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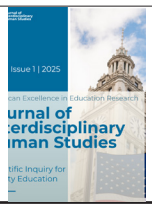

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THEORETICAL AND CONCEPTUAL FOUNDATIONS FOR STUDYING THE REFUGEE PROBLEM IN INTERNATIONAL RELATIONS

Abstract. *This scholarly article provides an in-depth analysis of the main theoretical and conceptual approaches to studying the refugee issue within the system of international relations. The article highlights the close interconnection between forced migration processes and global politics, security, state sovereignty, human rights, and international institutions. It also analyzes scholarly views on the refugee issue within the frameworks of realism, liberal institutionalism, constructivism, securitization, and normative-critical approaches, and reveals the place of this problem in contemporary world politics.*

Keywords: *refugee manipulation, constructivist approach, social burden, securitization, the right to have rights, limited generosity.*

INTRODUCTION

In the 20th and 21st centuries, the problem of refugees and forced migration has become one of the most urgent and complex issues in the system of international relations. Armed conflicts, domestic political instability, ethnic and religious tensions, as well as global economic inequalities, are forcing millions of people to leave their places of residence. As a result, the refugee issue has manifested not only as a humanitarian problem, but also as a political phenomenon that directly affects international security and world politics (Loescher, 2001).

Historically, the phenomenon of refugeeness has been closely connected with the formation of nation-states and the strict delineation of borders. As the institution of state

citizenship became more firmly established, the difference between the concepts of "citizen" and "stranger" sharpened, and this process increased the political significance of forced migration (Haddad, 2008). For this reason, a need emerged to study the refugee problem within the framework of international relations theories.

AIM AND OBJECTIVES

The aim of the article is to reveal the political and normative significance of the refugee problem in contemporary world politics by analyzing its theoretical and conceptual interpretations in the system of international relations. Based on this aim, the task was set to study, on a comparative basis, the views on the refugee issue within the frameworks of realism, liberal institutionalism, constructivism, and securitization.

METHODS

The article is based on qualitative methodology and employs a theoretical-analytical approach, the comparative method (between different theoretical schools), historical-conceptual analysis, content analysis of academic literature and scholarly debates, as well as systemic-logical methods.

RESULTS AND DISCUSSION

Analysis of the refugee problem within the framework of international relations theories shows that this phenomenon is a multifaceted and dynamic political process that cannot be explained by a single theoretical approach. Different theoretical schools interpret the refugee issue differently, and each highlights specific aspects of the problem. This section provides an in-depth analysis of the main views within realism, liberal institutionalism, and constructivism, as well as the scholarly debates between them.

1. Realism: refugees – a source of threat or a political consequence?

In realist theory, the refugee problem is, first of all, considered from the standpoint of state security, sovereignty, and the balance of power. For realist scholars, the main issue is not refugees' humanitarian needs, but their impact on state stability.

In his research, G. Loescher emphasizes that refugee flows often intensify regional instability. In his view, refugees are not only the result of conflicts; in some cases, they

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become a factor that contributes to their continuation. In particular, refugee camps can be used as logistical and mobilization bases for armed groups (Loescher, 2001).

This perspective is sharpened further by S. Stedman and F. Tanner. According to their concept of "refugee manipulation," cases in which refugees and refugee camps have been used as political and military resources by states and non-state armed actors are common. The authors argue that imagining refugees as an absolutely neutral humanitarian group is academically unfounded (Stedman & Tanner, 2003).

At the same time, Weiner and Zolberg, adopting an approach close to realism, note that refugee flows can heighten tensions in interstate relations, deepen border disputes, and negatively affect domestic political stability (Weiner, 1995; Zolberg et al., 1989).

However, this approach faces serious criticism. Hyndman argues that realist discourse, by interpreting refugees as a threat, overlooks their underlying causes – violence, state weakness, and human rights violations. According to Hyndman, refugees are not a source of threat but direct victims of a security crisis (Hyndman, 2000).

Relying on empirical research, Salehyan and Gleditsch show that refugees do not always "export" conflicts. They emphasize that the link between refugees and conflicts is conditional: it depends directly on the host state's policies, the mechanisms for managing camps, and the involvement of external actors (Salehyan & Gleditsch, 2006). At this point, a key scholarly debate emerges: are refugees viewed as a threat to security, or are they a consequence of insecurity?

2. Liberal institutionalism: international cooperation and the refugee regime

Liberal institutionalism interprets the refugee problem as a global issue that can be managed through international cooperation. In this approach, international institutions – especially the Office of the United Nations High Commissioner for Refugees (UNHCR) – and the 1951 Convention relating to the Status of Refugees occupy a central place.

Developing the liberal perspective, A. Betts argues that the international refugee regime has formed as a result of reciprocal interests and normative commitments among states. In his view, by protecting refugees, states not only fulfill a humanitarian duty but also contribute to ensuring long-term regional stability (Betts, 2009). Indeed, the model described by Betts highlights the significance of international legal mechanisms, yet it cannot fully deny the primacy of states' political interests.

Within the institutionalist approach, Keohane and Martin note that international institutions can strengthen mutual trust between states and help reduce the "collective

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action problem" associated with refugee issues. According to them, these institutions significantly increase the likelihood that states will choose a cooperative path rather than purely individual strategies (Keohane, 1984; Martin, 1992). This idea also helps explain that, in the absence of institutions, the refugee issue may take on a more unstable and disorderly character.

However, this viewpoint is not free from criticism. Haddad argues that, in practice, the international refugee regime serves more to preserve state sovereignty than to fully protect refugees. In Haddad's view, the refugee regime is oriented toward managing refugees as a "temporary problem" and does not pay sufficient attention to their political roots (Haddad, 2008).

Chimni, in turn, criticizes liberal institutionalism as an approach that legitimizes global inequalities. He argues that international institutions are not aimed at changing the economic and political structures that generate refugee flows; rather, they function as mechanisms that control these flows (Chimni, 1998).

Within this approach, the complex relationship between the practice of refugee protection carried out by international institutions and the normative reinforcement of state interests through humanitarian discourse constitutes a main direction of scholarly debates.

The above analysis shows that realism and liberal institutionalism illuminate the refugee problem from different perspectives. Realism highlights security and state interests, while liberal institutionalism explains cooperation and the role of international institutions.

However, neither approach fully captures refugees' social identification, moral condition, and normative status. Therefore, to gain a deeper understanding of the refugee problem, it is necessary to turn to constructivist and normative approaches. These issues are analyzed in detail in the following sections of the article.

3. Constructivism: identity, discourse, and othering

The constructivist approach explains the refugee problem in international relations not through material factors or institutional mechanisms, but through ideas, identities (self-understandings), norms, and discourses. Representatives of this theoretical school link the refugee issue to how, in the interstate system, "who is who" is defined and how the distinction between "us" and "them" is formed.

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For constructivists, the main question is: who is a refugee, and how does that person become politically "other"?

Haddad is one of the scholars who has analyzed the refugee problem within constructivism on a deep conceptual basis. In Haddad's view, refugees are not a natural or accidental phenomenon; they arise from a breakdown in the relationship between the state, territory, and citizenship (Haddad, 2008). According to Haddad, when nation-states strictly separate internal and external matters, individuals who remain outside their territory acquire a politically ambiguous status. It is precisely in this process that refugees, unlike ordinary citizens, become "subjects of exception" deprived of legal and political protection. This perspective contrasts with realism: whereas realists interpret refugees as a source of threat, Haddad explains them as a "disrupted" point (a sign) of the state-centered international system.

M. Barnett enriches the constructivist approach by incorporating an analysis of humanitarianism. He argues that refugees appear not only as victims, but also as a social category shaped in a particular way through international humanitarian discourse (Barnett, 2008). This approach shows that refugees' status is determined not naturally, but through international speech and practices, meaning that the political system defines who they are.

Humanitarian organizations and international institutions portray refugees as objects in need of protection. This, on the one hand, facilitates the provision of assistance, but on the other hand, shapes refugees not as political subjects but as a group to be managed.

Within this approach, constructivism takes a critical stance toward liberalism. If the liberal approach sees institutions as the solution to the problem, Barnett reveals how these institutions can covertly reinforce power relations.

According to constructivism, refugeeness is not limited to the process of territorial movement; it also includes profound changes in a person's social identity. In a new social setting, the refugee subject is often formed through discursive images such as "foreigner," "source of threat," or "social burden." These discourses serve to justify migration policies, security measures, and political decisions. In this respect, the constructivist approach intersects with securitization theory.

Huysmans and Weiner show how refugees can be "constructed" as a threat through security discourse. Constructivists interpret this process not as a natural phenomenon

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but as a product of political speech (Huysmans, 2006; Weiner, 1995). For this reason, in the refugee issue, a security-based approach may politicize and complicate the problem rather than solve it.

At the same time, constructivism is not free from criticism. Some realist and liberal scholars consider this approach overly abstract, arguing that constructivism relegates real political decisions and material conditions to a secondary place. Constructivists respond that it is precisely ideas and discourses that shape material policy: portraying refugees as "others" creates a basis for closing borders, camp-based policies, and legal restrictions.

The analysis above shows that constructivism reveals invisible but decisive aspects of the refugee problem. This approach makes it possible to explain identity issues that realism cannot account for, power and discourse relations that liberalism overlooks, and why refugees so often remain in a state of exception.

4. Securitization: how are refugees turned into a "threat"?

The securitization approach interprets the refugee problem not as a real threat, but as a phenomenon constructed as a "threat" through political discourse. This approach emerged within the Copenhagen School and focuses on security discourse, speech acts, and the mechanisms through which extraordinary measures are justified.

According to Buzan et al. and Weiner, when a given issue is presented as a security matter, it moves beyond the scope of ordinary political discussion and becomes a domain that justifies extraordinary measures. The refugee issue, through exactly such a process, has become a tool in many states for justifying border closures, camp-based containment, and legal restrictions (Buzan et al., 1998; Weiner, 1995).

Huysmans shows how refugees in European politics have been articulated as a threat to internal order and national identity. In his view, security discourse about refugees in practice serves to tighten migration policy (Huysmans, 2006). Thus, security discourse not only depicts a threat, but also reinforces the image of the "stranger" in society and narrows the possibilities for inclusive policy.

However, this approach is also criticized. Some liberal and critical scholars argue that securitization theory interprets the problem at the level of discourse and does not sufficiently explain material violence, economic inequality, and the root causes of forced displacement. Hyndman, in particular, shows that the practice of securitizing

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refugees further weakens them and leads to restrictions on human rights. According to Hyndman, refugees are not a source of threat but direct victims of security policy (Hyndman, 2000). Therefore, interpreting the refugee issue only through the prism of security pushes refugees' real needs and rights into the background and overlooks the structural roots of the problem.

5. Normative and critical approaches: moral responsibility and political exception

Normative and critical theories interpret the refugee problem as a moral crisis. In these approaches, it is not state interests but human dignity, rights, and justice that are central.

Hannah Arendt describes refugees as people deprived of the "right to have rights." In her view, the condition of being a refugee removes a person from political society and leaves them completely without legal guarantees (Arendt, 1951). This view sharply criticizes realism and liberalism, because these traditional approaches preserve the state as the primary subject.

Giorgio Agamben radicalizes Arendt's idea further, interpreting refugees as subjects living in a "state of exception." In his concept, refugee camps become a central institution of modern biopolitics (Agamben, 1998). Although Agamben's concept of the "state of exception" powerfully reveals refugees' legal vulnerability, it does not sufficiently account for practical political processes and refugees' active agency. As a result, refugees are portrayed as permanent victims, and their possibilities for resistance and adaptation are overlooked.

However, Chimni links the normative approach to global political economy. In his view, the refugee crisis is a product of structural inequalities in the international system, and humanitarian institutions often limit themselves to managing these inequalities rather than eliminating them (Chimni, 1998). Chimni's interpretation of the refugee crisis as a product of global political-economic inequalities reveals the structural roots of the problem. This approach shows that humanitarian aid itself can reproduce existing power relations and emphasizes the need to interpret the refugee issue as a political problem connected to unjust distribution in the international system.

Gibney discusses states' moral responsibility toward refugees and criticizes the concept of "limited generosity." According to him, if human rights are universal in

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character, assistance to refugees cannot be conditional (Gibney, 2004). Gibney's critique of "limited generosity" shows that limiting help to refugees by state interests is morally unjustifiable. This approach substantiates the need to place the universality of human rights at the center of political decision-making.

CONCLUSION

This study has shown that the place of the refugee problem in the international relations system is complex and systemic, and that it is a political phenomenon that is constantly reinterpreted. The results of the analysis indicate that forced migration processes cannot be explained within the framework of only one theoretical approach, because the refugee issue is shaped by the influence of interrelated factors such as security, sovereignty, human rights, identity, and global governance.

The realist approach interprets refugee flows primarily as a factor affecting state security and stability, focusing on the political consequences of this process. Liberal institutionalism considers the refugee problem as a global issue that can be managed through international cooperation and institutions, thereby highlighting the role of normative-legal mechanisms. The constructivist approach shows that refugees' political status is formed through ideas, identities, and discourses, explaining the process by which they are interpreted as "others."

Securitization theory explains how the refugee issue is turned into a security problem through political discourse and reveals how extraordinary measures and legal restrictions are legitimized. Normative and critical approaches emphasize the moral and legal consequences of these processes and encourage reconsidering the refugee issue on the basis of human dignity and standards of justice.

Overall, the results of the study show that refugees should be viewed not only as a passive group in need of humanitarian assistance, but also as an important factor that influences international political processes. Therefore, the most effective approach to analyzing the refugee problem is a multi-theoretical, critical, and integrative perspective. Only such a comprehensive approach makes it possible to deeply understand the political, social, and moral dimensions of the refugee issue simultaneously and lays the groundwork for developing balanced and sustainable political decisions to address this problem.

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