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LETTER FROM THE EDITOR

May 8, 2023

Dear Readers,

I am excited to present to you the Spring 2023 edition of the Towson University Journal of International Affairs. I am proud to share with you four intriguing articles that this issue contains. The authors represent a cross-section of IR scholars in varying parts of their career including professionals, graduate students, and undergraduates. Additionally, the authors represent various academic institutions in a number of different countries, including our own Towson University.

In our first article, "*Future Scenarios for The Middle East, Post-U.S. Hegemony,*" Mahmoud Refaat explores the United States's declining position in the Middle East, which can be attributed to economic development, nuclear weapons development, government levying of oil reserves, and the increased influence of Russia and China. Dr. Refaat explores the future of the Middle East, pondering what it might mean for the region to move away from Western dominance and even more specifically, American hegemony.

In our second article, "*Impacting the European Union: The Refugee Crisis,*" Carolyn Reid provides a compelling examination of the effects of the migration crisis on the European Union. Ms. Reid surveys a range of case studies to explore how differential philosophies and policies on mass migration, especially from non-European states, has undermined the EU's solidarity and destabilized European integration.

In our third article, "*Transformation of Gendered, Racial Capitalism in Lebanon: The Impact of the Post-2019 Lebanese Crisis on the Kafala System,*" Lindsey Parnas explores the impact of economic crisis, the COVID-19 pandemic, and the Beirut explosion on the status and treatment of migrant domestic workers in Lebanon Ms. Parnas also investigates increased unemployment, mass emigration and deportation, surging homelessness, and gender-based violence under the *Kafala* system.

In our final article, "*Alliance Dilemma: Decreasing State Compliance and Increasing Useable Scenarios,*" Alexia Fitz explores a new way of examining the success of current nuclear treaties and the limited support for TPNW. The author coins the term "alliance dilemma" to explain non-nuclear state's desire for collective security, which in turn is a form of indirect proliferation. Her provocative article raises important theoretical questions while carefully canvassing the field of nuclear studies.

Finally, I would like to extend my sincerest gratitude to our journal staff and Dr. Paul T. McCartney, who have helped to complete all aspects of this issue. Together we are all honored to present Volume LVI Number 1 of the Towson University Journal of International Affairs.

Sincerely,

Alexia Fitz

Editor-in-Chief

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Future Scenarios for The Middle East, Post-U.S. Hegemony

Mahmoud Refaat

Abstract: The Americans were successful in taking over control of the Middle East post World War II. The nation, through its diplomacy, democratic values and military strength, has maintained its status in the region. However, as years went by, the Middle East has appreciated this American interference less and less. The U.S and many states in the GCC have decade-long relationships based on friendship and diplomacy. However, the rate at which the position of the U.S is declining in the Middle is alarming. The economic development, technological curiosity regarding nuclear weapons, rich oil reserves and government that can strategically levy it, and the support from Russia and China, pose serious threats to American dominance. The events unravelling in the U.S and the Middle East have set in motion the possibility of the world moving on from western dominance. This paper aims to examine the future of the Middle East post-American hegemony.

Introduction

The United States has used 'instability' in the Middle East to justify its presence in the region. However, parts of the international community are in consensus that a great deal of this instability is owed to the Americans themselves. The Middle East, while it still witnesses conflicts, has come a long way since the 1980s and 1990s, especially in the Gulf Cooperation Council (GCC) nations. The Middle East remains the biggest source of the world's oil, and this has shaped the foreign policy in the region.[1] While the success of the region is not equal among all the states of the Middle East, the growth of the region through capitalizing on its energy resources must be applauded. The hegemony that the United States had over the Middle East

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[1] David Oluwafemi Bodunde, "Iran"s Geo-Politics: the Implications of American Hegemony in the Middle East," *International Journal of Research and Innovation in Social Science*, April 2021, https://www.rsisinternational.org/journals/ijriss/Digital-Library/volume-5-issue-4/103-109.pdf.

served two functions 1) National Security 2) Free Flow of Global Commerce. Neither requires

American presence or hegemony in the region. With this knowledge, the nations in the Middle

East have embarked on creating strong and robust foreign and economic policies around the

globe, causing the decline, but not yet fall, of the American hegemony in the region. The Middle

East is retaliating after decades of flawed foreign policy which targeted the Middle East as

inferior to the Western Bloc. Despite being the most powerful country in the world from an

economic and military perspective, the U.S is facing difficulties in maintaining its leadership in

the face of internal and external factors.[2] The United States government has been semi-successful

in convincing the world that China is a threat, whereas China is only a threat to American

hegemony.[3] This research paper examines the future of the Middle East after it detaches itself

from American interference and whether such a future is practical.

      Chapter I of the research paper examines the history and origins of the Middle East-

United States Administration, which began with the oil trade and further intensified through

American military presence in the region to maintain "stability".

      Chapter II explores the challenges and potential cause that contribute to the decline of

American Hegemony in the Middle East. Factors such as China's economic policy for the

Middle East, failed diplomatic missions, and the rise of other blocs have impeded the U.S

position as a global leader as well as a Middle East mediator.

    Finally, chapter III concludes with a dive into the future of the Middle East after American

hegemony. By examining the current administration's policies versus the former, one can assess

whether the dominance of the United States can be revived. This chapter also looks into whether

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[2] Emma Ashford, "Unbalanced: Rethinking America's Commitment to the Middle East," *Strategic Studies Quarterly* 12, no. 1 (2018): 127–48. http://www.jstor.org/stable/26333880.

[3] "US arrogance the major threat to its hegemony, not China," The Global Times, October 14, 2022, https://www.globaltimes.cn/page/202210/1277163.shtml.

the Middle East can actually survive without the United States, as neither China, Russia or India

has displayed a commitment to the region the U.S has displayed in the Middle East. This chapter

also addresses the Trump and Biden Administrations' policies with regard to the Middle East and

its contribution to decline.

1. The US Policy Towards Middle East From An Historical Perspective

Despite the traditional American view, enshrined in the Monroe doctrine the U.S aspiration

to become the sole superpower in the international game shaped the idea that the U.S had a

Global responsibility. Due to the Middle East high strategic value, the initial philosophy of

rejecting direct political intervention within other region was retracted in order to curb the spread

of communism and terroristic organisations. Washington's contributions through diplomacy, aid,

education, espionage, subversion, and military power made the U.S the main foreign State that

influenced the Middle East development. [4]

1.1 The Middle East during the Cold War

Since the end of World War II, when the United States emerged as a superpower in terms

of industrial output and economic power, the aim of American policymakers was to secure status

and economic interests. The U.S intended to redesign the post-war landscape through oil, to

boost domestic industrial growth and finance a global design oriented towards the capitalistic

recovery of Western Europe. Due to the vital role of petroleum for militaries, the U.S that

Middle East and its fossil fuel reserves as being a vital strategic interest. Subsequently, the US

rapidly became a major political force in the Gulf.[5] Post World War II, the U.S had three main

policy objectives regarding the Middle East: to ensure access to the Gulf oil reserves and

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[4] Michael C. Hudson, "To Play the Hegemon: Fifty Years of US Policy toward the Middle East," *Middle East Journal* 50, no. 3 (1996): 329–43. https://www.jstor.org/stable/4328954#metadata_info_tab_contents.
[5] David M. Wright, "Oil Money: Middle East Petrodollars and the Transformation of US Empire, 1967-1988," Cornell University Press, 2021. https://www.cornellpress.cornell.edu/book/9781501715723/oil-money/.

maintain a stable oil price on the global market, to contain the influence of the USSR in the

region, and to ensure the wellbeing of the new-born State of Israel.[6] To do so, the U.S action

shifted within various degrees of interventionism in the subsequent years. Maintaining close

relationships with regional allies by providing military and economic aid, managing changing

scenarios, and controlling the volatile balance of powers became the U.S strategy.

1.1.1US State security policy through Middle East oil

      Oil started acquiring a strategic security dimension in the aftermath of the World War II,

to successfully end the war and drive Western post-war economic development. Already in 1945

it was recognized that the MENA oil reserves would have played a pivotal role in the global

energy market, making it a priority area for the U.S foreign policy. At that time, it was estimated

that there were almost forty government agencies dealing with it; moreover, many officials in

control of key defense and foreign policy position within the administration had close ties with

oil tycoons.[7]

      In the subsequent years, the Reagan Corollary to the Carter Doctrine stated that it is in the

U.S interest not to maintain good relations with Saudi Arabia and to avoid another Iran scenario.

The relationship between the U.S-Saudi governments was strengthening, through petrodollar

economy but and military aid. Reagan furnished military equipment and expressed his

commitment to protect Saudi Arabia if the Saudi oil reserves were endangered. Progresses was

made in the field of regional security, in which the U.S supported the creation of the Gulf

Cooperation Council or GCC, a multilateral defensive organization. The GCC was compromised

of Gulf States allies, with the main aim to develop a joint air defence strategy, which had limited

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[6] Ilksoy Aslim, "United States and the legacy of the Cold War politics in the contemporary Middle East," *Journal of Social Sciences* XI, No. 1 (2018), https://dergi.neu.edu.tr/public/journals/7/yazardizini/aslim-i-2018-april.pdf.
[7] Michael J. Cohen, "William A. Eddy, the Oil Lobby and the Palestine Problem," *Middle Eastern Studies* 30, No. 1 (1994): 166-80, https://www.jstor.org/stable/4283621.

capacity. This was since the Gulf allies would be unable to cope with a serious threat from Iran

or Iraq without the U.S intervention. Moreover, the States' peculiar identities undermined the

functional spill over of unification in the financial, political or security field.[8]

2. Challenges To The United States' Hegemony

The United States has successfully nurtured and maintained its hegemony since World

War II, however in recent years, the nation is facing setbacks in maintaining its position in the

Middle East.[9] Although the United States overcame a similar setback in the 1970s, recovery

today is doubtful. This chapter will discuss factors and events that contributed to the decline of

U.S. hegemony of the United States in the Arab world and future developments that could

further accelerate this decline.

2.1 Oil, Middle East and Revisiting Diplomacy

While the United States has focused its its time, money and energy on the war in Ukraine,

the Biden Administration is facing backlash among American voters for rapid inflation and

increased oil prices. Saudi Arabia, one of the U.S.' longest allies, has been criticized for 'war

profiting'.[10] While Saudi Arabia blamed the supply cuts on a collective OPEC decision[11], as the

leader of the Organization the decision is still an indicator of a deteriorating relationship with

Washington. The Biden Administration initially responded with threats of reconsidering the

Saud-U.S diplomatic relations, but did not act further on their threats. This is owing to the

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[8] Waafa A. Alaradi and Hasan A. Johar "Gulf Cooperation Council: Structural and Political Challenges in Establishing a Unified Regional Gulf Identity (RGI)," *Contemporary Arab Affairs* 14, No. 2 (2021), https://go-gale-com.pros2.lib.unimi.it/ps/i.do?p=AONE&u=milano&id=GALE%7CA689479468&v=2.1&it=r.

[9] Fareed Zakaria, "The Challenges of American Hegemony: Then and Now," *International Journal* 54, no. 1 (1998): 9–27, https://doi.org/10.2307/40203352.

[10] "Biden accuses oil companies of 'war profiteering' and threatens windfall tax," The Guardian, October 31, 2022, https://www.theguardian.com/us-news/2022/nov/01/biden-oil-companies-war-profiteering-windfall-tax-ukraine.

[11] Leen Al-Rashdan, "OPEC Says Supply Surplus Was Main Reason for Oil Production Cut," Bloomberg Markets,October 31, 2022, https://www.bloomberg.com/news/articles/2022-10-31/opec-says-supply-surplus-was-main-reason-for-oil-production-cut?leadSource=uverify%20wall.

following factors. 1) The U.S- Saudi Oil Deals 2) Saudi as an access point to retain control over the Middle East 3) Fear of China replacing its role in the Middle East.

2.1.1 U.S-Saudi Oil Deals

President Biden's visit to the Middle East after his presidential win was supposed to seal Saudi's cooperation with the U.S in oil production and supply. However, the Biden Administration was not successful in boosting oil production, which contributed to rising inflation in the U.S Keeping aside domestic displeasure of the Biden Government, the decision of OPEC+ has indirectly affected the Russian-Ukraine war.[12] The OPEC decision plummeted the world, into a deeper crisis, which was already on the brink of recession. The OPEC decision can be understood as a statement of solidarity with the OPEC+ member, Russia.[13] The Biden Administrations' failure to convince the Arab world to side with the Western Bloc highlights the diminished American control over how the Arab world conducts its business and politics.

2.1.2 Saudi as the center point of the Middle East

The Americans also know that losing Saudi Arabia as an ally and removing its military from the region would result in losing its presence in the Middle East. The U.S has relied on the proximity of Saudi Arabia to Iran in developing its foreign policy against Iran. Moving out of the region and pulling out military assistance to Saudi Arabia would only aid Iran in strengthening its forces in the Middle East, a scenario both U.S and Saudi Arabia want to avoid.

2.1.3 Fear of China replacing its role in the Middle East

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[12] Andrew Desiderio and Connor O'Brien, " 'Enough is enough': Dems rage at Saudis over oil cut, vow to block weapons sales," Politico, October 10, 2020, https://www.politico.com/news/2022/10/10/dems-rage-at-saudis-over-oil-cut-vow-to-block-weapons-sales-00061123.
[13] Simon Johnson, "Op-Ed: OPEC's move to raise oil prices is all about Russia," LA Times, October 6, 2022, https://www.latimes.com/opinion/story/2022-10-06/opec-oil-prices-russia-ukraine-inflation.

Another concern for the United States, regarding its hegemony in the Middle East, is China replacing its position. China, over developed an economic relationship with the Middle East in the last few years, with over half of China's imported crude oil originating from the region in 2021.[14] The impact and implication of Chinese influence in the Middle East will be further discussed as the article progresses.

Oil and diplomacy have played a crucial role in America ascertaining its hegemony in the Middle East, however, the same has recently contributed to its declining prominence. The factors discussed above have contributed to the U.S losing its voice or being unable to raise its voice against Saudi Arabia, which is a symbol of the decline in hegemony in the region.

2.2 The Rise of China in the Middle East

The growing relations between China and the Middle East have gained international attention and caused growing concern among many states including the United States. China, with its long-term vision of conquering markets through its BRI initiative, exporting its industrial surplus capacity, and securing access to critical resources and trade routes, have carved out a spot on the global map.[15] The Middle East, with its strategic routes, which connect Eastern to Western Markets, are of greater interest to Beijing. [16] Unlike the U.S, China has strategically entered the region through robust economic policies rather than military engagement. China has also engaged in business with both Iran and Saudi Arabia, competing superpowers in the region. Ultimately, there was a shift of global power, and this weakened the U.S as it was questioned due to wars not fought in confidence. The success of Chinese rise is due to the ability of staying out

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[14] Yanrong Huang and Dan Han, "Analysis of China's Oil Trade Pattern and Structural Security Assessment from 2017 to 2021," *Chemistry and Technology of Fuels and Oils 58*, 146–156 (2022). https://doi.org/10.1007/s10553-022-01362-y.

[15] Camille Lons, Jon Alterman, Chas W. Freeman Jr. and Jim Moran. "The Rise of China in the Middle East," *Middle East Policy*, 2022; 29: 3– 24, https://doi.org/10.1111/mepo.12617.

[16] Ibid

of conflicts as they took neutral position becoming a mediator state for the region of the Middle East. Chinese influence is through trade and diplomatic actions. Even though when the U.S removed military presence in the region this left a void that could be filled by Chinese bases and troops, China did not take this role but was able to increase its influence without having military presence in the Middle East.

capacity, and securing access to critical resources and trade routes, have carved out a spot on the global map.[17] The Middle East, with its strategic routes, which connect Eastern to Western Markets, are of greater interest to Beijing. [18] Unlike the U.S, China has strategically entered the region through robust economic policies rather than military engagement. China has also engaged in business with both Iran and Saudi Arabia, competing superpowers in the region. Ultimately, there was a shift of global power, and this weakened the U.S as it was questioned due to wars not fought in confidence. The success of Chinese rise is due to the ability of staying out of conflicts as they took neutral position becoming a mediator state for the region of the Middle East. Chinese influence is through trade and diplomatic actions. Even though when the U.S removed military presence in the region this left a void that could be filled by Chinese bases and troops, China did not take this role but was able to increase its influence without having military presence in the Middle East.

2.2.1 Iran-China 25-Year Comprehensive Cooperation Agreement

  The Cooperation Road Map between Iran and China was signed in March 2021, which includes cooperation in many sectors such as energy, finance, transportation, and housing. China invested 280 billion dollars in Iran's energy industry (oil and gas) and 120 billion dollars in the

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[17] Camille Lons, Jon Alterman, Chas W. Freeman Jr. and Jim Moran. "The Rise of China in the Middle East," *Middle East Policy*, 2022; 29: 3– 24, https://doi.org/10.1111/mepo.12617.
[18] Ibid

Iranian transportation sector.[19] This is in exchange of a steady supply of oil to China, which would continue to boost their growing economy. China has also offered critical diplomatic support in Iranian nuclear talks.[20] This move by China, not only deepens its presence in the region, but also ruins years of American efforts in isolating Iran.[21] China's support for Iran also can be traced to the Joint Comprehensive Plan of Action (JCPOA), with China backing Iran against the U.S' efforts to revive the deal.[22]

2.2.2 China-Saud Relationship

The relationship between China and Saudi-Arabia has transformed over the last decade.[23] China, by entering the Middle East in the guise of economic development, has managed to create strong diplomatic relations with many in the GCC, including revivals such as Iran and Saudi Arabia.[24] Saudi Arabia is the major oil supplier to world's No. 2 economy.[25] China's strategic move of supplying the region with weaponry has furthered the Saudi-Chinese partnership from an economic to military relationship. This power move by China has led to U.S losing its regional powerbroker status in the Middle East. China will play an important role in actualising 'Vision 2030', Crown Prince Muhammad bin Salman's plan to diversify the

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[19] Farnaz Fassihi and Steven Lee Myers "China, With $400 Billion Iran Deal, Could Deepen Influence in Mideast," New York Times, March 27, 2021, https://www.nytimes.com/2021/03/27/world/middleeast/china-iran-deal.html.
[20] Nadeem Ahmed Moonakal, "The Impact and Implications of China's Growing Influence in the Middle East," The Diplomat, July 09, 2022, https://thediplomat.com/2022/07/the-impact-and-implications-of-chinas-growing-influence-in-the-middle-east/.
[21] Michael Singh, "When China Met Iran," The Washington Institute of Near East Policy, July 21, 2020, https://www.washingtoninstitute.org/policy-analysis/when-china-met-iran.
[22] Jon B. Alterman, "China Headaches for Iran Deal," Center for Strategic and International Studies, September 22, 2021, https://www.csis.org/analysis/china-headaches-iran-deal
[23] Joseph Y. S. Cheng, "China's Relations with the Gulf Cooperation Council States: Multilevel Diplomacy in a Divided Arab World," China Review 16, no. 1 (2016): 35–64, http://www.jstor.org/stable/43709960.
[24] Ibid
[25] "China, Arab Nations to Hold Summit in Saudi Arabia Next Month," Bloomberg Politics, November 24, 2022, https://www.bloomberg.com/news/articles/2022-11-24/china-arab-nations-to-hold-summit-in-saudi-arabia-next-month.

country's economy.[26] By providing the region with economic and military support, unlike the

U.S who supported it militarily, China is expected to replace the U.S as Saudi Arabia's closest

ally in the coming years.[27] However, the decline in Saudi Arabia's trust in the U.S has been

declining in the past decades. With the U.S implementing strong and harsh scrutiny over the

Middle East post 9/11, Washington has viewed all Arab nations through a lens of suspicion.[28]

This can be traced to the U.S's policy of strictly scrutinizing weapons exports into the Middle

East. China on the other hand comes in with a fresh start and one without prejudice, which the

Arab world has welcomed.

China's Middle East foreign policy strategy China has resulted in the rise of China in the

Middle East.[29] The Middle East reassures China that it can easily replace the U.S' status in the

region, due to its strong economic and military status. This has resulted in the United States

losing its hegemony in the region, despite efforts by the Biden Administration to revamp it. Over

the years, the U.S made questionable actions resulting in its declining dominance since 2011.

Strained relations with countries such as Saudi Arabia stood out as it is one of the country with

the highest level of geopolitical structure.

2.3 Failure of the U.S in leading the JCPOA

Former President Donald J. Trump's termination of the United States' participation in the

Joint Comprehensive Plan of Action (JCPOA) with Iran, which led to the re-imposing of

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[26] Bernard Haykel, "Saudi Arabia's China policy is made in the USA," Alarabiya News, November 28, 2022, https://english.alarabiya.net/views/2022/11/28/Saudi-Arabia-s-China-policy-is-made-in-the-USA.
[27] Ibid
[28]David M. Mednicoff, "Compromising toward Confusion: The 9/11 Commission Report and American Policy in the Middle East," *Contemporary Sociology* 34, no. 2 (2005): 107–15, http://www.jstor.org/stable/4147163.
[29] Theodore Karasik, "The GCC's New Affair with China," Middle East Institute, 2016, http://www.jstor.org/stable/resrep17585.

sanctions, has resulted in Iran resuming and advancing its nuclear program.[30] Pulled out for

national security reasons, Trump's call put an end to years of negotiation to dismantle Iran's

Nuclear Policy.[31] The failure to stop Iran from gearing up their nuclear activities has made Iran a

threat, especially in the Middle East.[32] The United States spread headed the program until 2018

but its inability to revive it shows the downfall of America's voice in the Middle East. American

hegemony in the Middle East would be threatened if Iran became powerful enough to force the

United States out of the region. If this occurs, Iran will act as a proxy voice for China and Russia

in the region, threatening American national security and U.S global power, which is dependent

on allies in the Middle East.[33] While the Biden Administration has expressed interest in

reinitiating the deal, the Iranian Government, backed by Russia and China, has demanded that

the U.S first lift its sanctions on Iran. This crossroads puts the United States in a unique position,

in which both pursuing and abandoning the deal could jeopardize U.S hegemony in the Middle

East in jeopardy.[34]

The new deal would be different from the original Obama Nuclear deal by including

significantly more concessions to the Iranian regime. This would in turn only weaken the

American position among its allies in the Middle East, further impeding American economic and

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[30] Laurence Norman andSune Engel Rasmussen, "What Is the Iran Nuclear Deal? What It Means, from Nuclear Weapons to the Price of Oil," The Wall Street Journal, March 16, 2022, https://www.wsj.com/articles/iran-nuclear-deal-explained-11610564572.

[31] "Protecting America From A Bad Deal: Ending U.S. Participation In The Nuclear Agreement With Iran," *U.S. Government Publishing Office Washington*. June 6, 2018, https://www.govinfo.gov/content/pkg/CHRG-115hhrg31273/html/CHRG-115hhrg31273.htm.

[32] Kali Robinson, "What Is the Iran Nuclear Deal?" Council on Foreign Relations, July 20, 2022, https://www.cfr.org/backgrounder/what-iran-nuclear-deal.

[33] Layla Mohey Eldin, " How Iran Acquiring Nuclear Weapons May Benefit the Middle East," Glimpse from the Globe, October 12, 2022, https://www.glimpsefromtheglobe.com/features/analysis/how-iran-acquiring-nuclear-weapons-may-benefit-the-middle-east/.

[34] Omid Irani, "The Joint Comprehensive Plan Of Action And Its Looming Shadow On American-Iranian Relations". *Seton Hall Legislative Journal*. 42:2 2018 https://scholarship.shu.edu/cgi/viewcontent.cgi?article=1133&context=shlj

political interests in the region.[35] Many allies in the Middle East were already upset about the

P5+ and EU negotiating the Iran Nuclear Deal without involving the Arab world, who is most

susceptible to Iran's nuclear policies. Similarly, American support for a nuclear arrangement

with the Iranian regime would hinder American relations with Israel, which has vehemently

criticised the nuclear deal since its inception.[36] By undercutting two of its strongest allies, the

United States would further weaken its position in the region.[37]

2.4 The BRICS

     As Saudi Arabia, UAE and Iran are eyeing BRICS membership, this could result in a

major power shift in the global dynamics. The Middle East giants joining BRICS would shift the

power of the group to the East.[38] The new proposed BRICS members would create an entity with

a GDP 30% larger than the United States, over 50% of the global population and after Algeria's

and Saudi Arabia's candidacy in control of 60% of global gas reserves of the world.[39] Saudi,

with its immense potential in energy, and UAE, with its infrastructure and economic growth,

come with huge potential to the group. With the new entrants, the organization is also proposing

'BRICS reserve currency' to better serve their economic interests. The new currency will be

based on a basket of the currencies of the five-nation bloc: the Chinese RMB Yuan, the Russian

Ruble, the Indian Rupee, the Brazilian Real and the South African Rand.[40] If Saudi Arabia joins

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[35] Rohan, Krishnan, "Allies First, Deals Second: An Analysis of the Iran Deal", *The Yale Review of International Studies.* April 2022 http://yris.yira.org/comments/5682

[36] Ibid.

[37] Josef Federman, "Explainer: Impending Iran Nuclear Deal Alarms Israel," AP NEWS, February 23, 2022, https://apnews.com/article/russia-ukraine-middle-east-iran-israel-europe-f30eca2ae3a7338f8811a49a039c6829.

[38] Peter Lowe, "The Rise of the BRICS in the Global Economy," *Teaching Geography* 41, no. 2 (2016): 50–53, https://www.jstor.org/stable/26455170.

[39] Tilak Doshi, " BRICS In The New World Energy Order: Hedging In Oil Geopolitics," Forbes, July 21, 2022, https://www.forbes.com/sites/tilakdoshi/2022/07/21/brics-in-the-new-world-energy-order-hedging-in-oil-geopolitics/?sh=6ed93b9b24bf.

[40] "BRICS Working To Develop A New Reserve Currency," Silk Road Briefing. October 4, 2022, https://www.silkroadbriefing.com/news/2022/10/04/brics-working-to-develop-a-new-reserve-currency/.

the group and starts trading in the BRICS currency, it could completely obliterate the dominance

of the petrodollar in global trade.[41] The creation of a new currency reserve could be a potential

threat to the currently dominant U.S dollar and contribute to the decline in American hegemony.

The coalition can pursue de-dollarization to challenge the dollar hegemony.[42] BRICS nations

have already advocated to promote the use of local currencies in international settlements in

order to build a nondollar alternative global financial infrastructure.[43] They have also taken steps

to de-dollarize their economies and protect themselves from sanctions.[44]

2.5 Failure of the Abraham Accords

The escalation of the conflict between Israel and Palestine points to the failure of the

Abraham Accords which aimed to normalize relations between Israel and the Middle East. While

initially it saw the normalization of relationship by UAE and Bahrain, the mandate of the

agreement to promote peace in the Middle East has failed.[45] The U.S took central role in

facilitating the accord. Blaming the United States for the failure of the Abraham Accords is far-

fetched, however, it almost points to the nations failure to act as a successful facilitator in the

global domain.

These are among the many factors that contribute to the decline of American hegemony

in the Middle East. While the U.S has successfully managed to come out of rocking water such

as this in the past, now the nation is crippled with internal issues of inflation and recession, gun

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[41] Gupta, Paurush Gupta, "BRICS currency will give Petro-dollar a taste of its own medicine". TFIPOST. October 21, 2022, https://tfipost.com/2022/10/brics-currency-will-give-petro-dollar-a-taste-of-its-own-medicine/.
[42] Zongyuan Zoe Liu, and Mihaela Papa, *Can BRICS De-Dollarize the Global Financial System?* Elements in the Economics of Emerging Markets, Cambridge: Cambridge University Press, 2022, doi:10.1017/9781009029544
[43] Id.
[44] Ryan Watkins, "Is BRICS a Threat to the Dollar?" U.S Gold Bureau, July 13, 2022, https://www.usgoldbureau.com/news/is-brics-a-threat-to-the-dollar.
[45] Jeremy Pressman, "The False Promise of the Abraham Accords," Foreign Affairs, September 15, 2021, https://www.foreignaffairs.com/articles/israel/2021-09-15/false-promise-abraham-accords.

control, and a failing health care system. While it is unclear whether the U.S would recover from this decline, it is only time that the before the world should prep for a Middle East post American hegemony.

3. Comparison Between Biden and Trump Administrations

The Biden administration has spent a great amount of time and resources in the past year to differentiate itself from the previous policies of the previous presidency, including through an intense focus on re-establishing a more cordial dialogue with the allies of the U.S government around the globe. However, a great amount of time and resources have been put and are still consumed in mostly domestic issues of the U.S by the current presidency, such as facing a battered economy[46] and dealing with the effects of the Coronavirus[47].

This leaves a limited amount of time to be applied by the current administration on external issues, and the current strategic priority of the Biden administration is to apply the majority of its resources on deterring the invasion of Ukraine and confronting the advancement of Chinese expansionism in the Indo-Pacific[48]. In consequence, apart from drastic and rapid withdrawal by the U.S. from Afghanistan, after 20 years of war and the resumption of the Iranian nuclear deal, there has been little action by the U.S on the Middle East. Multiple human rights crises in the region, namely in Syria and Yemen with the current Saudi-Houthi[49] war, have yet to

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[46] Quint Forgey, "`My top economic priority': Biden op-ed lays out plan to fight inflation," *Politico,* May 31, 2022, https://www.politico.com/news/2022/05/31/biden-inflation-op-ed-00035951.
[47] Steve Holland, "Biden says Ukraine, COVID are priorities; Senate Democrats push for spending bill," Reuters, November 29, 2022, https://www.reuters.com/world/us/biden-convening-congressional-leaders-discuss-legislative-priorities-white-house-2022-11-29/.
[48] Ellen Knickmeyer, "US strategy for Indo-Pacific stresses alliances on China," *Associate Press,* February 11, 2022, https://apnews.com/article/joe-biden-antony-blinken-china-asia-united-states-85ca36137fb531fe5da58c122c114271.
[49] Mwatana, "Violations and Abuses against Civilians during Yemen's Truce,". Reliefweb. November 8, 2022, https://reliefweb.int/report/yemen/violations-and-abuses-against-civilians-during-yemens-truce.

be addressed by an administration that has claimed to protect the liberal world order of which the promotion of human rights is a central part[50].

The Biden presidency has made the commitment to strategically downsize the resources it puts in the Middle East and the presence of U.S military forces there starting with Afghanistan.[51] This was evident through an important public remark when President Biden released a statement through the Interim National Security Guidance indicating that the U.S's number one enemies are states and governments that are identified as quote "antagonistic authoritarian powers"[52]- those powers eager to undermine the U.S-led liberal democratic world order.

While it takes time for the current administration to orient the country's diplomatic apparatuses towards an exact strategic goal, President Biden has inherited a complex legacy concerning the U.S posture in the region from his two predecessors. On one hand the Obama administration made the decision to reposition the foreign policy and regional strategy of the U.S. government in the Middle East away from the neo-conservative Bush-era war-prone approach strategy of the "War on Terror". It furthermore issued a strategic guidance paper in 2012 where it had drawn the commitment to curb military expenditure away from the region and gradually disengage from the various conflicts in the Middle East.

However, the strategy ultimately became an unfulfilled project of reducing conflicts within the region, with the U.S leaving a gap of power that would later be filled by the rise of

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[50] Simon Lewis, and Humeyra Pamuk, "Biden put rights at heart of U.S. foreign policy. Then he pulled punches,". REUTERS. September 13, 2021, https://www.reuters.com/world/asia-pacific/biden-put-rights-heart-us-foreign-policy-then-he-pulled-punches-2021-09-13/.
[51] Jon Greenberg, "Joe Biden declares the war in Afghanistan over," POLITIFACT, August 31, 2021, https://www.politifact.com/truth-o-meter/promises/biden-promise-tracker/promise/1548/end-wars-afghanistan-and-middle-east/.
[52] President Joseph Biden Jr, "Interim Strategy Security Guidance," White House Press (2021), https://www.whitehouse.gov/wp-content/uploads/2021/03/NSC-1v2.pdf.

ISIS which it helped indirectly create and in the process of trying a pacifist approach to the Iranian problem alienating local allies and partners in the region. On the other hand, the context of tension inside the region got increasingly worse with the Trump administration, which brought a strategically more aggressive and confrontational approach to U.S foreign policy back to the White House in 2016 under the "America First/Maximum Pressure" policy plan. This policy plan ultimately aggravated tensions with Iran and created throughout the region a greater climate of strategic uncertainty.

Ultimately this resulted in a greater militarization in the region by the various actors, with the Trump administration´s favouring a more transactional quid pro quo diplomacy via multi-billion-dollar arms deals that served as strategic rewards to U.S partners in the region, notably the UAE and the Saudi house. Unlike Trump who made his first official overseas visit to Saudi Arabia in his first year in office; Biden made his official visits to the Middle East later on and in a slow and cautious manner, a year after getting put officially into power after being elected democratically.

They have had central meetings with Saudi Deputy Minister of Defence Prince Khalid bin Salman, Emirati Foreign Minister Sheikh Abdullah bin Zayed al Nahyan and Qatari Foreign Minister, Mohammed bin Abdulrahman Al-Thani. Regional players have made strategic messages to President Biden that they have a vested interest in being more informed and have stated that the Trump administration is more balanced and diplomatic. The Arab Gulf monarchies have made it particularly clear to the Biden administration when they made the decision to close ranks at the al-Ula meeting in early 2020 that for the time being, they want to avoid head-on disputes. This was a clear sign of a new trend of deep-seated transformations that began after September 2019, when President Trump refused to retaliate against Iran after the

drone attacks that targeted Saudi oil facilities at Abqaiq and Khurais[53]. Efforts to thaw regional relations have also included a Saudi and an Emirati international relations rapprochement with both Iran and Turkey mending fences with the country's regional rivals. However, it should be taken into consideration that the Gulf States are also wary of the domestic shift within the U.S away from military involvement in the region, even as the administration's focus on troop reduction is increasingly less likely to happen.

Calls to do so have been common and have dominated the electoral presidential campaigns of the last three administrations, with the lasting characteristic being that after taking office, both parties have faced difficulties in turning these electoral promises into sustainable, concrete policies. Ambitious agendas, fuelled by strategic realignment or populist sentiment against decade-long "endless wars" have "butted up" in contrast to the realities of the region along with the vested interests of the U.S military and its industrial partners in ensuring an increasing defence budget.

One should also consider that downsizing would require a reassessment of American military bases and accepting the sunk economic, political, strategic and human costs for their maintenance. In the Gulf alone, the U.S 5th Fleet has been harboured in Manama, Bahrain[54]. Troop reductions have been planned but the reality on the ground is that there hasn't been a scheduled major structural transformation that is public. In spite of its strategic feasibility, the Gulf Arab states see the U.S withdrawal from Afghanistan, which is a component of the

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[53] Ben Hubbard, Palko Karasz, Stanley Reed, "Two Major Saudi Oil Installations Hit by Drone Strike, and U.S. Blames Iran," The New York Times,September 15, 2019.
https://www.nytimes.com/2019/09/14/world/middleeast/saudi-arabia-refineries-drone-attack.html.
[54] American Navy,"U.S. 5th Fleet Completes Vessel Boarding Exchange with Regional Partners," November 2022, https://www.navy.mil/Press-Office/News-Stories/Article/3207123/us-5th-fleet-completes-vessel-boarding-exchange-with-regional-partners/.

February 2020 Doha Agreement, as a paradigm shift moment in regard to U.S presence in the region.

Since the early 1980´s, these countries viewed the U.S military footprint as an insurance policy against the main strategic threat to their national sovereignty and security- Iranian revolutionary Islamic revanchism. Consequently, the GCC monarchies have raised strong doubts regarding the U.S commitment to stand up and deter looming threats to the stability of the ruling families, with the U.S government signing its intention to strategically avoid risks of returning to a position of being trapped in regional conflicts that do not represent their priorities, ultimately giving the signal of leaving its decades-long role as security hegemon and guarantor.

The unabated continuation of the arms sales circle, now accompanying the Biden team, resulted in multi-billion-dollar weapon contracts successfully navigating twists and turns within the power structure of Washington. However, in Riyadh, most Saudi strategic analysts and foreign relations cabinet members remain sceptical about Washington's commitment to the long game in the Middle East. One strategic issue thus entails ensuring the security of Saudi oil production and public infrastructure, with the Saudi kingdom being directly dependent for its security on the U.S resupplying its military with equipment such as interceptor missiles.

To avert this risk, Saudi Arabia and the UAE have increasingly resorted to a balanced diplomatic posture in their foreign policy agendas between the genuine desire to diversify their arms procurement networks away from the traditional American military supply chain. New strategic decisions were made, such as the arms deal signed in August 2021 between Saudi Arabia and Russia[55], while the UAE leadership has made arrangements with the French fighter

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[55] Mark Katz, "Saudi Arabia is Trying to Make America Jealous With its Budding Russia Ties,"Atlantic Council .August 27, 2021, https://www.atlanticcouncil.org/blogs/menasource/saudi-arabia-is-trying-to-make-america-jealous-with-its-budding-russia-ties/.

jet industry, Dassault, to acquire 80 Rafale fighter jets in 2021[56] and made a 3.5 billion dollar

contract with South Korea to have in its arsenal the Cheongung II missiles[57].

It is debatable whether this policy decision by the Gulf Sunni states might prove

successful. Both Riyadh and Abu Dhabi, as well as Washington understand the strategic reality

that the Gulf monarchies military apparatus structure were designed to operate in sync with U.S

systems and U.S made technology. However, it should be considered that running a highly

diversified armaments architecture is a time and resources-consuming endeavour that is not a

strategically sustainable option for either UAE or Saudi Arabia in the long term. Consequently,

the primary need to preserve armaments interoperability is bound to keep the relation of

interdependence within its long-term strategic boundaries.[58]

As Washington debates which policies should be advanced, U.S warships are still

stationed within the Gulf ready for action without any future closures being announced of major

U.S. military bases in the Arabian Peninsula. Within this scenario, if President Biden does

ultimately decide to go forward with the withdrawal strategy and proceed to effectively change

the military and diplomatic presence of the U.S in the region, the U.S government will have the

challenge of having to convince and make its partners in the region take more responsibility for

maintaining stability in the Middle East.

Consequently, the administration will inevitably have to find a way to persuade its allies

to make the strategic commitment to cooperate in a multilateral system and be more self-

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[56] "UAE Signs 'Historic' Deal to Buy 80 French-Made Rafale Fighter Jets," FRANCE24. 2021,
https ://www.france24.com/en/diplomacy/20211203-france-s-macron-heads-to-uae-aiming-to-secure-major-rafale-fighter-jet-sale.
[57] Brian Kim, "South Korea Inks Largest Arms Export Deal With UAE for Missile Interceptor," DefenseNews.
January 18, 2022, https://www.defensenews.com/industry/2022/01/18/south-korea-inks-largest-arms-export-deal-with-uae-for-missile-interceptor/.
[58] Richard Blumenthal and Jeffrey Sonnenfeld, "The Saudis Need a Reality Check: Washington Should Pause Arms Sales to Rein in Riyadh," Foreign Affairs, October 24, 2022, https://www.foreignaffairs.com/saudi-arabia/saudis-need-reality-check.

sufficient, ultimately achieving its greater goal of saving resources that were in the region and

applying them in the other areas of its foreign policy and to regain its credibility[59]. Qatar has

taken significant steps and made efforts towards this scenario, as the Gulf state helped broker the

2020 Doha agreement with the Taliban[60] and provided significant logistical assistance for the

evacuation of Western diplomatic teams and military troops out of Kabul[61]. Doha has thus made

it clear to Washington that despite it being a small power, it has enough credentials and is willing

to contribute to the regional security of the Middle East, with its efforts being publicly praised by

the U.S government.

On the other hand, the Saudi leadership as well as leadership in the UAE have also seen in the

past year full support from the U.S regarding the uninterrupted provision of ballistic missiles and

launching systems from the United States as proof that Washington is committed to protecting its

allies. Ensuring an air defence system among its partners in the Arabian Peninsula remains a vital

issue for the U.S government and despite the confrontational approach chosen by Biden in his

criticisms of the actions of the Saudi forces in Yemeni territory during his electoral campaign,

once his administration got into power, he adopted a less aggressive attitude.

This can be read as the U.S government understanding that its relationship with Saudi

Arabia is too strategically important and that it cannot sever its ties with such a central partner

for the stability of the balance of power in the globe. Although Biden can hold Saudi Arabia

more accountable in terms of human rights violations, its only relevant action has been taking out

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[59] Rachel Myrick, "America Is Back—But for How Long? Political Polarization and the End of U.S. Credibility," Foreign Affairs, June 14, 2022, https://www.foreignaffairs.com/articles/world/2021-06-14/america-back-how-long.
[60] David Roberts, "Qatar, the Taliban, and the Gulf Schism," *The Arab Gulf States Institute in Washington*, October 19, 2020, https://agsiw.org/qatar-the-taliban-and-the-gulf-schism/.
[61] AP, "Qatar Emerges as Key Player in Afghanistan After US Pull-Out," The Economic Times, August 30, 2021, https://economictimes.indiatimes.com/news/international/uae/qatar-emerges-as-key-player-in-afghanistan-after-us-pullout/articleshow/85761805.cms.

the Houthi forces out of the U.S terrorist list[62]. It should be noted that although the current administration is more responsible and less impulsive in its foreign policy decisions and strategic decision-making, a more moderate and responsible approach won't safeguard the U.S from the incoming storm of great power competition[63].

The U.S government will most likely keep a vigilant and active role and try to limit ambivalent attitudes from its partners that may threaten its strategic geo-political interests, goals, and values[64], as was the case when the Biden administration confronted Chinese influence when, for example, it stopped China's government from its strategic attempt to create a military base in the UAE. Through the Presidents' policies during his first year, we can understand his strategy[65], and come to the conclusion that although the administration is more moderate compared to the previous administration, its policymaking still fits within the paradigm of the "America first label" since it seeks to restore trust in the hegemony of U.S on all planes of power globally, although through negotiation instead of unilateral actions. The Biden presidency has shown that American policymaking in the Middle East is more based on pragmatism.

However, for a successful eventual exit from the Middle East to happen, the Abraham Accords must be protected and advanced, and for that to happen there is the strategic need to ultimately proceed with the two-state solution.

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[62] John Hudson and Missy Ryan, "Biden Administration to Remove Yemen's Houthi Rebels from Terrorism List in Reversal of Trump-Era Policy," The Washington Post, February 2021, https://www.washingtonpost.com/national-security/biden-yemen-rebels-terrorist-list/2021/02/05/e65e55c8-5b40-11eb-aaad-93988621dd28_story.html.
[63] Colby, Elbridge A. and Mitchell A. Wess, "The Age Of Great-Power Competition: How the Trump Administration Refashioned American Strategy," Foreign Affairs, January/February 2020, https://www.foreignaffairs.com/united-states/age-great-power-competition.
[64] Harlan Ullman, "Biden's Defence and Security Strategies Need Specifics," Atlantic Council, December 2021, https://www.atlanticcouncil.org/blogs/new-atlanticist/bidens-defense-and-security-strategies-need-specifics/.
[65] James Traub, "The Biden Doctrine Exists Already. Here's an Inside Preview," Foreign Policy, August 20, 2020

Conclusion and Recommendations

Strategically, the accords offer Washington a unique opportunity to bring its Middle East partners together for the first time ever as a part of a unique coalition committed to bolstering the forces of stability and peace in the region against the forces promoted by Iran and radical terrorist organizations. After two years, the Abraham Accords lost its original strength, a strategic result of the intensification of the Israeli-Palestinian conflict inside Israel, which is aimed at thwarting violence and Palestinian attacks, setting the country´s agenda.

The Biden administration was and is still acting in a strategically slow manner to fully embrace the Abraham Accords, having not advanced any concrete policies to widen or deepen the peace process, even though Israel and its Arab state partners pushed ahead on the diplomatic, economic and cultural potentials of their newfound warm peace. Instead, the administration focused its energies on a different set of regional priorities, including withdrawing from Afghanistan, resurrecting the Iran nuclear deal, and ending the war in Yemen. As these efforts encountered difficulties, important signs emerged of the Biden team´s growing appreciation for the value of the Accord.

This includes key diplomatic engagements with important Arab-Muslim countries such as Saudi Arabia and Egypt as well as the Muslim world. While the Kingdom´s de facto ruler, Crown Prince Muhamad bin Salman has been supportive of the Accords, there are serious obstacles that still exist to creating a stable and open Saudi- Israeli normalization a reality. One of these obstacles existing at the centre of the current paradigm is the administration´s strained relationship with Saudi Arabia due to disagreements regarding foreign policy.

In terms of advancing the security potential of the accords, President Trump's decision in January 2021 to reassign Israel to CENTCOM (United States Central Command)[66] was of great strategic importance, and under its multinational rubric, tremendous opportunities now exist for the U.S to integrate Israel into its network of Middle East partnerships. This will foster both Israel and Arab countries burgeoning military-to-military ties, developing a new regional security framework grounded in the reality of increasing cooperation. If done successfully, these new partnerships can challenge the imperial regional aspirations of Iran in the Middle East and deter it from attempting to cause harm through its proxies and its network of influence on its enemies. This would ultimately shift the regional balance of power in ways that are beneficial for the U.S strategy. This would also enhance America's strategic posture, prestige, and overall power without requiring the direct application of U.S military force, something the Biden administration is also interested in doing.

It was the central role of U.S diplomacy, critical for the Accords success, to continue its central strategic contribution and persistence. Consequently, it is critical for all parties involved, mainly the Arab states and Israel, that the Accords withstand on the long-term, so that access to military technology developed by Israel or the U.S is maintained. However, for this to succeed there must be a greater effort by the Biden administration to advance a dual-state solution for the Israeli-Palestinian conflict.

The Israeli occupation of the West Bank and Palestinian houses in Jerusalem cannot simply be solely blamed on Israeli leaders and the Israeli government since the fault is mainly centred strategically speaking around the failure of the Palestinian leadership to create a stable

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[66] U.S. Central Command Public Affairs Address, "U.S. Central Command Statement on the Realignment of the State of Israel," September 1 2021, https://www.centcom.mil/MEDIA/STATEMENTS/Statements-View/Article/2762272/us-central-command-statement-on-the-realignment-of-the-state-of-israel/.

society for Palestinians. The majority no longer supports the two-state solution, and due to it not

being viable or realistic, are moving to support a one-state solution, with the civil rights model

being the preferred one, although the need for strong partners on both sides that will join forces

to change the status quo is necessary.

There are two strategic alternatives that only a limited number of people in Jewish society

are currently talking about[67]. The first alternative is correctly considered by the Israeli side as

unsustainable for the peaceful existence of both peoples and this is the one-state solution and

although it is something that the majority of Israeli society does not accept, this became a reality

with the annexation of the West Bank. If things continue as they are, the long-term effect will be

the gradual disappearance of a real Palestinian Authority since it will continue to become

weaker. At the current pace, the West Bank will inevitably be swallowed by Israel, and as a

result, the Palestinian population that lives in it will resist through subversive means against

Israeli society[68]. This option is unacceptable to the Israeli elite, since it would put Jews at the

mercy of an Arab majority; while the other option which is the only viable path is the creation of

a real border between the two people, which would not mean that both sides would independent

countries, but rather a clear border separating each other[69].

The initiative for a peace settlement must be played by an external actor with great

influence and only a serious actor such as the U.S can make this process real, and although the

U.S government has the capability and instruments to create a platform and promote measures

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[67] Muriel Asseburg and Jan Busse, "The End of a Two-State Settlement? Alternatives and Priorities for Settling the Israeli-Palestinian Conflict," Stiftung Wissenschaft und Politik, April 2016, http://www.swp-berlin.org/fileadmin/contents/products/comments/2016C24_ass_Busse.pdf.

[68] Moshe Arens, "Two States, Sne State, No State," *Haaretz*, February 2017, https://www.haaretz.com/opinion/.premium-two-states-one-state-no-state-1.5438052.

[69] Bashir, Bashir and Azar Darkwar, "Rethinking the Politics of Israel/Palestine: Partition and Its Alternatives," Bruno Kreisky Forum for International Dialogue, 2014, https://issuu.com/brunokreiskyforum/docs/rethinking_-_the_politics_of_israel.

and policies for a common understanding for both sides, it is central that it also discourages the expansion of the settlements policy. The possibility of the U.S taking such a position is however highly unlikely since the Trump administration officially normalized the settlements, a policy that the Biden administration has not reversed, with his recent visit to both the Palestinian Authority and the Israeli government being marked by the promise that his administration was committed to advancing the project of a peace agreement under the establishment of the dual state deal.

However, a speech is not in itself enough, peace-making measures must be taken, and the current administration is hypocritical since President Biden and his administration have prioritized undermining Russia through the war in Ukraine and confronting the rise of Chinese power in the pacific. Biden understands that his promise is not strategically a serious or feasible one under the current paradigm and with the current approach to the reality of the conflict between Palestinians and Israeli society.

He understands that the current reality on the ground in Israel and in the West Bank as well as the present political reality in the Israeli political system is not conducive to allowing a two-state solution to become a reality or even start its process. Although the announcements regarding financial aid made by the current administration are a positive sign, it is not enough to advance a peace process between Palestinians and the Israeli state. The dual-state solution is consequently necessary for the greater peace and stability of the region.

Impacting the European Union: The Refugee Crisis

Carolyn Reid

Abstract: The refugee crisis, or commonly referred to as the European migration crisis, is characterized as the mass migration of displaced people to the European Union between 2014 and 2019. In addition to being a highly controversial topic, mass migration has had a profound impact on the European Union as both a political institution and as a community of states. This paper analyzes the effects of the refugee crisis on the solidarity and politics of the EU through national comparisons. A comparative analysis of individual member states' responses to the refugee crisis determines and explains how it affects the EU as a whole. Evidence suggests that the influx of refugees has incited a perverse reaction from member states in the form of value deviation, a populist resurgence, and political disunity. This paper argues that the refugee crisis has affected the solidarity and politics of the European Union by destabilizing European integration. Integration is vital to the success and prosperity of the EU as a supranational authority, but divergences over the refugee crisis signify disintegration.

Keywords: European Union, Integration, Supranationalism, Refugees, Solidarity, Non-refoulement

Introduction

From 2014 to 2019, the world witnessed the mass migration of displaced people from the Middle East and Africa to the European Union. In 2015 alone, over one million refugees arrived in EU territory. The refugee crisis strained the infrastructural capacity of the European Union, resulting in resource shortages, economic downturn and austerity, political upheaval, and negative societal consequences. Hence, many people believe the EU mishandled the refugee crisis.[1] The 1948 Universal Declaration of Human Rights (UDHR), the 1951 Refugee Convention, and the 1967 Protocol on Refugees codified the principle of non-refoulment and guaranteed the right of refugees to seek asylum. The principle of non-refoulement prohibits nation-states from returning asylum seekers to countries in which they are likely to be

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[1] Felix Biermann, Nina Guérin, Stefan Jagdhuber, Berthold Rittberger, and Moritz Weiss, "Political (Non-)Reform in the Euro Crisis and the Refugee Crisis: A Liberal Intergovernmentalist Explanation," *Journal of European Public Policy* 26, no. 2 (2017): 246–66. https://doi.org/10.1080/13501763.2017.1408670.

persecuted, tortured, irreparably harmed, and/or killed.[2] Under international law, states have

certain legal obligations towards refugees and their protection, but it does not account for the

political ramifications of mass migration. The main objective of this paper is to determine why

the refugee crisis triggered such a divergent set of responses from EU member states and how

they affected the European Union as a whole.

This paper is divided into four sections and proceeds as follows. In the first section,

relevant academic literature will explain the development and critical aspects of the refugee

crisis. The second section will detail the methodology used for data collection. The third section

empirically tests the thesis and hypotheses of this paper. The final section consists of the findings

and analysis of this research.

Literature Review

According to previous literature on this topic, the refugee crisis exposed and challenged

the legal, structural and coordinative defects of European integration (Garvey 2018). These

assertions suggest that the refugee crisis and the EU's response to it discredited normative EU

values, intensified internal discord among member states, triggered a nationalistic resurgence,

and increased Euroscepticism.[3] The rapid and massive influx of refugees inadvertently but

unsurprisingly increased xenophobia, bigotry and nationalistic inclinations. This triggered a

gigantic chauvinistic and populist revival within domestic political spheres.[4] Civil discontent

surrounding the refugee crisis also negatively impacted the socio-political climate of the EU as a

whole. Member state dissatisfaction reduces nation-state cooperation and adherence to EU

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[2] "The 1951 Refugee Convention," UNHCR, 2021, https://www.unhcr.org/en-us/1951-refugee-convention.html.
[3] Tamas Dezso Ziegler, "The Anti-Enlightenment Tradition as a Source of Cynicism in the European Union," *Chinese Political Science Review,* 2020, https://doi.org/10.1007/s41111-020-00168-9.
[4] Jan-Willem Van Prooijen, André P. Krouwel, and Julia Emmer, "Ideological Responses to the EU Refugee Crisis." *Social Psychological and Personality Science* 9, no. 2 (2017): 143–50, https://doi.org/10.1177/1948550617731501

guidelines and policies. When this happens, states feel more inclined to observe their own

domestic laws and procedures regarding refugees instead of those espoused by supranational

organizations.[5]

The European Union's mishandling and mismanagement of the refugee crisis signifies

deeper problems with infrastructure and uniformity. The EU's inability to formulate and

implement a cohesive migration and asylum policy suggests that European unity was never as

successful as previously supposed.[6] Some scholars even argue that the refugee crisis signifies the

failure of European Union as both a political institution and a cohesive body.[7] By this logic,

European disintegration is a multi-faceted phenomenon, attributable to complex institutional and

integrative failures. The refugee crisis simply served as the catalyst for this breakdown.[8]

Thesis and Hypotheses

This paper argues that the refugee crisis has affected the solidarity and politics of the

European Union by destabilizing European integration. EU integration was never absolute, nor

was it supposed to be, but imperfect achievements occurred in the form of institutions, policies

and mutual values. The refugee crisis exposed and intensified the integrative defects of the EU,

provoking increasingly Eurosceptic and nationalistic reactions from EU member states. This

paper will examine three hypotheses: (1) the influx of refugees is challenging the normative

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[5] Linus Peitz, Kristof Dhont, and Ben Seyd, "The Psychology of Supranationalism: Its Ideological Correlates and Implications for EU Attitudes and Post-Brexit Preferences," *Political Psychology* 39, no. 6 (2018): 1305–22, https://doi.org/10.1111/pops.12542.
[6] Magnus Henrekson, Ozge Oner, and Tino Sanandaji, "The Refugee Crisis and the Reinvigoration of the Nation State: Does the European Union Have a Common Refugee Policy?," *SSRN Electronic Journal*, 2019, https://doi.org/10.2139/ssrn.3342561.
[7] Monika Eigmüller, "Beyond the Crisis: The Societal Effects of the European Transformation," *European Law Journal 23*, no. 5 (2017): 350–60, https://doi.org/10.1111/eulj.12258.
[8] Eelco Harteveld, Joep Schaper, Sarah L. De Lange, and Wouter Van Der Brug, "Blaming Brussels? The Impact of (News about) the Refugee Crisis on Attitudes towards the EU and National Politics," *JCMS: Journal of Common Market Studies* 56, no. 1 (2017), 157–77, https://doi.org/10.1111/jcms.12664.

values of the EU, (2) mass migration stimulated the recent rise of extreme right-wing parties

(ERP's) in Europe, and (3) the lack of a unified migration and asylum policy has created internal

discord between EU member states.

Methodology

In order to determine how the refugee crisis has affected the solidarity and politics of the

European Union, this paper will utilize several case studies as its primary research method. The

case studies will be supplemented with assorted historical, political, institutional and socio-

cultural evidence. All four of the hypotheses will be tested with case studies. Case studies are a

commonly used method of data collection within the field of political research and will provide

the analysis with an abundance of descriptive and explanatory information. Since case studies

involve cross-national comparisons, it is the ideal form of methodology for this topic. The case

studies will help identify the effects of political phenomena at the aggregate level (the EU)

through an in-depth analysis of empirical data from individual nation-states. This study also

recognizes how important it is to distinguish the independent variable (IV) from the dependent

variable (DV). In this case, the independent variable is the refugee crisis whereas the dependent

variable is its effects on politics and solidarity of the European Union.

The countries and regions this paper will use for case studies are located within the

Schengen Area: the United Kingdom, France, Germany, Italy, Greece, Hungary, Poland, and

Sweden. These countries are, or were, key players in the European Union and have had very

different experiences in regards to their responses to the refugee crisis. To determine the cost of

mass migration on European values, as described in the first hypothesis, this paper will examine

its consequences for the Schengen Area and the United Kingdom. The rise of ERPs (extreme

right-wing parties) is well-documented in previous literature, but it is important to investigate the

refugee crisis as a contributing factor, particularly within the most powerful EU countries.

Therefore, this paper will examine France and Germany for the second hypothesis. For the third

hypothesis, this paper will compare migration and asylum policies in Greece, Italy, Hungary,

Poland, Germany, and Sweden. These countries are ideal to analyze because of their geographic

and political significance within the refugee crisis. Greece and Italy will represent southern

Europe, Hungary and Poland will represent eastern Europe, Germany will represent central

Europe, and Sweden will represent northern Europe.

The concepts addressed and outlined in this paper will include but are not limited to

refugees, the refugee crisis, asylum-seekers, asylum, supranationalism, irregular migration, the

European Union, the Schengen Agreement, the UDHR, frontline states, destination states,

Euroscepticism, integration, the EU-Turkey Deal, domestic sovereignty, European sovereignty,

Brexit, the possibility of Frexit, extreme right-wing parties (ERPs), populism, normative values,

open internal borders, the Common European Asylum System (CEAS), the Dublin Regulation,

the Temporary Protection Directive, the on-going Russo-Ukrainian War, etc.

Case Studies

H1: The influx of refugees has challenged the normative values of the EU

The European Union is often regarded as a community of common values. This means

that the EU sponsors a series of normative principles that are generally acknowledged and

applied by its member states.[9] These values consist of democracy, human rights, the rule of law,

equality, integration, sociopolitical solidarity, unionism and most importantly, European

sovereignty. However, this value system is not uncontroversial as member states tend to diverge

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[9] Biermann, et al., "Political (Non-)Reform in the Euro Crisis and the Refugee Crisis: A Liberal Intergovernmentalist Explanation," *Journal of European Public Policy* 26, no. 2 (2017): 246–66. https://doi.org/10.1080/13501763.2017.1408670.

on the definition and application of EU principles, especially in times of political turmoil. The

European Union is the largest and most successful supranational sovereignty experiment in the

world, but just like every other multinational body, it operates on state consent and compliance.

The refugee crisis forced (or enabled depending on one's persuasion) individual member states

to prioritize their national identities and interests over those of the European Union.[10] Thus, mass

migration challenged both domestic and European sovereignty—the latter of which is the

foundation of the EU as both a political institution and a society of like-minded states. The

relationship between the refugee crisis and European values is best examined through the effects

of mass migration within the Schengen Area and the United Kingdom.

The Schengen Agreement is commonly regarded as one of the greatest achievements of

the European Union. It abolished internal borders between participatory nation-states and

arranged the free mobility of people, goods, services, and capital in what is now known as the

Schengen Area. Initially signed by only five EU member states in Luxemburg on June 14, 1985,

the Schengen Agreement remains one of the biggest and most influential border control-free

areas in the world. On June 19, 1990, the Schengen Convention was signed to aid the

implementation of its predecessor. This convention codified the abolition of internal border

controls, devised a common visa policy, and established collaborative structures, including those

related to immigration, law enforcement, judicial systems, and trade.[11] The Schengen Area has

expanded over the last thirty years and now includes twenty-six countries—22 EU member states

and 4 non-EU nations. The Schengen Agreement was incorporated into the legal and institutional

framework of the European Union by the Treaty of Amsterdam in 1999, even though not all EU

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[10] Ian Manners, "The Normative Ethics of the European Union," *International Affairs* 84, no. 1 (2008): 45–60, https://doi.org/10.1111/j.1468-2346.2008.00688.x.

[11] Shichen Wang, "An Imperfect Integration: Has Schengen Alienated Europe?," *Chinese Political Science Review* 1, no. 4 (2016): 698–716, https://doi.org/10.1007/s41111-016-0040-0.

members are equal parties to it.[12] Nevertheless, the Schengen Agreement is a symbol of

European unity and promotes the concept of European sovereignty.

In contrast, EU member states responded to the refugee crisis with their own domestic

border policies that clashed with Schengen free mobility. Eurosceptics often criticize the

Schengen Area as an open door for immigrants and criminal activity/terrorism.[13] After the

migration of over a million refugees in 2015, several Schengen states elected to re-impose border

controls as a safety precaution. This was due to the fact that the infrastructure of the Schengen

Area did not have the capacity to manage such a large influx of refugees. Member states re-

instated temporary or indefinite internal border restrictions to strengthen external border

controls.[14] This constituted a major setback to European sovereignty as it revealed the fragility of

and decline in European political unity.

The United Kingdom

Even though the United Kingdom is no longer a member of the European Union, the

circumstances surrounding its withdrawal heavily correlated with the refugee crisis. The 2016

British referendum on EU membership both resulted from and produced major reconfigurations

in European politics.[15] Brexit was premised on repatriating sovereignty from Brussels (EU

headquarters) to London, restoring the British Empire, and obtaining financial independence

from the EU.[16] Within the Leave campaign, the popular slogan 'take back control' was in

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[12] "The Schengen Agreement - History and the Definition," 2021, https://www.schengenvisainfo.com/schengen-agreement.

[13] "Schengen: Controversial EU Free Movement Deal Explained," BBC News, 2016, https://www.bbc.com/news/world-europe-13194723.

[14] Bridget Carr, "Refugees Without Borders: Legal Implications of the Refugee Crisis in the Schengen Zone," 2016, https://repository.law.umich.edu/mjil/vol38/iss1/4.

[15] Karine Tournier-Sol, "From UKIP to the Brexit Party: The Politicization of European Integration and Disruptive Impact on National and European Arenas," *Journal of Contemporary European Studies* 29, no. 3 (2020): 380–90. https://doi.org/10.1080/14782804.2020.1785849.

[16] John Agnew, "Taking Back Control? The Myth of Territorial Sovereignty and the Brexit Fiasco," *Territory, Politics, Governance 8*, no. 2 (2019): 259–72, https://doi.org/10.1080/21622671.2019.1687327.

reference to immigration and the EU's handling of the refugee crisis. Brexiteers asserted that mass migration was responsible for straining infrastructures, welfare, and public services, such as affordable housing, education, and the National Health Service (NHS). Correspondingly, a significant portion of pro-Brexit literature and advertisements denounced the EU as a failed supranational authority because of its mishandling of the refugee crisis. This particular argument emphasized that the EU's general tolerance of mass migration directly conflicted with domestic principles and had negatively impacted the British economy.[17] The refugee crisis undoubtedly affected the socio-political and economic climates of the UK, but Brexiteer logic is faulty.

First, the European Union and all other UN members are obligated to admit and protect refugees under international law. Even if the EU did not act in accordance with its norms and values, member states would still be required to follow the UDHR. Second, as a former EU superpower, Britain contributed to the development and implementation of common EU norms and values. How can EU norms and values conflict with British principles when they were partially created by and designed for British people? Besides, Britain willingly joined the EU knowing that sacrifices in state autonomy were necessary in order to reap the benefits of European integration. Third, withdrawing from the EU will not deter or prevent mass migration to the UK. Brexit has only restrained the free mobility of British citizens and other Europeans in travelling to and from the United Kingdom. Fourth, the EU fosters an extensive European trade hub which the British economy heavily relied on. Obstructing trade with other nations will not and has not generated financial independence for the UK. In conclusion, Brexit represented a misguided effort to preserve the fantasy of state sovereignty in today's highly globalized society.

H2: Mass migration stimulated the recent rise of ERPs in Europe

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[17] Stuart Gietel-Basten, "Why Brexit? The Toxic Mix of Immigration and Austerity," *Population and Development Review 42*, no. 4 (2016): 673-80, http://www.jstor.org/stable/44132229.

The populist ideologies of extreme right-wing parties (ERPs) have always existed in European politics, but the ERPs themselves were essentially wiped out after the Second World War and absorbed into more moderate right-wing parties.[18] Recently, however, widespread discontent over the refugee crisis has prompted a far-right resurgence in Europe. This phenomenon is indicative of the 'Old Right Hypothesis,' which stipulates that ERPs personify modern incarnations of preceding right-wing parties with the added element of socio-economic insecurity.[19] By this logic, contemporary ERPs are simply the beneficiaries of political fragmentation and the perceived inaptitude of mainstream parties to tackle burgeoning social, political and economic issues.

The refugee crisis constitutes a very significant added element of socioeconomic insecurity. When competition for jobs, capital, property, and assets intensify as a result of increased immigration and deteriorating economic circumstances, ERPs tend to appeal to majority group electorates.[20] Correspondingly, ERPs are more successful in elections when they are able to link immigrants with economic downturn, austerity, terrorism, and criminal activity.[21] The refugee crisis proved to be an indispensable electoral tool for populist ERPs by harnessing public outrage over the influx of refugees within majority groups.[22] This has set a

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[18] J. Rydgren, "Is extreme right-wing populism contagious? Explaining the emergence of a new party family," *European Journal of Political Research 44*, no. 3 (2005): 413-437.

[19] A. Cole, "Old right or new right? The ideological positioning of parties of the far right," *European Journal of Political Research* 44, no. 2 (2005): 203-230.

[20] M. Lubbers, M. Gijsberts and P. Scheepers, "Extreme right-wing voting in Western Europe," *European Journal of Political Research* 41, no. 3 (2002): 345-378.

[21] C. Cochrane and N. Nevitte, "Scapegoating: Unemployment, far-right parties and anti-immigrant sentiment," *Comparative European Politics* 12, no. 1 (2012): 1-32.

[22] Harteveld, Schaper, De Lange, and Van Der Brug, "Blaming Brussels? The Impact of (News about) the Refugee Crisis on Attitudes towards the EU and National Politics," *JCMS: Journal of Common Market Studies* 56, no. 1 (2017): 157–77, https://doi.org/10.1111/jcms.12664.

dangerous precedent for the EU because, in the context of Europe, populism is synonymous with Euroscepticism.

France

The French far-right National Front party (FN) was founded in the 1970s and is one of the most prominent ERPs in Europe.[23] Although the party has been revamped several times since its initial formation, the political platform of the FN is still centered around nationalism, Euroscepticism and xenophobia. Since 2015, the FN has gained traction by blaming rising unemployment rates, inflation and terrorism on the refugee crisis and the EU.[24] Immigrant and refugee scapegoating is a common strategy of populists, ERPs, and desperate politicians. In fact, French President Emmanuel Macron, a self-proclaimed centrist and leader of the En Marche! party, advocated for stronger anti-immigrant policies to strengthen his 2022 reelection bid.[25] Although Macron won his bid for re-election, the increased popularity of the FN is cause for concern. If the FN ever does take power, the party will almost certainly advocate for Frexit.[26] That said, with the French political climate shifting to the right, its relationship with the European Union is bound to change, regardless of who is in power.

Germany

ERP advancement in Germany is quite unique because the refugee crisis has altered long-standing public opinions about populism. As the birthplace of Nazism, Germany has had a rather

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[23] S. Martinez, "Unemployment, Immigration and The Rise of The National Front in France," 2019, Scholarworks.csun.edu, <http://scholarworks.csun.edu/bitstream/handle/10211.3/210561/Ramos%20Martinez-Sigfredo-thesis-2019.pdf?sequence=1>

[24] P. Hainsworth, "The extreme right in France: the rise and rise of Jean-Marie Le Pen's front national," *Representation* 40, no. 2 (2004): 101-114.

[25] Anja Durovic, "Rising electoral fragmentation and abstention: the French elections of 2022," *West European Politics* 46, no.3 (2023): 614-629, DOI: 10.1080/01402382.2022.2123095.

[26] Markus Gastinger, "Brexit! Grexit? Frexit? Considerations on How to Explain and Measure the Propensities of Member States to Leave the European Union," *SSRN Electronic Journal*, 2019, https://doi.org/10.2139/ssrn.3489132.

complicated history with far-right politics. Ever since the end of World War II, there has

justifiably been a national taboo surrounding ERPs. Consequently, German ERPs have

consistently failed to gain ground in the German political arena.[27] However, the 2017 Federal

election was a political game-changer, because the Alternative for Germany (AfD) party became

the first ERP since 1945 to achieve any form of electoral success. The AfD won 12.6% of the

vote and received 94 seats in the Bundestag (German federal parliament), becoming the main

opposition to the centrist coalition government and the third-largest political party in Germany.[28]

This highly unanticipated political development constituted a systemic shock to the country, but

Germany's overly generous response to the refugee crisis incited mass indignation the majority

electorate. Although centrists and leftists tolerated former German Chancellor Angela Merkel's

'open-door' policy to refugees, it did not bode well within Merkel's own party. The AfD used

Merkel's decreasing popularity to their advantage during the 2017 election season by denouncing

migration and the European Union. This strategy proved effective in that it not only garnered the

AfD electoral success, but it also forced Merkel to renounce her open-door policy and concede

that her government severely mishandled the refugee crisis.[29] The ascension of the AfD in such a

notoriously anti-extremist and pro-EU country has two major implications about the connection

between the refugee crisis and ERPs: (1) mass migration has the capacity to infuriate even the

most dedicated EU countries and (2) if the refugee crisis inadvertently increased the allure of

populism in liberal Germany, then imagine how it affected less dedicated EU countries.

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[27] K. Arzheimer, "The AfD: Finally a Successful Right-Wing Populist Eurosceptic Party for Germany?," *West European Politics* 38, no. 3 (2015): 535-556.

[28] Melissa Eddy, "Alternative For Germany: Who Are They, And What Do They Want? The New York Times," 2017, https://www.nytimes.com/2017/09/25/world/europe/germany-election-afd.html.

[29] Charles Lees, "The 'Alternative for Germany': The Rise of Right-Wing Populism at the Heart of Europe," *Politics* 38, no. 3 (2018): 295–310, https://doi.org/10.1177/0263395718777718.

H3: The lack of a unified migration and asylum policy created internal discord between EU
member states

The European Union was designed to facilitate European collectivity by cultivating inter-

state cooperation, political coordination, and free mobility. Such interconnectedness usually

translates into mutual policies about issues that affect Europe as a whole.[30] However, the EU

operated without a common migration policy, leading to polarizing responses to the refugee

crisis. Each member state has either granted or not granted asylum based on domestic legal codes

and individual interpretations of the UDHR.[31] Since political fragmentation of this nature

inexorably creates conflict and disunity, the European refugee crisis can also be categorized as a

European solidarity crisis.

The EU has been developing the regulatory Common European Asylum System (CEAS)

for over twenty years. The CEAS incorporates the Dublin Regulation, an EU law that determines

which border states are responsible for refugees and asylum-seekers entering the Schengen area

through their respective territories.[32] This is a highly controversial provision because it places an

unequal amount of responsibility on EU border states to admit and integrate refugees. The vast

majority of refugees came from Africa and the Middle East, meaning that if Mediterranean and

Balkan border states actually followed the Dublin Regulation, they would have to take in a

disproportionate number of refugees.[33] It is important to note that a state's capacity to properly

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[30] Rainer Bauböck, "Refugee Protection and Burden-Sharing in the European Union," *JCMS: Journal of Common Market Studies* 56, no. 1 (2017): 141–56, https://doi.org/10.1111/jcms.12638.
[31] Irene Kyriakopoulos, "Europe's Response To The Migration Crisis: Implications For European Integration," Institute For National Strategic Studies, 2019, https://inss.ndu.edu/Media/News/Article/1824758/europes-responses-to-the-migration-crisis-implications-for-european-integration/
[32] Hanspeter Kriesi, Argyrios Altiparmakis, Abel Bojar, and Ioana-Elena Oana, "Debordering and Re-Bordering in the Refugee Crisis: a Case of 'Defensive Integration,'" *Journal of European Public Policy* 28, no. 3 (2021): 331–49, https://doi.org/10.1080/13501763.2021.1882540.
[33] Kyriakopoulos, "Europe's Response To The Migration Crisis: Implications For European Integration," Institute For National Strategic Studies, 2019, https://inss.ndu.edu/Media/News/Article/1824758/europes-responses-to-the-migration-crisis-implications-for-european-integration/.

manage asylum-seekers varies within the EU. Countries like Greece, Italy, and Austria do not

have the funding or resources to suitably host such vast numbers of refugees, whereas the UK,

Sweden and Germany foster more favorable conditions.[34] This section will examine migration

and asylum policies in Greece, Italy, Hungary, Poland, Germany, and Sweden.

Greece & Italy

As the main entry points to the European Union, at the height of the refugee crisis no

other member states witnessed more refugee arrivals and border crossings than Greece and Italy.

Of the million refugees that crossed the Mediterranean Sea in 2015, there were over 850,000

recorded arrivals in Greece and 154,000 in Italy.[35] Greece and Italy handled the refugee crisis

slightly differently, but they shared the weight of being frontline states to Africa and the Middle

East.

Initially, the Greek government responded to the rapid influx of refugees by doing the

bare minimum—not sending the refugees back. Greece mostly just waved refugees on through to

northern EU countries without registering them.[36] Italy's initial response to the refugee crisis

was to not register most arrivals and urge refugees to seek asylum in northern EU states.[37]

Greece and Italy's strategies were widely criticized by the international community for being

ineffective and inefficient, but both countries were unable to cope with such rapid mass

migration because of infrastructural shortcomings and poor economic conditions resulting from

[34] Kriesi et al., "Debordering and Re-Bordering in the Refugee Crisis,'" *Journal of European Public Policy* 28, no. 3 (2021): 331–49, https://doi.org/10.1080/13501763.2021.1882540.
[35] Christina Velentza, "The Greek Response to the Refugee Crisis in Eastern Mediterranean," Observatory of the Refugee and Migration Crisis in the Aegean, 2018, https://refugeeobservatory.aegean.gr/en/greek-response-refugee-crisis-eastern-mediterranean-period-2015-2016-overview-c-velentza.
[36] Kriesi et al., "Debordering and Re-Bordering in the Refugee Crisis,'" *Journal of European Public Policy* 28, no. 3 (2021): 331–49, https://doi.org/10.1080/13501763.2021.1882540.
[37] Pietro Castelli Gattinara, "The 'Refugee Crisis' in Italy as a Crisis of Legitimacy," *Contemporary Italian Politics* 9, no. 3 (2017): 318–31, https://doi.org/10.1080/23248823.2017.1388639.

recession and the eurozone crisis.[38] The migration policies of both countries took a turn for the worst when the Western Balkans (which includes states both in and outside the EU) decided to shut down the Balkan immigration route. Without the Balkan route, Greece and Italy could not secure their external borders from irregular migration. Irregular migrants are refugees who enter into a country through irregular channels and either do not apply for asylum or get rejected from it. As a solution, the European Council adopted the 'hotspot approach,' which shifts refugee responsibility back to the frontline states, but within specific locations and under unpromising assurances that Europol and other multinational organizations would provide extensive assistance. This approach proved difficult to implement due to structural defects and general unenthusiasm in both Greece and Italy.[39] Subsequently, the EU sought to contain the refugee crisis by other means: striking a deal with Turkey.

In a desperate attempt to stop the flow of migrants from Turkey to the EU, both parties signed onto the EU-Turkey Joint Action Plan or the EU-Turkey Deal/Statement in March of 2016. Under this agreement, Turkey agreed to increase border security while Greece promised to return irregular migrants to Turkey. Premised on a system of exchange, each time Greece sends an irregular migrant back to Turkey, Turkey will send one registered asylum seeker to Greece for resettlement in the EU. The EU also pledged to give Turkey 3 billion to support the refugees it takes in.[40] This deal helped fortify the Greek islands by turning Turkey into buffer zone, but political scholars and human rights activists criticized the arrangement for undermining fair and

[38] Kriesi et al., "Debordering and Re-Bordering in the Refugee Crisis,'" *Journal of European Public Policy* 28, no. 3 (2021): 331–49, https://doi.org/10.1080/13501763.2021.1882540.

[39] Velentza, "The Greek Response to the Refugee Crisis in Eastern Mediterranean," Observatory of the Refugee and Migration Crisis in the Aegean, 2018, https://refugeeobservatory.aegean.gr/en/greek-response-refugee-crisis-eastern-mediterranean-period-2015-2016-overview-c-velentza.

[40] Roman Lehner, "The Eu-Turkey-'Deal': Legal Challenges and Pitfalls," *International Migration* 57, no. 2 (2018): 176–85, https://doi.org/10.1111/imig.12462.

efficient asylum procedures.[41] While there are legitimate concerns about the EU-Turkey Deal,

the EU as a whole never fostered fair or efficient asylum procedures. As evidenced by Greece

and Italy's lack of adherence to the vastly inequitable Dublin Regulation, hotspot approach, and

burden-sharing system, the EU's efforts to devise and administer common migration and asylum

policies failed.

Hungary & Poland

Although it can be argued that all EU member states have entertained increasingly

xenophobic policies, Hungary and Poland are notorious for their hostility towards migrants.

Before analyzing Hungary's migration and asylum policies, it is important to note that Hungary

is the only country in the European Union to still foster traditional ERPs. The fascist Fidesz

party, led by Prime Minister Viktor Orban, has been in government since 2010.[42] Hungary is also

known for breaching EU norms and values. Article VII of the Treaty on European Union is

designed to ensure that every EU member state upholds and adheres to the rules, norms and

values of the European Union. Along with Poland, Hungary is now formally cited under Article

VII for frequent violations.[43]

Prime Minister Orban and the Hungarian government exacerbated fears that mass

migration threatened Hungarian society by launching a vicious anti-migrant campaign, which

branded refugees as foreign intruders, criminals, and terrorists.[44] This migrant scaremongering

aided the implementation of several zero-tolerance migration policies, all of which defy

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[41] Jonathan Zaragoza-Cristiani, "Containing the Refugee Crisis: How the EU Turned the Balkans and Turkey into an EU Borderland," *The International Spectator* 52, no. 4 (2017): 59–75, https://doi.org/10.1080/03932729.2017.1375727.

[42] A. Bozóki, "Consolidation or Second Revolution? The Emergence of the New Right in Hungary," *Journal of Communist Studies and Transition Politics* 24, no. 2 (2008): 191-231.

[43] Veronica Anghel, "Together or Apart? The European Union's East–West Divide," *Survival* 62, no. 3 (2020): 179–202, https://doi.org/10.1080/00396338.2020.1763621.

[44] Bozóki, "Consolidation or Second Revolution?," *Journal of Communist Studies and Transition Politics* 24, no. 2 (2008): 191-231.

universal precedents surrounding refugees. To avoid its obligations towards refugees, Hungary

erected fences along its southern borders, criminalized irregular entry into the country, expelled

refugees and asylum-seekers to Serbia, and refused to coordinate or cooperate with other EU

member states on policy formation.[45] Hungary's draconian migration and asylum policies reflect

the conservative nature of the state, but the country's flat-out rejection of burden-sharing and

inter-state cooperation presents a threat to the structural and political integrity of the European

Union as a collection of like-minded states.

Poland's response to the 2015 refugee crisis mirrored much of its neighbor, Hungary, in

that the country elected an ERP, refused to participate in EU burden-sharing, and banned

refugees from entering the country. Additionally, the far-right Law and Justice party (PiS) came

into power at the height of the refugee crisis by championing on a xenophobic and anti-

immigrant platform.[46] However, Poland's firm anti-migrant stance has seemingly applied only to

non-white and non-Christian refugees. Whereas African and Middle Eastern refugees have been

assaulted with tear gas and water cannons, physically attacked by Polish patrolmen, detained at

the Belarus-Poland border and villainized by ERP propaganda, Ukrainian refugees have been

welcomed into Poland with open arms.[47]

Since Russia's invasion of Ukraine in February of 2022, Poland has willingly accepted

over one million Ukrainian refugees which is more than any other EU nation.[48] Although

Ukrainian and African/Middle Eastern refugees share the same plight of fleeing violence and

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[45] "Amnesty International," amnesty.org (Amnesty International Publications, 2015),
https://www.amnesty.org/en/wp-content/uploads/2021/05/AMR2330092020ENGLISH.pdf.
[46] Jan Cienski, "Why Poland Doesn't Want Refugees" POLITICO, POLITICO, May 26, 2017.
https://www.politico.eu/article/politics-nationalism-and-religion-explain-why-poland-doesnt-want-refugees/.
[47] Addie Esposito, "The Limitations of Humanity: Differential Refugee Treatment in the EU," Harvard International
Review, Harvard International Review, September 14, 2022. https://hir.harvard.edu/the-limitations-of-humanity-
differential-refugee-treatment-in-the-eu/.
[48] "How Many Ukrainian Refugees Are There and Where Have They Gone?" BBC News, BBC, July 4, 2022.
https://www.bbc.com/news/world-60555472.

persecution in war torn countries, the Polish government has only recognized the humanity of Ukrainians. This begs the question: why? The most obvious answers are racism and Islamophobia—Poland is proudly one of the most racially, religiously, and ethnically homogenous European countries—but it is critical to take Poland and Ukraine's geographic and historical connections into account. Specifically, that they are both former Soviet states.[49] The renewed threat of Russian imperialism in eastern Europe has led to the emergence of a new alliance between Poland and Ukraine. Despite their past grievances, the two nations are now united against a common enemy. This alliance, combined with the fear that if Ukraine falls then Poland is next, has increased Polish sympathy and respect for Ukrainian refugees.[50] Poland's refusal to accept refugees unless it benefits or supports national interests negates the concept of European sovereignty and places an unfair burden on rule-abiding EU nations.

Germany & Sweden

Within the European Union, Germany and Sweden have established themselves as the two major asylum states for refugees. Germany received the largest number of applications for asylum and Sweden accepted more refugees per capita than any other country in the EU.[51] Whereas Greece and Italy consist of frontline states, Germany and Sweden can be categorized as destination states. The high acceptance rate of asylum-seekers in both countries attracts refugees

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[49] Kasia Narkowicz, "'Refugees Not Welcome Here': State, Church and Civil Society Responses to the Refugee Crisis in Poland," *International Journal of Politics, Culture, and Society* 31, no. 4 (2018): 357–73. https://doi.org/10.1007/s10767-018-9287-9.

[50] Taras Kuzio, "Poland and Ukraine: The Emerging Alliance That Could Reshape Europe," Atlantic Council, April 13, 2023. https://www.atlanticcouncil.org/blogs/ukrainealert/poland-and-ukraine-the-emerging-alliance-that-could-reshape-europe/.

[51] Henrekson, et al., "The Refugee Crisis and the Reinvigoration of the Nation State: Does the European Union Have a Common Refugee Policy?," *SSRN Electronic Journal*, 2019, https://doi.org/10.2139/ssrn.3342561.

to Germany and Sweden. These two countries were also more equipped to manage the refugee

crisis than frontline states.[52]

      As mentioned in the previous section, Chancellor Angela Merkel initially instituted an

open-door policy towards refugees. Merkel took a political hit because of this policy and

ultimately had to renounce it for electoral reasons.[53] Following the repeal of this policy, Merkel

and her government introduced a series of new migration restrictions, which included reforms to

immigration, integration, and national security. Germany did not outright reject refugee arrivals

to its territory, but the country reintroduced domestic border controls and implemented more

restrictive asylum policies, including more stringent procedures for family reunification and

asylum process acceleration. Germany also played a fundamental role in reducing the flow of

refugees to the EU by orchestrating and securing the EU-Turkey Deal.[54] However, as one of the

EU superpowers, Germany's involvement in this matter was most likely on behalf of the EU.

      Progressive Sweden has a longstanding tradition of holding exceptionally liberal

migration and asylum policies. Even before the outbreak of the refugee crisis in 2015, migrants

tended to gravitate towards Sweden due to the country's emphasis on social welfare, equality,

and left-wing politics.[55] Accordingly, Sweden welcomed migrants into the country with open

arms at the beginning of the crisis. Parallel to Germany, however, public demands for more

restrictive migration and asylum policies grew substantially as the crisis dragged on. After

intense political pressure resulting from the rise of the center-right Sweden Democrats party, the

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[52] Kriesi et al., "Debordering and Re-Bordering in the Refugee Crisis,'" *Journal of European Public Policy* 28, no. 3 (2021): 331–49, https://doi.org/10.1080/13501763.2021.1882540.

[53] Lees, "The Alternative for Germany," *Politics* 38, no. 3 (2018): 295–310, https://doi.org/10.1177/0263395718777718.

[54] Asli Ilgit and Audie Klotz, "Refugee Rights or Refugees as Threats? Germany's New Asylum Policy." *The British Journal of Politics and International Relations* 20, no. 3 (2018): 613–31, https://doi.org/10.1177/1369148118778958.

[55] Kriesi et al., "Debordering and Re-Bordering in the Refugee Crisis,'" *Journal of European Public Policy* 28, no. 3 (2021): 331–49, https://doi.org/10.1080/13501763.2021.1882540.

Swedish government was forced to close its internal borders, implement harsher family

reunification and asylum procedures, and increase the number of migrant detentions and

expulsions.[56] Following the enactment of this new policy package, Sweden promised to respect

the common asylum policy of the EU if the European Council ever develops and passes one

through the European Parliament.[57] There are two major problems with this contingency: (1)

deep divisions between nation-states hinder most prospects for policy cohesion and (2) even if

the European Parliament manages to pass a common policy, there is no guarantee that member

states would abide by it.

Discussion

Normative values of the European Union include integration, egalitarianism, solidarity

and European sovereignty. Nation-states observe these values through membership and

participation in EU institutions, structures and amalgamative arrangements. As previously stated,

the Schengen Agreement is regarded as the greatest cohesive achievement of the EU. The

abolition of internal borders between participatory nation-states, which arranged the free

mobility of people and capital, symbolized the capacity of European unity. Unfortunately,

member states decided to reinstate internal border controls, because the Schengen Area's border

governance struggled to effectively manage such a large-scale migration.[58] By compelling

individual member states to re-impose internal border controls, the refugee crisis and its

mishandling publicized the true fragility of European unification. Problems with

supranationalism, like this one, were specifically capitalized on in the Brexit referendum. The

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[56] Henrekson, et al., "The Refugee Crisis and the Reinvigoration of the Nation State: Does the European Union Have a Common Refugee Policy?," *SSRN Electronic Journal*, 2019, https://doi.org/10.2139/ssrn.3342561.
[57] Admir Skodo, "Sweden: By Turns Welcoming and Restrictive In Its Immigration Policy," 2018, https://www.migrationpolicy.org/article/sweden-turns-welcoming-and-restrictive-its-immigration-policy.
[58] Carr, "Refugees Without Borders: Legal Implications of the Refugee Crisis in the Schengen Zone," 2016, https://repository.law.umich.edu/mjil/vol38/iss1/4

Leave campaign put considerable effort into immigrant scaremongering, which involved a large number of factual inaccuracies, to discredit the norms and values of the EU, specifically European sovereignty.[59] Brexit was premised on regaining British sovereignty from the EU. Due to the realities of modern society, Brexit logic is innately flawed, but it raises an interesting point about the challenges of the refugee crisis on both domestic and European sovereignty.[60] Domestically, the refugee crisis has challenged the ability of individual member states to manage their citizens and internal affairs. In terms of the broader European sovereignty, the refugee crisis has challenged internal borders and the functionality of supranationalism.

The success rate of ERPs depends on the conditions of the countries in which they form. This means that the political, social and economic circumstances of a nation-state or in this case a collection of nation-states can either assist or obstruct ERP growth. As evidenced by the rise of the far-right in both France and Germany, the refugee crisis created favorable conditions for ERP mobilization and expansion by intimidating and infuriating majority electorates. ERPs exploited the widespread indignation over the massive influx of refugees to their electoral advantage by campaigning on an anti-immigrant and anti-EU political platform.[61] The shocking success of ERPs in France and Germany, the two most powerful EU member states, indicate that the recent rise in populism was symptomatic of the refugee crisis. Immigration is and always has been one of the world's most contentious political issues, but under the context of European politics, it has incited an ERP resurgence.

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[59] Ian Manners, "The Normative Ethics of the European Union," *International Affairs* 84, no. 1 (2008): 45–60, https://doi.org/10.1111/j.1468-2346.2008.00688.x.

[60] Agnew, "Taking Back Control? The Myth of Territorial Sovereignty and the Brexit Fiasco," *Territory, Politics, Governance* 8, no. 2 (2019): 259–72, https://doi.org/10.1080/21622671.2019.1687327.

[61] Rydgren, "Is Extreme Right-wing Populism Contagious?" *European Journal of Political Research* 44, no. 3 (2005): 413-437.

Although the EU was designed to cultivate political cooperation and coordination between member states, the EU has consistently operated without common migration and asylum policies Member states have handled the refugee crisis according to their own domestic laws and institutional interpretations.[62] Prior policies within the CEAS have been inequitable in terms of burden-sharing, capacity to host refugees, and the distribution of asylum-seekers. The Dublin Regulation, in particular, places an unequal amount of responsibility on frontline states to admit and integrate refugees.[63] Predictably, these regional and infrastructural imbalances have deepened divisions between member states.

Greece and Italy constitute the two major EU frontline states. Both countries blatantly ignored the Dublin Regulation and other CEAS procedures by ushering refugees to the north, granting few asylums and not registering arrivals.[64] The EU-Turkey Deal helped to secure Greece's external borders against irregular migration, but the reluctance of both countries to host refugees and grant a greater number of asylums—which stems from their limited financial and structural capacity to do so—is problematic for other EU member states. Hungary had the harshest reaction to the refugee crisis by launching an anti-immigration campaign, closing its borders, constructing fences to keep migrants out, criminalizing irregular migration, expelling refugees, and declining to negotiate with other EU members on formulating common policies.[65] Although Hungary's zero-tolerance migration and asylum policies align with the political and

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[62] Kyriakopoulos, "Europe's Response To The Migration Crisis," Institute For National Strategic Studies, 2019, https://inss.ndu.edu/Media/News/Article/1824758/europes-responses-to-the-migration-crisis-implications-for-european-integration/.

[63] Kriesi et al., "Debordering and Re-Bordering in the Refugee Crisis,'" *Journal of European Public Policy* 28, no. 3 (2021): 331–49, https://doi.org/10.1080/13501763.2021.1882540.

[64] Velentza, "The Greek Response to the Refugee Crisis in Eastern Mediterranean," Observatory of the Refugee and Migration Crisis in the Aegean, 2018, https://refugeeobservatory.aegean.gr/en/greek-response-refugee-crisis-eastern-mediterranean-period-2015-2016-overview-c-velentza.

[65] "Amnesty International," amnesty.org (Amnesty International Publications, 2015), https://www.amnesty.org/en/wp-content/uploads/2021/05/AMR2330092020ENGLISH.pdf.

social precedents of the state, the country's refusal to coordinate or even cooperate with other EU member states negates the entire purpose of the European Union. Poland is only accepting of refugees that benefit their national sovereignty and meet their demographic requirements. Poland's refusal to burden-share when it supports EU sovereignty over national sovereignty contradicts the foundational purpose of the EU.[66] In stark contrast to the Hungarian and Polish models, Germany and Sweden have been hailed as safe haven states for asylum-seekers. However, their liberal migration and asylum policies did not come without electoral consequences. The ruling leaders and parties of both countries received extensive political backlash from their electorates, which forced them to change their policies and implement harsher restrictions on migration and asylum.[67] The geographic, political and economic discrepancies between nation-states have not only produced political disharmony but have also hindered the prospect of a common migration and asylum policy.

Conclusion

The aim of this paper was to identify and explain the consequences of the refugee crisis on the solidarity and politics of the European Union. Based on the case studies, it is clear that immigration, in all forms, is one of the most contentious and divisive issues in contemporary politics. Mass migration and the EU's mishandling of it triggered a Eurosceptic wave across the continent. It both manifested itself in and negatively affected EU institutional arrangements, policy development and implementation, political solidarity, domestic politics, and normative

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[66] Kasia Narkowicz, "'Refugees Not Welcome Here': State, Church and Civil Society Responses to the Refugee Crisis in Poland," *International Journal of Politics, Culture, and Society* 31, no. 4 (2018): 357–73. https://doi.org/10.1007/s10767-018-9287-9.

[67] Kriesi et al., "Debordering and Re-Bordering in the Refugee Crisis,'" *Journal of European Public Policy* 28, no. 3 (2021): 331–49, https://doi.org/10.1080/13501763.2021.1882540.

value systems. Altogether, this destabilized European integration—the foundational element of

European sovereignty and the EU as a whole.

Transformation of Gendered, Racial Capitalism in Lebanon: The Impact of the Post-2019 Lebanese Crisis on the *Kafala* System

Lindsey Parnas

Abstract: *Following the post-2019 economic crisis, the COVID-19 pandemic, and the Beirut explosion, the Lebanese economy, including migration flows, has collapsed, and migrant domestic workers (MDWs) under the kafala system have been among those most impacted by these crises, with many losing their jobs, being voluntarily or involuntarily deported, or becoming homeless. This paper will argue that the 2019 economic crisis, the COVID-19 pandemic, and the Beirut explosion exacerbated the existing racialized and gendered marginalization of MDWs in Lebanon under the Kafala system, leading to increased unemployment, mass emigration and deportation, surging homelessness, and gender-based violence.*

Keywords: *Lebanon, Migrant Domestic Workers, Kafala System, 2019 Economic Crisis, Beirut Explosion, COVID-19, Racism, Sexism, Post-structuralism, Biopolitics*

Introduction

Lebanon has a long history of domestic labor. The original Lebanese domestic labor system was domestic slavery under the Ottoman Empire. Under this system, rural families from Mount Lebanon were used for voluntary household labor, and Palestinian, Egyptian, and Arab families were also used as domestic labor post-Lebanese independence.[1] From the Lebanese civil war on, there has been a system of majority Asian and African domestic labor, creating what is known as the modern *kafala* system.[2] The "*Kafala* system is a neoliberal approach to immigration… [in which] has been described as 'essentially an employer-led, large-scale guest worker program that is open to admitting migrant workers, but at the same time restrictive in

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[1] Sumayya Kassamali, "The *Kafala* System as Racialized Servitude," *Racial Formations in Africa and the Middle East: A Transregional Approach* (2021): 102-103.
[2] Ibid, 102-103.

terms of the rights granted to migrants after admission.'"[3] Under the kafala system, the employer

of a migrant worker, the *kafeel,* acts as a guarantor or sponsor and assumes full legal and

economic responsibility for the worker they have hired for the full contract period.[4] As of 2019,

Lebanon hosted approximately 200,000-300,000 migrant domestic workers (MDWs), mostly

coming from the Philippines, Ethiopia, Sri Lanka, Bangladesh, and India.[5] This number is

significantly less than the Gulf, where there are approximately 30 million migrants across all

Gulf countries, far exceeding the number of citizens in many of these countries.[6] Lebanon's

MDWs are 99% female, working predominantly as health/care workers, nurses, and cleaners,

thus receiving gendered jobs such as cleaning and cooking and often working in the informal

sector in dangerous roles.[7]

     MDW treatment drastically declined post-2019. In 2019, a government announcement on

a tax on WhatsApp, compounded with the poor public services and sectarian tensions resulted in

mass demonstrations countrywide calling for full-scale political reform and the end of

corruption. Soon after, in March 2020, the Lebanese government announced that it would default

on a debt repayment for the first time in its history. Then the country locked down due to

COVID-19, paralyzing the labor, education, and healthcare system. The national situation

continued to deteriorate, and on August 4, 2020, a large amount of unsecured volatile ammonium

nitrate exploded at a Beirut port warehouse, killing more than 200 people and injuring at least

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[3] Warisha Siddiqui, "Unavoidable aspects of Migrant labor: analysis of race, gender, and class in the Kafala system in contemporary Middle east," *An Undergraduate Journal of International Affairs at Dartmouth College*: 3.
[4] Ibid, 3.
[5] James Sater, "Migrant workers, labor rights, and governance in middle income countries: The case of migrant domestic workers in Lebanon," in *Migration, Security, and Citizenship in the Middle East* (Palgrave Macmillan, New York, 2013), 120.
[6] Brooke Sherman, "Changing the Tide for the Gulf's Migrant Workers," Viewpoint Series, Wilson Center, June 6, 2022, https://www.wilsoncenter.org/article/changing-tide-gulfs-migrant-workers.
[7] Jasmin Lilian Diab, "Gender and Migration in Times of COVID-19: Additional Risks on Migrant Women in the MENA and How to Address Them," *Identities: Journal for politics, gender and culture* 17, no. 1 (2020): 162.

6,500. Inflation continued to grow throughout this period, so the price of food and basic needs skyrocketed while massive fuel shortages also disrupted electricity and transportation.[8] These problems continue to compound to this day.

Following the post-2019 economic crisis, the COVID-19 pandemic, and the Beirut explosion, the Lebanese economy, including migration flows, has collapsed. Hundreds of MDWs have died, many continue to face violence, and the Lebanese pound has dropped to an all-time low, devaluing to 41,650 liras against the US dollar in December 2022 (compared to 1507.5 liras to the dollar from 1997 to 2019).[9] Migrant workers have been among those most impacted by these crises, with many losing their jobs, being voluntarily or involuntarily deported, or becoming homeless.[10] Consequently, Lebanon now reports 170,000 migrants have left Lebanon altogether, and remittances from Lebanon to migrant countries have drastically decreased.[11]

The 2019 economic crisis, the COVID-19 pandemic, and the Beirut explosion exacerbated the existing racialized and gendered marginalization of MDWs in Lebanon under the Kafala system, leading to increased unemployment, mass emigration and deportation, surging homelessness, and gender-based violence. This phenomenon will be examined through a post-structural lens. Post-structuralism will be defined as a study of the diffuse distribution of power or a "multiplicity of force relations" that exist through individuals, discourses, and structures popularized by Michel Foucault.[12] To explore the power relations impacting MDWs, I will initially discuss the background of economic exploitation of the *kafala* system from the end of

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[8] "Lebanon: Timeline of a Country in Crisis," The Lebanese Society for Educational & Social Development, LSESD, August 29, 2022, https://www.lsesd.org/lebanon-timeline-of-a-country-in-crisis/.

[9] Kareem Chehayeb, "Value of Lebanese pound drops to all-time low," Al Jazeera, Al Jazeera, May 26, 2022, https://www.aljazeera.com/news/2022/5/26/lebanese-pound-value-drops-to-lowest-level.

[10] Rana Aoun, "COVID-19 Impact on Female Migrant Domestic Workers in the Middle East," *GBV AoR Helpdesk* 5 (2020): 3.

[11] Bibikova Olga, "On Systemic Racism In the Lebanon Society," *Russia and the moslem world* 2, no. 316 (2022): 88.

[12] Michel Foucault, *The History of Sexuality: An Introductio*n, *Volume 1* (New York: Vintage, 1978), 92.

the Lebanese Civil War to 2019 and how this economic exploitation discriminated against

MDWs along gender and racial/ ethnic lines. Then, I will analyze how the crises post-2019

mentioned above impacted domestic workers within Lebanon and the systems of power in which

they were entrenched, resulting in their emigration from Lebanon. Due to a lack of primary

sources by MDWs, this article will predominantly draw on secondary-source sources such as

academic literature, reports from humanitarian organizations such as Human Rights Watch

(HRW), Amnesty International, and UN Women, and news analysis from October 2019- present,

looking specifically at the *New York Times*, *Washington Post*, and *Al Jazeera*.

Background: Lebanese Kafala System 1990-2019

The 1990-2019 era of the Lebanese kafala system demonstrates how the kafeels as

individuals, and the Lebanese government and legislation, worked together to allow the severe

abuse of MDWs on racial and gender grounds even before the 2019 crisis. To provide some

background, most MDWs in Lebanon come from Ethiopia, followed by Bangladesh, the

Philippines, Sri Lanka, and Nepal, as well as additional African countries such as Benin, Burkina

Faso, Cameroon, Ghana, Ivory Coast, Nigeria, Madagascar, Senegal, and Togo, although there

are not exact numbers on each.[13] The kafala system was so widespread before 2019 that it was

estimated that one in four Lebanese families employed a full time, live-in migrant domestic

worker prior to 2019.[14]

Despite their prevalence in Lebanese families, kafeels exhibited widespread abuse and

mistreatment towards MDWs prior to 2019. For example, MDWs were often prevented from

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[13] Janine Gunzelmann, "Intersecting Oppressions of Migrant Domestic Workers: (In)Securities of Female Migration to Lebanon," Master's thesis, (Linnaeus University, 2020), 9.

[14] Sumayya Kassamali, "Understanding Race and Migrant Domestic Labor in Lebanon," *Middle East Research and Information Project* 299 (2021), https://merip.org/2021/07/understanding-race-and-migrant-domestic-labor-in-lebanon/.

calling their families, prevented access to adequate food and accommodation, and expected to be

on-call 24/7.[15] Many MDWs furthermore faced several types of abuse, as seen in Figure 1:[16]

Figure 1: *Statistics on MDW Treatment by Employers/ Kafeels*; Source: Kassamali.

% of employers that give MDWs their legally entitled day off	<50%
% of employers who give their MDWs their legally entitled day off and % who let them leave the house alone	50%
% of employers who lock MDWs inside the house regularly	20%
% of employers who confiscate MDWs' passports upon arrival	93%
% of employers who refuse to pay MDW salaries in full at the end of the month	40%
Average hours of work of MDWs per day	15
% of employers reported to beat their MDWs	33%
% of MDWs threatened by their employers[17]	46%

These statistics demonstrate that MDWs faced significant curtailment of their mobility,

danger to their bodies, and were forced to overwork without sufficient compensation even before

2019. HRW also exposed the extent of MDW working conditions when revealing reports from

2017 from Lebanon's intelligence agency, estimating that two migrant workers on average died

each week in Lebanon from suicide or cases suspected to be suicide that year.[18] Thus, MDWs

were already treated as disposable with roles encompassing all work in the household without

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[15] Bina Fernandez, "Racialised institutional humiliation through the Kafala," *Journal of Ethnic and Migration Studies* 47, no. 19 (2021): 43453.

[16] Kassamali, "The Kafala System as Racialized Servitude," 105.

[17] Macy Janine R Pamaranglas, "The Kafala System: A Replica of Lebanon's Violent Sectarian System?" Senior Study, (Lebanese American University, 2021), 22.

[18] Aine Healy, "Structuring the Patriarchy through Borders," Trinity Middle East and North Africa Review, Trinity Middle East and North Africa Review, July 7, 2022, https://tcdmenareview.com/structuring-the-patriarchy-through-borders/.

appropriate or often any compensation. Therefore, the interpersonal relations between kafeel and MDWs showed an imbalance of power leading to hegemonic treatment by kafeels and subordination of MDWs.

MDWs also did not have the legal power to punish their employers for these abuses because the legal system as an institution works against the human rights of MDWs. As a result of abuses, HRW reports that although 114 criminal cases were brought by MDWs to the Ministry of Labor in 2010, none of them were brought to trial.[19] The lack of litigation to protect MDWs is because there is no specific legislation that regulates domestic workers in Lebanon besides the Standard Unified Contract.[20] According to article 14 of the Contract, the worker can terminate the contract if the employer fails to pay wages for three consecutive months, if the worker has to work in another capacity without her or his consent, or if the worker is being assaulted, abused, harassed, or sexually assaulted by one of the occupants of the houses.[21] However, workers must provide proof in such cases of abuse, which is often difficult, if not impossible, so the 114 cases did not have sufficient proof and could not be brought to trial.[22] Furthermore, if MDWs protest their terms of employment, the *kafeel* can unilaterally lower their wages, abuse them, refuse to renew their contract, or petition for their deportation, which results in a loss of their legal residency and possible criminal charges.[23] However, for MDWs who do leave their employers and become what are called "freelancers," they often have no way of traveling back to their

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[19] Lara Ramon Icart, "The UN's Sustainable Development Goals 5 and 8 in Lebanon: Women migrant domestic workers sustaining Lebanese lives while resisting the *kafala* system," thesis, (Universitat Pompeu Fabra, 2021), 18.
[20] Dimitra Dermitzaki and Sylvia Riewendt, "The Kafāla system: Gender and migration in contemporary Lebanon," *Middle East-Topics & Arguments* 14 (2020): 109.
[21] Ibid, 110.
[22] Ibid, 110.
[23] Marya Al-Hindi, "A Comparative Analysis of the Femicide of Migrant Domestic Workers in Bahrain and Lebanon," *Contemporary Challenges: The Global Crime, Justice and Security Journal* 1 (2020): 59-75.

home countries because they do not have legal status. [24] Therefore, leaving an abusive *kafeel* or challenging their mistreatment could result in further abuse, termination, or loss of legal status for MDWs. Further research on the diffusion of kafeel domination and MDW subordination indicates that gender and race were also used as justifications for mistreatment.

A Gender Lens to Lebanon's Kafala System Pre-2019

By taking a post-structural approach, it appears that in the pre-2019 period, MDW exploitation already occurred because sexist stereotypes of women inform their roles and treatment. As mentioned above, women before 2019 made up 99% of MDWs in Lebanon, much higher than the rate of women in other kafala systems, and they worked predominantly in informal sectors, where there were fewer protections compared to the formal sector.[25] Gunzelmann in her interviews found that the high proportion of female domestic workers in Lebanon is due to lower costs associated with female labor in Lebanon.[26] Prior to 2019 (as well as after), Lebanese *kafeels* paid less for women because the combination of racial and gender discrimination resulted in the devaluing of female/domestic work, and the specific stereotypes implied within that devaluation will be articulated below.

As often seen in feminist analyses, Lebanese women, while possible allies to MDWs, were often the individuals who most perpetuated sexism toward MDWs before the economic crisis through "female misogyny, i.e., hatred and rejection of women by other women (madams)."[27] Hence, gender did not create the basis for solidarity between Lebanese women and their MDWs, but instead, Lebanese women used the differing employment status to enrich

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[24] Janine Gunzelmann, "Intersecting Oppressions of Migrant Domestic Workers: (In)Securities of Female Migration to Lebanon," Master's thesis, (Linnaeus University, 2020), 40.
[25] Diab, "Gender and Migration in Times of COVID-19," 162.
[26] Gunzelmann, "Intersecting Oppressions of Migrant Domestic Workers," 31.
[27] Dimitra Dermitzaki and Sylvia Riewendt, ""The Kafāla system: Gender and migration," 112.

themselves and further subordinate their employees. It is also intriguing to note that out of the

1,200 kafeels examined by the International Labor Organization (ILO) in 2016, most were

married middle-aged women in the intermediate and lower middle class of the Lebanese working

population; in contrast, upper-class Lebanese people would pay for non-migrant labor.[28]

Therefore, MDWs' legal statuses were largely dependent on other women, and Lebanese women

did not need to be upper-class to be able to hire MDWs. Another level of domination can be seen

as lower-/middle-class Lebanese women marginalized individuals who are lower-/middle-class

in their societies, so there was no class or gender solidarity. Aine Healy portrays how male

employers and other men in the household further degraded MDWs because MDWs were

expected to show affection and maternal love for the children they cared for and frequently show

emotional support to their employer, a dynamic that often resulted in sexual abuse.[29] The idea of

affection for home and family members was often manipulated to coerce illicit emotional and

sexual labor. Therefore, kafeels manipulated a fundamental tenet of post-structuralism,

biopolitics, also known as the exercise of power over populations through managing and

regulating their biological and social lives, to abuse MDWs,[30] and Lebanese women in the

household were complicit in this physical and sexual violence.

Unfortunately, biopolitical discrimination against MDWs without legal consequences

extended beyond the household pre-2019. The Lebanese system of citizenship provides that

Lebanese women cannot pass down their citizenship, but also migrant women cannot get

Lebanese citizenship regardless of how many years they have lived in the country, unless they

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[28] Rasha Shalha, "Class Interest and the Kafala System in Lebanon," Master's thesis, (Lebanese American University, 2020), 28.

[29] Healy.

[30] Michel Foucault, *Security, Territory, Population: Lectures at the Collège de France, 1977-1978* (London: Palgrave Macmillan, 2008), 141.

marry a Lebanese man.[31] The lack of stable citizenship situation for MDWs and their children

made pregnancy and long-term residency extremely unstable as many MDWs feared deportation

unless they stayed with the same kafeels for years, which comes with its dangers. MDWs also

experienced sexism directly in public. For example, MDWs regularly faced sexual harassment

from taxi drivers, shop owners, and other men when navigating the country.[32] To escape some of

the harassment and seek some intimacy, some MDWs entered relationships with Lebanese men

or other non-nationals, which could sometimes help with mobility around Lebanon. However,

often MDW relationships with men lead to further misogyny as well as abuse because male

partners felt the female MDWs were beholden to them for the male privileges they offered, such

as safety in society and/or possible citizenship.[33] Thus, men exploited MDWs more explicitly

than Lebanese women because of racism and because of the national, gender, and employment

power dynamics that force MDWs to hook up to survive.[34] Spaces outside the home could also

be just as dangerous for MDWs and could result in MDWs looking to those who hold gendered

power (or citizenship) to maneuver society more safely, resulting in other forms of gendered

exploitation. For many MDWs, there were few safe spaces in Lebanon to escape from the

biopolitics of gendered harassment. MDWs also faced specifically racialized exploitation that

may have intensified gender hierarchies.

A Racial Lens to Lebanon's Kafala System Pre-2019

Racism has also been used as a primary justification for MDW mistreatment

transhistorically in Lebanon. During the 1950s and 1960s, large numbers of Asian and African

students studied at universities in Lebanon as the hub of anticolonial intellectual and political

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[31] Pamaranglas, "The Kafala System: A Replica," 25.
[32] Fernandez, "Racialised institutional humiliation," 4354.
[33] Gunzelmann, "Intersecting Oppressions of Migrant Domestic Workers," 42-43.
[34] Ibid, 35.

imagination.[35] However, after the 1990s, when South Asian and African workers became the predominant domestic workers in Lebanon, domestic work's racialization led to the lowering of the social status of domestic workers and the subsequent decrease in their salaries.[36] Thus, after the Lebanese Civil War, domestic work became shameful for Arabs, so Black and Brown people's labor filled this gap. Because of the increasingly negative connotations of their nationalities and skin color, domestic workers received less money and social status. The kafala system further positioned Lebanese citizens closer to "whiteness" as social power and MDWs closer to "Blackness," on top of further entrenching the hierarchies associated with the ability to speak Arabic and nationality.[37] Although the kafala system did not physically change kafeels' or MDWs' races, it did create systemic power disparities along these lines.

This history also created a racialized hierarchy of wages and working conditions throughout Lebanon. Across global kafala systems, MDWs' wages were ranked by race and nationality with Filipina women commanding the highest wages, followed by Indonesian, Sri Lankan, Bangladeshi, Nepali, and finally Ethiopian and other African women.[38] The hierarchy of wages and conditions was because Filipinas (and Indonesians) were believed to be cleaner, more educated, and capable of speaking English, so Filipina and Indonesian women often received around $300 per month.[39] In contrast, Ethiopians, Sri Lankans, and Bangladeshis, who were believed to be less educated and have little to no experience with household appliances, had salaries of around $200 per month.[40] Ethiopian women were also more likely to be given more

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[35] Sumayya Kassamali, "Understanding Race and Migrant Domestic Labor in Lebanon," *Middle East Research and Information Project* 299 (2021), https://merip.org/2021/07/understanding-race-and-migrant-domestic-labor-in-lebanon/.

[36] Icart, "The UN's Sustainable Development Goals 5 and 8 in Lebanon," 15.

[37] Kassamali, "Understanding Race and Migrant Domestic Labor in Lebanon."

[38] Fernandez, "Racialised institutional humiliation," 4353-4354.

[39] Ibid, 4353-4354.

[40] Aina Puig-Ferriol Cabruja, "The *Kafala* System: the case of Lebanon and ways forward," Master's thesis, (Universitat de Barcelona, 2021), 29-30.

physically taxing work in the household while Filipina and Indonesian women might be given

childcare-related work.[41] On the basis of the same racist stereotypes, recruitment agencies in

Lebanon would also pay 1,000-1,500 USD for a Sri Lankan worker compared to 2,000-3,000

USD for a Filipina worker.[42] To some degree this is true as Filipina workers are the most

educated (i.e. being able to read their contracts); however, the stereotypes about Ethiopians', Sri

Lankans', and Bangladeshis' cleanliness and experience with appliances are unfounded.[43] Thus,

racial stereotypes heavily dictated the beliefs about different ethnicities/ nationalities and their

personalities/abilities, and as a result, puts a number on their financial worth.

Biopolitical treatment also manifests as everyday racism towards MDWs in the

household. For example, Ethiopian and other African women were often called *asuad* (black), or

kafeels referred to them and their country as "poor" and uncivilized. However, simultaneously,

in other forms of treatment, these groups were universalized and essentialized. For example,

MDWs would be referred to according to their countries instead of their first names, such as

srilankiyye, which means Sri Lankan, but this misnaming was used to mean maid with gendered,

racialized, and classed connotations.[44] Calling MDWs by these slurs and universalizing them

shows that MDWs are not valued as individuals; instead, they are seen as one unit within a

monolithic workforce slightly broken down into racial hierarchies. Some MDWs even recounted

in interviews to Icart that their employers would call them dirty and stinky and consequently

would refuse to share physical contact with their MDWs, use the same dishes, share a pool with

them, or eat with them, which would create a situation of physical and social segregation

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[41] Fernandez, "Racialised institutional humiliation," 4354.
[42] Shalha, "Class Interest and the Kafala System," 8, 21.
[43] "Lebanon-Domestic Policy," Atlas of Enslavement, Rosa-Luxemburg-Stiftung, accessed December 1, 2022, https://atlasofenslavement.rosalux-geneva.org/lebanon/.
[44] Sumayya Kassamali, "The *Kafala* System as Racialized Servitude," 102.

between MDWs and kafeels. Similarly, MDWs were often forced to walk behind their employers in public, only eat their leftovers, and they were often not allowed to cook their traditional food because it was seen as low status.[45] Hence, Lebanese people often treated their workers like livestock that needs to be kept physically segregated from them and as if their stereotypes, no matter how grounded in imagination, are contagious. As briefly tackled before, MDWs' race was inherently connected to their class. Lebanese employers and civilians would also bully MDWs because of their poverty, taunting them that they are not clever enough for social mobility and that they were born and programmed to do domestic work due to their gender and race, so they should not be tired or complain about it.[46] Thus, the identity of an MDW (and the stereotypes associated with that identity) was weaponized against their work and intended to prevent them from resisting.

Although the Lebanese state as an institution exemplifies the disenfranchisement of MDWs and further prevents resistance, migrant workers did find ways to organize for their labor rights prior to 2019. Nevertheless, post-structural power's difficulty is that its diffusiveness makes it difficult to challenge and exterminate. From an organizational lens, the Lebanese government prohibits migrant workers from organizing trade unions and deprives them of political rights. Additional examples include even deporting workers periodically to control the supply of cheap labor and banning the ILO-organized Action Programme for Protecting the Rights of Women Migrant Domestic Workers in Lebanon/ Domestic Workers Union before 2019.[47] Internal trade union practices were often not better because they were predominantly pan-Arab in orientation and resisted extending rights to MDWs based on the aforementioned

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[45] Icart, "The UN's Sustainable Development Goals 5 and 8 in Lebanon," 8-9.
[46] Gunzelmann, "Intersecting Oppressions of Migrant Domestic Workers," 36.
[47] Icart, "The UN's Sustainable Development Goals 5 and 8 in Lebanon," 17.

racist and gender stereotypes.[48] Because unions were unable and unwilling to support MDWs,

and the Lebanese state was an active participant in MDW oppression, the Lebanese Anti-Racist

Movement, KAFA Violence and Exploitation, INSAN Association, This is Lebanon, and Caritas

have provided food and health resources for MDWs when the state and their kafeels fail to do

so.[49] Even traditional forms of class/ labor solidarity have barriers or biases against supporting

MDW rights. However, internal MDW organizations continue to work to resist the state.

This background indicates that Lebanese individuals and institutions implicitly

collaborated to subjugate MDWs in the labor system based on gendered and racialized attitudes

and stereotypes without legal recourse for abuse, even prior to 2019. Unfortunately, these

conditions continued to deteriorate post-2019. The following section will fill gaps by providing

news and articles emphasizing how the gendered and racialized subjugation of MDWs deepened

under the economic crisis, COVID-19, and the August 4th explosion.

Changes to the Kafala System in Lebanon Post-2019

Although there were many features of the kafala system mentioned above that continued

post-2019, the economic collapse, COVID-19, and the August 4th explosion deepened the

biopolitical sexist and racist violence towards the MDW community, causing increased

unemployment, mass emigration and deportation, surging homelessness, and gender-based

violence. Across the Middle East, countries with kafala systems suffered from a 20% drop in

remittances to low- and middle-income countries from 2019's $714 billion to $572 billion in

2020, exceeding the 5% dip of the 2008 crisis.[50] Due to the currency devaluation, Lebanon far

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[48] Sater, "Migrant workers, labor rights, and governance in middle income countries," 126.
[49] Icart, "The UN's Sustainable Development Goals 5 and 8 in Lebanon," 19.
[50] Omer Karasapan, "Pandemic highlights the vulnerability of migrant workers in the Middle East," Brookings Institution, Brookings Institution, September 17, 2020, https://www.brookings.edu/blog/future-development/2020/09/17/pandemic-highlights-the-vulnerability-of-migrant-workers-in-the-middle-east/.

exceeded the 20% drop, with reports approximating a 50% decrease in remittances, especially

due to the payment of MDWs in Lebanese lira instead of USD.[51] According to the World Bank,

this economic crisis is one of the top ten worst, even possibly the top three worst, economic

crises worldwide since the mid-nineteenth century.[52] This section will examine the severity of

the post-2019 period through an analysis of how gender and racial power relations impacted

MDWs, first discussing power relations in the economic crisis, then during the COVID-19

pandemic, and lastly, following the Beirut explosion.

First, individual kafeels have exerted their power during the economic crisis by cutting

costs attributed to MDWs, and this caused an increase in severe poverty for MDWs, resulting in

their displacement and emigration. While before, some MDWs were being paid a portion of their

salary, during the crisis, most MDWs were not being paid at all, and their savings were stolen by

their employers because their employers could not afford to pay them the total amount.[53] The

lack of salaries is compounded by how the prices of food and basic hygiene products are rising

rapidly, so many migrant workers cannot afford to buy them.[54] Thus, it is near-impossible to

send money home on top of buying necessities. While MDWs in Lebanon have historically

chosen to survive the terrible working conditions mentioned above to support their families back

in their home countries, the combined economic decline of the events mentioned above has

resulted in a severe decline in remittances. Due to the sharp deterioration of the economic

situation and inability to send remittances, about 170,000 immigrant women workers have left

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[51] "Lebanon- Domestic Policy."

[52] "Lebanon Sinking into One of the Most Severe Global Crises Episodes, amidst Deliberate Inaction," World Bank, World Bank, June 1, 2021, https://www.worldbank.org/en/news/press-release/2021/05/01/lebanon-sinking-into-one-of-the-most-severe-global-crises-episodes.

[53] Icart, "The UN's Sustainable Development Goals 5 and 8 in Lebanon," 24.

[54] Zeina Mezher, "Impact of COVID-19 on migrant workers in Lebanon and what employers can do about it," *International Labour Organization* (2020): 1.

Lebanon in the last two years.[55] By December 2019, 1,000 Filipino migrant workers also registered for their free repatriation program.[56] As Amnesty reports, hundreds of Ethiopian MDWs in 2020 were also dropped off by their employers to the streets without any aid. Hence, they gathered at the side of the Ethiopian Consulate for a couple of months to attempt to get urgent assistance concerning repatriation, as many of their kafeels had not given them their wages or passports. During the summer of 2020, the new Ethiopian consul allowed displaced women to reside temporarily in the Embassy's shelter, but it is uncertain what happened to these Ethiopian MDWs after this period.[57] There has never been a mass displacement of MDWs like this in the history of Lebanon. For MDWs who are unable to leave, many are choosing to end their lives, causing the suicide rate to climb since October 2019, although exact data remains limited.[58] Thus, the implication of combining the institutional decline of the Lebanese economy and individual kafeels' decisions with MDWs' gender and racial status is that MDWs cannot earn enough wages to survive or send remittances, so they are often forced to emigrate.

COVID-19 as a pandemic and the government and kafeels' response to it dramatically increased the economic and health biopolitical exploitation of MDWs in Lebanon, with many justifications drawing from racial bases. An international assessment of MDWs in Lebanon found that nearly 80 percent of kafeels stopped paying their MDWs during the financial/economic crisis of 2019, and one-third of those losses were reported during the

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[55] Olga, "On Systemic Racism In the Lebanon Society," 88.

[56] Aya Majzoub, "Life for Lebanon's migrant domestic workers worsens amid crisis: From bad to worse," Human Rights Watch, Human Rights Watch, March 6, 2020, https://www.hrw.org/news/2020/03/06/life-lebanons-migrant-domestic-workers-worsens-amid-crisis#:~:text=Hardly%20anyone%20in%20Lebanon%20has,marginalized%20prior%20to%20the%20crisis.

[57] Parisa Nasrabadi, "Removing the Cloak of Invisibility: The Case of Ethiopian Female Domestic Workers in Lebanon," *Unknown* (2020): 4.

[58] Puig-Ferriol, "The *Kafala* System: the case of Lebanon," 7.

COVID-19 pandemic. [59] The high rate of salary decline during the COVID-19 pandemic is substantial given that the economic crisis was severe prior to the pandemic and has continued to deteriorate after the pandemic climax. MDWs were also asked to leave their households, especially if MDWs got COVID-19, forcing them into homelessness or living in other overcrowded situations. [60] For example, one case was reported where 41 MDWs and their families were living in an apartment together in Beirut during the lockdown.[61] Some were also forced to leave because panic and fear of the COVID-19 virus also increased xenophobia with many referring once again to the racist stereotypes that MDWs are dirtier, believing they would be more likely to catch the virus.[62] Thus, MDWs were kicked out of their homes because kafeels believed they were more likely to transmit the virus. For the MDWs that did not have their contract terminated, the risk of contracting COVID-19 was exceptionally high because many MDWs oversee cleaning, caregiving for children and the elderly, and taking care of family members with COVID-19 or going outside to perform tasks.[63] Kafeels view MDW lives as less important to preserve from COVID, especially given that their jobs already revolved around caretaking. Thus, MDWs were forced to risk their lives daily to protect their employers from COVID-19, solidifying images that MDWs' worth is inferior to Lebanese citizens' worth because of their race or ethnicity and that they have less power over where they can live even in a pandemic.

With many MDWs already struggling with lack of privacy, workers were also often unable to leave their kafeels' homes, so many MDWs have experienced additional gender-based

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[59] Samantha M. Constant et al., "The Status of Women in Lebanon: Assessing Women's Access to Economic Opportunities, Human Capital Accumulation, and Agency," *World Bank and UN Women* (2022): 40.
[60] Aoun, "COVID-19 Impact on Female Migrant Domestic Workers," 3.
[61] Icart, "The UN's Sustainable Development Goals 5 and 8 in Lebanon," 21.
[62] Mezher, "Impact of COVID-19 on migrant workers in Lebanon," 1.
[63] Ghaddar et al., Ghaddar, Ali, Sanaa Khandaqji, and Jinane Ghattas. "Justifying abuse of women migrant domestic workers in Lebanon: the opinion of recruitment agencies." *Gaceta sanitaria* 34 (2021): 6.

violence (GBV) or have had to isolate themselves with their abusers, putting them in dire mental and physical situations.[64] For example, the Gender-Based Violent Information Management System recorded a 3 percent increase of intimate partner violence by current or former partners, a 5 percent increase of physical assault incidents, and a 9 percent increase of incidents occurring in a survivor's home.[65] In total, in 2022, two-thirds of female MDWs in Lebanon reported being survivors of some form of sexual harassment or sexual assault, with most assaults being from their employers.[66] The Law 293 in Lebanon criminalizing GBV also does not cover MDWs at all.[67] Therefore, the COVID-19 pandemic worsened biopolitical violence against MDWs because it increased the incidence of GBV due to the lack of privacy of MDWs and the authority of kafeels without institutional support for MDWs in cases of abuse.

On top of not protecting MDWs against GBV, the Lebanese government has actively imposed biopolitical damage on MDWs by contributing to the abysmal health outcomes of MDWs during COVID-19. The Lebanese government could not maintain the lockdown throughout the pandemic because of the fear that poverty and famine would continue to get worse.[68] In 2020, the Lebanese government enacted new laws restricting the ability of MDWs to get tested, so MDWs were denied access to PCR (polymerase chain reaction) tests, vaccines, and hospitals despite displaying symptoms of COVID-19, resulting in many deaths of MDWs from COVID-19 who did not have access to healthcare even though this right was guaranteed in the Standard Unified Contract.[69] The implicit logic of the Lebanese government, as well as the

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[64] Aoun, "COVID-19 Impact on Female Migrant Domestic Workers," 3.
[65] Constant et al., "The Status of Women in Lebanon," 12.
[66] Etenesh Abera and Zecharias Zelalem, "'Two thirds' of female migrant workers in Lebanon survivors of sexual harassment," Middle East Eye, Middle East Eye, October 17, 2022, https://www.middleeasteye.net/news/lebanon-two-thirds-migrant-worker-women-survivors-sexual-harassment.
[67] Constant et al., "The Status of Women in Lebanon," 68.
[68] Puig-Ferriol, "The *Kafala* System: the case of Lebanon," 32.
[69] Ibid, 33.

kafeels who consolidated the health degradation of MDWs, is that the lives of MDWs mattered less than that of the Lebanese. Due to their race, work status, and nationality, it was presumed that MDWs did not deserve the medical resources to survive the pandemic.

The August 4th explosion exemplified that despite its status and responsibilities as a national government, the Lebanese state failed its citizens and MDWs through their neglect, further exacerbating the economic and human rights situations of MDWs. See Figure 2 below for the International Organization for Migration's rates of the total impact of the Beirut explosion on MDWs.

	Total Impact of the Beirut explosion	MDW Impact
# of Deaths	>200	15
# of Injured	>6,500	150
# of Homeless	>300,000	>24,000

Figure 2: Total Impact of the Beirut Explosion and Impact on MDWs; Source: Puig-Ferriol, "The *Kafala* System: the case of Lebanon," 32.

Therefore, many of the deaths, injured, and homeless were MDWs. On top of these rates, many MDWs have been laid off by families hit by the explosion and/or been placed in safe houses without any furniture, access to food, drinking water, and communication facilities.[70] Throughout the explosion, both individual kafeels and institutions have wholly neglected MDWs to the point of their destitution. There were no government-led responses to help MDWs after the explosion. To make matters worse, after the explosion in the port of Beirut, Lebanese employers started hiring more Syrian women as domestic servants because their wages are lower than previous MDWs, they do not require housing, and there is no need to pay for a visa or work

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[70] Nasrabadi, "Removing the Cloak of Invisibility," 4.

permit, etc.[71] Hence, it is intriguing and heart-breaking that the government devalued MDWs

once they found a possible cheaper labor force, returning to an Arab source of labor as they had

in the decades before without helping MDWs. The impacts of the explosion continue to be

experienced today. Around the second anniversary of the explosion, the Northern section of the

grain silos damaged in the blast collapsed and brought down eight more siloes.[72] Currently, there

is no research or reports on additional damage, injuries, or murders from this event, and notably,

there is a total lack of research on the impact on MDWs.

Thus, the combined impact of the Lebanese economic crisis, COVID-19, and the Beirut

explosion have demonstrated the total subjugation of MDWs in Lebanon, as seen through their

deaths, injuries, homelessness, or exposure to increasing GBV. Moreover, because MDW

workers receive second-class treatment due to their lack of citizenship, ethnicity, and race, and

they could be disposed of for cheaper labor with Syrian refugees, they received little to no

protection from the brunt of the economic and physical atrocities facing the country and were

actively put in harm's way.

Conclusion

This article has indicated that the power relations impacting MDWs in Lebanon prior to

2019 were already highly exploitative and often exacerbated by gendered and racial stereotypes

on an individual and institutional level. However, after the economic crisis, the COVID-19

pandemic, and the August 4th explosion, the biopolitical discrimination affecting MDWs

worsened significantly, and the same basis of sexism and racism has been used to disregard their

human rights and health needs to the point of their severe poverty. Thus, the strengthening of the

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[71] Olga, "On Systemic Racism In the Lebanon Society," 87.
[72] "New Beirut port silo collapse brings back blast trauma," Al Jazeera, Al Jazeera, August 23, 2022, https://www.aljazeera.com/news/2022/8/23/new-silo-collapse-in-blast-ravaged-beirut-port.

gendered and racial hierarchy post-2019 and MDWs' consequent economic exploitation have resulted in many MDWs returning to their home countries as the economic decline on top of gendered and racial biopolitical violence has made it not worth it to stay in Lebanon.

Further research on this topic should more thoroughly examine the political economy of MDW freelancers, compare Lebanon and Jordan as smaller-scale kafala systems, and gather more comprehensive quantitative data, such as on the exact rates of remittance decline in Lebanon.

Alliance Dilemma: Decreasing State Compliance and Increasing Useable Scenarios

Alexia Fitz

Abstract: *Since the rapid development of nuclear weapons in the 1940s, many international laws have been put in place to combat the dangerous weapons. Many treaties created by the international community seek to limit the use, stockpiling, threat of use, production, and sharing of nuclear weapons: Including the Treaty of Non-Proliferation of Nuclear Weapons (NPT) and the Treaty on the Prohibition of Nuclear Weapons (TPNW). State compliance is crucial for international security regarding the success of nuclear treaties. Some assumed that because of the destructive nature of nuclear weapons, states are interested in ratifying and complying with treaties that work to eliminate these weapons. However, as time has progressed, states have been less willing to be a party to nuclear treaties as seen with the lack of state support for TPNW. Similarly, members of the international community fear that state compliance could decrease and lead to the possible use of nuclear weapons. This project asks, what is preventing progress on eliminating nuclear weapons? This research argues that the existence of an alliance dilemma interferes with state compliance related to nuclear treaties. Despite the fact that these treaties and alliances are established to increase state security, alliances actually increase the possible chances of nuclear warfare. This result occurs because nuclear alliances bring nuclear states and non-nuclear states together under one umbrella, meaning that these weapons could be engaged as a result of conflict between states that do not possess nuclear infrastructure themselves. This argument creates a new way of examining the success of nuclear treaties beyond simply looking at compliance by nuclear states.*

Keywords: *Nuclear Weapons, Proliferation, Alliances, State Compliance*

Introduction

Since the rapid development of weapons of mass destruction (WMDs), including chemical, biological, and nuclear weapons, in the 1940s, many international laws have been put in place to combat the dangerous weapons. The various treaties created by the international community seek to limit the use, stockpiling, threat of use, production, and sharing of weapons of mass destruction (WMD), including the Treaty of Non-Proliferation of Nuclear Weapons (NPT) and the Treaty on the Prohibition of Nuclear Weapons (TPNW). However, despite these treaties we have seen a growing threat of nuclear warfare both by the number of nuclear weapons and the number of states that have nuclear arsenals. For example, the NPT recognized only five

nuclear weapons states, but that number has since grown to nine. Furthermore, nuclear technology has only become more destructive.

State compliance is crucial for international security regarding weapons of mass destruction. It might be assumed that because of the destructive nature of WMDs, it would be of interest to states to ratify and comply with treaties that work to eliminate them. However, as time has gone on, states have been less willing to be a party to WMD treaties as seen with the lack of state support for TPNW. Similarly, there are fears that state compliance could decrease and lead to the possible use of nuclear weapons. So, what is preventing progress on eliminating WMDs? And why are states not as eager to comply with already established WMD treaties? I argue that there is an alliance dilemma that interferes with state compliance with WMD treaties. Alliances that are created to increase a state's security are actually increasing the usable scenarios of nuclear warfare. A realistic scenario of the use of nuclear weapons is spread with the formation of alliances between nuclear and non-nuclear states, which could lead to the threat of nuclear use between states that do not have nuclear weapons of their own. This argument creates a new way of examining the success of WMD treaties beyond just looking at nuclear states. Instead, it examines how international politics have led to the spread of desired nuclear security in a time of rising international tensions, without states needing to create new nuclear programs.

This paper seeks to explain the alliance dilemma examining current literature. Then the paper will describe both the uniqueness of nuclear politics and alliances to explain the development of the alliance dilemma to further explain how useable scenarios are increasing and preventing progress of established nuclear treaties. Finally, the paper will explain the desire of the current nuclear states to want to maintain their arsenals as it connects to the alliance dilemma.

Literature Review

Many scholars have attempted to understand the desire for nuclear security to explain the direct proliferation of states acquiring nuclear weapons. However, few scholars examine indirect proliferation, or the spread of nuclear capabilities through collective security alliances. This paper will attempt to understand the connection between indirect proliferation and increased useable scenarios of nuclear weapons by first examining the gaps and expanding the understanding of existing literature.

Mutually assured destruction (MAD) comes from the realist theory that "the outcome [of the use of nuclear weapons] would be so dreadful that both sides would be deterred from starting a nuclear war or even taking action that might lead to it".[1] Theorists then expand on MAD to claim that the more states that acquire nuclear weapons, the less likely states would be to use nuclear weapons because if one state were to use nuclear weapons, a nuclear response by other states would be almost certain, resulting in mass devastation to all. One major issue with MAD theory is that it relies on states being rational actors to consider that nuclear weapons come with great consequences to their own nation and in turn they reduce tensions and number of arms.[2] MAD theory also only considers the thoughts and actions of nuclear powers like the United States and Russia but fails to consider if nuclear weapons were to be used against non-nuclear states and how their nuclear alliances would respond.

Sagan and Waltz are two prominent scholars in the realm of international theory and nuclear weapons. Waltz is a prominent realist and believes that rational actors use nuclear

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[1] Robert Jervis, "Mutual Assured Destruction," *Foreign Policy*, no. 133 (2002), https://doi.org/10.2307/3183553.

[2] Glenn Buchan, "The Anti-MAD mythology," *Bulletin of the Atomic Scientists*, (1981), https://eds-p-ebscohost-com.proxy-tu.researchport.umd.edu/eds/detail/detail?vid=2&sid=c38141d3-0561-4043-b04b-86c49489b8a0%40redis&bdata=JnNpdGU9ZWRzLWxpdmUmc2NvcGU9c2l0ZQ%3d%3d#AN=24227145&db=asn.

arsenals to refrain from escalating conflict.[3] Much like MAD theory, this argument does not

account for non-nuclear states with deterrence agreements and their role in the decision to use

nuclear weapons, which this paper argues is crucial to understand in a world with rising tensions.

Sagan on the other hand more accurately debates that proliferation of nuclear weapons as a

source for increasing the likelihood of nuclear warfare because the more weapons there are, the

more likely there is to be either intentional or accidental use.[4] Sagan's argument is more

persuasive but overlooks the dangers indirect proliferation.

Many scholars tend to mitigate the risk of indirect proliferation as it relates to alliances

forming for increased deterrence efforts. Deterrence comes with two parts: Urging adversaries to

refrain from force, and also creating a means of retaliation to threat adversaries if they do not

comply.[5] In the case of nuclear weapons, agreements were utilized by states to optimize the

possible punishment for adversaries, therefore strengthening deterrence.[6] Scholars will make the

argument that nuclear deterrence works because nuclear weapons have not been used since

World War II and intrastate wars have been significantly reduced.[7] However, the threat of

nuclear warfare continues to rise even with the creation of deterrence agreements therefore it

cannot be assumed that these agreements completely eliminate the use of nuclear weapons.

Authors also claim that nuclear weapons "equalize the power of states" because nuclear

power states have the capability of providing equal amounts of assured destruction towards each

other no matter the size of their arsenals. They fail to mention the power given to non-nuclear

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[3] Scott Sagan and Kenneth Waltz, *The Spread of Nuclear Weapons: A Debate.* 1st ed. W.W. Norton, 1995.
[4] Ibid.
[5] James Wood Forsyth Jr. et al, "Remembrance of Things Past: The Enduring Value of Nuclear Weapons," *Strategic Studies Quarterly 10,* no. 5 (2016) https://www.jstor.org/stable/26271624.
[6] Ibid.
[7] Ibid.

states that have access to nuclear deterrence through collective security agreements.[8] The authors

heavily rely on the use of adversaries like the U.S and Russia to explain their ideas of deterrence

and countering strategies but pay little attention to the influence that alliances have on these

deterrence strategies. For example, NATO allows for the US to further spread into nuclear

arsenals to states in Europe like Turkey, which provides strategic counterthreats to the Russian

homeland more so than what the US could do alone. The Russian government has even made

claims that it greatly threatened by the US being able to strategically maneuver its nuclear

weapons deeper into Eastern European states with the expansions of its alliance agreements. The

authors then conclude that having nuclear weapons is a great political tool for states therefore

they will continue to spread, and some states will actively seek nuclear weapons and others will

not.[9] But to fill in the gap, it should not be assumed that states that do not actively seek nuclear

weapons are not gaining the benefit of deterrence through other means like nuclear alliance

agreements.

Quantitative research is also an approach used to understand the question "Do Alliances

Really Deter?" Kenwick, Vasquez and Power's study finds that when comparing the pre and post

nuclear world, there is no evidence to suggest that the formation of deterrence alliances reduces

the likelihood of going to war with one's adversaries.[10] Therefore, this research can then be

understood in the context of nuclear deterrence to suggest that nuclear deterrence agreements

between states are not preventing the use of nuclear weapons and can be expanded to also argue

that it is even increasing the useable scenarios of nuclear weapons.

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[8] Ibid.
[9] Ibid.
[10] Michael R. Kenwick et al. "Do Alliances Really Deter?" *The Journal of Politics* 77, (2015), https://eds-s-ebscohost-com.proxy-tu.researchport.umd.edu/eds/detail/detail?vid=24&sid=2970277d-2ae9-4989-b776-4b7ad20b05f4%40redis&bdata
=JnNpdGU9ZWRzLWxpdmUmc2NvcGU9c2l0ZQ%3d%3d#AN=edsjsr.10.1086.681958&db=edsjsr.

Scholars like Neil Narang and Rupal Mehta find in their research that states under nuclear umbrellas are more likely to initiate crises with other states because they are emboldened by their alliance agreement. However, the authors claim that this more ideal than more states acquiring nuclear weapons, but they fail to mention the negative effects that these agreements can have on the security of the international community. Because their research shows that states under nuclear umbrellas tend to be more aggressive, this increases the chances of nuclear warfare, especially if they start a crisis with a nuclear or another non-nuclear state with a separate deterrence agreement.[11] Many other authors will suggest extending and strengthening deterrence is the best way to go for protecting the nuclear state's security, like in the United States.[12] But this paper continues to stress that the indirect proliferation through deterrence agreements and nuclear sharing will only signal further signs of aggression towards adversaries and have more likelihood of sparking the use of nuclear weapons, leading to further non-compliance of nuclear treaties.

Another element of this research is the term coined the "alliance dilemma" which is an expansion of the heavily researched concept of the "security dilemma." The security dilemma has two different approaches seen in both alliance and adversary politics. Through adversary politics approach states seek security by competing to match the military capacity of its adversaries and often leads to arms races, as seen during the Cold War. Alliance politics approach is when states seek or abstain from alliances in order to reach their desire of security. Snyder accurately portrays alliance security dilemma as having more severe consequences on

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[11] Neil Narang and Rupak Mehta, "The Unforeseen Consequences of Extended Deterrence: Moral Hazard in a Nuclear Client State," *The Journal of Conflict Resolution,* (2019), https://www.jstor.org/stable/48596926.

[12] Stephen Frühling and Andrew O'Neil, "Alliances and Nuclear Risk: Strengthening Extended Deterrence," *Survival,* (2022), https://eds.p.ebscohost.com/eds/detail/detail?vid=1&sid=43bfcc9f-15f1-4bbb-ba09-5708be8d7992%40redis&bdata=JnNpdGU9ZWRzLWxpdmUmc2NvcGU9c2l0ZQ%3d%3d#AN=155642774&db=mth.

states ability to counteract its adversaries because of the concern ally states will not follow

through with its commitments, including if states would actually use their nuclear weapons to

defend their allies.[13] In this paper, it expands on these two approaches of security dilemma to

create the "alliance dilemma" to explain specifically how states are competing to expand nuclear

deterrence alliances in order to compete with their adversaries, which in turn becomes a form of

indirect proliferation that increases the useable scenarios of nuclear weapons and limits the

ability for states to comply with nuclear treaties.

Nuclear Treaties

Treaty on the Non-Proliferation of Nuclear Weapons (NPT)

  The Treaty on the Non-Proliferation of Nuclear Weapons (NPT) is one of the first

influential treaties seeking to promote international security by preventing the spread of nuclear

weapons. This multilateral treaty was open for signatures on 1 July 1968 during a time of great

concern for the devastating effects of nuclear weapons in the mists of an arms race. NPT was

then entered into force on 5 March 1970 with an indefinite duration. NPT has three main

objectives: To prevent the proliferation of nuclear weapons by other states and non-state actors,

promoting disarmament of current nuclear holding states, and allowing all states to have access

to peaceful nuclear technology with regulated safeguards.[14] There are currently 190 state

signatories to NPT, including nuclear holding states like the United States, Russia, France, and

the United Kingdom. However, there are four states that are not signatories, North Korea, India,

Pakistan, and South Sudan, three of which have nuclear weapons but are not labeled as nuclear

weapons states under NPT due to the late creation of their nuclear programs. A provision in NPT

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[13] Glenn Snyder, "The Security Dilemma in Alliance Politics," *World Politics,* (1984)
https://www.jstor.org/stable/2010183.

[14] Nuclear Threat Initiative, "NPT," *Nuclear Threat Initiative,* (2021), https://www.nti.org/
education-center/treaties-and-regimes/treaty-on-the-non-proliferation-of-nuclear-weapons/.

defines a nuclear weapon state as a state that made and tested a nuclear weapon before 1 January 1967.[15]

One major limitation of NPT to note is that there is no verification process for the commitment of nuclear weapons states to disarm under NPT, which is a major goal of NPT.[16] This means that nuclear states have not been held accountable for compliance regarding working towards complete disarmament and they have been able to continue to maintain their arsenals without repercussions. NPT also does not have provisions addressing indirect proliferation (or the spread of nuclear weapons protection in deterrence agreements), which means nuclear sharing continues to progress without international supervision.

Treaty on the Prohibition of Nuclear Weapons (TPNW)

The Treaty on the Prohibition of Nuclear Weapons was open for signature on 20 September 2017 and was entered into force on 22 January 2021 for an indefinite duration. Currently only 56 states have ratified TPNW and 33 have signed but have not ratified the treaty. 101 states have neither signed nor ratified TPNW, including all nuclear states, such as the United States, Russia, and many of their allies that continue to benefit from nuclear security through deterrence agreements. One of the main reasons for the lack of state participation of TPNW is the strict international laws that it puts in place, which many states argue goes against state sovereignty. The main goal of TPNW is to completely outlaw the possession, testing, use, and transfer of nuclear weapons and creating a binding international law. Another aspect of TPNW is that it outlaws threatening the use of nuclear weapons as well.[17] With these provisions in place,

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[15] Ibid.
[16] Ibid.
[17] Nuclear Threat Initiative, "Treaty on the Prohibition of N Nuclear Weapons." *Nuclear Threat Initiative*, (2021), https://www.nti.org/education-center/treaties-and-regimes/treaty-on-the-prohibition-of-nuclear-weapons/.

the adoption of TPNW would rid of any power of both nuclear and non-nuclear states in deterrence agreements and reduce collective security measures all together. Although this seems reasonable in order to eliminate nuclear weapons, states are not signing on and are actually expanding their collective security agreements.

Nuclear Politics

These treaties are the best way to demonstrate the uniqueness of nuclear politics. The stakes for state compliance on nuclear treaties are extremely high because of the devastating effects that nuclear warfare causes, as seen after the bombings of Hiroshima and Nagasaki by the United States military to end World War II. Although this is the only example of the use of nuclear weapons during conflict, nuclear technology has continued to develop, becoming more powerful and spreading in both the number of nuclear states and number of weapons within a state's arsenal. A single act of non-compliance to a nuclear treaty could lead to an all-out nuclear war, therefore the international community relies on the legitimacy of these various treaties to provide security.

The international system of global governance is set up in such a way that it can create institutions to establish laws and monitor compliance, while also respecting individual state sovereignty. In theory, states each make their own decisions to sign and comply with treaties based on their own self-interests, although these interests can change if the security of a state is threatened. In the case of nuclear treaties, the security of a state is at risk if it fails to ratify or comply with the provisions. Ratifying nuclear treaties, like any international laws, is thought to be successfully implemented when states incorporate the treaty's provisions into their domestic legal system. This legal grounding holds both the government and the people within the state accountable for upholding international legal standards related to nuclear weapons.

Another important aspect of state compliance with nuclear treaties is that states are often obligated to report progress in implementing different aspects of the treaties, including nuclear states reporting the number of weapons in their arsenals or any possible nuclear meltdowns. Compliance is often ensured through mandated reporting of important events like disarmament, weapons testing, and other aspects that might go against a treaty's obligations.[18] However, the international community must trust that states are being fully transparent with the reports they are given. It has become harder for states to hide the creation of new nuclear weapons programs with improved technology, like satellite imagining but it is not impossible; a state could claim that it does not intend to have a nuclear program but be in secret communications to acquire the materials needed to begin the process.

Reporting compliance on WMD treaties can build trust amongst states and encourage other states to comply as well, but mistrust emerges when one state finds that other states are actually not complying with the treaty like they said they were, especially for WMD treaties because they already center around high-tension topics.[19] For example, Russia could report that it is reducing its nuclear arsenal, but other states like France or the United States might not trust Russia because of its reputation as a non-compliant authoritarian state but still believe that Russia is a committed party to the treaty. If a state does not comply by giving false reports, others can often discover these falsehoods through intelligence like satellite detection or other safeguard systems like inspections of sites that report the use of certain weapons. For example, if a state tests a nuclear weapon even in an underground test site, this action can be picked up by

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[18] Treasa Dunworth, "Compliance and Enforcement in WMD-Related Treaties," *United Nations Institute for Disarmament Research,* 1-21, https://unidir.org/sites/default/files/2020-02/compliance-wmd-treaties.pdf.

[19] Ibid.

the international monitoring system sites, established in the Comprehensive Test Ban Treaty, and reported to the international community.[20]

Another way to ensure compliance with WMD treaties, especially nuclear treaties, is when states provide assistance and support to help other states comply with the treaty's obligations. This assistance can come in the form of training officials to monitor for WMDs, helping to eliminate existing stockpiles, response training for possible WMD attacks, or even helping to draft domestic laws. These changes are beneficial not only for developing states that might not have the resources to implement treaties on their own, but for developed states that want to ensure proper implementation of treaties.[21] Providing assistance to ensure that a treaty's obligations are met is not a requirement of any international treaty, including NPT. States can request assistance but even with assistance a state is still not guaranteeing that they will comply when signing most international laws.[22]

Compliance is like a ripple effect. If one state sees that another state is not complying with a certain nuclear treaty, then it might stop complying as well because it might feel threatened if it sees another state building up its nuclear arsenal. Other treaties prevent the spread of weapons of nuclear weapon technology and if a state were to not comply, then nuclear weapons could fall into the hands of rogue non-state actors. The issues with states not complying with nuclear treaties is endless because of the large number of casualties, environmental damage, and overall security threats that arise with the use of nuclear weapons. Therefore, it is important to examine why nuclear weapon states continue to want to maintain their arsenals.

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[20] Ibid.
[21] Ibid.
[22] Ibid.

Alliances

Nuclear states create and maintain nuclear arsenals for increased national security and to be able to better challenge its adversaries. These factors are also what lead states to form alliances. States have been forming alliances for thousands of years in order to mutually benefit from a formal agreement of support in times of peace and war. As time has gone on power balances change and alliances fall apart or shift, but one thing remains the same, alliances remain a key factor in international relations. Alliances come in many different forms, bilateral, such as agreements between two states like France and Germany, and also multilateral, which includes mutual support agreements between multiple states regionally or internationally, such as the North Atlantic Treaty Organization (NATO). The type of support offered by an alliance treaty can also differ depending on the type of alliance or agreement including trade, human rights, and war. Alliances are particularly important during wartime as they benefit national defense with support from other states.[23] However, some argue that alliances are the cause for war in the first place. The formation of alliances leads then to the formation of counter alliances, creating greater international tensions that if provoked could start the outbreak of international wars. For example, the entangling alliances in World War I was one of the major causes to the spread of the Great War after countries continued to join the conflict to support their alliances.[24] The Great War was not the first time that alliances led to war and nor was it the last, as it was followed by a Second World War.

Leading world powers are often dragged into conflict as domestic public opinion influences the state to support its allies in times of conflict. Alliances then continue to expand the

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[23] Claudette Roulo, "Alliance vs. Partnerships," United States Department of Defense, March 22, 2019, https://www.defense.gov/News/Feature-Stories/story/Article/1684641/alliances-vs-partnerships/.

[24] Norwich University Online, "Six Causes of World War I," Norwich University Online, August 1st, 2017, https://online.norwich.edu/academic-programs/resources/six-causes-of-world-war-i.

overall scope of war by increasing the number of states participating, expanding the geographical

positioning, and increasing the likelihood of conflict escalation.[25] International tensions

revolving around alliances continue to be at the forefront of news and media with multilateral

deterrence alliances such as NATO. There are two very important types of military alliances that

need to be considered. First, permanent alliances have been created between states in times of

war and peace like alliances between France and Germany, which have had a long-term military

alliance but also diplomatic and economic. NATO is a permanent military alliance, which

includes nuclear weapons holding states. The second type of military alliance is an ad-hoc

alliance, which is formed to work against a specific aggressor state.[26] If the US was willing to

back Ukraine with troops (beyond supplying weapons), then that would be an ad-hoc military

alliance with nuclear capability. Permanent alliances have become more common over the past

century, whereas before alliances were more ad hoc, forming because of war. Roughly 80

percent of alliances involving great power states formed following wars involving powerful

states, meaning that states form alliances for defensive purposes due to fear of war.[27]

Nuclear Alliances

Nuclear Deterrence Agreements

Nuclear deterrence has continued to spread within alliances since the Second World War,

which ended with the devastating usage of nuclear weapons. Nuclear deterrence is created

around alliances, where more powerful, nuclear holding states, provide protection to their allies

through means of military defense in the form of nuclear retaliation. For example, the United

States is estimated to have around 30 ally states under its nuclear umbrella, mainly in the regions

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[25] Jack S. Levy, "Alliance Formation and War Behavior: An Analysis of the Great Powers,
1495-1975," *The Journal of Conflict Resolution* 25, no. 4 (1981): 581-613, https://www.jstor.org/stable/173911.
[26] Ibid.
[27] Ibid.

of Europe and the Asian-Pacific.[28] The United States handles its various nuclear deterrence agreements differently. In Europe nuclear deterrence is covered under NATO, a multilateral agreement between the various participating states, whereas in the Asian-Pacific the United States has bilateral agreements with individual states, such as Australia and Japan.[29]

In many cases nuclear deterrence benefits the nuclear holding state rather than the states seeking protection. This result occurs because nuclear deterrence gives nuclear states, rather than non-nuclear states, control over potentially dangerous international relations situations, like war outcomes, and creates a power identity for nuclear states that affects other aspects of international relations. Nuclear deterrence might benefit nuclear states more, however the promise for military alliance is enough for states to continue to make nuclear deals with states, like the United States, that might even go against their own domestic opinions of nuclear weapons. For example, Germany and Japan are both emergent international actors over the past several decades with power in the international community. However, both states domestically do not support nuclear weapons and are outspoken about non-proliferation efforts,[30] yet they both have nuclear deterrence agreements with the United States, proving the seriousness of nuclear threats and the importance of alliances.[31] Additionally, nuclear alliances often lead to the creation of counter alliances, which expands nuclear deterrence agreements. For example, during the Cold War the Soviet Union formed the Warsaw Pact with seven of its satellite states as a

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[28] Michael Rühle, "Non-Nuclear Allies and Declaratory Policy: The NATO Experience," *Alliances, Nuclear Weapons and Escalation: Managing Deterrence in the 21st Century 1,* (2021), 163-176, https://www.jstor.org/stable/j.ctv25m8dp0.

[29] Ibid.

[30] Nuclear Threat Initiative, "Japan Nuclear Overview," *Nuclear Threat Initiative,* (2018), https://www.nti.org/analysis/articles/japan-nuclear/.

[31] Brad Roberts, "Germany and NATO's Nuclear Deterrent," *Federal Academy for Security Policy*, (2021), https://www.baks.bund.de/en/working-papers/2021/germany-and-natos-nuclear-deterrent.

response to the creation of NATO, which increased the threat of nuclear attacks because the

Soviets were protecting additional states under their nuclear umbrella.

The North Atlantic Treaty Organization

The North Atlantic Treaty Organization (NATO) is a multilateral, permanent military and

political alliance formed in 1949 following the end of the Cold War. NATO is currently made up

of thirty states, including the United States and other European states. Many of the current

member states joined the military alliance following the end of the Cold War. Most recently

states like Sweden and Finland, who are seeking international protection due to heightened

tensions in the region, have actively sought NATO membership. On 4 April 2023, Finland was

granted permission to become a NATO ally adding another state on the list of nuclear endorsers

and taking part in indirect proliferation.[32] The cornerstone of NATO activities falls under Article

5 of its treaty, the idea of a collective defense that has the ability to perform military operations

and prepare mutual defensive efforts to combat threats, including potential nuclear attacks.[33]

NATO's nuclear strategy developed as a joint defense against the Soviet Union in order to

protect democratic states in Europe and has continued into today.[34] NATO is made up of three

nuclear states, the United States, France, and the United Kingdom, which equips them with

nuclear weapon capability in the case of significant threats to any of its member states. In other

words, a non-nuclear state like Spain falls under the protective nuclear umbrella of its fellow

NATO member states, which could be used in a scenario where Spain is threatened or attacked.

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[32] North Atlantic Treaty Organization, "Finland Joins NATO as 31st Ally," *North Atlantic Treaty Organization,* https://www.nato.int/cps/en/natohq/news_213448.htm#:~:text=Finland%20became%20NATO%27s%20newest%20 member,at%20NATO%20Headquarters%20in%20Brussels.
[33] North Atlantic Treaty Organization, "What is NATO?" *North Atlantic Treaty Organization,* https://www.nato.int/nato-welcome/index.html.
[34] Beatrice Heuser, "The Development of NATO's Nuclear Strategy," *Contemporary European History* 4, no. 1, (1995):37-66, https://www.jstor.org/stable/20081541 .

Collective Security Treaty Organization

The Collective Security Treaty Organization (CSTO) is another example of a multilateral, permanent military alliance formed in 1992 after the collapse of the Soviet Union and the Warsaw Pact. This military alliance is led by Russia and includes five post-Soviet states, Belarus, Armenia, Kazakhstan, Kyrgyzstan, and Tajikistan. CSTO addresses various international issues with collective defense efforts, including drug trafficking, terrorism, cyber-attacks, humanitarian emergencies, and international militaristic threats.[35] Collective defense by the CSTO is similar to NATO with combined military training exercises and shared weapon immobilization, which is mainly supported by Russian resources. The CSTO states are supported in their alliance with the promise of a joint military mobilization in the case a war breaks out. The CSTO's military efforts emphasize the potential of conflict with NATO, including the possible use of nuclear weapons, which are the center of both organizations mutual defense initiatives. The legitimacy of CSTO is contested by its Western counter alliance, NATO. However, CSTO has been recognized by the United Nations and has signed various agreements.[36] Information is limited on the extent to which CSTO would use nuclear weapons in defense efforts because the organization does not explicitly state that nuclear deterrence is a part of the agreement, but it is suggested based on current examples of nuclear sharing. It is also important to note that all CSTO states are members to the Treaty on the Non-Proliferation of Nuclear Weapons and claim to be fully compliant. However, just recently President Vladimir Putin announced a new policy to deploy Russian nuclear weapons to Belarus, which could lead

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[35] Richard Weitz, "Assessing the Collective Security Treaty Organization: Capabilities and Vulnerabilities," *Strategic Studies Institute,* (2018), https://www.jstor.org/stable/resrep20082.
[36] Ibid.

to the expansion of nuclear sharing within CSTO and increasing tensions with neighboring

NATO.[37]

Nuclear Sharing

Nuclear sharing is another form of military alliances which allows states to station their

nuclear weapons on another states' territory through an arranged agreement. This type of nuclear

alliance often comes with a nuclear deterrence of its own, meaning that if a state allows another

state to put nuclear weapons on its territory, in exchange the host state will also receive

additional security measures and protection in case of conflict. NATO is the only military

alliance that maintains a nuclear sharing program. Although NATO comprises three nuclear

weapons states, the United States is the only country to place its nuclear weapons holdings

throughout Europe. Currently, five states host US nuclear weapons, including Turkey, Germany,

Belgium, Netherlands, and Italy, each estimated to have 10-50 warheads.[38] There are no

international nuclear treaties that prevent the spread of nuclear sharing programs, meaning that

there is a potential for other nuclear states, like Russia, to station their arsenals in various regions

of the world, as a means of intimidation or a strategic military positioning for an offensive attack.

Alliance Dilemma and Increased Useable Scenarios

Non-nuclear states, a part of nuclear alliances, through nuclear sharing and deterrence

agreements have become known as nuclear endorsers. There are approximately 35 nuclear

endorsing states including NATO states, CSTO states, and states that take part in bilateral

agreements, Australia, South Korea, and Japan. These nuclear endorsers support the continued

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[37] Nikolai N. Sokov, "Russia is Deploying Nuclear Weapons in Belarus. NATO Shouldn't take the Bait," Bulletin of the Atomic Scientists, https://thebulletin.org/2023/04/russia-is-deploying-nuclear-weapons-in-belarus-nato-shouldnt-take-the-bait/.

[38] The International Campaign to Abolish Nuclear Weapons, "The World's Nuclear Weapons," The International Campaign to Abolish Nuclear Weapons, 2021, https://www.icanw.org/nuclear_arsenals.

possession of nuclear weapons because they are promised protection in the form of nuclear weapons used on their behalf.[39] This endorsement goes as far as not taking part in various international nuclear treaties like TPNW, which would completely prohibit the possession of nuclear weapons. Nuclear endorsing states, even though they do not have their own nuclear arsenals, are preventing the progress of these nuclear treaties because they want to maintain the security they gain from their various alliances.

Strategic military alliances like that of nuclear deterrence and nuclear sharing, although created for increased security, are negatively affecting non-proliferation efforts by increasing the useable scenario of nuclear weapons. A useable scenario of nuclear weapons is spread with the formation of alliances between nuclear and non-nuclear states. These alliances create a means of nuclear intimidation between states that do not have their own nuclear weapons but instead are under a nuclear umbrella. For example, Germany is a non-nuclear state who is allies with the United States, a nuclear power, and Belarus is allies with Russia. If Germany and Belarus (two non-nuclear states) were to go to war a usable scenario of nuclear weapons is created. Although, nuclear warfare would not likely be the first line of defense for either state, both states have strong alliances with powerful nuclear countries who have agreed to offer security. Additionally, both Russia and the US do not have no-first-use policies, meaning that they would potentially use nuclear attacks in response to any credible threat to their ally. However, if Niger and Chad were to go to war, a useable scenario is highly unlikely because they do not have nuclear backings through any alliance agreement.

An alliance dilemma is a unique way of examining nuclear politics because the international community has an increased threat of usable scenarios of nuclear weapons, not only

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[39] Ibid.

by conflicts between nuclear states but now non-nuclear states as well. This is a new way of

looking at the success of NPT, which would traditionally be seen as successful because it has

played a major role in managing nuclear proliferation with only nine out of nearly 200 countries

having nuclear weapons. Many scholars also acknowledge the success of NPT to address the

diversity in states who have and are seeking nuclear weapons programs yet do not acknowledge

non-nuclear states that have nuclear deterrence agreements.[40] When NPT is examined while also

considering an alliance dilemma it demonstrates that proliferation is continuing not by number of

nuclear states but by increasing usable scenarios. The NPT in a sense fails to recognize the

indirect threat of proliferation through nuclear deterrence agreements and instead only focuses on

direct proliferation of states through sharing of nuclear technology and monitoring compliance

with IAEA safeguards.[41]

Alternatively, realism theorists will argue for further proliferation through mutually

assured destruction because of the idea that nuclear deterrence creates a more secure

international community through the idea of mutually assured destruction. Realists suggest the

spread of nuclear weapons programs, which goes against the goals of nuclear treaties like NPT

and TPNW, claiming that a state would be more hesitant to use their nuclear weapons if it were

almost guaranteed they would be attacked in return, which increases with more states who have

their own nuclear weapon programs. This theory gained popularity during the Cold War even

though it goes against common logic, claiming that the more destructive weapons in the world

the safer the international community would be because states are balancing each other's military

capabilities. Nuclear deterrence theory also relies on states having similar self-interests, which is

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[40] Spurgeon M Keeny Jr., "The NPT: A Global Success Story," *Arms Control Today* 25, no. 2, (1995):3-7, https://www.jstor.org/stable/23625647
[41] Ibid.

not the case for most of the states that maintain nuclear arsenals and does not account for rogue

state actors who threaten nuclear responses as offensive tactics.[42] Nuclear deterrence theory is

seen on a small scale between India and Pakistan, who both acquire nuclear weapons for the sole

purpose of ensuring their security from one another. However, nuclear deterrence theory is

limited in addressing alternative methods of deterrence for states that do not have nuclear

weapons but gain protections through alliances.[43] When acknowledging the alliance dilemma,

the idea of mutually assured destruction is expanded to include the possibility of usable scenarios

occurring even without a state having its own nuclear program.

Recognized Nuclear Weapon States

Recognized nuclear weapon states are key factors in the alliance dilemma as they are the

actors that spread deterrence to non-nuclear states. This is especially significant for nuclear states

that are recognized by NPT because although they internationally recognize the significance at

preventing the increased number of nuclear weapon states, they are then taking part in the

indirect spread of these weapons. The United States for example began its nuclear weapons

program in order to give the US a military advantage over its enemies brought on by the security

dilemma.[44] The dilemma then escalated with Russia during the height of the Cold War when the

US was estimated to have around 31,000 nuclear warheads.[45] Since the end of the Cold War the

United States has greatly reduced its nuclear arsenal to roughly 5,550 warheads making it still

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[42] Alexander George and Richard Smoke, "Deterrence Theory Revised. By Robert Jervis," *Deterrence in American Foreign Policy: Theory and Practice,* Robert Jervis. *World Politics* 31, no. 2 (1979): 289-324, https://www.jstor.org/stable/2009945 .
[43] Ibid.
[44] Atomic Heritage Foundation, "The Manhattan Project," Atomic Heritage Foundation, May 12, 2017, https://www.atomicheritage.org/history/manhattan-project.
[45] Comprehensive Nuclear-Test-Ban Treaty Organization, "Nuclear Testing 1945-Today," Comprehensive Nuclear-Test-Ban Treaty Organization, https://www.ctbto.org/nuclear-testing/history-of-nuclear-testing/nuclear-testing-1945-today/.

the second largest in the world.[46] Nowadays the United States justifies its remaining nuclear

arsenal by claiming it offers nuclear and non-nuclear deterrence purposes, both for its own state

and its allies in Europe and the Indo-Pacific. It also claims that its nuclear capabilities help to

maintain its alliances, meet US objectives in the failure of deterrence efforts, and provide

protection from an unforeseen future in the international realm.[47] It is also important to note that

the United States takes a part in nuclear sharing, although the weapons remain fully under US

control. The scope of the United States deterrence agreements has become a major foreign policy

objective as they work towards expanding and redefining the agreements. This means it is very

unlikely to see the US and its nuclear alliances consider being members of TPNW anytime soon

as it continues to reinforce the alliance dilemma.

The United Kingdom is another NATO member and takes pride in its independent

nuclear deterrent program and the protection it provides to its own territories and its NATO

allies. The UK government claims that it was taken many steps towards nuclear disarmament,

however not all states have, therefore it must maintain its nuclear arsenal to prevent potential

aggression. The UK specifically calls out Russia and China increasing their nuclear arsenals to

compete with the UK and its NATO allies.[48] The UK has found itself in both a security and

alliance dilemma, which keeps it from fully disarming and also becoming a member of TPNW.

France shares similar dilemma concerns as it is also an active member in the NATO

nuclear alliance. It is important to note that France operates a "final warning" policy in regard to

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[46] The International Campaign to Abolish Nuclear Weapons, "The World's Nuclear Weapons." .

[47] Heritage, "U.S. Nuclear Weapons Capability," Heritage, October 18, 2022, https://www.heritage.org/military-strength/assessment-us-military-power/us-nuclear-weapons-capability.

[48] Ministry of Defence, "The UK's Nuclear Deterrent: What You Need to Know," Ministry of Defence, March 16, 2023, https://www.gov.uk/government/publications/uk-nuclear-deterrence-factsheet/uk-nuclear-deterrence-what-you-need-to-know.

its nuclear weapons meaning that it will use a nuclear attack first to protect its interests.[49] France

is also currently the only nuclear weapons state a part of the European Union, since the UKs

withdraw in 2020, therefore France is working to have discussions on the role of France's

nuclear umbrella over its European partners.[50] This move by France is particularly concerning in

the fact that it will further expand its nuclear deterrence threatening the legitimacy of NPT and

further prevent the efforts of TPNW.

Russia has also been involved in the security dilemma regarding its nuclear weapons,

mainly with the United States and its NATO allies. Russia also reinforces the alliance dilemma

as demonstrated once the Cold War had ended and the Soviet Union was dismantled, all Soviet

nuclear weapons were removed from Soviet satellite states and given to the Russian procession

in exchange for nuclear protection and transitioning to an alliance dilemma scenario against

Western powers. Today, Russia holds the largest stockpile of nuclear weapons with roughly

6,255 nuclear warheads in its arsenal.[51]

China is another state that maintains its nuclear weapons arsenal in order to compete with

its Western adversaries. It has become clear in recent years that China is working to quickly

expand its nuclear arsenal. The US State Department estimates that China is developing nuclear

weapons at a rate that would lead to 700 nuclear weapons by 2027 and 1000 nuclear weapons by

2030.[52] China is greatly motivated to expand and maintain its nuclear arsenal, which could

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[49] Center for Arms Control and Non-Proliferation, "Fact Sheet: France's Nuclear Inventory,"
Center for Arms Control and Non-Proliferation, March 27, 2020, https://armscontrolcenter.org/fact-sheet-frances-nuclear-arsenal/.
[50] Ibid.
[51] The International Campaign to Abolish Nuclear Weapons, "The World's Nuclear Weapons."
[52] Shannon Bugos, "Pentagon Sees Faster Chinese Nuclear Expansion," Arms Control Association, December 2021, https://www.armscontrol.org/act/2021-12/news/pentagon-sees-faster-chinese-nuclear-expansion.

potentially lead to the creation of its own nuclear deterrence agreements in order to compete with

United States military dominance in the Pacific and continue the alliance dilemma.

Other Current Nuclear Weapon States

India, China, Israel, and North Korea are all outliers in the international community for

being states that created nuclear weapons programs following the creation of NPT. Although

none of these states are currently a part of nuclear alliances, many of these states gained nuclear

weapons programs with technology given to them by allies or because they believed they did not

have enough security from their alliances. For example, North Korea received support from the

Soviet Union to help it to build a peaceful nuclear energy program and had even signed the NPT

in 1985 to continue to receive Soviet aid. However, after failed agreements with the United

States over nuclear concerns North Korea withdrew from NPT in 2003 and expanded its nuclear

initiative to include nuclear weapons.[53] Another example, Pakistan, in which China was a major

contributor to its nuclear knowledge as well as supplying equipment to aid them in building their

nuclear program. After Pakistan established their own nuclear program, it had some part in

illegally transferring nuclear technology to Iran and North Korea. Pakistan claims that its nuclear

program is to have a nuclear deterrent solely against India and does not seek to expand its

deterrence through any agreements.[54]

India can be used as an example of how exclusionary deterrence agreements because it

felt pressure to start a nuclear weapons program of its own to create a nuclear deterrence because

it was not given any support by the two largest nuclear powers at the time, the US and USSR

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[53] Council on Foreign Relations, "What to Know About Sanctions on North Korea," Council on Foreign Relations, July 27,2022, https://www.cfr.org/backgrounder/north-korea-sanctions-un-nuclear-weapons.
[54] Nuclear Threat Initiative, "Pakistan Nuclear Overview," Nuclear Threat Initiative, November 5, 2019, https://www.nti.org/analysis/articles/pakistan-nuclear/

because their interests were focused on Europe.[55] Nowadays Continued tensions between India

and its neighbors, China and Pakistan, encourages India to maintain its arsenal of around 156

nuclear weapons.[56] Finally, Israel is unique because it began its nuclear weapons program due to

constant conflict with its neighboring Arab states and lack of alliances with nuclear states has led

to the Israelis desire to assert its position in the Middle East as a powerful state.[57]

Conclusion

Compliance with nuclear treaties is crucial t to maintaining international peace and

preventing the spread of nuclear weapons. International treaties have been established to work

towards the elimination of these dangerous weapons. However, there is an alliance dilemma that

is hindering the establishment of nuclear weapons becoming an international taboo, which could

eventually lead to non-compliance with already established nuclear treaties. This alliance

dilemma puts non-nuclear states under a nuclear umbrella, which increases the likelihood of

useable scenarios of nuclear weapons even better states that do not have nuclear weapons of their

own. As demonstrated above one of the main reasons that states are maintaining their nuclear

weapons arsenals is to both compete with their adversaries and support their allies. Just like

nuclear states have their own individual security reasoning for having their arsenals, this

mentality has spread to their allies as well. Non-nuclear states a part of alliance agreements is

benefiting from the non-elimination of nuclear weapons. Nuclear alliances continue to form or

expand in order for non-nuclear states to be protected, but in reality, it is increasing the

possibility of the usage of nuclear weapons. For example, since the Russian invasion of Ukraine

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[55] Atomic Heritage Foundation, "Indian Nuclear Program," Atomic Heritage Foundation, August 23, 2018, https://www.atomicheritage.org/history/indian-nuclear-program.
[56] The International Campaign to Abolish Nuclear Weapons, "The World's Nuclear Weapons." s
[57] Nuclear Threat Initiative, "Israel Nuclear Overview," Nuclear Threat Initiative, May 14, 2014, https://www.nti.org/analysis/articles/israel-nuclear/.

in February 2022, Finland and Sweden have applied to be covered under NATO's nuclear

umbrella, which is simultaneously increasing the number of nuclear endorser states and possible

usable scenarios. Alliances allow non-nuclear states to not feel vulnerable during times of rising

regional/international tensions because of the security it gains from its ally's nuclear weapons.

There are additional problems surrounding the alliance dilemma involving nuclear

weapons. For example, if a state does not feel confident that its ally will defend them, it might be

motivated to develop its own nuclear program, complicating compliance with established nuclear

treaties like NPT and TPNW. This is demonstrated in a survey that shows 71 percent of the

South Korean population supports developing their own nuclear weapons program. Although the

South Korean government claims it will not develop nuclear weapons, their citizens fear the

increased threat by North Korea and the lack of trust that the United States will defend them as

stated in their deterrence agreement.[58]

The world is currently facing many threats that lead to the question, is the usage of

nuclear weapons becoming a part of reality in the near future? Whether someone is examining

rogue nuclear powers like North Korea and Russia, to what extend would the United States use

its nuclear weapons to defend itself or its allies, or the threat of China's rapid increase in nuclear

technology? One thing is clear, alliance agreements are increasing the possibility of useable

scenarios for nuclear weapons and preventing further progress by nuclear proliferation treaties.

The international policies must be strengthened to not only prevent the spread of weapons by

nuclear states but to also prevent proliferation through means of mutual defense initiatives for

non-nuclear states. As a recommendation, the international community should reevaluate the

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[58] Mitch Shin, "Nearly Three-Quarters of South Koreans Support Nuclear Weapons
Disarmament," The Diplomat, February 22, 2022, https://thediplomat.com/2022/02/nearly-three-quarters-of-south-koreans-support-nuclear-weapons-development/.

success of current nuclear treaties by monitoring indirect proliferation and consider provisions that eliminate direct threats of deterrence agreements like nuclear sharing. A universal no-first-use agreement could also help to reduce the threat of nuclear warfare if states only agree to deploy weapons if they are attacked first.