduction of staff at the United States's embassy. It is legitimate, however, to assume the given expulsion of diplomats generally aimed at limiting the exodus of Cuban citizens to the United States.<sup>100</sup>

### **2.3.3.2 Cuba – Soviet Union relations**

70. Ana Samson (University in Krakow) somehow embraces the notion of Bonsal asserting that “the Soviet Union came to Castro’s rescue only after the United States had taken steps to overthrow him”. It is, however, more accurate to recognise the two happenings as parallel and interdependent. Despite having no particular interest in revolutionary struggle since 1956, it is positive to say the Soviets were cautious to track events in a proximity of its nemesis, the United States and, in Pravda newspaper even interpreted the revolt against Batista as “an uprising against Yankee imperialism”. As the conflict between two Western countries had been becoming strained, Castro became aware, in accordance with the cold war, of the necessity to side. “If Cuba did not want to be pro-American, it had to become pro-Soviet. He himself, as well as most of the guerilla fighters, was not communist, yet he certainly became one over time. Being unaware of the direction Castro was to take, the Soviets reluctantly recognised his government in 1959. There was not much interaction between two countries until an expert for Latin America, Aleksandr Alekseyev (also future ambassador to Cuba) reported some positive changes under Castro to Moscow. In the wake of United States’ embargo expansion, the Soviet Union stepped in offering the purchase of superabundant sugar and even loaning

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<sup>99</sup> Rodríguez Raúl and Harry Targ, “US Foreign Policy towards Cuba: Historical Roots, Traditional Explanations and Alternative Perspectives”, *International Journal of Cuban Studies* Vol 7, No. 1. (2015), 16-37.

<sup>100</sup> Domínguez Jorge I, “The @#%& Missile Crisis: Or, What was “Cuban” about U.S. decisions during the Cuban Missile Crisis?”, *The Journal of the Society for Historians of American Foreign Relations* Vol. 24, No. 2 (2000), 305-315.

\$ 100 million at favourable interest rates. Other countries in the eastern bloc followed soon.<sup>101</sup>

71. It was, coincidentally, the day before the Bay of Pigs invasion when Castro defined his revolution as socialist for the first time. Not willing to escalate their already frail relationships with Americans, the Soviets were restrained in their reactions at first, but eventually they acknowledged Cuba as a partnering socialist State. For Castro and Khrushchev, it seemed a win-win situation. Cuban dictator attributed the absence of internal opposition to the causes of classless society and Moscow pronounced the Monroe doctrine dead. As early as in July of 1960, Khrushchev, in his typical dramatic manner, threatened to use Soviet rockets in order to protect Cuba, had it been attacked by the United States. The episode in the Bay of Pigs was an opportunity to move forwards with the threats, leading to the missile crisis of 1962.<sup>102</sup>

### **2.3.3.3 United States – Soviet Union relations**

72. In the early 1960s, the decreasing trend in the Soviet-American relations was evident. While Khrushchev official visit to Washington proceeded in a rather collegial manner – Eisenhower even hosted him at the presidential retreat residence, Camp David<sup>103</sup> – and the Soviet leader traded jabs jokingly with Nixon during the famous kitchen debate in Moscow<sup>104</sup>, the Vienna meeting of 1961 already signalled near-open hostility of the two nations. By the time, the conventional contest had moved high up into the orbit. The space race was a matter of an incredible prestige, and thanks to Yuri Gagarin, the Soviets were a step ahead in that regard when Khrushchev and Kennedy met in the Austrian capital. The primary objective of the summit was to resolve increasingly delicate situation in Berlin. Soviet leader threatened to sign a separate treaty with East Germany, retracting commitments of cooperation, made by allied parties in the aftermath of the World War 2. Kennedy attributed it to the Bay of Pigs invasion, even privately admitting his weakness: “So he just beat hell out of me. I have got a terrible problem. If he thinks I

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<sup>101</sup> Samson Anna, “A History of the Soviet-Cuban Alliance (1960-1991)”, *Politeja* Vol. 10, No. 2 (2008), 89-108.

<sup>102</sup> *Ibid.*

<sup>103</sup> Sorrels Charles A, “Khrushchev in America”, *The National Interest* Vol. 7, No. 6 (1986): 53-65.

<sup>104</sup> Richard Nixon Foundation.

am inexperienced and have no guts, until we remove those ideas, we will not get anywhere with him.”<sup>105</sup>

73. They had not gotten anywhere for some time indeed. In August 1961, the Wall emerged, isolating Western Berlin and a month later Soviets resumed unilateral nuclear testing despite renouncing the action at the Vienna summit. Khrushchev remained dismissive of Kennedy, even labelling him “too liberal to fight” in a conversation with American poet Frost. Backchannel was established, instead, between Attorney General Robert Kennedy and undercover agent Georgi Bolshakov.<sup>106</sup>

### **3 THE CUBAN MISSILE CRISIS**

74. The Cuban Missile Crisis (or Caribbean Crisis<sup>107</sup> as it was called in the Soviet Union) was a tense 1962 confrontation between the US and the Soviet Union over Soviet nuclear missiles deployed in Cuba. The crisis brought the world to the brink of nuclear war but was resolved peacefully through diplomatic negotiations, with the Soviets removing the missiles in exchange for a US commitment not to invade Cuba and a private agreement to remove American missiles from Turkey.

#### **3.1 American actions against Cuba**

75. Unsuccessful Bay of Pigs Invasion and failure of Operation Mongoose were crucial events during the Cold War that set the stage for one of the most intense confrontations between the United States and the Soviet Union, known as the Cuban Missile Crisis.

76. 'Operation Mongoose' approved by President Kennedy in November 1961 authorised the Central Intelligence Agency (CIA) to train Cubans to infiltrate the island and carry out sabotage activities, while also trying to assassinate Fidel Castro.<sup>108</sup> In 1962, Cuban leaders held the belief that the United States, in response to the 1961 Bay of Pigs debacle, was preparing for a large-scale invasion of Cuba. The Soviets appeared to agree

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<sup>105</sup> Absher Kenneth Michael, “Mind-sets and Missiles: A first hand account of the Cuban Missile Crisis”, Carlisle Barracks, (Strategic Studies Institute at the US Army War College, 2009).

<sup>106</sup> Ibid.

<sup>107</sup> Sergei Khrushchev, “*Memoirs of Nikita Khrushchev volume 3 statesman [1953–1964]*”, (The Pennsylvania State University, 2007). [https://kiatipis.org/Books\\_Hosted\\_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf](https://kiatipis.org/Books_Hosted_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf), 356.

<sup>108</sup> Rabe Stephen G, “The Cuban Missile Crisis Revisited”, *JSTOR* <http://www.jstor.org/stable/30001786> (accessed on July 19, 2023).

with this perspective. This perception significantly influenced how Cuba interpreted any hostile actions taken by the US during the months following the Bay of Pigs. Consequently, Cuban leaders became convinced that an invasion was imminent. Cuban suspicions were further heightened by a series of events in early 1962. Firstly, the Organization of American States (OAS) made the decision to suspend Cuba's membership in January. Shortly afterwards, the United States conducted two significant military exercises in the Caribbean, near Cuba. The first exercise, known as Lantphibex i-62, featured a marine assault on an island off the coast of Puerto Rico. The second exercise, named QUICK KICK, was a massive display of naval manoeuvres with cca. 79 ships and more than 40.000 troops taking place off the southeastern US coast. <sup>109</sup>

### 3.2 Missile gap

77. Missile gap was a term popularized during the late 1950s and early 1960s referring to the perception referring to the belief among U.S. government officials that the Soviet Union held a significant advantage over the United States in ballistic missile technology. However, through military intelligence sources, President Eisenhower later discovered that the perceived missile gap was not real and, in fact, favoured the United States. <sup>110</sup> During the 1960 presidential campaign, Democratic presidential candidate John F. Kennedy promised to rebuild U.S. defence forces, running on the notion that the missile gap was a grave concern, he was later made aware of the truth. <sup>111</sup>
78. Soviet Union on the other hand was aware of their own shortcomings and that may be the reason why they decided to deploy missiles in Cuba in an effort to balance the power. <sup>112</sup> Khrushchev in complete contrast to the US politicians increased the perception of a

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<sup>109</sup> Brenner Philip, "Cuba and the Missile Crisis" *JSTOR*, 115–42 <http://www.jstor.org/stable/157169> (accessed on July 19, 2023).

<sup>110</sup> Graham T. Allison, "Essence of decision", *Archive*, [https://archive.org/details/essenceofdecisio00alli\\_0/page/92/mode/1up](https://archive.org/details/essenceofdecisio00alli_0/page/92/mode/1up) (accessed on July 23, 2023).

<sup>111</sup> Encyclopedia Britannica, "Missile gap", *Britannica*, <https://www.britannica.com/topic/missile-gap> (accessed on July 23, 2023).

<sup>112</sup> Kahan Jerome H., and Anne K. Long, "The Cuban Missile Crisis: A Study of Its Strategic Context" *Political Science Quarterly* 87, no. 4 (1972): 564–90. <https://doi.org/10.2307/2148197> (accessed on July 23, 2023).

missile gap when he loudly boasted that the USSR was building missiles "like sausages" whose numbers and capabilities were nowhere close to reality.<sup>113</sup>

### 3.3 Castro – Khrushchev agreement

79. It is still unclear why exactly the Soviets decided to deploy medium-range missiles in Cuba, but in Khrushchev's unofficial but authenticated memoir he attributed the genesis of the idea to put a number of medium and intermediate-range ballistic missiles (MRBMs and IRBMs) in Cuba to his musings while visiting Bulgaria in May 1962. Khrushchev says that he wanted to bring a "balance of fear" and as the Americans established nuclear missile bases in Turkey and Italy, so had he at that moment decided to deploy nuclear missiles in Cuba. It is important to mention that the official Soviet story since the end of the crisis was that they deployed the missiles in an honest desire to defend Cuba from an imminent US invasion. But with the growing "missile gap" as had been already established in this study guide, the theory that the Soviets especially wanted to offset the American advantage holds more ground.<sup>114</sup> Khrushchev discussed the idea with his "comrades" several times before the details of the operation were agreed upon. The Soviets decided that if they were going to install missiles, they should also be able to protect and defend them. Therefore, they decided to send a whole task force of infantry, anti-aircraft defences, tanks and artillery to Cuba, as they would be needed to defend the missiles in case of an enemy landing. The anti-aircraft defence system that they sent was for the time their most modern surface-to-air missile system S-75 Dvina<sup>115</sup> (NATO reporting name SA-2 Guideline).<sup>116</sup>

80. On May 30, 1962, a Soviet delegation began a publicized 10-day visit to Cuba, but what was not disclosed was the fact that the delegation also included military experts and

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<sup>113</sup> Correll John T., "Airpower and the Cuban Missile Crisis", *Resources Saylor*, <https://resources.saylor.org/wwwresources/archived/site/wp-content/uploads/2011/03/Cuban-Missile-Crisis.pdf> (accessed on July 27, 2023).

<sup>114</sup> Garthoff Raymond L., "Cuban Missile Crisis: The Soviet Story" *JSTOR*, <https://doi.org/10.2307/1148820>, <https://www.jstor.org/stable/1148820> (accessed on July 27, 2023).

<sup>115</sup> The same system was used to down United States U-2 spy plane in 1960 incident.

<sup>116</sup> Sergei Khrushchev, "Memoirs of Nikita Khrushchev volume 3 statesman [1953–1964]", *Kiatipis*, [https://kiatipis.org/Books\\_Hosted\\_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf](https://kiatipis.org/Books_Hosted_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf), 329.

Marshal Sergei Biryuzov, who was there to present Fidel Castro with Soviet intention. Biryuzov was sent there to answer any questions and to investigate the deployment possibilities. Castro agreed to the Soviet plan, believing that the United States are on the brink of invasion. With positive reactions from Cuba, the plan could be set into motion.

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81. During 2-17 July Cuban defence Minister Raul Castro arrived in Moscow to discuss Soviet military shipments, including nuclear missiles. Khrushchev met with the defence minister on 3 and 8 July. Raul Castro initiated a draft treaty with the Soviet Defense Minister that governed the deployment of Soviet forces to Cuba. This pact was not to be publicly revealed until the visit that Khrushchev planned to make to Cuba in November. Minister for Industry Ernesto the Guevara and the head of the Cuban militia led another delegation to Moscow from 27 August to 2 September. The purpose was to introduce Fidel Castro's revisions into the draft treaty. The Cubans proposed that the deployment would be made public to head off any American overreaction, Khrushchev, however, successfully argued for continued secrecy.<sup>119</sup>
82. In 1968, Castro gave an extraordinary 12-hour speech before the Central Committee of the Cuban Communist Party where he asserted that when a Soviet delegation proposed the installation of ballistic missiles in Cuba, they saw it as a means of strengthening the socialist community. Additionally, due to their denied admission to the Warsaw Pact, they perceived the supplied missiles as equivalent to de facto membership in the Pact, with the supplied missiles also being seen as an immediate deterrent to a U.S. invasion.

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<sup>117</sup> Ibid.

<sup>118</sup> Garthoff Raymond L., "Cuban Missile Crisis: The Soviet Story", *JSTOR*, <https://doi.org/10.2307/1148820>, <https://www.jstor.org/stable/1148820> (accessed on July 27, 2023).

<sup>119</sup> James H. Hansen, "Soviet Deception in the Cuban Missile Crisis", *CIA*, <https://www.cia.gov/static/205b8c27be0286b9a0d19fbf90d2382a/Soviet-Deception-Cuban-Missile.pdf> (accessed on July 27, 2023).

<sup>120</sup> Philip Brenner and James G. Blight, "The Crisis and Cuban-Soviet Relations: Fidel Castro's Secret 1968 Speech", *Latina American Studies*, <https://www.latinamericanstudies.org/cold-war/castro-speech-1968.pdf> (accessed on July 27, 2023).

### 3.4 Missile launch facilities construction

83. The Soviets decided that the missile deployment must be made in absolute secrecy. So, to avoid detection by the United States agents and aerial reconnaissance they sent Biryuzov with a group of staff officers from our missile forces so that they could evaluate where best to position the missiles. The officers were sure, that the palm trees would be enough to camouflage missile installations and that the deployment of the missiles could be kept secret.<sup>121</sup>
84. Soviet Union launched Operation Anadyr to deliver the task force and missiles to Cuba. But this wasn't a normal operation, with Soviets going extra mile to try and conceal true intentions of the operation. To find an attempt at deception, one doesn't have to look further than the name of the mission: Anadyr. The operation was a perfect example of "maskirovka"<sup>122</sup> since Anadyr is both the name of a river that feeds into the Bering Sea and the name of a Soviet bomber base and city in the far Russian north. The misnomer was meant to obscure, from both American communication interceptions and Russian military alike, the actual location of the mission. Only selected Soviet officers knew the details of the operations and planned the entire operation in handwriting themselves to protect against the leak of information, despite the fact that an operation of this magnitude typically requires hundreds of individuals working for several weeks. Even the soldiers and the captains of the transport ships were deceived. The soldiers were told to pack ski boots and parkas, while the captains were not told of their true destination until they were out at sea. The security measures went so far, that even the troops that were being transferred from the Soviet Union, had to stay in the lower decks of the ships, where temperatures rose so high that some personnel died during the trip.<sup>123</sup> <sup>124</sup> The ships sailed without naval escort and furthermore, only the Soviet

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<sup>121</sup> Sergei Khrushchev, "Memoirs of Nikita Khrushchev volume 3 statesman [1953–1964]", *Kiatipis*, [https://kiatipis.org/Books\\_Hosted\\_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf](https://kiatipis.org/Books_Hosted_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf), 331.

<sup>122</sup> *Maskirovka* is Russian word for deception.

<sup>123</sup> John D. Gresham, "Cuban Missile Crisis: Operation Anadyr, Part 4 of a series on the anniversary of the October 1962 confrontation", *Defence Media Network*, <https://www.defensemедianetwork.com/stories/cuban-missile-crisis-50th-anniversary-operation-anadyr-2/> (accessed on July 27, 2023).

<sup>124</sup> James H. Hansen, "Soviet Deception in the Cuban Missile Crisis, Studies in Intelligence", *CIA*, <https://www.cia.gov/static/205b8c27be0286b9a0d19fbf90d2382a/Soviet-Deception-Cuban-Missile.pdf> (accessed on July 27, 2023).

personnel loaded and unloaded the military cargo, also, it was exclusively Soviet personnel who set up the missiles at their locations. The same was true for the troops protecting the areas where the missiles were installed.<sup>125</sup> Equipment that had at least a superficial resemblance to agricultural machinery was unloaded in broad daylight, but weapons and other military equipment could be unloaded only at night.<sup>126</sup>

85. The “maskirovka” measures were quite successful and by late October, the size of the contingent in Cuba had reached about 41,90 personnel, quadruple the size figured by the US intelligence agencies.<sup>127</sup>

86. Another example of the “maskirovka” was the steady stream of official denials made by Soviet officials. On September 7, Soviet Ambassador Anatoly Dobrynin assured U.S. Ambassador to the United Nations Adlai Stevenson that the USSR was supplying only defensive weapons to Cuba. On September 11, the Soviet News Agency TASS announced that the Soviet Union neither needed nor intended to introduce offensive nuclear missiles into Cuba. On 13 October, a high State Department official questioned Dobrynin on whether Moscow intended to put offensive weapons in Cuba; the Ambassador denied any such intention. And again, on October 17, Soviet embassy official Georgy Bolshakov brought President Kennedy a “personal message” from Khrushchev reassuring him that “under no circumstances would surface-to-surface missiles be sent to Cuba.”<sup>128</sup> Khrushchev in his memoirs states that when the Soviets were questioned by the United States, stating: “*Naturally we denied everything. Some might say that this was perfidy on our part. Unfortunately, this type of diplomacy persists in our times, and we didn’t invent anything new in this respect.*”<sup>129</sup>

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<sup>125</sup> Sergei Khrushchev, “Memoirs of Nikita Khrushchev volume 3 statesman [1953–1964]”, *Kiatipis*, [https://kiatipis.org/Books\\_Hosted\\_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf](https://kiatipis.org/Books_Hosted_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf), 332 (accessed on July 27, 2023).

<sup>126</sup> James H. Hansen, “Soviet Deception in the Cuban Missile Crisis”, *CIA*, <https://www.cia.gov/static/205b8c27be0286b9a0d19fbf90d2382a/Soviet-Deception-Cuban-Missile.pdf> (accessed on July 27, 2023).

<sup>127</sup> *Ibid.*

<sup>128</sup> Resources Saylor, “Cuban Missile Crisis”, *Resources Saylor*, <https://resources.saylor.org/wwwresources/archived/site/wp-content/uploads/2011/03/Cuban-Missile-Crisis.pdf> (accessed on July 31, 2023).

<sup>129</sup> Sergei Khrushchev, “Memoirs of Nikita Khrushchev volume 3 statesman [1953–1964]”, *Kiatipis*, [https://kiatipis.org/Books\\_Hosted\\_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf](https://kiatipis.org/Books_Hosted_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf) (accessed on July 31, 2023).



### 3.5 U-2 SPY plane images

87. The movement of Soviet forces did not go unnoticed by the United States. United States were conducting flyovers by U-2 spy planes over the Caribbean country since the Bay of Pigs invasion. Lockheed U-2 spy plane was a plane designed specifically for the purposes of long time, high altitude (cca. 21.000 meters) all weather intelligence gathering.<sup>130</sup> U-2 spy planes, also made a lot of flyovers over Soviet territory. The Soviets did not have an immediate response and their attempts at shooting them down were at first not successful. But in 1960 CIA pilot Francis Gary Powers in U-2 was shot down Near the city of Sverdlovsk Oblast in the Ural Mountains by the Soviet air defence system S-75 Dvina (SA-2 Guideline). On August 29 one such fly over of Cuba documented the same type of surface-to-air missiles in the country and the administration did not want to risk a similar incident, so they halted U-2 flyovers of Cuba. Even if the flights stopped, the United States was not completely blind as it had established a complicated underground spy network in Cuba. Spies on the ground reported multiple unusual Soviet activity in Cuba, they kept tabs on Soviet vessels that docked in ports and by the middle of September, they reported more Soviet personnel and secret operations taking place in central Pinar del Río.<sup>131</sup> Reports were at first not considered as very important, but after more of them came in, the administration decided to continue the reconnaissance flights. On a Sunday morning, October 14, the U-2 flight piloted by Major Richard Heyser, took photographs of Soviet SS-4 medium-range ballistic missile being assembled for installation.<sup>132</sup> Soviet planners were sure that the palm trees would conceal the building site, but that was not the case, still the Soviets knew that U.S. Intelligence will sooner or later catch on.<sup>133</sup>

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<sup>130</sup> Air Force, "U-2S/TU-2S", *Air Force*, <https://www.af.mil/About-Us/Fact-Sheets/Display/Article/104560/u-2stu-2s/> (accessed on July 31, 2023).

<sup>131</sup> Jason Daley, "How CIA-Backed Spies Detected Soviet Nukes First During Cuban Missile Crisis", *Smithsonian*, <https://www.smithsonianmag.com/smart-news/how-cia-backed-spies-detected-russian-nukes-first-during-cuban-missile-crisis-180971341/> (accessed on July 31, 2023).

<sup>132</sup> The National Security Archive, "The Cuban Missile Crisis", *The National Security Archive*, [https://nsarchive2.gwu.edu/nsa/cuba\\_mis\\_cri/photos.htm](https://nsarchive2.gwu.edu/nsa/cuba_mis_cri/photos.htm) (accessed on July 31, 2023).

<sup>133</sup> Sergei Khrushchev, "Memoirs of Nikita Khrushchev volume 3 statesman [1953–1964]", *Kiatipis*, [https://kiatipis.org/Books\\_Hosted\\_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf](https://kiatipis.org/Books_Hosted_gr/Nikita.Khrushchev/Memoirs-of-Nikita-Khrushchev%5BVol3%5D.pdf), 333 (accessed on July 31, 2023).

88. These photographs provided positive proof that the Soviet Union was installing medium-range nuclear weapons in Cuba, capable of striking major U.S. cities and killing tens of millions of Americans within minutes. In a televised address on October 22, 1962, President Kennedy informed the American people of the presence of missile sites in Cuba. With the October 14 photographs, the United States caught the Soviet Union building offensive nuclear missile bases in its backyard, and the two superpowers were now joined in the first direct nuclear confrontation in history.<sup>134</sup>

### 3.6 Cuban naval quarantine

89. On 16 October (1962) President John F. Kennedy convened a meeting with a team of advisers, known as Ex-Comm, to discuss how to effectively respond to the missile threat. Secretary of Defense Robert McNamara presented three options to Kennedy: diplomatic negotiations, a naval quarantine of Cuba, or a “surgical” air attack to destroy the missile sites. Kennedy swiftly rejected the air attack option due to the potential enormous civilian casualties and the risk of full-scale nuclear war. Instead, he favoured a quarantine, which would buy time for negotiation and avoid a direct act of war. The chosen solution was *de iure* naval quarantine but *de facto* blockade because the usage of word blockade would define American answer to missile facilities construction as an act of war and as such wouldn’t give both parties in conflict time and space to manoeuvre rising tension. From Kennedy’s perspective<sup>135</sup> if the war was imminent, he is obliged to try every other possible instrument to prevent harm to American citizens and their welfare.

90. On 22 October in a dramatic televised address, President Kennedy shocked the American public by revealing the "unmistakable evidence" of the missile threat and announcing the United States' intention to prevent weapons from reaching Cuba through naval quarantine. Kennedy demanded that the Soviet Union withdraw their

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<sup>134</sup> National Archives, “Aerial Photograph of Missiles in Cuba (1962)”, *National Archives*, <https://www.archives.gov/milestone-documents/aerial-photograph-of-missiles-in-cuba> (accessed on July 31, 2023).

<sup>135</sup> Kennedy Robert F., “Thirteen Days: A Memoir of the Cuban Missile Crisis”, (New York: Norton, 1971).

missiles from Cuba. Additionally, the U.S. ambassador to the Soviet Union, Foy Kohler, delivered a letter from Kennedy<sup>136</sup> to Soviet Premier Nikita Khrushchev, emphasizing the importance of understanding the United States' unwavering determination to prevent a nuclear conflict. Simultaneously with his address to the nation all required military and administrative actions took place.

91. The naval quarantine by itself was an extremely light reaction for a such great threat as the nuclear arsenal in Cuba was, even the EXCOOM board members were aware of its superficial ineffectiveness because most of the weaponry material for constructing operational launch pads and rockets with nuclear warheads already safely arrived in Cuba before the quarantine. The only real obstacle for USSR to have an operational nuclear arsenal in Cuba at that moment was construction that needed time, not a lack of military equipment. And those were not the only disadvantages of quarantine, to have a proper legal backing, the act needed the application of international law instruments to be fully enforceable. As such, the primary podium for gaining legitimacy should be the United Nations, backed by resolution or similar act, but Kennedy's administration knew that USSR's veto would be an obstacle that could not be removed in adequate time. So, the only viable alternative was at that moment Organization of American States and luckily (for Kennedy's administration) the Cuba was expelled from it. Kennedy's administration secured practically all of the votes (only Uruguay voted against).
92. Those actions taken through Organization of American states were nevertheless important for USA, but not even close as important as to renew support from important European countries such as France and UK, which was done through American diplomats stationed in Europe. One of the most remarkable reactions was UK's Prime ministers: "Now the Americans will realize what we here in England have lived through for the past many years"<sup>137</sup>.

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<sup>136</sup> John F. Kennedy Presidential Library and Museum, "Letter From President Kennedy to Chairman Khrushchev", *John F. Kennedy Presidential Library and Museum*, <https://microsites.jfklibrary.org/cmc/oct22/doc4.html> (accessed on August 23, 2023).

<sup>137</sup> Nsarchive, "Chronologies of the Crisis", *Nsarchive*, [https://nsarchive2.gwu.edu/nsa/cuba\\_mis\\_cri/620928\\_621025%20Chronology%201.pdf](https://nsarchive2.gwu.edu/nsa/cuba_mis_cri/620928_621025%20Chronology%201.pdf) (accessed on August 27, 2023).

93. On 23 October morning Khrushchev letter<sup>138</sup> arrived through TAM machine into the White house, the letter itself did not contain any specific threats and was written in restrained tone. The grand purpose of letter was allegation of USA unlawful quarantine, which in the eyes of USSR meant breaking The United Nations Charter and international norms. As Khrushchev stated those missiles on Cuba are regardless of classification meant solely for defence purposes and as such no threat to USA.

## **3.4 SECURITY COUNCIL**

### **3.4.1 The role of the United Nations in the Cuban Missile Crisis**

94. United Nations (UN), as the ultimate international organisation, always had to tread carefully around the biggest superpowers, as they had enormous influence on the work of the United Nations and could easily block any decisions. That is why it was very important for UN to understand that they could not solve every crisis by force.

95. Secretary-General Dag Hammarskjöld knew that the United Nations could do little where there was a direct clash of interests between the superpowers during the Cold War. But he had in mind that, if the opportunity presented itself, he might be able to head off disputes between lesser powers and prevent them from the gravitational pull of the superpowers contest. But it was Secretary-General Thant who moved Hammarskjöld's vision forward. His role in preventing a nuclear confrontation over the Cuban Missile Crisis must rank as the most spectacular example of preventive diplomacy in the annals of the United Nations.<sup>139</sup>

96. Thant was amongst the first who were informed by the US officials, when the US took pictures of missile launch sites in Cuba. Thant sent appeals and messages, relayed proposals, offered reassurances, advanced the “non invasion for missiles” formula that formed the basis of the final agreement, shuttled to Cuba to mollify Castro, and helped secure a verification arrangement. He pioneered the success of the idea of preventive

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<sup>138</sup> John F. Kennedy Presidential Library and Museum, “Chairman Khrushchev's Letter to President Kennedy”, *John F. Kennedy Presidential Library and Museum*, <https://microsites.jfklibrary.org/cmc/oct23/doc6.html> (accessed on August 27, 2023).

<sup>139</sup> Ramcharan G. Bertrand, “Preventive Diplomacy at the United Nations”, *UN Chronicle*, <https://www.un.org/en/chronicle/article/preventive-diplomacy-united-nations> (accessed on August 28, 2023).

diplomacy as one of the great UN ideas that will be around for as long as the world organization exists; for behind it is a simple faith that whatever might be done to prevent crises or conflicts should be considered.<sup>140</sup>

97. During the crisis, the Kennedy administration came to rely heavily upon the UN secretary general. In recognition of Thant's intermediary services, Kennedy afterwards said: "Thant has put the world deeply in his debt."<sup>141</sup>

### **3.4.2 UN as the intermediary**

98. After President Kennedy's televised announcement UN members, mostly the nonaligned countries, implored Secretary General Thant to assume the role of an intermediary. Adlai Stevenson (American delegate to UN) later called this intervention an essential "first step" in resolving the crisis. Thant sent his first message to the two leaders on October 24, which happened to be UN Day, only a few hours after the quarantine had taken effect. It contained an urgent appeal for a moratorium of two to three weeks involving both the voluntary suspension of all arms shipments to Cuba and the quarantine measures, especially the searching of ships bound for Cuba. The aim was to gain time to find a peaceful solution. At first both the Soviets and the United States reacted negatively to this proposition, but then both sides agreed to try and mediate through Thant and the UN.<sup>142</sup>

99. The Security Council meeting of October 25 was one of the most famous UN meetings ever held. Adlai Stevenson faced Valerian Zorin (USSR delegate) with hard evidence of ballistic missile imaging, and it was during the speech at this meeting that Stevenson made the bold and famous statement: "I am prepared to wait for my answer until hell freezes over."<sup>143</sup>

100. Stevenson presentation of evidence was not intended only to diplomatically defeat USSR and its allies, the point was also to inform all members of UN Security council

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<sup>140</sup> Ibid.

<sup>141</sup> Dorn A. Walter, Pauk Robert, "Unsung Mediator, U Thant and the Cuban Missile Crisis", *Diplomatic History*, [https://walterdorn.net/pdf/CubanMissileCrisis-UnsungMediator\\_Dorn-Pauk\\_DiplHistory\\_Vol33No2\\_Apr2009.pdf](https://walterdorn.net/pdf/CubanMissileCrisis-UnsungMediator_Dorn-Pauk_DiplHistory_Vol33No2_Apr2009.pdf) (accessed on August 28, 2023).

<sup>142</sup> Ibid.

<sup>143</sup> Ibid.

about reality of situation and to destroy any left doubts about how serious the situation is. Also, with such allegation of USSR, were all delegates passively forced to pick a side, whether they support USA or USSR and Cuba.

101. During the coming negotiations Thant emphasized that a deal could be reached by trading an American guarantee of the territorial integrity of Cuba for the dismantling and removal of all Cuba's missile sites and offensive weapons. This formula, would soon become the backbone of the settlement.<sup>144</sup>

## **4 APPLICABILITY OF THE EXPECTED UTILITY HYPOTHESIS**

### **4.1 Introduction**

102. The theory of choice, also known as decision theory, is an area of mathematical sciences, elucidating an optimal outcome in the decision-making processes. In his work about the dynamics of international relations, Slovenian author Tit Turnšek has applied it to the historical example of the Cuban Missile Crisis. The following passage is an abstract of the concerning case-study.<sup>145</sup>

### **4.2 Theory of choice**

103. Based on the mathematical algorithm, the normative theory of choice analyses therationality of a certain decision – favourability of the consequences respective to the given objective. The process of the rational decision-making, as set by the authors of the theory, consists of multiple steps, performed in the following order: First, a problem, objectives and alternative options are to be determined. Further, a totality of circumstances must be introduced to serve as a bridge between the alternatives and their consequences (outcomes). Such intertwinement of the elements is referred to as a model. Construction of the model enables choosing the rational decision – the most favourable of given alternatives, since the formation of the outcome is an element at the

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<sup>144</sup> Ibid.

<sup>145</sup> Turnšek Tit, "*Dinamika mednarodnih odnosov*", (Ljubljana: Svobodna misel, 2008).

junction of an alternative and the circumstances. The following is presented in a table below:

	<b>c<sub>1</sub></b>	<b>c<sub>2</sub></b>	<b>c<sub>n</sub></b>
<b>a<sub>1</sub></b>	O <sub>1,1</sub>	O <sub>1,2</sub>	O <sub>1,n</sub>
<b>a<sub>2</sub></b>	O <sub>2,1</sub>	O <sub>2,2</sub>	O <sub>2,n</sub>
<b>a<sub>n</sub></b>	O <sub>n,1</sub>	O <sub>n,2</sub>	O <sub>n,n</sub>
KEY: a = alternative c = circumstances O = outcome			

104. To determine the most rational alternative, the preference scale of alternatives within a particular set of circumstances shall be established. The scale below indicates that the favourability of the alternative  $a_1$  is larger than the favourability of the alternative  $a_2$  yet inferior to the favourability of the alternative  $a_n$ , while the circumstances, characterised as  $c_n$ . Seemingly, the alternative  $a_n$  results in a most preferable outcome and is, thus, an object of the rational decision.

$$f(O_{n,n}) > f(O_{1,n}) > f(O_{2,n})$$

105. Previous model is based on the presumption of total certainty, a state of perfect information about the circumstances. However, most of the time the information is incomplete. Therefore, the preference scale encompasses two or more sets of circumstances.

106. As the factor of risk is involved in a decision-making process, the model becomes much more realistic, as well as complex. Think of a situation where the assessment of a possibility for the actualization of all the circumstances is possible, enabling the percentual allocation of probability for pre-given sets of circumstances.

	<b>c<sub>1</sub></b>	<b>c<sub>2</sub></b>	<b>c<sub>n</sub></b>
<b>a<sub>1</sub></b>	O <sub>1,1</sub>	O <sub>1,2</sub>	O <sub>1,n</sub>
<b>a<sub>2</sub></b>	O <sub>2,1</sub>	O <sub>2,2</sub>	O <sub>2,n</sub>
<b>a<sub>n</sub></b>	O <sub>n,1</sub>	O <sub>n,2</sub>	O <sub>n,n</sub>
<b>p</b>	p <sub>1</sub>	p <sub>2</sub>	p <sub>2</sub>
KEY: a = alternative c = circumstances O = outcome p = probability			

107. In such an instance, evaluation of the possible outcomes does not only reflect one's subjective attitude towards the consequences itself, but also to the risk-taking. Both elements, the preferability of the given outcome and the probability of its actualization, are pondered into a value known as the expected utility. Therefore, the classification of the outcomes is a product of generating a utility scale, instead of the preference scale. Rational decision-maker will choose an alternative which provides him with the largest value of the expected utility.

### 4.3 Expected utility in an international conflict

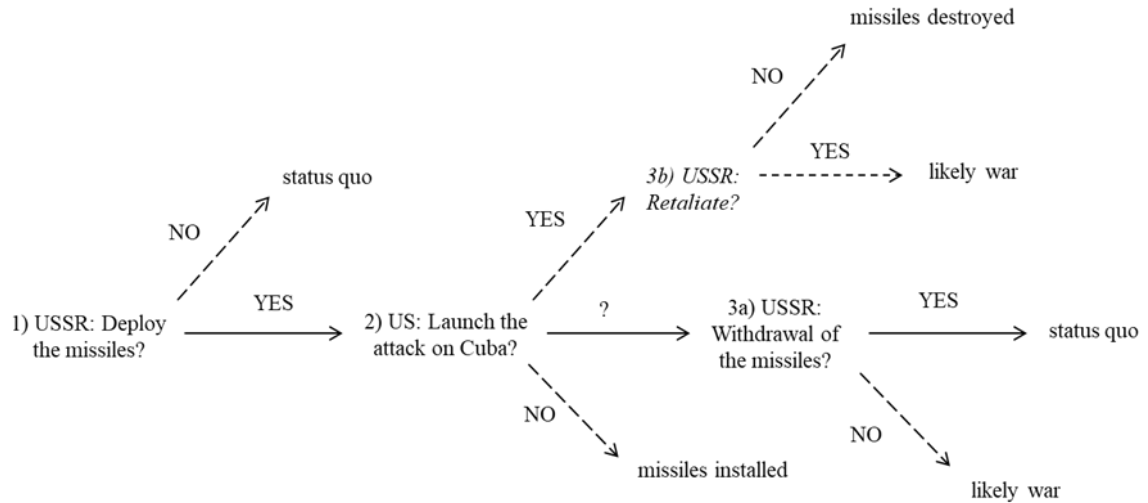
$$U_i^e \text{ [expected utility]} = \sum_{i=1}^n p \text{ [probability]} \cdot f(O_{i,i}) \text{ [preferability]}$$

#### 4.3.1 Alternatives

108. The tree diagram below represents sets of alternatives the Soviet Union and the United States leadership has or possibly could have met with during the missile crisis. For the purposes of studying, the model is heavily simplified and – with an exception – set within a binary system of choices. Kennedy had many other retaliatory measures at



his disposal to the deployment of Soviet missiles, and Khrushchev could have certainly decided to strike back with the opposite threat, perhaps by blocking air routes connecting West Berlin with the Federal Republic of Germany.



#### 4.3.2 Phase 1

109. The Soviet leadership was faced with the problem of whether to deploy the nuclear warhead missiles to the island of Cuba as an attempt to change the balance of power in the western hemisphere ( $U_{1+}^e$ ), having in mind the possibility of Americans launching the attack on Cuba ( $p_{2,x}$ ). On the other hand, the United States could also accept the change in the balance ( $p_{2,y}$ ) or stand in a posture of strategic ambiguity, waiting for the further developments ( $p_{2,z}$ ). Presuming the rationality of their decision and knowing the approval of deployment, the Soviets must have calculated the utility of risky manoeuvre greater than the utility of maintaining the status quo ( $U_{1-}^e$ ). Considering the American attack ( $u_{2,y}$ ) or ambiguity ( $u_{2,z}$ ) as consequences of negative utility for the Soviet Union, they must have believed there is only a trivial probability of such a response. Not knowing about the following moves on the side of Moscow, one could also argue the utility of having missiles installed and thus changing the balance of power ( $u_{2,x}$ ), had a substantially larger positive utility compared to the negative utility of the other two possible outcomes. It is possible, however, that Khrushchev decided upfront not to retaliate, had the United States attacked Cuba.

$$U_{1+}^e = p_{2,x} \cdot u_{2,x} + p_{2,y} \cdot (-u_{2,y}) + p_{2,z} \cdot (-u_{2,z}) > U_{1-}^e; \quad x+y+z=1$$

### 4.3.3 Phase 2

110. The United States had to, within our model, choose among one of the following alternatives: They could either launch an attack on Cuba, destroying the missile sites and missiles present themselves ( $U^{e_{2+}}$ ), let the move go unpunished ( $U^{e_{2-}}$ ) and suffer a negative utility of changed balance of power ( $u_{3c}$ ) or find an alternative solution, letting Soviets speculate and perhaps intervene later, had it been necessary ( $U^{e_{2?}}$ ). Announcing the naval quarantine is certainly one of such measures. Seemingly, the expected utility of it prevailed. Knowing that both attack and quarantine could have led to an all-out war, had the Soviets retaliated ( $u_{3b,x}$ ) or refused to withdraw the missiles ( $u_{3a,x}$ ), and presuming destroying the missiles (and perhaps toppling Castro) as an act on strengthening the United States ( $u_{3b,y}$ ), it must have been believed that the probability of Soviets obeying the quarantine and withdrawing the missiles ( $p_{3a,y}$ ) likelier than refusing to retaliate ( $p_{3b,y}$ ).

$$U^{e_{2?}} = u_{3a,x} \cdot p_{3a,x} + u_{3a,y} \cdot p_{3a,y} > U^{e_{2-}}, x+y=1$$

$$U^{e_{2?}} > U^{e_{2+}} = u_{3b,x} \cdot p_{3b,x} + u_{3b,y} \cdot p_{3b,y}, x+y=1$$

### 4.3.4 Phase 3a

111. It was all up to the Soviet Union when the naval quarantine was declared. Had Khrushchev decided to turn around vessels, carrying the missiles and withdraw those, already delivered to Cuba, the outcome would be similar as if they were never deployed at all. However, he would certainly have lost some of his own political prestige. Were the Soviet vessels to meet American Naval Forces, the war would have perhaps been imminent. Staying within the given model and not speculating about the potential armed conflict between the two powers, his decision did not base on the expected utility. To the contrary, stakes were known, therefore we can characterise it as deciding in certainty. Accepting the status quo ( $f_{3a+}$ ) was preferable.

$$f_{3a+} > f_{3a-}$$

## 5 ISSUES TO ADDRESS

The delegates shall address the issue as it stands as of October 23rd, 1962. Considering the state of affairs with Soviet vessels approaching the naval quarantine as misdirected and prone to escalate into an armed conflict, at least some incremental recalibration of parties' stances ought to be made. Any measure proposed, however, is unlikely to be embraced, does it fail to meet the following criteria:

1. The United States of America is under no immediate national security risk, induced by nuclear-armed ballistic missiles, erected or stored within or in the proximity to the territory of the Organization of American States member states.
2. The Republic of Cuba is provided security guarantees to retain its sovereignty in both internal and external aspects, including the right of its people to self-govern and constitute its government independently.
3. The Union of Soviet Socialist Republics is not deprived of its macroregional strategic position, particularly concerning to the policy of non-involvement of the western powers into the countries within the scope of Warsaw Pact alliance.

### 1.2. redirecting the Cold War trajectory

Laying grounds for any further conciliation of the larger-scale cold war dispute is of a secondary relevance, yet highly appreciated.

## 6 CONCLUSION

112. The Cuban Missile Crisis was a crucial moment during the Cold War, where two superpowers brought the world to a standstill. The world teetered on the brink of nuclear Armageddon, as ideological adversaries, the United States and the Soviet Union, engaged in a dangerous game of chicken in which no one wanted to be last.
113. As much as we can see the Cuban Crisis as a human failure that nearly ended the World, we can also look at it from a different angle. The resolution of the Crisis was reached on a negotiating table with zero directly caused casualties. The organisation of United Nations which has always been known for its tedious and slow processes played a major role in getting the United States and Soviet Union behind the same desk and when it mattered the most negotiators from both blocks showed that they can find a solution with which both sides would be content. Cuban Crisis should be therefore seen a victory for diplomacy, from which we can still learn today.
114. After the crisis was resolved the tensions between the superpowers noticeably warmed and resolution was followed by a batch of more or less successful treaties, that tried to stop the arms race and the seemingly never-ending production of nuclear weapons (ex. Strategic Arms Limitation Talks (SALT)).
115. Despite these demilitarisation attempts the cold war continued till the fall of the Soviet Union in the years of 1990 and 1991. In the present day we can sense the beginnings of a new cold war brewing between United States and China therefore it is incredibly important that we do not forget the lessons which were given to us.
116. The Cuban Missile Crisis reminds us of the enduring need for dialogue, cooperation, and the pursuit of peaceful solutions to global challenges, for the stakes of miscalculation remain as high as ever.

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