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Alliance politics in the post-2011 Middle East: Advancing theoretical and empirical perspectives

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ABSTRACT

Alliances in the post-2011 Middle East are characterized by anomalous shifts and upsurge of new actors leading to theoretical and empirical puzzles. This article argues that unravelling these patterns requires grappling with in-depth knowledge of regional politics and a serious engagement with the broader IR literature. Through this dual exploration, the article explores how the literature on alliance cohesion within IR could inform anomalous alliance dynamics in the post-2011 regional order. It also reveals how regional developments in the post-2011 Middle East, such as the pursuit of alliance by non-state actors, present avenues for theoretical innovations.

KEYWORDS Alliance; IR of the Middle East; IR theory; alliance cohesion; non-state actors

Introduction

A decade after the 2011 Arab Uprisings, the Middle East has faced the outbreak of new types of violent conflicts, the emergence of novel forms of regional rivalry, and the rise of new actors. The Uprisings and their aftermath not only challenged the resilience of authoritarian regimes but had momentous effects on international relations in the region. In particular, the post-2011 Middle East witnessed multiple changes in the dynamics of alliance politics thereby challenging established theories of international relations in intriguing ways (Gause, 2017; Ryan, 2012). One notable element of current regional dynamics is the cohesion of some alliances as opposed to the weakness of others in the post-2011 Middle East. While the Iran-Syria-Hezbollah axis endured and gained new dynamics during the Syria crisis, Hamas' drift from and then return to this axis presents challenges to conventional theories on alliances as the original driver of Hamas' decision to join the axis has not faded (i.e. threat from Israel). Rifts within the Gulf Cooperation Council (UAE and Saudi Arabia isolating Qatar 2017–2020) and the subsequent reconciliation present scholars with fascinating questions on alliance cohesion. Another intriguing element in the post-2011 alliances is the rise of

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armed non-state actors not only as proxies to regional powers but as autonomous, significant players pursuing independent agendas through allying with states and other non-state actors (Moghadam & Wyss, 2020). These developments lend scholars to question whether theories of alliances, once designed to explain state behaviour, can inform the alliance decisions of these new actors. How do we make sense of these unprecedented patterns of alliance politics in the post-2011 Middle East? Unravelling these patterns requires grappling with in-depth knowledge of regional politics and a serious engagement with the broader theoretical field. In other words, explaining these patterns requires engaging in what Halliday (2009, p. 2) calls a 'dual interaction', where the theoretical endeavour 'is not just a matter of seeing if a particular theory can explain and conceptually order the politics, and international relations, of a specific country or region, but also of seeing how far this specific case, be it a state, event or region, itself challenges the theory'.

The aim of this article is not to offer a single theory or approach for the study of alliances in the post-2011 regional order. This article argues that patterns of alliances in the post-2011 make an interesting case not only for thinking through the international relations of the region but also for developing theories about alliances beyond the Middle East to explain a wider array of cases. This article argues through concrete examples that a dual interaction between cases of alliances in the post-2011 Middle East and the alliance research programme within IR could advance scholarly understanding of both. On the one hand, engaging with IR theories provides analytical tools for a better understanding of the crucial dynamics of alliance politics in the post-2011 Middle East and can contribute to 'de-exceptionalizing' what may initially seem to be uniquely Middle Eastern. The article focuses on the crucial dynamics of alliance cohesion in the region and shows an enhanced understanding of the patterns of alliances in the post-2011 through an engagement with the literature on alliance cohesion within the alliance research programme. I use the example of Hamas' decision to drift away from the Syria-Iran-Hezbollah axis to show how cases, often considered to be uniquely Middle Eastern, could be studied within the broader framework of alliances, and I show that situating Hamas within IR frameworks of alliance politics can enlighten this case.

On the other hand, I argue that the post-2011 alliances highlight gaps within the alliance literature and present avenues for theoretical innovations within the alliance research programme. The upsurge of armed non-state actors pursuing local, regional and international alliances unravels one of the major limitations in the alliance literature, that is the question of actorness, and whether alliance behaviour varies with different types of actors. I use the case of Syrian Kurds and their network of alliances in the context of the Syria crisis to reveal the question of actorness in IR. While Kurdish questions are

predominantly studied from an area studies perspective, the article shows that integrating these cases in a broader dynamics of non-state actors and alliance politics can expand the alliance research programme beyond its state centric perspective.

The article is structured as follows. First, I present a critical review of the alliance research programme within IR theory and its cross-fertilization with Middle East Studies in examining pre-2011 alliances in the Middle East. Despite the centrality of the Middle East as a case study in the development of the alliance research programme, the post-2011 uprisings have hardly prompted theoretical innovations in the study of alliances in the region or in the IR discipline. Second, I show how patterns of alliances in the post-2011 can be better understood through a serious engagement with IR theories, and I illustrate this strategy by focusing on the question of alliance cohesion. Third, I examine how crucial empirical developments in the post-2011 Middle East present areas of theoretical innovations and avenues for future research within the alliance research beyond the Middle East. Drawing on the case of Syrian Kurds, I show how alliance politics pursued by armed non-state actors present unprecedent avenues for theory development with the alliance research programme. Finally, the conclusion offers some reflections on the ethics of conducting desk research in the study of alliances in the post-2011 Middle East.

I. The area study controversy and IR theories: The study of alliances in the pre-2011 Middle East

Middle East scholars have consistently warned against what they perceived a significant intellectual gulf that divided International Relations (IR) theory and the study of international relations of the Middle East (IRME). Revealing a lack of cross-fertilization between IR theories and region-focused analyses, a number of scholars have highlighted the necessity to move beyond the 'Area Studies Controversy' (ASC) in favour of a dialogue between IR theory and Middle East Studies (Gause, 1999; Gerges, 1991; Tessler et al., 1999; Teti, 2007; Valbjørn, 2003). The ASC refers to a tension between Area Studies and Social Science discipline-oriented scholars about how to study different regions of the world. The ASC evolved as a tradition of debating and contesting whether the Middle East and its international relations is a region 'like no other' or 'like any other' (Valbjørn, 2004); whether regional dynamics can best be studied through the lens of general IR theories, or IR theories with their Western origins are not suited to examine the region, and finally to what extent can the Middle East contribute to theory development in International Relations (the introductory article to this Special Issue offers a detailed engagement with the ASC). A review of the scholarship suggests that in the last two decades a different direction is being taken, as IR and the ME are

increasingly engaged in serious interchanges, which manifested in publications of sophisticated analyses and studies that combine IR theories with rich empirical analyses. Despite this engagement, dialogue between IR and IRME remains unidirectional, where the interchange has been limited to theory application and adaptation, and the Middle East has hardly contributed to 'universal' theories that travel beyond regional confines. One of the few exceptions to this unidirectional engagement is the alliance research programme, where both Middle East and IR scholars have engaged in fruitful and serious dialogues. The study of alliances has arguably been the only area where the Middle East has visibility within the IR field and has contributed to theory development beyond the region.

Many IR scholars interested in developing 'universal' theories found an appeal in the complexity of alliances in the Middle East. The region often constituted a least-likely case study to test allegedly universal theories of alliances – if it applies in the region, then it applies elsewhere (Haas, 2012; Walt, 1987). Other scholars also used alliances in the Middle East to develop novel theories that travel beyond the region (Barnett, 1996, 1998). These endeavours have enabled a critical dialogue between IR scholars and area specialists, and Middle East scholars found a middle ground by offering modified theoretical frameworks for the study of alliances that contextualize mainstream IR approaches without discounting the 'particular' characteristics of the Middle East (Allinson, 2016; Brand, 1994a; Darwich, 2019; David, 1991a; Harknett & VanDenBerg, 1997; Priess, 1996; Rubin, 2014; Ryan, 2009; Salloukh, 2004). The widespread disagreement among proponents of various theoretical approaches has lent the study of alliances to various perspectives within IR scholarship: realist theories; theories rooted in ideational factors and social constructivism; and theories rooted in political economy and the domestic material bases for alliances. Furthermore, Middle East scholars also suggested frameworks and revisions to contextualize these theories to regional particularities.

With the prevalence of (neo-)realism in IR theory, generations of scholars examined alliance politics as the result of power asymmetries (Mearsheimer, 2001; Waltz, 1979). Walt (1987) argues that power asymmetries are not sufficient to explain alliance dynamics. Walt's balance-of-threat theory advances threat – not power – and its perception as the primary driver behind alliance formation, which explains why states do not always balance the predominant power. Having developed his theory based on European alliances, Walt (1987, p. 13) found the Middle East to be 'a strong test of many familiar hypotheses' and argues that 'the Middle East provides a large number of cases for consideration and is likely to reveal more about the factors that determine alliance choices than would examination of a less turbulent region'.

Walt's study has placed the Middle East at the heart of the debate on alliance politics within IR. A second perspective emerged focusing on non-material factors in shaping threat perception and alliances. Barnett (1998) challenges Walt's neorealist account of alliances from a constructivist approach, examining the role of ideas, identities, and socially constructed norms to understand alliance politics in the Middle East and international relations more broadly. Barnett (1998, p. 401) argues that 'it is the politics of identity rather than the logic of anarchy that often provides a better understanding of which states are viewed as a potential or immediate threat to the state security'. Other scholars have looked at threats as function of ideologies, defined as 'the specific, often idiosyncratic, political principles and goals that leaders both value most highly and use to legitimate their claim to rule' (Haas, 2012, pp. 3–4). Haas (2012) explains how ideological similarity can be a source of alignment whereas ideological difference can be a source of conflict. Haas' theory was initially developed based on the case of alliances in Europe in the 1930s (Haas, 2003) and great power dynamics in the post-Cold War era (Haas, 2014). The Middle East, a region bursting with ideological factions viewing one another as opposing especially since the end of the Cold War, provided an ideal test for Haas' argument. Rubin (2014) also presents an analysis of how political ideologies can threaten states and determine their alliance choices. He examines threat perceptions and policies of two Arab, Muslim majority states – Egypt and Saudi Arabia – in response to the Islamic Revolution in Iran (1979) and the establishment of the Islamic state in Sudan (1989). He argues that transnational ideologies can present greater threats than shifts in the military balance of power. As a response to these threats, states engage in 'ideational balancing', that is a non-military response involving resource mobilization and counter-framing (Rubin, 2014, pp. 37–39).

The third group of alternative explanations is that of scholars versed in studies of the Global South, who consider the domestic level to be central when explaining alliance politics. They claim that state-society relations and regime security are at the forefront of any foreign policy decision (Ayoob, 1984, 1995; David, 1991b, 1991a; Dawisha, 1983; Korany et al., 1993). The Middle East also constituted a rich empirical pool for scholars developing alliance theories on how domestic political concerns and economic capabilities determine alliance choices (Barnett & Levy, 1991; Brand, 1994a, 1994b; Harknett & VanDenBerg, 1997). Therefore, Middle East scholars often relied on 'regime security' as the primary lens through which one can include individual, domestic, and regional levels of analysis (Ryan, 2009).

The fourth cluster includes scholars who contextualize IR approaches to the study of alliances in the Middle East through eclectic frameworks combining elements from realism, constructivism, and domestic politics. Most relevant is Gause's (2003) presentation of a framework combining neorealist elements underlined by Walt (1987), the regime security approach of David

(1991a), and the importance of transnational identities highlighted by Barnett (1996) to explain alliance decisions in the Gulf. Gause argues that Arab states overwhelmingly perceived ideational threats – which emanated from abroad and targeted the domestic stability of Arab ruling regimes – as more salient than material threats. Allinson (2016) devises a political economy framework situated within a historical sociology perspective to examine Jordanian alliance politics during the Arab Cold War period (1950s-60s). Alliance choices, he argues, are not the province of a single leader, but rather emerge from domestic political struggles and dynamics of state formation. Moreover, Ryan (2009, 2014) relies on the concept of regime security to bridge several perspectives, namely realism, political economy and constructivism, to show how alliance politics are at the intersection of individual, domestic, and international dynamics. Darwich (2016, 2019) provides an eclectic framework combining elements of realism and ontological security to show how ideational and material factors, operating at multiple levels of analysis, shape threat perceptions and alliance choices in the Middle East.

Despite this 'dual interaction' within the alliance research programme, one would have expected the post-2011 uprisings to stir further exchanges between IR and ME scholars to reflect on (1) how the existing theoretical tools can enlighten recent developments in Middle East alliances, and (2) how the post-2011 uprisings challenges theories of alliances. Yet, post-2011 regional developments have hardly generated any debates between regional specialists and IR scholars (Valbjørn, 2017). Despite being the richest in enabling a fertile dialogue in the past, the study of alliances has also fallen behind. A review of the studies of alliances in the post-2011 regional order shows rich empirical analyses on several aspects of alliance politics in the region, such as the endurance of regional coalitions, namely the so-called moderate versus resistance axis (Guzansky & Winter, 2015; Khoury, 2013; Mohns & Bank, 2012), international and regional coalitions surrounding the Syria crisis (Harrison, 2018; Phillips, 2016; Ryan, 2012), the collapse and shift of some alliances in the region, such as the Sudan-Saudi alliance, divisions within the Gulf Cooperation Council (GCC), and Hamas' drift from and return to the so-called resistance axis, an alignment of Iran, Syria, and Hezbollah, that challenges Israeli power and defies the alliance of conservative (so-called moderate axis) Arab states of Saudi Arabia, Jordan and Egypt (Abu Amer, 2019; Koss, 2018; Milton-Edwards, 2013; Nuruzzaman, 2017; Shay, 2017). Despite the empirical richness of these analyses, they examine current dynamics through historical analogies and have drawn on theoretical assumptions from IR only implicitly, with a few notable exceptions (Gause, 2017; Ryan, 2019).

II. Explaining the puzzle of alliance cohesion in the Middle East: The case of Hamas

In the post-2011 decade, international relations in the Middle East were outturned by domestic instability, civil wars, insurgencies, and military interventions. These events have shaken the system of regional alliances as states have tried to adjust to drastic changes in their regional environment. While 'fluid and shifting' patterns of informal alliances have been one of the enduring features of regional politics (Ryan, 2019), the outbreak of wars and conflicts in the post-2011 Middle East has brought the question of alliance cohesion during war and peace times at the forefront of regional politics. Cohesion dynamics are particularly evident in the case of the Iran-Syria-Hezbollah-Hamas axis, which proved to be an enduring alliance during the pre-2011 period. While the alliance between Iran, Syria and Hezbollah increased in cohesion to support the regime in Syria, Hamas broke ranks with the resistance axis in 2012 (Mohns & Bank, 2012, pp. 31–32). The Gulf Cooperation Council (GCC), another enduring alliance since the early 1980s, also imploded over regional wars, namely Syria and Libya, manifesting in the Qatar crisis (Bianco & Stansfield, 2018). This section explores how the theoretical toolkit within the alliance research programme unravels and explains the patterns of alliances in the post-2011 Middle East. I illustrate this potential with a particular focus on the case of Hamas.

While dilemmas of alliance formation in the Middle East were central in the alliance literature, scholarship on alliance cohesion in the Middle East is surprisingly limited – either pre- or post-2011. This is does not mean that the phenomenon is irrelevant. On the contrary, shifts in alliances may have culminating consequences for the regional system. States pursue alliances to preserve themselves in the face of threats and/or increase their power. How alliances perform once formed may alter some of the enduring features of regional politics; alliances shape interactions among states for a long period, can make the region more or less conducive to conflict, and can even alter the identity politics of some members. The dynamics of alliance cohesion are as important as the objectives they are designed to pursue. This section will use the example of Hamas' alliance shift in 2012 away from the resistance axis to show how engaging with existing debates within the alliance literature can bring novel understanding to some empirical puzzles in the post-2011 regional order.

Although the broader alliance literature in IR has expanded significantly to explain the origins of alliances and dilemmas of their formation, less attention has been devoted to the phenomenon of alliance cohesion, which denotes 'the very essence of how alliances perform' (Weitsman, 2004, p. 24). While some alliances persist in the face of external and internal strains, even after their original rationale had faded, others dissolve, and its members

stray in different directions. Few works within the alliance literature examine this question, provide varying definitions of the phenomenon, and advance discrepant explanations based on neorealist, liberal, and neoclassical realist approaches (Weitsman, 2003; Resnick, 2013; Walt, 1997).

Alliance cohesion is often presented as allies' capacity to effectively carry out the alliance's goals. Walt (1997) indicates that this is often connected to alliance duration. Weitsman (2003; 2004), offering the most comprehensive studies on alliance cohesion, defines the phenomenon around allies' ability to effectively coordinate their strategies towards attaining their shared goals. Resnick (2013, p. 674) goes further by defining it 'as the extent to which the members of a military alliance resemble a unitary actor in their wartime or peacetime activities'. Alliances can be unreliable if the conditions alter; alliances formed during peacetime can dissolve once war breaks. When alliances are formed during peacetime, the outbreak of war often leads to several dynamics that can either lead to higher cohesion or collapse. The security dilemma often pervades alliance thinking before war begins. Allies are torn between two extreme outcomes; either be abandoned at moments of greatest insecurity or entrapped into an unwanted conflict (Lawson, 2011; Snyder, 1984, 1997). Even though the primary assumption of alliance formation around external threats posits that wartime will bring alliances together and increase cohesion, not all alliances operate in the same way.

While scholars agree that what brings allies together will affect the cohesion of the alliance, they provide contending theoretical explanations of alliance cohesion. Neorealist theory attributes variation in cohesion to systemic variables. Specifically, high cohesion manifests if (1) states face military defeat rather than victory, (2) the distribution among the allies is symmetrical and allies share equal burden, (3) states agree on the source of threat, and/or (4) the level of external threat to the alliance exceeds the level of intra-alliance threats (Weitsman, 2003, 2004). Liberal theory focuses on domestic regime type of allies as the primary determinant of alliance cohesion, hypothesizing that democratic states will be more likely to build cohesive wartime alliances than their autocratic counterparts. Other scholars presented syntheses of these approaches. Walt (1997) argues that alliances can endure due to the presence of a hegemonic leadership discouraging dissolution by offering material inducement or threatening punishment, the presence of a domestic group benefiting from the alliance and manipulating the domestic public opinion, the higher level of institutionalization and/or ideological solidarity and shared identities. He also argues that alliances can dissolve for several reasons, such as changing perceptions of threat, declining credibility and doubts about the efficacy of an existing alliance and/or domestic politics, including regime change, demographics, or ideological divisions. Resnick (2013) adopts a neoclassical realist approach to show why states sometimes follow neorealist predictions while others might diverge. His analysis shows

that when international systemic variables are pushing allies towards fragmentation and collapse, regime type will be salient in determining how allies behave especially during wartime. For example, during military defeat, allies might be tempted to withdraw and bandwagon with the winner. It will be easier for autocracies rather than democracies to cross this threshold and switch allies prior to the outbreak of war.

An engagement with this literature can inform some puzzling alliance decisions in the post-2011 Middle East. Dynamics of alliance cohesion are particularly salient in Hamas' decision to drift from the axis of resistance in 2012. The outbreak of the civil war in Syria in 2011 put Hamas in a difficult situation. Linked ideologically to the Syrian Muslim Brotherhood, embodying the image of a group based on popular revolt and struggle against oppression, but having been sponsored by the Damascus regime since the 1990s, the group ultimately cut ties with Damascus in 2012. At the beginning of the protests in Syria in March 2011, Khaled Mash'al, head of the Hamas Political Bureau based in Damascus, met with Bashar al-Assad and advised him to adopt political reforms in response to the uprisings in Syria. Hamas then adopted a wait-and-see approach during the first phase of the crisis. As violence erupted throughout the country, al-Assad requested a public announcement of Hamas' allegiance towards his regime. Hamas responded with a vague, ambiguous statement to please the regime without alienating the opposition, including the Syrian Muslim Brotherhood, and stressing that the issue is a strictly Syrian 'internal affair'. As Hamas made an effort to stay away from the conflict, both the Syrian regime and Iran put further pressure on Hamas to publicly announce its support of the Assad regime. The break from the axis of resistance was in February 2012, when Ismail Haniyeh, then prime minister of the Hamas government in Gaza, confirmed officially that the movement left Damascus. This decision also damaged Hamas' relations with Iran and Hezbollah, leading to a withdrawal of financial support from Iran. In the process, Hamas switched sides and allied with Egypt's then-Brotherhood government, Qatar, and Turkey (Napolitano, 2013).

Based on the assumption that alliances are driven by threats, the expectation is that the outbreak of war will lead to heightened cohesion. Nevertheless, realist scholars show that divergence over sources of threats can have a corrosive effect on alliance cohesion (Resnick, 2013). The outbreak of war can lead to different sources of threats as experienced by varying allies, which can lead to divisions. The resistance axis was formed and consolidated to face the external threats of Israel and US dominance in the region, and to counter the influence of their regional allies, namely Saudi Arabia, Egypt, and Jordan. While the outbreak of the Syrian civil war led to the cohesion of the alliance between Iran, Hezbollah, in support of the Assad regime, the case of Hamas shows that wars and threats do not necessarily lead to increased cohesion. In some cases, domestic conditions may trump systemic-level

analysis (Weitsman, 2003, 110; Barnett & Levy, 1991). While Hamas remains wary of Israel as the imminent source of threat and the fall of Assad could have a detrimental impact on balancing Israel, Hamas leaders feared an entrapment in the Syrian conflict which could be highly costly at the domestic level. Hamas, a resistance movement, siding with the oppressive regime of Bashar al-Assad would have costed Hamas a high price in legitimacy not only among Palestinians in Gaza and the West Bank but also among the diaspora and its supporters in the Arab world (Abu Amer, 2018b). Thousands of Palestinians were killed in Syria, and many more were detained in regime prisons. The Arab uprisings affected attitudes among Palestinians towards the Assad regime. A 2012 poll showed that 80% of Palestinians in the West Bank and Gaza were supporting the Syrian protesters (Palestinian Center for Policy and Survey Research, 2012). In short, Hamas' drift from the axis of resistance is best explained by a neoclassical realist reading, where systemic variables could have led to further cohesion but domestic considerations shaped Hamas decision in 2012 showing that alliance cohesion varies in peace and war times.

As the Syrian war developed, and especially due to the Russian military intervention in 2015, it became clear that Assad would survive, Hamas restored its relations with Iran and Hezbollah, as the main source of threat driving the alliance, i.e. Israel, still persists, but the domestic conditions – Palestinian attitudes towards the Arab uprisings – changed. In this regard, Mahmoud al-Zahar, member of the Hamas leadership in the Gaza Strip, stated: 'Hamas and Syria do not have to reach a point of pointing fingers and exchanging accusations about what happened in the past . . . . What we need today from both sides is coordination and cooperation to liberate their occupied territories from Israel' (Abu Amer, 2018a).

As dilemmas of cohesion in the case of Hamas can be unravelled with a neoclassical realist approach, a similar approach incorporating domestic factors can enlighten other empirical puzzles in the post-2011 Middle East. The GCC, another enduring alliance since the early 1980s, also imploded over regional wars, namely Syria and Libya, as disagreements increased over the most pressing source of external threat. The GCC responded to the existential threat of the uprisings with the 2012 Internal Security Pact, aiming at enhancing cross-border repression of domestic opposition across Gulf monarchies. Yom (2018, 2020), in a provocative analysis, shows how the rejection of Kuwait to ratify the pact and the Qatar crisis within the GCC, led to the failure of the pact, which eventually affected the cohesion of the alliance. Yom posits that the defection of Kuwait and Qatar from this alliance was related to the regime identity and role conception that both Qatar and Kuwait developed at domestic levels. In short, the post-Arab uprisings brought dilemmas of alliance cohesion to the forefront and questioned several issues related to how alliances perform under conditions of

peace and war. As I have shown in this section, a more systematic engagement with the cohesion literature within the alliance programme can capture important alliance dynamics from the post-2011 Middle East. The case of Hamas points to the crucial difference of peace and war contexts, thereby contributing to enriching scholarly understanding of the region.

III. The Middle East and theory development in alliance politics: The case of Syrian Kurds

Another intriguing element in the post-2011 alliances is the rise of armed non-state actors (ANSAs) not only as proxies to regional powers but as autonomous, significant players pursuing independent agendas through allying with states and other non-state actors. ANSAs alliance behaviour, in particular, poses various questions: do non-state actors engage in alliance politics similar to states? How do they choose their allies? Do they balance against threats? What are the determinants of their threat perceptions? This section shows how regional developments in the post-2011 Middle East can inform theory development and provide the ground for theoretical innovations within the alliance research programme. It argues that the rise of armed non-state actors (ANSAs) as significant regional players in the post-2011 Middle East challenges conventional conceptions actorness and present opportunities to develop the alliance research beyond its state-centric focus. I illustrate the potential contribution of ANSAs in the Middle East by examining the case of Syrian Kurds, an issue conventionally studied from an area studies perspective, to show the benefit of examining the case through the broader framework of alliance politics and the benefit to the study of alliances beyond the region.

While Middle Eastern international relations conventionally abound with examples of ANSAs pursuing distinct and autonomous foreign policy activities, ANSAs emerged as key players in the post-2011 order pursuing alliances at regional and international levels. The Kurds in Syria (especially after 2011), through the People's Protection Units (PYG) – the armed wing of the PYD (Partiya Yekîtiya Demokrat/Democratic Union Party) – maintained a successful foreign policy with other non-state actors and managed to secure assistance from regional and international powers, namely Russia, the United States, and European States (Moghadam & Wyss, 2020; Öğür & Baykal, 2018). Hamas is another ANSA who has relentlessly adopted a multifaceted foreign policy in navigating regional politics. Hezbollah, a group conventionally confined to Lebanese politics, has conducted an influential foreign policy in the region since 2011. Hezbollah has become a patron of other ANSAs in the region: conducting military operations in Iraq, training militias in Iraq, Syria, and Yemen, and launching a military intervention to save the Assad regime in Syria (Slim, 2014).

Armed non-state actors not only challenge state authority in the international system but also engage in state-like behaviour, and there is substantial evidence of armed non-state actors carrying out what looks like traditional foreign policy, including pursuing alliances at regional and international levels (Seurat, 2015; Walther et al., 2020). The foreign engagement of ANSAs beyond their territorial boundaries have been examined in the context of civil wars from several perspectives, including proxy warfare dynamics (Berman & Lake, 2019; Hughes, 2014; Moghadam & Wyss, 2020), insurgency, rebel groups (Varin & Abubakar, 2017), international interventions as negotiated processes between international actors and ANSAs (Arves et al., 2019; Bapat, 2007; Byman, 2007; Idler, 2012), and their diplomacy strategies alongside their war tactics (Coggins, 2015). With the multiplicity of proxy conflicts in the twenty-first century, especially in the Middle East, scholars increasingly examine ANSAs through the principal-agent lens, where states employ ANSAs as proxies in the form of 'conflict delegation' (Salehyan, 2011). An emerging literature is also looking at how some ANSAs outgrow their patrons and become patrons themselves for other ANSAs in international and regional conflicts (Moghadam & Wyss, 2020; Mumford, 2013; Phillips & Valbjørn, 2018).

Despite the exponential growth of literature on ANSAs and their role in world politics, the study of ANSAs' alliance decisions has been overlooked. The omission of questions related to actorness in the alliance research programme prompts dilemmas about whether different types of actors exhibit different alliance behaviour. Lemke, for example, demonstrates statistically that ANSAs' alliance behaviour is similar to states, and ANSAs are likely to ally to balance external threats (Lemke, 2008a). He also shows that power politics theories of war have explanatory power within the domain of non-state actors (Lemke, 2008b). Nonetheless, many IR scholars assume that different types of states (and actors) lead to different behaviour (Hinnebusch, 2015: 121–53; Salloukh, 2017; Alden & Aran, 2012, Chapter 5).

Theories about balancing and bandwagoning could not explain alliance choices by armed non-state actors convincingly, in part as they focus on how states respond to identified threats (either external or internal). Instead, alliances dynamics from the Middle East show that ANSAs are independent, autonomous actors pursuing multifaceted foreign policies, resulting in unexpected and odd alliance choices with both enemies and friends. Their alliance decisions are not necessarily driven by external and internal threats, but they often adopt hedging behaviour. Scholars often advance the concept of 'hedging' to capture the nuances of alignment when actors engage in a mix strategy, that involves taking middle positions, by improving relations with both enemies and friends without offsetting risks (Weitsman, 2004, p. 28). Hedging is used when actors cannot be fully convinced of the intentions of their allies and their interests will not fully align. The concept is often adopted by small powers emerging in the context of international relations of

the Asia-Pacific (Ciorciari & Haacke, 2019), but several examples from the Middle East – such as Syrian Kurds, Iraqi Kurds, and Hamas – show that armed non-state actors often use similar strategies and that different types of actors engage in different alliance behaviour. In a highly uncertain regional environment, non-state actors forge protective ties with regional and great powers and adopt mixed strategies to guard against the possibility of abandonment. While the concept of hedging remains an emerging concept in IR and is often confined to small states, cases of ANSAs from the Middle East show that extending the debate to actorness can drive innovation in the alliance research programme. The case of Syrian Kurds is particularly revelatory.

In the post-2011 regional order, Syrian Kurds became a prevailing actor in the Syria crisis and the focus of global actors in their Syria policy. The PYD (Partiya Yekîtiya Demokrat/Democratic Union Party) with its military wing the YPG (Yekîneyên Parastina Gel/Peoples Protection Units), the dominant political organization of Syrian Kurds, pursued a 'successful' and 'consistent' foreign policy maintaining a network of ties in a constantly changing conflict zone. While the PYD enjoys relations with Kurdish minorities in Iraq, Iran, and Turkey, it also built ties with non-Kurdish groups in Syria, such as the Free Syrian Army and radical-Islamist Al-Nusra Front. More importantly, it pursued alliances with international powers, including, Russia, the US, and European States (Öğür & Baykal, 2018). The primary objectives of the PYD/YPG are (1) to establish a 'democratic self-administration' over Kurdish and non-Kurdish communities that fell under their control and (2) gain control of the borders between Syria and Turkey. To navigate a complex regional environment, the PYD employed a mix of alliance strategies involving cooperative and confrontational elements with various local, regional, and extra-regional actors.

Syrian Kurds are particularly aware that international and regional supporters do not share the same agenda for the region, particularly their objective of establishing a self-autonomous Kurdish area. To navigate this uncertain environment, Syrian Kurds resorted to hedging to attract international military support while being constantly alert for possibilities of abandonment. Since 2014, the United States has provided military support to the YPG since the latter's military capacity and combat experience have been crucial for the US in their fight against ISIS (Wimmen, 2017). That said, the US has not supported the PYD's wider strategies, as one US official stated: 'We are equally clear that we don't see the future of Syria an autonomous Kurdish area or territory' (quoted in Öğür and Baykal, 2018: 66). Always wary of the US continued support to the Kurds in Syria, the PYD relied on other allies. They maintained equally conflict-free relations with Russia and secured its military and political support. Russia is similarly reluctant to support an autonomous Kurdish area in Syria, and its relations with Turkey have constituted a point of contention and a worry for the Kurds. The situation in 2019 shows the

hedging strategy at work. The Trump administration gave the green light to a Turkish intervention – Operation Peace Spring – compelling Kurdish forces to hand their weapons and withdraw, which was considered by Syrian Kurds as an abandonment (Borger, 2019). In response, the YPG came closer to Russia and the Assad regime and struck a deal to deter their long-lasting enemy, Turkey (Ayton, 2020).

Other non-state actors adopted similar hedging behaviour in navigating uncertain regional environment. Iraqi Kurds too knitted complex and often contradictory alliances at regional and international levels through a mix of confrontational and cooperative strategies with Iran, Syria, Turkey, Israel and the United States to achieve their political goal i.e., establish a Kurdish Iraqi state (Gunter, 1997, 2015). These cases reveal that the question of actorness in conducting alliances can have significant implications for key understandings of alliance politics. While the state-versus-non-state binary has led to the omission of non-state actors from the alliance research programme, cases from the Middle East show that an alternative conceptualization of actorness needs to be included in debates on alliance politics to transcend the static concept of the state. Understanding the alliance politics of armed non-state actors can contribute to theory development within the alliance programme by problematizing actorness and its impact on alliance choices. Furthermore, the post-2011 Middle East showed that states in the region often seek alliances with non-state actors to forgo the cost of being involved directly in regional conflicts (Salehyan, 2010; Salehyan et al., 2011). The post-2011 regional provide substantive evidence that states seek alliances with non-state actors, and these alliance yields benefits for states in the region, such as Hezbollah becoming a beneficial ally for Syria especially after 2011 (El-Hokayem, 2007; Saade, 2017; Slim, 2014). Future research can examine whether alliances between states and non-state actors involve similar/different dynamics than alliances between states. The Middle East with the increase in armed non-state actors in the post-2011 offers an unprecedented pool of alliances involving different types of actors that allow for theory development and testing on actorness and alliance politics.

Concluding reflections

Over the decades, the Middle East has thus offered a large number of cases, which IR scholars engaged with to test hypotheses and advance theoretical innovations about alliance politics. The 2011 Arab uprisings have certainly not turned the Middle East into a less turbulent region. As regimes adjusted to the seismic shifts caused by the uprisings, alliance commitments shifted, new actors emerged, and the regional structure transformed. Despite the centrality of the Middle East as a case study in the development of the alliance research programme, the post-2011 uprisings and the ensuing

complex alliance map have hardly prompted any scholarly reflections or theoretical innovation in the study of alliances in the region or beyond. Instead, the study of alliances in the post-2011 remained an empirical topic where scholars only engaged with IR theories in a limited way.

This article showed how a two-way dialogue between empirical puzzles and IR theories can inform the alliance research programme in the discipline of IR and lead to in-depth knowledge about regional affairs in the post-2011 Middle East. It argued that a serious engagement between IR and Middle East Studies will improve our grasp of alliance politics in the post-2011 regional order while informing theory development within the broader discipline. On the one hand, it showed how dilemmas of alliance cohesion within IR could inform the seemingly puzzling and constantly shifting alliance dynamics in the region. Dilemmas of cohesion became particularly relevant to the Middle East as some alliance formed during peacetime shifted and changed in dynamics with the outbreak of civil wars. As this article showed, the case of Hamas is particularly revelatory, but also other cases, such as the GCC, invite further research and engagement with the IR literature on cohesion. On the other hand, the article showed how some cases from Middle East alliances, conventionally studied from an area studies perspective, present novel avenues of research and could lead to theory development and innovations within the alliance research programme and IR theory. The alliance politics of non-state actors present avenues for novel research on actorness in the alliance research programme.

The post-2011 Middle East not only provides opportunities for engagement between IR theory and Middle East Studies as an area study, but it also presents opportunities for reflections on how we study alliances. While the 2011 Arab uprisings did not significantly change the way scholars study alliance politics in the region, regional developments invite reflections on the ethics of these methods. The study of alliance politics in the Middle East has predominantly relied on small-*n* case studies involving 'process tracing' (George & Bennett, 2005, p. 6) where researchers rely on 'desk research' based on collecting data derived from archival documents, interview transcripts, historical narratives, and secondary sources, where researchers rarely have direct contact with participants. The study of alliances does not necessarily require extensive field research as in other fields. Therefore, 'desk research' on alliance politics, among other IR topics, in the region has been implicitly treated as ethically uncomplicated. Yet, conducting 'desk research' can poses ethical challenges (Green & Cohen, 2020).

First, qualitative data and empirical evidence are not waiting to be picked by the researchers. In the study of alliance politics, researchers engage process tracing to unpack the narratives surrounding the events, in an effort to disentangle the variables that influenced the choices made by the decision-makers from the narratives surrounding the consequences of the event

i.e., distinguishing cause from effect. In a highly politicized region, like the Middle East, the researcher often faces the challenges of navigating these narratives to present an impartial study. Authoritarian regimes in the region are often gatekeepers of narratives and information surrounding events and often control the media to prevent any competitive narratives from arising (as can be seen in the SI contributions on protests or repression). Some of the secondary data often reproduce some of these narratives in addition to other biases. The challenge remains for researchers to navigate these biases and politically charged narratives while conducting research impartially.

Second, researchers face further constraints in accessing data for research on alliances. Authoritarian rollback and the stronghold of some authoritarian regimes in the region reinforced coercion and fear, which have also been detrimental to 'desk research'. Researchers have less access to elite interviews, as participants are reluctant to engage with researchers out of fear of persecution. Furthermore, researchers are unable to forge new networks and contacts for them to be trusted by the participants. Restrictions on archival material have also been mounting (Carminati, 2019), and researchers have less (almost to none) access to archival documents in the region, which presents researchers with considerable challenges to conduct research on alliance politics in the region without availability of new data.

Despite those restrictions and challenges, the post-2011 Middle East presents some opportunities for research on alliances. The breakdown of several countries and defections from the authoritarian regimes provide opportunities for politicians to open up and speak about historical incidents and unravel some of the secretive aspects of past alliances in the region. Officials defecting from the Assad regime and fleeing Syria constitute an opportunity for researchers to gather first-hand data on decision-making processes of alliance politics (Al-Jazeera, 2012). More importantly, with the breakdown of some regimes and the downfall of some leaders, many historical events in the region's history are revisited and re-interpreted as their gatekeepers are no longer there, which provides opportunities for examining old alliances. In short, the post-2011 Middle East not only provides opportunities for further engagement between IR theory and Middle East Studies, but it also invites reflections on how we study alliances in the region and beyond.

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