the MENARA **booklet** for Academia

Jordi **Quero** & Cristina **Sala** (Eds.)

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The *MENARA Booklets* are a series of publications, created under the MENARA Project framework, which provide insights on the Middle East and North Africa regional order. These Booklets translate scholarly-sounded research into helpful insights for practitioners, including humanitarian agencies; development agencies and NGOs; the private sector; and academia. In each of the four Booklets you may find a compendium of articles and extracts covering the most pressing issues for your field of expertise.

The *MENARA Booklet for Academia* provides you state-of-the-art and thoughtful analysis which may enrich your research and teaching on Middle East affairs. This Booklet is designed for teachers and students not devoted to Area Studies of the region but still interested in its reality and how this relates to their fields of expertise. It includes our researchers' main ideas on topics like the impact of the so-called Arab Spring in the region; ongoing changes for societies and political institutions; peace and conflict dynamics and their effects over economy; and the shifting role of foreign actors. All these, read together, would offer a comprehensive picture of the most critical elements to better understand what it is happening in the region since 2011.

Under the framework of the MENARA Project, fourteen research institutions have been carrying out fieldwork in the last three years to improve our understanding of the Middle East and North Africa amid a shifting context. It has studied the geopolitical order in the making, identified the driving forces behind it, shed light on bottom-up dynamics and assessed the implications of these processes on the EU and its policies towards the region. All in all, analysis and ideas from fact-finding missions, interviews, stakeholders meetings and focus groups come together to offer you a valuable outcome.

The extracts presented in this compilation have been modified and adapted by the editors. For the sake of accessibility, we have rid every bibliographic reference and footnote included in the original versions of the articles. For those interested in them, please check the full original versions at **www.menaraproject.eu**. Some other minor editing changes have been introduced to make the document fully coherent (such as changes in names and number of sections and subsections or the elimination of some graphs and infographics). We have tried to respect each author's contributions, trying to be as less intrusive as possible.

We hope that The *MENARA Booklet for Academia* is useful and enjoyable for you.

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Re-conceptualizing orders in the MENA region

EDUARD SOLER I LECHA, SILVIA COLOMBO, LORENZO KAMEL, & JORDI QUERO (EDS.)

MENARA Methodology and Concept Papers, No. 1.

WHAT IS A REGION? UNDERSTANDING A CHALLENGING NOTION

The definition of what a region is and what it is not, and who is part of a set region and who is not, is of paramount importance for a project such as MENARA that will be studying "regional dynamics," "regional orders," "regional powers" and "regional security complexes." There is no standard definition of what a region is. Yet, most authors refer to a set of states and territories bounded to each other through geographic proximity and some level of interdependence, interaction and commonality. The concept of region and the geographical limits of such are not given facts. From that perspective, regions are social constructions shaped by various political processes and both the meaning and the scope of a region can evolve over time. In that process, it is particularly relevant whether the governments and societies of those territories have a sense of belonging to a particular region and whether this corresponds to the dominant perception of other international actors.

In view of this discussion, one of the assumptions of MENARA is that regions are geographical units made up of territorially based political entities, tied together by high and persistent levels of political, economic, security-based and/or cultural interaction among them (objective factors) and/or by a shared sense of belonging (subjective factors). As both objective and subjective factors can change over time, the existence and limits of a set region may evolve accordingly. A region can comprise one or more subregions, understood as narrower groupings whose members have more intense interactions and/or a deeper sense of belonging among them than with the broader group. Similarly, a region can be qualified functionally as a cultural, historical, security, political, economic or ecological unit depending of the variables analysed.

THE MIDDLE EAST AND NORTH AFRICA: SETTING THE GEOGRAPHICAL SCOPE

There is no common agreement on the limits and the name of the region studied by the MENARA Project. The MENARA research consortium members have opted for "Middle East and North Africa" (MENA), understanding that this term meets the criteria of being inclusive and relevant and is the one that best encompasses the actors and dynamics that may shape a new regional order in this part of the world. The scope of MENARA will thus include the countries of the so-called Arab core (Morocco, Mauritania, Algeria, Tunisia, Libya, Egypt, Sudan, Palestine, Lebanon, Syria, Jordan, Iraq, Kuwait, Saudi Arabia, Bahrain, Qatar, the United Arab Emirates, Oman and Yemen) as well as three non-Arab countries (Turkey, Israel and Iran).

Thus, our conceptualization of the region goes beyond alternative approaches focusing exclusively on the Arab countries that refer to the "Arab world" or "Arab region". MENARA does not assume that attachment to a specific language and culture is the only criterion for being part of a region, nor is belonging to an intergovernmental organization – in that case the League of Arab States would qualify as a particular territory of the studied region. This definition would also include countries like Somalia, Djibouti and Comoros that, despite being part of the League of Arab States, are more deeply embedded in other regional dynamics. More importantly it would exclude Turkey, Israel and Iran, which are critical to the understanding of regional politics.

The project considers that the terms "West Asia" and "Southern and Eastern Mediterranean" do not fully fit the project scope either since they leave out some parts of the region (North Africa for the former and the Arabian Peninsula, Iran and Iraq for the latter). Similarly, other definitions such as "Broader Middle East" or "Arab and Muslim world" that include Pakistan and Afghanistan and in some cases other countries from South East Asia and sub-Saharan Africa are also problematic, in this case because they are too broad. Having clarified the geographical scope of MENARA and why the conceptualization of Middle East and North Africa seems the most adequate (or at least appropriate) in terms of relevance and inclusiveness, it may be useful to take into account some terms that will be used to refer to parts of the studied region and that correspond, largely, to the idea of subregions. Traditionally, the Arab world is divided into three subregions: the "Maghreb" (the land where the sun sets, basically, all the territories west of Egypt); the "Mashreq" (which literally means "the East" in Arabic and Persian and which – like "Bilad al Sham" and contrary to all other expressions used to refer to the East-

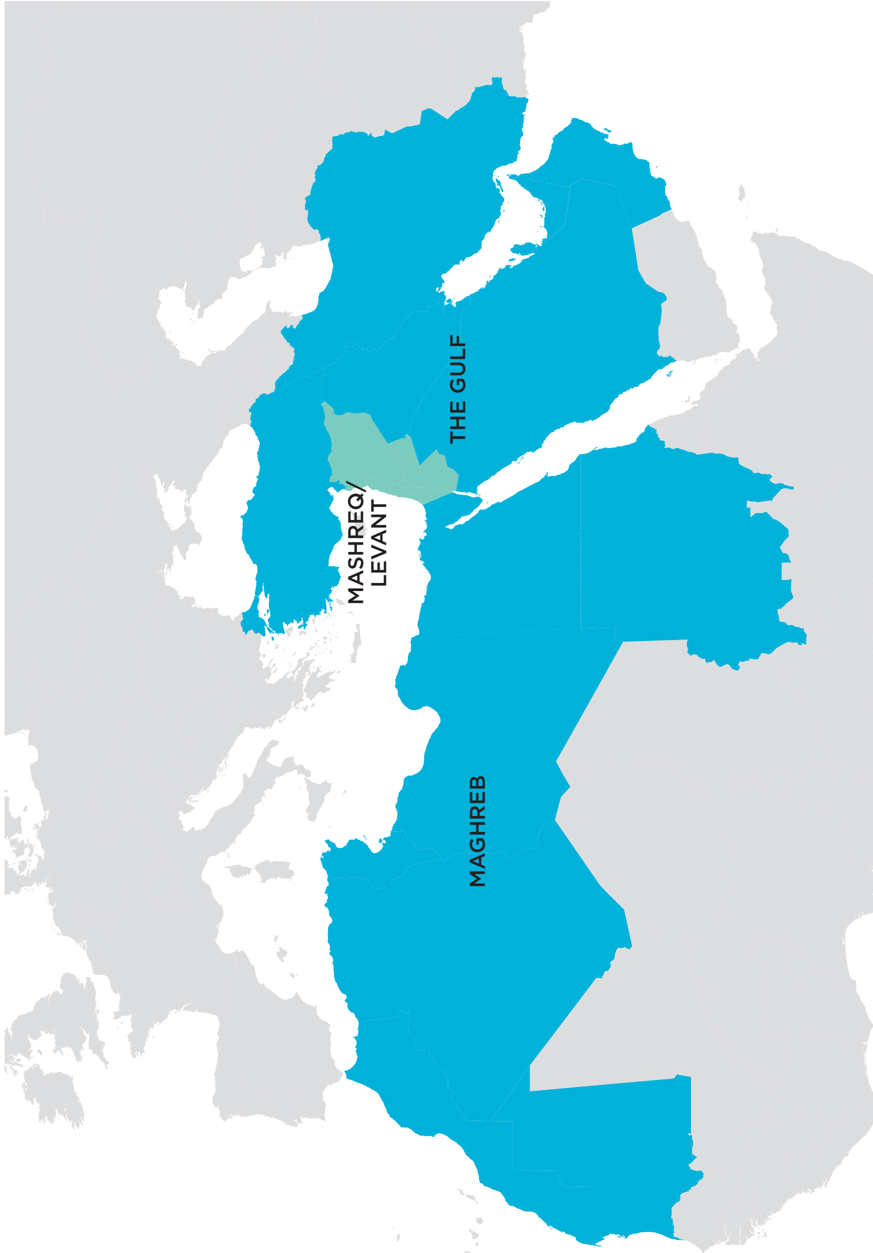
ern Mediterranean – emerged from within the region); and the "Jazeera" (the Arabian Peninsula). Interestingly, Egypt is in an ambiguous position: narrow definitions of Mashreq exclude it, although its links with this subregional system are unquestionable. Sudan's place in this tripartite structure also poses problems as it does not belong to any of the three subregions. In this case the links to Egypt and, more broadly, to the Nile basin are often emphasized. It is also worth noting that the concept of the "Jazeera" coexists with that of the "Gulf," commonly referred to as the Persian Gulf in Western literature and Gulf in most of the Arab-speaking literature.

Egypt is in an ambiguous position: narrow definitions of Mashreq exclude it, although its links with this subregional system are unquestionable

Some subregional terms can encompass non-Arab countries as well. In fact, the "Gulf" is one of them as some may include Iran in it. Similarly, the case of Israel may be seen as part of the "Levant" but not of the "Arab Mashreq." Finally, Iran, Turkey and Israel are seen as part of the Middle East (understood as the core subregion of a broader MENA region). In a similar vein, some of the countries of this region are considered to belong to more than one region. This is the case of Mauritania and Sudan, which are sometimes considered to be part of the Sahel, or Turkey, which is also part of Europe.

Finally, it is worth mentioning that regions can be seen through the lenses of particular disciplines. Thus, we could speak of historical, political, economic, cultural or environmental regions and, depending on the focus, the geographical scope of the region may vary. As mentioned above, MENARA is an interdisciplinary project and, thus, has opted for a terminology and regional scope that is inclusive and relevant in the light of the project's goals. Notwithstanding this, we should acknowledge the centrality of security studies in any project dealing with issues related to geopolitical dynamics, and in this respect the contribution of the Copenhagen School in the understanding of regional security complexes is of great use. Those complexes are defined as a "set of units whose major processes of securitisation, desecuritisation, or both are so interlinked that their security problems cannot reasonably be analysed or resolved apart from one another". This school considers the Middle East "a near perfect example of a classical, state-centric, military-political type RSC [regional security complex]" and divides the region into three regional sub-complexes: the Maghreb, the Levant and the Gulf. They also identify three key "insulators" (the Sahel, Turkey and Afghanistan), that is, bordering states or regions "where larger regional security dynamics stand back to back".

THE MENA AND ITS SUBREGIONS



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THE DISTRIBUTION OF POWER: THE EVOLUTION OF THE STRUCTURE OF THE MENA SUB-SYSTEM

There are many historical accounts describing how international affairs took shape in the MENA region following the end of colonialism in the first half of the twentieth century, but not many do so from a purely International Relations perspective, focusing on the evolution of the sub-system. While Stephen Walt focused on balance of power, Raymond Hinnebusch focused on power distribution. He identifies how regional polarity evolved over time and characterized the main features of the order in place for each phase.

Firstly, Hinnebusch claims the regional system per se was brought into existence after the end of the Second World War – a turning point when many of the states in the region gained independence. He labels this first period as the "oligarchic multipolarity" (1945-1955), recognizing Egypt, Saudi Arabia and Syria as poles in confrontation with a Hashemite axis in Iraq and Jordan – commonly identified as together representing another pole in the system – in the purely Arab scenario. The rising power of Turkey, Iran and the newly created state of Israel needs to be added to the equation to have a full picture of the oligarchic multipolarity. This period was marked by a high level of penetration by foreign powers (especially the United Kingdom); tension between Arabism and the consolidation of sovereign states; and the impact of the 1948 war between Israel and the Arab countries.

The second period (1956-1970) was marked by the rise and fall of an Egypt-centric pan-Arab system. The logic of pan-Arabism under Nasser underpinned Cairo's hegemonic drive which over this period of time consolidated Egypt's leadership in regional politics. This quasi-hegemonic position, backed by alliances with and bandwagoning movements by countries like Syria, Jordan and Lebanon, saw in the pre-1958 Iraq and the Baghdad Pact countries its principal potential contester. This phase saw an increase in intra-Arab solidarity and a reduction in Western control over regional politics.

This was followed by the period of the Arab Triangle (1970s). At this point, three Arab countries (Egypt, Saudi Arabia and Syria) articulated an alliance to face the rising power of Israel following the 1967 Six Day War. Additionally, Iran represented a stronghold of power in the region, principally as a result of the Shah's privileged relationship with the United States. This period was also marked by the inception of a renewed interdependence among the Arab states in the region: the new wealth of the oil-rich states was transferred to their allies through a variety of channels of cooperation, while the latter turned into a net labour force exporter towards the former. The end of the Arab Triangle came as result of the 1973

Arab-Israeli War. Egypt re-approached the United States after the war and shifted its approach towards Israel through the signature of the Camp David Agreements in 1979, which ultimately consolidated the so-called "qualitative military edge" for Israel over any and all potential adversaries in the region. This last event resulted in the exclusion of Egypt not only from the tripartite alliance but also from broader regional politics as its peace agreement with Israel was quasi-unanimously condemned by the rest of the Arab states.

A centreless fragmented multipolarity followed in the 1980s. Initially, the decade saw a decline in pan-Arabism in favour of state consolidation dynamics, pan-Islamism and communalism. Five poles of power seemed to compete for regional leadership: Egypt, Syria, Saudi Arabia, Iraq and the newly formed Islamic Republic of Iran. Generally speaking, two blocs were formed, one pulling together so-called moderate pro-West countries (Iraq, Egypt, Saudi Arabia and other Gulf Cooperation Council countries, North Yemen and Jordan) and the other comprised of the so-called "Steadfastness Front" (Libya, South Yemen, Algeria, Syria and Iran). This broader split lived side by side with intra-alliance rebalancing movements in the face of revisionist efforts by Israel, Iran and Iraq.

A new period began with the Gulf War, launched in response to the Iraqi invasion of Kuwait in 1990. The main poles of power were Saudi Arabia, Egypt, Syria, Iran, Israel and Turkey. Although all of these countries felt challenged by Saddam Hussein's Iraq, they nevertheless did not feel compelled to articulate fully fledged alliance mechanisms among them. The United States' penetration of the sub-system was primarily the result of the end of the Cold War and the global bipolar system, in what has been described as the "American hegemonic moment" in the region.

The structure of this system, at least since 2003, has usually been defined as multipolar, comprised of five medium-sized or regional powers, each with different power capabilities: Egypt, Saudi Arabia, Iran, Turkey and Israel. The invasion of Iraq in 2003 caused the effective disappearance in terms of power of one of the traditional poles of the sub-system. This coincided with the Iranian and Turkish "return" to regional politics in the turn of the new century. More recently, Kristina Kausch has characterized the regional system emerging after the 2011 uprisings as competitive multipolarity where "[r]ather than forming cohesive blocs and entering long-term alignments, a range of regional and external players of different sizes and weights are likely to compete in shifting, overlapping alliances."

This paper goes one step further by characterizing the structure of the sub-system in terms of regional heteropolarity. The concept of "heteropolarity" as used by Daryl Copeland and James Der Derian, besides recognizing the diffuse nature of power and its distribution within a system,

circumvents the problem of limiting the discussion on the structure to considering only state units. It gives analytical room to include non-state actors in the examination of the distribution of power beyond conceptualizing them as mere instruments of state units. In line with this, MENARA will question the impact of non-state actors in the structure of the sub-system, while aiming at identifying novel poles of power that are indispensable to fully grasp how regional politics work.

APPROXIMATIONS OF THE CONCEPT OF REGIONAL ORDER

The notion of order is extensively used in International Relations scholarship, although often it is merely equated with international reality. Any discussion about order in International Relations (IR) necessarily starts with the conceptualization proposed by the founding fathers of the English School of IR, but most precisely by Hedley Bull. In his masterwork The Anarchical Society, Bull defines order as “a pattern of activity that sustains the elementary or primary goals of the society of states, or international society.” This definition includes two constitutive elements that are worth examining in detail. Firstly, the “international society” is defined as a group of states, conscious of their shared interests and values, who recognize that they are bounded by common norms ruling their relations. Secondly, he conceptualizes those shared interests as (a) preserving the international society itself; (b) avoiding the “elimination” of any of the actors within the system; (c) safeguarding actors’ independence and states’ external sovereignty; (d) maintaining peace among all the actors within the system; (e) respecting the pacta sunt servanda principle; and (f) preserving property. From this perspective order does not replace anarchy, generally defined in IR as the absence of a supranational authority with the capacity to impose its will over all the units of the system – a sort of worldwide Leviathan. Instead, order lives together with the anarchical condition of the international system, palliating some of its potential negative effects on actors’ behaviour.

Since the inception of the English School some alternative definitions of order have been offered, most of them challenging Bull’s conception of the goals any order is willing to attain. For Joseph Parent and Emily Erikson, for instance, order is defined as a pattern of activity that limits the frequency and intensity of violence among the units within an international system, thus limiting the objective of any international order to the security dimension and, more narrowly, to a decrease in levels of hostility. David Armstrong focuses on the regularity and continuity of a certain web of rules, practices and assumptions which are accepted among the members of any society as legitimate and affect how changes are operationalized within that society.

This definition, alternatively, underscores the idea that any order ultimately aims at setting the acceptable margins of potential change in how the units of the system relate to each other and how these might be translated into reality. For Muthiah Alagappa, order is understood as "a formal or informal arrangement that sustains rule-governed interactions among sovereign states in their pursuit of individual and collective goals," broadening the scope of the concept by not setting in stone the objectives of any international order. Christian Reus-Smit suggests that the international society comprises a set of international institutions divided hierarchically into three different layers: the "constitutional structure," its "fundamental institutions" and the "international regimes" in place. By doing so, he opts for an operative definition of order as he focuses on the patterns of activity that constitute any order – hierarchizing them – without assuming that there is any goal underpinning that construction.

The invasion of Iraq in 2003 caused the effective disappearance in terms of power of one of the traditional poles of the sub-system

This discussion of the definition of regional order is key. One of the original foundational concepts of the English School of International Relations was that of the "expansion of the international society," a process in which the MENA region has been critical. In an effort to grasp the inception of the international society at the global level, authors like Hedley Bull or Adam Watson proposed that the international society as we know it nowadays, and some of its fundamental institutions, arose on the European continent and from there expanded worldwide.

This process took place in a context marked by European imperialism and, consequently, the expansion of this order is contingent with structural violence and domination. It is also worth mentioning Thomas Naff's contribution in describing the process of the expansion of the European international society towards the Ottoman Empire – and, consequently, a great part of the MENA region – through the study of the transformations of diplomatic practices and the shifting conceptualizations of sovereignty in the region. All of this scholarship represented the point of departure for the analysis of autochthonous orders in place in regional sub-systems. Bull himself recognized the existence of regional orders by acknowledging the reality of some institutions of order which only operate in some regional sub-systems. Yet, as pointed out by Richard Little, Bull did not discuss how these institutions worked nor what the relation between the global order and the regional ones were.

In the wake of this initial effort, some authors have continued to explore the possibility of using this approach to scrutinize regional rather than global dynamics. With the end of the Cold War, the study of regional systems

reached one of its zeniths. A new interest in the explanatory power of regions – understood as something more than just "subordinate[d] components of a global international system" – prompted a plethora of new studies that placed the region at the very centre. Scholars like Keene, Alagappa, Fawcett and Hurrel, Lake and Morgan and Godehart and Nabers, among others, have explored the explanatory capacity of the concept of regional order either generically or applied to the study of a concrete region. The Middle East itself has been the focus of analysis by Ayoob, Binder, Barnett, Hinnebusch, Buzan and Gonzalez-Pelaez, Halliday, Dessouki and Brown in describing and analysing the reality of the whole sub-system, while others like Gause or Potter and Sick have opted to undertake parallel endeavours for the cases of subregional systems like the Persian Gulf. (...) This paper defines international order as a formal or informal arrangement that sustains rule-governed interactions among different units within a system in their pursuit of individual and collective goals. This characterization of order offers some comparative advantages over the definitions outlined above.

Firstly, and probably most importantly, it does not impose any limit in relation to the objective behind the patterns of activity observed by the international actors participating in this order. Unlike many of the definitions seen above, ours does not determine from the beginning what the aim of this order is. By doing so, it allows for the possibility of inquiring what the objectives of any order(s) in the Middle East and North Africa have been/are, whether they have changed over time or even if different actors within the system understand these goals differently. Furthermore, it does stick with a security-centred approach by acknowledging that the aims of any order might not necessarily be restricted to survival or the reduction of violence, but alternatively socio-economic considerations might also play a role.

Secondly, the definition takes as its starting point the existence of a system, not narrowing our scope to the international system but alternatively making it possible to use the term when discussing regional systems such as the Middle East and North Africa. It also does not take for granted that ordering arrangements are exclusive to an international society and not international systems. (...) By appealing to the "units within a system," the definition enables the project to further investigate the role of non-state actors in the construction, maintenance and evolution of any international order, in line with some of the objectives of this research endeavour. (...)

THE INSTITUTIONS OF THE REGIONAL ORDER IN THE MENA SUB-SYSTEM

In accordance with well-established literature, one of the research hypotheses of MENARA is that the Middle East and North Africa region constitutes a "system" or a "regional sub-system." Stemming from this premise, it is reasonable to question what its regional order looks like and what

institutions are in place. A number of authors have theorized about the scope, size and characteristics of the different regional orders. (...)

An important milestone in that respect has been Michael Barnett's contribution. His main claim is that the Arab world constitutes a distinct supra-state community or order, which shares a belief in their common bonds and distinctiveness as an Arab nation. Within this order there are certain norms or rules of acceptable behaviour that must be followed in order to count as "Arab," and Arab state leaders have indeed, Barnett asserts, mainly fought with symbolic – rather than military – instruments of power over the meaning of being a true Arab and acting in the interests of the Arabs. Identifying how this community and its associated norms came about and how they have changed over time, Barnett detects five distinct periods of heightened Arab debates over what it means to be Arab and what the core Arab interest is: from 1920 to the 1945 establishment of the Arab League; from 1945 to 1955 over the Baghdad Pact; from the 1956 Suez war to the 1967 war; from 1967 to the 1990 Iraqi invasion of Kuwait; and the 1990s post-Gulf war period. Barnett shows how interactions and "negotiations" between Arab states over core Arab interests gradually gave rise to three shared concerns and norms: (1) how to relate to the West? Here the so-called positive neutrality spearheaded by Nasser became the winning interpretation in the wake of discursive battles over the Baghdad Pact; (2) how to deal with Zionism and Israel? Here resistance and solidarity with the Palestinians became the shared norm; and (3) how to reconcile Arab Unity with state formation and state sovereignty. Here unification in several loose forms initially held sway, but after the failed unity attempts in the 1950s it gradually lost ground to the norm of state sovereignty.

A complementary analysis of the institutions of the regional order in the MENA region is provided in the edited volume by Barry Buzan and Ana Gonzalez-Pelaez entitled International Society and the Middle East: English School Theory at the Regional Level. This reference work first analyses the expansion of international society to the Middle East, and examines the institutions governing the current sub-system's order as well as the impact of pan-Arabism, Islam and revolutionary narratives and agendas. The authors conclude that there are a total of nine primary institutions in place in the region. (...)

FRAGMENTED REGION? AMITY AND ENMITY PATTERNS

In the work of Barry Buzan et al. on regional security complexes, patterns of amity/enmity are key defining features. Conflicts and security dynamics, they argue, cannot be predicted by material power distribution alone; one must also consider historical constellations of hatred and friendship and the specific issues that trigger conflict or cooperation. Amity refers to

relations that range from friendship to expectations of protection and support, and conversely enmity refers to relations of fear and distrust. These can revolve around a whole range of issues, for example border disputes, ethnicity, ideology or religion, but the issues must be determined empirically rather than theoretically. In the MENA region one might argue that some of the main cleavages that have guided the region's amity/enmity relations are the Arab-Israeli conflict, divisions between Arabs and non-Arabs, between Sunni and Shia, between pro-Western and anti-Western, and between status quo and revisionist states.

In the MENA region one might argue that some of the main cleavages that have guided the region's amity/enmity relations are the Arab-Israeli conflict, divisions between Arabs and non-Arabs, between Sunni and Shia, between pro-Western and anti-Western, and between status quo and revisionist states

In terms of the latter, the region has since the 1950s been split between so-called status quo states and revisionist or revolutionary states. This cleavage initially revolved around differences in regime type and relations with Western powers. Thus from the 1950s to the 1970s the region was divided between the status quo powers (the Gulf monarchies, Jordan and Morocco) and Egypt, Iraq, Syria, Yemen and Algeria, which constituted the revolutionary powers. From the 1980s the region saw a shift in this dynamic, partly due to Egypt's peace agreement with Israel and partly due to the Islamic Revolution in Iran. The two regional powers changed positions, as it were, as Iran came to spearhead the revolutionary anti-Western camp and Egypt the pro-Western status quo powers. Concurrently the region also witnessed the rise of Islamist or non-state actors as contenders in the regional order. The Muslim Brotherhood, Hamas and Hezbollah, for instance, all challenged the status quo regimes' legitimacy and alliances with the West, just as political Islam in many ways came to substitute for Arab nationalism as the most effective mobilizing ideology and collective identity marker in the regional arena.

While relations of amity/enmity may reinforce one another – as is the case, for instance, in the competition between Iran and Saudi Arabia, which runs alongside and amplifies Sunni-Shia, Arab-non-Arab and pro-Western-anti-Western enmity relations – they may also run counter to one another, for instance as in the case of Hamas. The degree to which present cleavages strengthen or weaken one another in the present regional order will in itself be an important question for the MENARA Project to investigate, as will the consequences of such reinforcing cleavages on the region's patterns of conflict and cooperation. (…) As Buzan and Wæver themselves point out, the concept of enmity/amity is in many ways close

to that of social constructivists' notions of how social structures (norms) and social roles (enemy, rival, friend) work in international and regional systems. Indeed, Barnett's book on the emergence of and changes in key Arab norms and institutions from the 1920s to the late 1990s provides an empirically rich social constructivist analysis of the main Arab issues that have compelled Arab states "to work in concert and to identify with each other" and yet at the same time have "represented a source of conflict and competition". In other words, we suggest that Barnett's study of Arab norms is a complementary way to study amity/enmity relations, insofar as it allows us to probe how enmity/amity relations arise from symbolic battles over meaning in the regional arena and the key issues over which states have respectively competed and connected with each other. (...)

GLOBAL DYNAMICS IN THE MENA REGION

The political and economic affairs of the Middle East and North Africa (MENA) region evolve inseparably from and interrelatedly with events of the contemporary global order. One cannot understand the dynamics on the ground without investigating the external environment of the region which constantly affects its conflicts, policies and social changes.

Despite the general commonplace, interactions between the regional and global orders essentially take place in a two-way process. While global players and global developments frame the leverage and the activities of state and non-state actors in the Middle East and North Africa, the regional order also has an impact on world politics through bilateral and multilateral relations, institutions and norms.

The exchange between the global and regional levels is being shaped by three general interrelated developments. First and foremost, it is taking place in the context of globalization, which constantly stimulates cross-border interactions. Secondly, the relations between actors ceased to be clearly unidirectional; they can be best described by the concept of complex interdependence, which includes reciprocal transactions in various fields that creates costs for the participating entities distributed in an asymmetrical way. Thirdly, this new framework has changed the role of states as primary shaping factors of politics and created leverage for new actors and factors (transnationalization) including non-governmental entities as well as norms and identities. (...)

THE RIVALRY OF STATE ACTORS AND THE GLOBAL SHIFT OF POWER

The existence of inter-state conflicts and the traditional involvement of external actors make the MENA region particularly well suited to test an understanding of international politics based on the struggle for pow-

er and the rivalry between states. Such analysis departs from a systemic perspective of world politics that refers to the study of the structure of the international system, taking as a starting point the neorealist accounts of international relations in which the distribution of power capabilities among the units of the system shapes the relations between them, under the condition of anarchy. More recently, the dynamics of the distribution of power have focused on the changing nature of polarity in the international system, affecting the position of the MENA region within the global system.

Dominant forces of the prevailing global order – usually Western and European states – have traditionally been accused of penetrating the Middle Eastern and North African system only to pursue their own interests, thus shaping the destiny of regional politics and embedding the region in the dynamics of the global balance of power. This idea, as used by Carl Brown following Rosenau, describes the Middle East regional system as the object of high and unparalleled intervention and control by actors from outside the region. Since Ottoman times, extra-regional powers have aimed at protecting their vital interests in the region by actively participating in local and regional politics and directing them toward the achievement of their goals.

This narrative was especially emphasized during the Cold War, a period characterized by the involvement of superpowers in the MENA, revealing the "strategic importance" of the region, with the United States making it a central part of its "global Cold War strategy". Regional actors aligned themselves with either the United States or the USSR, transferring the bipolar order to regional politics, although not necessarily allowing for direct "control" of the politics of regional states. The MENA region became deeply embedded in the dynamics of global politics as states forged alliances around the two superpowers.

These circumstances reinforced the view of the Middle East and North Africa as a "penetrated system." Extensive scholarship has been produced on the fundamental role of the United States, the Soviet Union and Russia, the United Kingdom and France in the regional order. This literature has taken the patron-client dynamic as a starting point to analyse interactions between global and regional actors, framing it as a relationship between weak states and great powers – between "puppeteers and regional puppets," as coined by Carl L. Brown. Discussion of the "penetrated system" has transcended the Cold War era and has been used as a way to understand how extra-regional actors have played a critical role in shaping the sociopolitical reality of the MENA region through direct presence (colonialism/imperialism) or (in)direct influence. From the perspective of clients, debates have focused more on the degree of autonomy this regional subsystem and its actors have vis-à-vis external forces. In the post-Cold

War era, clients are considered to have greater leverage to pursue their interests vis-à-vis global players on a bilateral basis, but there was no fundamental change in the viewpoint of the literature.

Nonetheless, evidence indicates that the extent to which MENA state actors are able to shape international politics and the global order is greater than ever. This is the result of globalization, deepening interdependencies and changes in the global distribution of power, namely polarity, a term which refers to the number of units of the system that might be considered as centres of power in a specific historical period, in the light of which we can speak about unipolar, bipolar or multipolar systems. Regarding the global distribution of power and its impact on the MENA region, the end of the Cold War triggered many discussions on the changing nature of the global structure and the place of the region therein. Once one of the two poles of the bipolar system was out of the picture, many argued that the system had turned unipolar. The "American unipolar moment" unfolded throughout the 1990s and an unparalleled power, the United States, took over leadership of the contemporary international system. In the Middle East, "no state, by itself or in concert with others in the region, was in a position to establish a Middle Eastern order independent of US influence". The region provided evidence of the formation of a unipolar international system, with the United States aiming to maintain a balanced distribution of power in the MENA in line with its interests (above all, the protection of Israel's security and a permanent military presence in the Gulf).

In the first decade of the twenty-first century, however, this period of US dominance seemed to end as the international structure began to take on a different form. Amid the post-9/11 developments, the hegemonic world power of the United States was perceived as declining, and the power of other states was increasing, to the extent that new poles seemed to be emerging. Fareed Zakaria summarized this trend with the expression "the rise of the rest", while Kishore Mahbubani emphasized the fact that the rise of Japan, China, India, South Korea and other Asian nations had created a new centre of global power in Asia in terms of demography, economy, trade, technology and ideas.

Ever since the end of the unipolar moment, a discussion has been taking place on the proper description of the emerging international structure. Many terms have been coined in the last two decades to describe the current global distribution of power among the units of the international system. Some authors have suggested that we are witnessing the unfolding of a world with no poles. The notion of "apolarity" used by Niall Ferguson and Daniel Drezner, "zeropolarity" coined by Simon Serfaty, "G-zero" put forward by Ian Bremmer and Nouriel Roubini or "nonpolarity" used by Richard Haass are fundamental examples of this approach.

Broadly speaking, all these concepts appeal to the idea that the end of the American "unipolar moment" prompted not a multipolar structure but rather a system where there is a "power vacuum," as no single unit is willing or able to exercise command or leadership. According to some authors, the loss of gravity in the international system has been translated into the emergence of "no one's world", triggering power relations based on zero-sum dynamics. In a "zero-sum world" no power is able to dominate the system and the lack of effective global governance schemes forces major powers to compete over national power. A zero-sum world would see external powers such as China, the United States, the EU or Russia competing for influence in the MENA region, although without the possibility of shaping its socioeconomic and political reality entirely. Under this reading, the region would have gained autonomy vis-à-vis the world's main powers.

Other scholarship alternatively indicates that the structure of the system is moving towards multipolarity, yet in a different form than has been seen before. For Samuel Huntington, the situation can be better described as "uni-multipolarity," stressing the dependency of other poles in the system vis-à-vis the hegemonic power (the United States) to maintain their privileged positions. "Asymmetric multipolarity," proposed by Thomas Renard but extensively used by others, highlights the contemporary rise of alternative poles of power that can, in any case, balance the superpower.

Besides multipolarity, other concepts have been suggested to describe the current global order. Giovanni Grevi also suggests the term "interpolarity," which emphasizes the complex web of interdependencies among the different poles based on an asymmetric distribution of power but urging multilateral cooperation. Comprehensive notions willing to encompass different dimensions of the former concepts, for instance "complex multipolarity", have also been applied to describe the contemporary international system. A third alternative is the notion of "heteropolarity" as used by Daryl Copeland and James Der Derian, which avoids state-centric analysis and integrates non-state actors into the discussion on the structure of the international system. The term also draws on the fundamental transformation of the nature of power, understanding that today's international structure cannot be fully grasped on the basis of state-based power alone.

For this reason, "the impact of the region's position in the world system on the foreign policies of local states is by no means straightforward". Authors such as Halliday, Khalidi and Yaqub suggest that the degree of leverage and actual independence of the MENA regional powers vis-à-vis extra-regional powers has generally been underestimated. According to this view, regional actors have developed over time the capacity to influence Western powers' actions in the region. Buzan and Wæver suggest that the relation between regional and extra-regional Western powers has not been as asymmetric as the "penetrated system" view suggests.

Mutual interdependence enabled MENA countries to toy with Western powers in order to guarantee their collaboration in advancing individual state agendas. Hinnebusch even claims that the regional system provides a pathway to gain further autonomy from the interests of global powers. In this view, some argue that the concept of axes and alliances no longer makes sense with regard to the MENA region. Turner has analysed how, since the Arab Spring, great powers are not attempting to exploit regional rivalries to gain advantage over other powers, but are being manipulated by regional adversaries. Client states exploit their relationships with their patrons to favour their own interests by appealing to the fears and interests of their most powerful allies.

A clear case in point is the Syrian civil war. Whereas many have tried to identify the United States or Russia as primary players in the conflict, evidence might suggest that their leverage is limited, even vis-à-vis their own allies. After numerous failed attempts led by either the United States or Russia, it became clear that without the participation of regional and local actors, the conflicts in the Middle East and North Africa in the twenty-first century cannot be dealt with solely on the basis of global power politics.

This also shows that within the framework of globalization, global powers are urged to tackle international challenges collectively. Besides using military power and coercion, states inside and outside the region can also dominate international politics through gaining or redistributing authority in the management of global affairs, "negotiate new bargains, and generate collective leadership". So-called peripheral states, including those of the MENA region, have somewhat more limited, but undoubtedly existing, leverage to do so by exerting influence in/by supra- and subnational organizations, attempting to "govern globalization" and shaping the global structure of interdependencies in prioritized policy areas. (...)

IDEAS, NORMS AND IDENTITIES

Following the end of the Cold War the global order – generally defined up to that point by the primacy of hard security – started to change, and new elements shaping the new order came to the fore. The meaning of security has been transformed and has come to incorporate – visibly – several different dimensions that were present before but had been made invisible by the classical approaches to security. Among the newly surfacing elements defining and restructuring the new global order, ideas, norms and especially identities have started to play a dominant role and have created unexpected outcomes.

The end of the Cold War saw the emergence of two contradictory currents: cultural globalization on the one hand, and the renaissance of identities on the other hand. Convictions regarding which would be the stronger

of the two developments shaped the foreign policy of global actors. Firstly, the formation of a series of newly independent – and in many cases new – nation states in the heart of Europe, which identified themselves with Europe, led on the one hand to the general assumption that the Western (European) ideal would spread across the whole world. The ideal of Western liberal democracy could be interpreted in the context of globalization, which seemed to face no further obstacles ahead. The End of History and the Last Man by Francis Fukuyama was in a way the expression of the globalization of the Western model. This narrative was present in the political programme for democratization of the Greater Middle East put forward by George W. Bush in the aftermath of the 9/11 terrorist attacks, which was, in a way, a continuation and implementation of this theory.

Secondly, in contrast, Samuel Huntington claimed that following the end of realpolitik during the Cold War, including the military aspect of security being the main determining factor in international relations, future alliances would be made within civilizations, with future conflicts arising across the civilizational fault lines. Civilization as the broadest umbrella of identification would have a major role in the relations among nation states, which would remain the main actors. Coincidentally, the 9/11 attacks were also considered as proof of the clash of civilizations, both by the political elites and by the public. And subsequent Western interference in the region – including both the Euro-Mediterranean cooperation initiatives (including the European Mediterranean Policy, the European Neighbourhood Policy and the Union for the Mediterranean), which were perceived as European "dictates," and the military missions in Iraq, Libya and Syria – strengthened these perceptions among local audiences. Recent developments in Europe (including the migration/refugee crisis and the activities of the Islamic State network) have again raised the clash of civilizations discourse.

All in all, both narratives emphasize the role of norms and identities in international relations and the global order, which, apart from the systematic changes caused by the end of the Cold War, was also fostered by the technological evolution in communication and IT. Such developments changed the rules of political struggle around the world by enhancing the politics of identity, namely the competition between political actors to shape and utilize social identities.

This change penetrated the regional order of the Middle East under special circumstances. MENA states have always had to "achieve a simultaneous balancing within the regional environment of material threats and competition over control of ideational movements (e.g. pan-Arabism, Islamist movements)". Although regular media outlets have played a role in interstate rivalry and intra-state dynamics, the spread of social media can be considered to represent a qualitative change in identity politics (e.g., during the Arab Spring).

Religious affiliation – at the core of civilizations – as opposed to Western secular norms has increasingly come to be a decisive element of identification and of narratives, yet this opposition of norms and values has proved to be "selective" as religiously identified groups and movements have widely used all the technical devices of modernity, while at the same time totally rejecting social and political modernization. Religious identification has come to be of increasing importance within religions as well, giving way to sectarianism. Rivalries in the region – primarily between Saudi Arabia and Iran but also between Islamic State and others, the Syrian, Iraqi and Yemeni civil wars, and so forth – are constantly framed, by many of the actors involved and by global audiences, with the verbal elements of the politics of identity, which might play out for the transformation of global politics described above.

The meaning of security has been transformed and has come to incorporate – visibly – several different dimensions that were present before but had been made invisible by the classical approaches to security

Ethnicity, or national identification, has emerged in parallel – sometimes in a complementary distribution – with religion. While it played an important role in Central Europe after the end of the Cold War, it was also strong enough to prevent any unification purely according to religious affiliation in the Middle East (most visibly in the Iraq-Iran war of 1980-1988). However, radical jihadist movements and their strict interpretations of Islam have so far seemed more or less immune to the influence of ethnic/national identity (e.g., al-Qaeda, Islamic State).

Besides religious, ethnic and national self-identifications, "imported" identities are also worth investigating. The start of the Cold War fostered political (or even normative) affiliations with either the Western or the Eastern world, but both choices were considered dangerous by the regimes (due to the general mistrust of Western powers on the one hand, and the fiercely anti-religious nature of communism on the other hand). Fearing the anger of the public over such affiliations, the offer of financial and military assistance by either superpower created a new kind of security dilemma for states, between external support and internal stability. For this reason the creation of and participation in the Non-Aligned Movement was a natural choice for MENA states.

Apart from the local and regional levels, "revolutionism" can be understood as a rejection of the world order and global identities as well. This affiliation has surfaced in numerous forms throughout history: it played a role in Arab nationalism and Islamism, and it has shaped fundamental events of regional politics, including the Iranian Islamic Revolution and the rise of al-Qaeda and Islamic State. Revolutionism has its roots in history

and the constant presence of external actors in the region (described in the first subsection) who, besides pursuing their own interests, also tried to create a new regional order. Naturally, such attempts have always produced a counter-effect. After 2001, the United States also tried to recreate the Middle East, which resulted in broken solutions on the one hand and widespread rejection on the other, not just in the capitals of the adversaries but in those of Western allies as well.

These notions suggest that the global normative order has penetrated the region only to a limited degree. The investigation of the MENA states does not support the presumption that globalization unifies local identities and norms, since counter-effects to such attempts are always seen (e.g., the Non-Aligned Movement, revolutionism, etc.), which can have an effect outside the region as well. On the other hand, the global order has penetrated the MENA region in the realm of norms and identities in the form of globalization, which has brought a new toolkit for political struggles: almost every rivalry on the regional level is also fought within the politics of identity.

Hybridization of domestic order-making in the contemporary MENA region

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The domestic political orders in the Middle East and North Africa (MENA) are in a state of profound crisis. Since mass protests spread from Tunisia and Egypt to other countries in the region during the winter and spring of 2011 a number of worrying trends have affected the forms and functions of states, regimes, contentious actors and collective identities.

In different shapes and to varying degrees the region has, since 2011, seen a trend of decreasing capabilities of state institutions to effectively control their borders and administer their territories and populations. In countries such as Syria, Iraq and, to a lesser degree, Egypt, protracted rebellions and civil war have challenged the territorial integrity of the states themselves, leading to non-state actors proclaiming parts of the territory as independent states. In other places, such as Libya and Yemen, a multiplicity of factions and power centres have succeeded in their attempt to use the process of rebuilding state institutions as a means to secure power and authority and to exclude their competitors. In such places, the intense competition for control has further weakened nascent state institutions.

In parallel, the initial push towards a possible transformation away from authoritarian regimes in the MENA region in 2011 has given way to a trend of restoration of authoritarianism in some countries, and to illiberal turns in formal democracies in others, including Israel and Turkey. This process spans from the gradual adaptation and reconfiguration of power networks in Libya to the full or partial restoration of the authoritarian regimes that used to govern in Egypt through repression, exclusion and co-optation of competitors and challengers. In other countries, where incumbent governments remained in place after 2011 – such as Morocco, Algeria, Jordan and the monarchies in the Gulf – old or refashioned authoritarian governance practices have prevailed.

Furthermore, the mass mobilization of unarmed political activists, which dominated contentious politics in several MENA countries for shorter or longer periods between 2011 and 2013, has since given way to protracted militarization. This trend, which has been expressed in a multiplicity

of forms, encompasses both cases of protracted armed rebellion against incumbent regimes, as, for instance, in Egypt, and smaller but growing armed mobilization against regimes in Tunisia, Morocco, Algeria, Jordan and the monarchies in the Gulf. It also encompasses the more complex processes of militarization in civil-war-torn countries such as Syria, Iraq, Yemen and Libya, where armed contentious actors fight each other as much as the weakened regimes and their regional and international allies.

Since mass protests spread from Tunisia and Egypt to other countries in the region during the winter and spring of 2011 a number of worrying trends have affected the forms and functions of states, regimes, contentious actors and collective identities

Finally, a number of MENA societies have seen a trend of increasing pluralization of collective identities since 2011. This trend has taken different forms, including the multiplication, fragmentation, partial hybridization and/or polarization of sectarian, tribal or ethnic markers of identity that have become plural and often antagonistic in their expressions and claims. Opposite trends pointing in the direction of the consolidation of existing collective identities or the subsuming of different collective identities under a larger one, have also seen the light in specific cases across the MENA region. All this calls for a thorough reassessment of the dynamic of collective identities per se and, particularly, of the extent to which these pluralized forms of collective identification (or lack thereof) have been embedded into institutions and political processes. The rewriting of the constitutions in Tunisia and Morocco provided important spaces to discuss and negotiate the role of collective identities within the new architecture of the states between 2011 and 2014. In other contexts, such as in Egypt, Turkey and the Gulf countries, there has been no successful accommodation of alternative claims based on such pluralized collective identities.

We suggest conceptualizing these trends as part of a broader process of hybridization of domestic political order-making in the MENA region. By hybridization of domestic political order-making we refer to a process in which the political order-making in the region occurs according to new and hybrid patterns that transcend or escape the processes, concepts and categories known in the past and described in the existing academic literature. Hence, hybridization concerns, in our use of the word, both empirical developments on the ground that manifest themselves in new ways, and analytical concepts and categories that scholars subsequently make use of to describe and theorize these empirical developments. (…)

Improving our understanding of how domestic power and politics work and the way in which they have become increasingly hybrid in the MENA region after the uprisings in 2011 is not exclusively an academic exercise. It is also an exercise that holds a strong relevance for international, and in particular for European, policy-making in the region. International and regional actors are not without influence or responsibility for the current domestic crises and conflicts. Both regional and international powers have seen the transformation of domestic political orders in the MENA countries as opportunities and threats to their abilities to project influence in the region and ensure their own stability and security. In a bid to sway the outcomes of the conflicts between domestic actors to their own advantage – or at least to ensure that their competitors do not succeed in doing so – regional great, middle and small powers from Iran, Turkey and Saudi Arabia, through to Egypt and Morocco, and further to the United Arab Emirates (UAE) and Qatar, have aggravated and protracted domestic conflicts by shielding, funding and arming local proxies. European and western states have done the same. While some, such as Russia, have arguably acted primarily to alter regional and international balances of power, others, including several western European powers, have sought to influence the outcomes of the domestic conflicts in ways that best represent their interests, or mitigate what they believe are direct threats against their security and stability. In this process, the initial boost in 2011–13 of western European support for "democratization" in the region has, over the past few years, given way to a reprioritization of anti-terrorism and anti-migration policies. In some cases this has led to the propping up of authoritarian militaryled autocrats such as Egypt's Abdel Fattah al-Sisi. In other cases – for example, Italy in Libya – western powers have sought to prop up decentralized local actors in a bid to stem the prospect of a further influx of refugees and migrants from the region. Hence, better understanding how domestic power and politics operate is as much a political as it is an academic endeavour.

FIRST TREND: THE EROSION OF STATE CAPACITIES

The trajectories of the MENA states since 2011 indicate that the existing analytical paradigms do not allow us to understand the transformations of domestic power relations sufficiently. While the patterns and outcomes of the transformations that have happened as a result of the so-called Arab uprisings vary from country to country, there are some common trends: central state institutions have been seriously challenged in their capacity to fully control their territories and borders and to provide basic functions and services such as security, justice, health care and education. These central institutions collapsed after 2011, and their rebuilding has been im-

peded by serious domestic conflicts about the nature and form of the state, as well as by the fragility of nascent institutions that were too weak to resist the depth of social and political conflicts. In order to fully understand these dynamics, we argue that we need to understand to a greater extent both how power is exercised within and outside "political" institutions, and how such relations and institutions are conceptualized and actually translated into practice. (…)

The Arab uprisings that spread through the MENA region during 2011 initially challenged existing state-focused research paradigms and exposed their inability to fully explain power dynamics in the region. Most scholars first interpreted the Arab uprisings as challenges to governments, elites and regimes, focusing on those who were perceived as exercising power rather than on the overarching systems, institutions and contexts through which such power was exercised. However, the state came back into focus from late 2012, when academics found their initial analysis incapable of explaining locally rooted actors' challenges to new and incumbent state elites and governments. Furthermore, the Islamic State's (ISIS's) subsequent seizure of territory, including the internationally recognized border between Iraq and Syria, further shifted most analysts' attention and the dichotomy "state vs non-state" started to emerge. Steven Heydemann and Jean-Claude Luizard, among others, analysed this act as both aiming to expose an apparent inherent weakness of the postcolonial states and to destroy the regional order based on a Westphalian conception of the inviolable sovereignty of territorial national states in the post-independence Middle East.

By 2016, Middle East scholars tended to argue that the MENA states were not just weak and illegitimate, but "eroded", "failing" or even "failed" entities. As a group of scholars associated with the Carnegie Endowment noted laconically in a report from late 2016, the MENA region had, since 2011, experienced "unprecedented state disintegration, particularly in Iraq, Libya, Syria, and Yemen". Several states, they pointed out, had

> *"lost control of large swaths of territory to non-state actors, including the self-proclaimed Islamic State. Former regional powerhouses, such as Egypt and Iraq, are now severely constrained by domestic weaknesses. Powerful states are increasingly interfering in the affairs of weaker ones, heightening internal and regional conflict". (…)*

While the empirical observations of scholars, such as those associated with the Carnegie Endowment cited above, cannot be denied, the analytical framework requires a greater level of explanation and attention. In 2016, for instance, Mehran Kamrava argued that "state weakness […] is fundamentally a product of diminished capacity". This he sees as brought about by four groups of factors:

"structural and economic factors, such as endemic poverty or chronic armed conflict; political and institutional factors, such as crisis of legitimacy and authority and the weakness of formal institutions; social factors, such as lack of social cohesion and sever identity fragmentation; and international factors, such as global economic shocks and loss of powerful patrons"

Arguably, however, the very factors Kamrava sees as causes of state weakness are also its symptoms: for example, armed conflict happens because the "state" no longer has a monopoly over the legitimate use of force.

Kamrava's definition of state capacity as "the ability to implement political decisions, especially in the face of actual or potential opposition from powerful social groups" thus seems insufficient to explain situations where multiple or parallel institutions exist and advance competing claims, as in the case of Libya in recent years. It rests on distinctions between state and society, which have become blurred in the MENA region as a result of the conflation of certain interest groups and political and institutional formations – if indeed such a distinction ever empirically existed: Mitchell, for example, argued back in 1999 that the state–society divide is a "line drawn internally" as a result of a specific set of practices.

While it is clear, therefore, that there are many examples in the Middle East where central authority structures are no longer able to perform functions such as "the provision of security, legitimacy, and wealth and welfare" to the same extent that they did prior to 2011, the analytical tools that the discipline has produced thus far have been incapable of fully explaining this phenomenon. In seeking to better understand this, we suggest a focus on the dynamics of the relationships between political and institutional formations and power networks and how these contribute to and shape narratives of state erosion. In this, we follow Hamieri's argument that institutional capacity is "a term that only has analytical merit within a theoretical framework that has a concept of power". With Del Sarto and Okyay, we furthermore suggest that the erosion of the state in the MENA region should also depart from a clearly expressed distinction between the international (or legal) aspect of state sovereignty and the domestic aspect of sovereignty, with the latter perhaps most clearly displaying hybridity.

SECOND TREND: THE RESTORATION OF AUTHORITARIAN REGIMES

Since the uprisings in 2011, the assessment of the capacities and capabilities of the authoritarian regimes in the MENA region has been hotly debated. While initial empirical developments seemed to suggest that several of the key assumptions about the nature and character of these regimes were misconceived, later developments have proven that several of these assumptions were closer to the truth than assumed back in 2011. (...)

The unravelling of the Tunisian, Egyptian, Libyan and Yemenite regimes under the pressure of domestic uprisings or international intervention during winter 2010 and spring 2011 initially seemed to challenge both these key pointers in the literature on Arab authoritarianism. The inefficient responses to the protests by the regimes in Tunisia, Egypt, Yemen and, to some extent, Libya, prompted leading scholars to question a number of key assessments in the existing literature on autocratic regimes in the region. Marc Lynch, for instance, declared that the Arab uprisings in 2011 had undermined serious parts of the literature about the endurance of authoritarian regimes, and Gregory Gause pointed out a number of flaws and omissions in the picture that he and his colleagues had painted around the "myth of authoritarian stability".

Authoritarian regimes would manage to ensure their endurance by meeting protesters within their own borders with mass repression on scales that surpassed much of what the region had previously seen

This early critique of the paradigm of authoritarian studies, however, also had its flaws. As pointed out by Steven Heydemann and Reinoud Leenders (and later also by Marc Lynch), the toppling of rulers and the collapse of regimes in early 2011 would also provide material for analysis of autocratic regimes in neighbouring countries such as Syria and Bahrain. In these cases, authoritarian regimes would manage to ensure their endurance by meeting protesters within their own borders with mass repression on scales that surpassed much of what the region had previously seen.

This preservation of incumbent regimes thorough mass repression would, furthermore, be complemented by a process of gradual restoration of authoritarian regimes in several of the countries in which governments had been toppled in 2011. An illustrative case in point is Egypt, where the military coup against the democratically elected president Mohamed Morsi in July 2013 – less than three years after the fall of Hosni Mubarak – cemented the power of an elite in which many were drawn from the circles of the former Mubarak regime. As demonstrated by Hazem Kandil, the revolution in 2011 did not erase the influence of Egypt's incumbent military, political and business elites, but can be seen as a continuation of their internal power struggles and competition.

Furthermore, authoritarian regimes have prevailed in most of the states that were not profoundly affected by the uprisings in 2011. A case in point is Algeria. In spite of the incumbent president Bouteflika's promises of reform, youth inclusion and democratization of the constitution, little progress has been made with regard to such issues. As Martinez and Boserup point out, the regime in Algeria thus remains a hybrid creature with its own specificities within the family of Arab autocracies.

Finally, formerly democratic regimes in the MENA region have recently, and in parallel with the processes initiated by the Arab uprisings, experienced illiberal turns that bend existing institutions and norms towards new hybrid forms authoritarian practice. As noted by Çağaptay, President Erdogan's tortuous political manoeuvring and "iron-fist" style of government has, over the past few years, led Turkey away from the liberal democratic prospects of the early Justice and Development Party (AKP) government towards an increasingly autocratic (or "sultanistic") style of government embedded into the existing democratic institutions of the republic. Comparably, Del Sarto has shown how the amplification of existing domestic and regional security threats by Israel's neo-revisionist right-wing political circles, represented by Benjamin Netanyahu and the Likud since the early 2000s, has led the country towards an increasingly exclusivist and conflict-generating type of government.

These parallel processes suggest that authoritarian regimes in the MENA region matter more than initially assumed in the early aftermath of the collapse of regimes in Tunisia, Egypt and Libya. Consequently, the trajectories of regimes in the MENA region since 2011 have revealed both flaws and strengths in the existing paradigms. While the sudden overthrow of several leaders of authoritarian governments in 2011 suggested that the literature had overemphasized the ability of authoritarian regimes to survive and endure, the parallel preservation of incumbent authoritarian regimes in some countries as well as the gradual restoration of autocratic elites in others, in combination with the illiberal turn in existing democratic regimes, suggested that the literature on authoritarian endurance and survival was right, in that regimes were mechanisms capable of observing, learning, adapting and expanding. (...)

THIRD TREND: THE MILITARIZATION OF CONTENTIOUS POLITICS

Developments in the MENA region since 2011 have shown that armed non-state actors, ranging from broad movements to tightly knit groups, state-financed militias and terrorist networks, have taken up new and increasingly important roles in the creation and transformation of the region's domestic political orders. While there exists a substantial body of literature on such groups, recent developments have shown that militarized contentious politics today manifests itself in new ways that challenge central ideas in the existing theories about the phenomenon. While the strong focus on individual cognitive changes in the so-called "radicalization theory" was critically scrutinized well before 2011, the weakening of the MENA states, combined with increasing regional and international meddling in the domestic affairs of several MENA countries, has, to varying degrees, challenged the state-centrist approach inspired by New Social Movement Theory found in much of the literature. (...)

Middle East scholars did accord a fair amount of attention to the issue of armed mobilization in the decades prior to 2011. In particular, scholars sought to conceptualize and explain how armed Islamist-led rebellions affected the domestic order-making of regimes in the postcolonial period, for example in Syria, Egypt, Algeria and other places. While early studies of the phenomenon, dating back to the 1970s and 1980s, typically drew on socalled "strain-based theories", which held that rebellions and protest movements emerged as psychological responses to collectively felt "strains" (either from modernization, urbanization or other large social processes), Middle East scholars would, in the 1990s, increasingly explain mobilization to rebellion as the outcome of one of two factors: theology or politics. Gilles Kepel, for instance, has argued in a number of volumes that theology was a key factor in jihadist mobilization. This argument was key in demonstrating how various segments of mainstream Islamists (e.g. what he refers to as the "pious" Muslim "bourgeoisie") in several MENA countries since the 1970s paved the way for jihadist mobilization as a reservoir for support and, subsequently, how theologically illegal conflicts between Muslims (fitna) played an important role in subsequent waves of demobilization. Within the more political and social reading, scholars such as Olivier Roy and (in a somewhat different manner) François Burgat argued that collective mobilization to jihad (and other types of armed rebellion) should rather be seen as responses to political and social developments. While Burgat's critique of the authoritarian regime's repression of non-violent Islamist contenders in the 1970s through to the 1990s gave the impression that he sought to justify jihadist mobilization, his diligent, rich and empirically supported analysis of the regime repression of Islamists in Syria, Palestine Egypt and Algeria in the decades after independence drew focus to the political nature of militant Islamist mobilization, including armed versions. In the decade of the 2000s, political scientists such as Mohammed Hafez and Quintan Wiktorowicz would, in a series of publications, aspire to link this type of political analysis reading of jihadist mobilization to broader theoretical debates within the social sciences, by analysing Islamist and jihadist mobilization in the MENA region with explicit reference to the vocabulary and methodology of the so-called New Social Movement Theory. Hafez in particular would align with the propositions made by François Burgat by arguing that armed militant resistance movements emerged in the MENA not as responses to collectively felt "strains", but in response to changes in political opportunity structures, mobilizing frames and organizational capacities. (...)

The most recent developments in the region confirm the importance of adopting the contentious politics perspective rather than other competing prisms when studying the ongoing and multiple forms of militant mobilization in the region. This perspective allows us to unpack and analyse, on

the one hand, how contentious movements and armed groups in the early days of the mobilization after 2011 emerged in countries such as Egypt, Tunisia, Algeria, Syria, Bahrain and so on as opposition and resistance political organizations, making political claims on the incumbent authoritarian regimes. On the other hand, it allows us to pursue the study of the current trend of militarization of contentious political mobilization in the strongly diverse set of cases of the contemporary MENA region. Hence, it enables us to study hybrid localized and/or transnationalized mobilization forms in collapsed states such as Libya, Yemen, Syria and Iraq, where opposition to international intervention exists as side by side with subnational, local dynamics of mobilization rooted in tribal-, family-, neighbourhood- or city-based relations. It also allows us a common language and analytical prism for analysing how militarization continues to work in cases such as Egypt, Algeria, Morocco, Jordan or the monarchies in the Gulf, namely under the influence of the dynamics emerging from the weakened but still remaining state structures and the trend of increasingly repressive and exclusive policies implemented by incumbent or restored authoritarian regimes. Finally, the contentious politics prism permits us to expand the types of mobilization under scrutiny beyond religious groups of jihadists and Islamists and beyond cognitively "radicalized" individuals to also include militant secular, socialist and nationalist movements, groups and cells. (…)

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FOURTH TREND: THE PLURALIZATION OF COLLECTIVE IDENTITIES

States, made up of institutions and bureaucracies, and regimes, constituted by political elites, do not exist in a vacuum but are embedded in a web of people-to-people relations that constitute societies. Belonging to a society more often means belonging to a specific group within it, hence the importance of collective identities in giving shape to society and to its relations with the state and the regime. In parallel to the hybridization undergone by states and regimes (and contentious politics), since 2011 collective identities in the MENA have also become more hybrid in nature and in their interaction with states and regimes. This is the result of the powerful forces that have been unleashed by the Arab uprisings. As a way of coping with this development, the literature on the MENA region has at least partially become more hybrid itself, by introducing new analytical

categories and new tools. While, in the pre-2011 phase, most studies dealing with collective identities at the national, subnational and supra-national levels tended to adopt a rather static view of the nature of collective identities and of their relations to states and regimes, since that time the literature itself has become more malleable and more open to contagion by less mainstream approaches, thus highlighting the growing complexity of the matter. Compared to the trajectories of the states and the regimes (and the literatures associated with them) discussed above, this has, so far, been a fairly linear development towards an increasingly nuanced understanding of the form and role of collective identities in domestic order-making in the contemporary MENA region. (…)

In this respect, few changes can be observed after the Arab uprisings, as states and regimes in the MENA largely continue to craft or sustain domestic orders on the basis of (often manipulated) collective identities. States, in general, tend to reach out to people and to perform duties towards them, in terms of the provision of representation, security and a minimum of welfare, by classifying them on the basis of categories of collective identities. This situation accentuates notions of distinctiveness and creates the conditions for people to compete for goods, assert their right to them and defend their allocation on the basis of their sense of belonging to a group. In their turn, political elites are often an extension of specific groups within societies and the claims that pertain to them. In Lebanon and Iraq, this has gone further, with the institutionalization of pre-defined notions of collective identities in state organizations. Up to the present time, senior positions in the legislature, executive, judiciary, civil service and army have been primarily allocated on the basis of sectarian identities. Similarly, quite fixed collective identities were elevated to become the primary organizing principle of politics in Iraq following the US-led invasion of the country in 2003, and this has been maintained even after 2011. In both countries, clientelism and patronage politics are not only prevalent forces in the maintenance of domestic order, but provide conducive conditions that prevent the rise of another type of politics. In addition, this situation accentuates the perception of communal differences and distinctiveness by reinforcing existing (geographical) separation, and creates competition and, in certain cases, violence.

In other contexts, such as Jordan, the modern political discourse of the elites has transformed the consciousness and identification of the individual with the community and has turned collective identity markers into "political artefacts" or an extension of the state. Today's tribal consciousness has been shaped by the shared political experiences of its members against the backdrop of regime manipulation. Thus, tribal identities have become a narrative of the state in MENA politics – a narrative that has been actively pursued by and has become ingrained in state institutions

in an attempt to deal with the challenges confronting the state after 2011. In this light, the literature on the politicization of tribal identities focuses on the continued manipulation of tribalism by states and regimes with the purpose of reconstructing state–society relations.

The process of reconfiguration of state–society relations in the MENA has been significantly shaped – in some cases more than in others – by what can be defined as the "pluralization of collective identities". This dynamic concern in particular those countries in which collective identities based on religious and ethnic but also ideological and political self-identification have emerged forcefully as drivers for contestation and political action during or after the Arab uprisings in 2011, although it does not exclude other cases as well. On the one hand, what has been observed is that collective identities have "exploded" and have given rise to a number of sub-identities that have put forth claims and competed for recognition and power. In this sense, "pluralization" does not necessarily mean that society has become "more pluralistic", but simply that the number of collective identities that tend to define people's sense of belonging and political action has increased. Collective identities, which used to be regarded and treated by states and regimes as homogeneous, have revealed fissures, and dynamics of competition and conflict have emerged. For example, being labelled "Islamist" is not a clear enough description any longer to understand a group's position vis-à-vis a number of issues such as participation in politics, the use of violence, the role of women and state–society relations in general, as this identity marker has become plural in itself, including starkly different positions and sub-identities. The trajectory of Tunisian Islamists is very telling in this regard. On the other hand, the growing exposition of MENA societies to different (global) identities, as discussed by Dalacoura, has led to the public emergence of previously dormant, unorganized or repressed collective identities. This has been accompanied by claims for better representation and more inclusiveness, which have been couched in terms of heightened identity self-consciousness.

In Morocco, ethnic claims based on linguistic identity distinctiveness have been advanced by the Amazigh minority. Similarly, age- and gender-based identities have found renewed meaning and impetus in the context of the – often short-lived – opening of spaces for contestation and participation that took place with the Arab uprisings. (…)

In conclusion, studying the hybridization of collective identities after 2011 means asking two interrelated sets of questions. First, to what extent have collective identities in the MENA become plural in the sense discussed above? Is this the result of the "explosion" of pre-existing collective identities along competing and/or conflictual fault lines or is this dynamic linked to the "bubbling up" of previously dormant collective identities? Second, what is the impact of collective identities on the restructuring or

maintenance of the domestic political order? How do collective identities manifest themselves at the meso level? What kind of organized groups embody them? What types of interests do they pursue? What interactions with other societal groups and/or the political elites do they give rise to? Finally, how are these interests and claims taken into account by state policies and institutions? What domestic order emerges from this dynamic in terms of cooperation versus conflictuality?

Armed conflicts and the erosion of the state: The cases of Iraq, Libya, Yemen and Syria

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The 2011 uprisings deeply affected the political order in the Middle East and North Africa (MENA) region. The popular protests directly challenged incumbent regimes' authority and legitimacy and in turn triggered what can be characterized as a crisis of the state itself. While in countries such as Tunisia and Egypt state institutions, as well as the very idea of the nation-state, have proven resilient in the face of the sudden disruption of power relations, this has not been the case in Syria, Libya or Yemen, where the uprisings rapidly became militarized and resulted in armed conflicts with foreign military intervention. Similar processes had occurred a decade earlier in Iraq, where military intervention by the American-led coalition and the ousting of Saddam Hussein in 2003 had a significant impact on state capacities and triggered dynamics that are still ongoing and in many respects mirror current trends in the overall MENA region. (…)

In these three countries, the transformation of the initially peaceful 2011 uprisings into armed conflicts pitting pro- and anti-regime forces against each other has further weakened the institutions of the state and led to extreme power fragmentation – especially in the security sphere; the collapse of formal political institutions and increased influence of armed actors over political processes; and the constitution of new power networks triggered by war economy dynamics. This has been the case irrespective of whether warfare eventually resulted in regime change or not. Similar dynamics have been at play in Iraq as Prime Minister Nouri al-Maliki's focus on securing control of key institutions, including the security services, resulted in the further weakening of institutional capacity and deep divisions within state structures along ethno-sectarian party lines that paved the way for the rise of the Islamic State in Iraq and the Levant (ISIL) in 2014. (…)

THE CHALLENGE OF REBUILDING CENTRALIZED STATES: PRIVILEGING LIBYA'S NATIONAL OR LOCAL INSTITUTIONS?

A focus on national-level political institutions – legislative and executive – has not proved particularly successful as a means to rebuild the centralized state, as demonstrated in the cases of Libya and Iraq, because these institutions have often lacked the capacity to recentralize service provision and security in the context of the new realities on the ground, including in some cases the presence of foreign actors. This inability to deliver what is expected of the "state" has been detrimental to the overall legitimacy of the centralized state.

Libya exemplifies many of the trends highlighted in the introduction to this section, with the specificities of local service delivery serving to reinforce the power and significance of local communities vis-à-vis the central state embodied in newly formed national-level political institutions. With the start of the 2011 civil conflict, newly developed local councils or local elites took on governance functions as the Gaddafi regime collapsed. This trend largely mirrored the local nature of newly formed armed revolutionary brigades. Despite the essentially local nature of the new power structures, the initial focus of international actors and Libyan political elites following the end of the conflict was on building national-level political institutions, particularly through electing the General National Congress (GNC) in July 2012. Elections for municipal councils took place between 2013 and 2014, based on a legal framework that made them responsible for all local service delivery. While in some areas they replaced the existing local governance actors/bodies, in others they became one of several actors in this space.

Since the breakdown of Libya's nascent national-level political institutions in 2014, the local nature of governance has been further reinforced, to the detriment of the political institutions of the central state. In the context of having two parliaments and governments, the central state's already weak ability to manage public finances and ensure a sufficient operating budget to provide basic services has further deteriorated. The fact that municipal and local councils in some areas have continued to provide limited services, coupled with the fact that they are elected, has provided these local bodies with a degree of legitimacy that generally exceeds that of national level authorities. The strength of the local over the national-level political institutions has been further bolstered by certain international organizations working at the municipal level, and by the inability of national-level authorities such as the Government of National Accord (GNA) to secure basic service provision.

However, it is perhaps a positive sign that the idea of the Libyan state remains significant for municipal councils, albeit with an undefined con-

cept of "decentralization" and with budgetary concerns apparently viewed as one of their main links with national political institutions. The highly centralized nature of the Libyan economy, based on oil and natural gas extraction, coupled with poor tax administration capabilities, has meant that municipalities continue to rely on the economic administration enshrined in the NOC and the CBL. The fact that these two bodies have more or less continued to function is testament to the fact that they were among the most technocratic institutions in the country before 2011 (given that they were responsible for the vast majority of the Libyan economy), and to the fact that they have been protected during the post-2011 transition. However, even the NOC's administrative integrity has been threatened by the fact that it relies on physical assets – Libya's oil infrastructure – to function. As a result, different groups on the ground have been able to blockade or take control of state infrastructure in pursuit of partisan aims (political and/or economic). This has reduced the potential for these bodies to play a role in rebuilding the legitimacy of the centralized state, as well as further linking the rebuilding of the state to rebuilding security structures.

The situation in Syria shows many parallels with Libya insofar as governance has become increasingly fragmented and localized

One further challenge in the Libya case is that institutional divisions and continuing conflict have rendered the economy deeply dysfunctional, as highlighted by the founding of a parallel Central Bank and National Oil Company (albeit with limited success) and the collapse of the banking system. The proliferation of players willing to take advantage of the crisis has dramatically increased corruption and malfeasance in the financial sphere, as well as the de facto privatization and plundering of state resources.

Armed groups and actors across the country in particular have made use of their military might on the ground to join or build profiteering networks that also include businessmen, politicians and members of the state administration. They have largely benefited from – and, by doing so, deepened – the blurring of the distinction between state and non-state, private and public interests, as well as between legitimate and illegitimate activities. They have, for instance, become involved in the diversion of state funds – notably through exerting pressure on managers of major commercial banks, misusing Letters of Credit and playing a direct role in cash distribution circuits (which should go from the Central Bank directly to local banks) – which allows them to finance their activities, but in so doing weakens state control over key economic functions.

In Tripoli, the "militia cartel" that provides security on the ground to the GNA seems to have been motivated to a large extent by access to

power and resources, rather than particular political views. Yet the special relationship between the cartel and the Presidential Council (PC) has also enabled them to exert considerable influence over appointments to key positions in the state administration and state-owned companies, and therefore to increasingly influence political decision-making. In the east of the country, Khalifa Haftar's strategy for consolidating his authority and expanding the self-styled Libyan National Army (LNA) has also been at least partly dependent on his capacity to source and distribute economic benefits and equipment to his eastern constituencies, especially among the tribes. The foreign support networks he has built up (especially in Egypt and the United Arab Emirates, UAE) have played a key role in this regard, thereby bypassing the traditional "state" channels altogether.

THE CHALLENGE OF REBUILDING CENTRALIZED STATES: ONE SYRIAN TERRITORY, MANY SYRIAN "STATES"

The situation in Syria shows many parallels with Libya insofar as governance has become increasingly fragmented and localized. However, in contrast to the Libyan example, local governance is (to varying degrees) linked to entities with differing visions of the state: the regime, opposition groups, the Kurds and the Islamic State (IS). The country is de facto divided into different areas dominated by different actors, which has been interpreted at times as the unravelling of the Syrian state as a territorial sovereign entity. However, the reality is that governing structures are highly dispersed among loose networks of multiple actors that compete over, or divide, governing tasks between them. All over the country, multiple groups enact and perform what are perceived as key state tasks – sometimes living side by side, and other times fighting, competing and negotiating in overlapping networks of power. These cross-cutting lines defy the simple rebel-versus-government control dichotomies that have become all too familiar from military control maps. Governing structures in Syria have become extremely fragmented, overlapping and above all localized, in no way resembling the highly centralized Syrian state from before the 2011 uprising, even though the Assad regime is keen to project an image of an uninterrupted all-powerful dawla (state).

Government-held areas have been calmer overall than those controlled by the opposition, with fewer active front lines and aerial bombardments and better access to international aid. This has obviously created more conducive conditions for governance in terms of providing basic public goods, administrating daily life and providing the civilian population with a relative sense of security. Importantly, the regime has been able to draw on the Syrian state's existing institutional and administrative capacities as well as its international status as a sovereign state. Yet there are vast differenc-

es between the territories nominally controlled by the Assad government.

The overlapping and very localized force structure is closely tied to Syria's war economy and business patronage networks. These have enabled the regime to simultaneously provide a minimum of (government) services to local communities and to nourish new and old power bases. Militia leaders and their families – both foreign and Syrian – have played a central role in these mechanisms. So too have business leaders, some of whom have, for instance, engaged in smuggling and trade of oil from IS-controlled areas to the regime or in illegal trading from regime-held territory to besieged areas. Local business leaders that help fund the armed groups are in return given rewards and remunerations such as government positions in the public sector, with local intelligence bureaus or as heads of the many new charity organizations that act as intermediaries for the regime. The Syrian government has also used contracts, properties and urban development rights to retain the loyalty of its patronage networks.

These patronage networks have been in part reconfigured due to war and displacement, with a new cohort of crony businessmen emerging. The new business figures have, on the one hand, made it possible for the regime to partially circumvent international sanctions and create a new loyal power base that feeds on the war economy and is dependent on the regime's continued survival. On the other hand, the new networks are highly decentralized, heavily involved in the illegal war economy and strongly influenced by foreign powers, thereby positioning the Syrian state in a less controlling role than before the war.

In opposition-held areas, opposition groups and activists have aimed from early on to create alternative governance structures to those of the Assad government. Importantly, however, the opposition efforts were not intended to create a new territorial sovereign entity or to break up Syria but rather to replace the Assad regime's state institutions within the existing national framework of Syria. The key civilian body – the so-called Local Administrative Councils (LAC) – initially grew out of the activist networks and over time were replicated all across the opposition-held areas – in part at the request of international donors – just as provincial councils were revived and organizational links with external opposition structures were established. Opposition governance became, in the words of one of the interviewees, "a simulacrum of the Syrian government".

Performing key tasks associated with "stateness" such as delivering basic health care, electricity and water, or even running local bakeries and providing affordable bread, have from the beginning been important vehicles for building local support in opposition-held areas. Local councils, non-governmental organizations (NGOs) and armed groups have therefore attempted to fill the void left by the withdrawal of the central gov-

ernment. Their governance efforts, however, have been heavily impacted by a hostile environment of rebel infighting, regime military attacks, sieges and inconsistent donor funding. Moreover, the Assad government has deliberately targeted opposition attempts to build alternative institutions, from military attacks on health care facilities and bakeries to "evacuating" members of the local administrative councils.

Moreover, armed groups, local councils and a variety of NGOs have ended up competing to provide basic services and regulation, and therefore competing for legitimacy. In practice governance structures have always been extremely localized and scattered, with very weak vertical linkages to, and support from, the Syrian National Coalition (ETILAF) and the Syrian Interim Government (SIG). Armed groups have often employed coercive means to tax goods and services, and have directly benefited from their control over lucrative channels of trade, smuggling and looting. However, such practices have also served to distribute resources and provide common goods to their own clients and extended families. Similarly, the armed factions' smuggling routes and shady wheeling and dealing with regime intermediaries have served as sources of self-enrichment and inflated prices on basic goods for the civilian population, especially in Eastern Ghouta, but at the same time these dodgy deals have facilitated the deliverance of goods to besieged areas. Poor living conditions, deep insecurity and a sense that the opposition has lost the war for good are now steadily causing Syrians to move from opposition-held to government-held areas. Yet people interviewed by the MENARA team underlined that local councils enjoy a form of popular legitimacy in their local communities that armed actors have not acquired, and that local council governance has for many Syrians been a whole new experience of participatory and representative politics that will have a long-lasting impact.

Building on the proclaimed principles of feminism, ecology and self-defence, the Kurdish Democratic Society Movement (TEV-DEM) in northern Syria has endeavoured to form a new grassroots system of democracy known as Democratic Confederalism since gaining control over the Kurdish territories. In 2014, TEV-DEM announced the creation of three autonomous cantons in Afrin, Kobani and Jazeera. These are formally ruled through provincial councils, referred to as Democratic Self Administrations (DSAs), a highly structured, multilevel administrative system in which the commune plays a key role. These self-administrations function as an administrative umbrella under the provision of the General Council of the Self Administration in Northern and Eastern Syria.

Each of the three DSA administrations has generally been able to provide basic services to the local population such as electricity, health care, education and security. Most of these services are provided for a fee, signalling that the DSA of each autonomous canton enjoys a more solid and exclusive

authority compared with rebel-held areas, where service provision is often shared and fought over among multiple competing actors. The DSAs have developed a number of institutions to administer various aspects of life in each canton. These institutions provide the main services in each of the cantons and the DSA pays the salaries of most of the employed personnel. The DSAs are also able to raise revenue from construction permits, taxes on land and cars, and border trade. The construction of roads, the provision of electricity and the management of health clinics are financed exclusively by the Kurdish authorities.

Interestingly, while service provision and administrative functions are essentially undertaken by the DSA, the Syrian regime remains in control of many government institutions (especially in Al-Hasakah and Qamishli, including the airport and a military base), just as the Syrian government continues to pay the salaries of many state workers and civil servants in state-run schools. Indeed, the DSA coordinates with regime institutions and works to a large extent in parallel with them. Thus, some services such as higher education and transport are planned, coordinated and paid for by the Syrian regime, and the regime also continues to provide key official state documents such as passports and certificates.

This pragmatic division of governing functions between the Syrian regime and the Kurdish authorities has, on the one hand, allowed the DSA to build relatively well-functioning and autonomous institutions. The regime has accepted this co-governance and outsourcing of its sovereignty, insofar as it has freed up valuable resources to be used elsewhere, while at the same time reminding the local population of its continued administrative presence. On the other hand, however, for the Kurds the continued presence and administrative foothold of the regime constitutes a constant reminder that it may intend to reclaim full authority over the Kurdish areas and Syria's external borders once the fighting is over in opposition-held areas. The extent to which Kurdish authorities will be able to sustain some degree of autonomy will largely depend on the support they receive from external powers – the USA, Russia and Turkey. If the USA remains committed to staying in north-eastern Syria in order to contain Iranian influence and secure some leverage in political negotiations, this may enable the Kurds to persevere. If not, the Kurds may stand to lose most of what they have built.

THE CHALLENGE OF REBUILDING CENTRALIZED STATES: YEMEN'S UNITY IMPERILED?

The mismanaged (and very recent) unification of the country in 1990, followed by several years of civil war, together with the weight of tribal structures, can account for the fact that Yemen has long been regarded as a "fragile" state, lacking strong central authority and with limited govern-

ment control outside of the cities. As a result of the 2011 uprising and the subsequent failed transition process, Yemen now appears to have broken down into an agglomeration of "small states" where traditional "state" functions are being carried out by different actors, including militias, armed groups and tribes. With the onset of the 2015 war and Saudi military intervention, political and local groups emerged and created their own order. In the south, the cities of Aden, Lahj, Al Dhale, Abyan and Shabwa, as well as the eastern governorates of Hadramawt and Al Mahra, are purportedly controlled by Hadi's government. Yet these governorates are subjected to varying degrees of control by pro-Hadi forces; security forces loyal to the UAE-backed former Aden governor, Aydrous al-Zubaidi; and other UAE-funded militias, including the Security Belt forces in Aden and the elite forces in the Shabwa and Hadramawt governorates. Interviewees have confirmed that local leaders, rather than Hadi's government, are in reality handling governance. Secessionist groups in the south have become more organized, thanks in large part to the support they have received from the UAE. The Houthis, who formed their own cabinet, have seized government facilities in the north and started performing state functions. Living conditions in the areas controlled by the former Houthi–Saleh alliance, particularly in the governorates of Saada, Hajjah, Amran, Hodeidah, Sana'a, Dhamar and Ibb, were described as "worse than in the rest of the country" due to the war, "although local security was perceived to be better than elsewhere".

Local councils, non-governmental organizations (NGOs) and armed groups have therefore attempted to fill the void left by the withdrawal of the central government

Direct foreign military involvement and competition, in particular between Saudi Arabia and the UAE, also contributed to the collapse of central authority and the division of the country into different areas of influence and control. Unlike Saudi Arabia, the UAE has been backing the secessionist groups under the pretext that "Hadi is a serial incompetent", and the country is believed to be carving out "strategic footholds for itself" in the south, "undermining Saudi influence" in Yemen. The Emiratis have seized the island of Socotra, in the Gulf of Aden, and have been establishing an air base on the island of Perim located to the west of the Bab al-Mandeb coast. Differences between Saudi Arabia and the UAE have started to surface, particularly after Al-Zubaidi's forces surrounded Hadi's government in Aden in January 2018. The UAE, which is a staunch opponent of the Muslim Brotherhood (MB), has been at variance with Saudi Arabia over the latter's support of the MB-affiliated Al-Islah Party against the Houthis. Moreover, before Saleh's death, the UAE was encouraging Saudi Arabia to back the former president instead of Hadi.

Interestingly, despite the war, overland trade has continued and the extraction of resources by the various groups in control of parts of the territory has been key to the expansion and consolidation of their power. The Hadi government has been able to generate income by resuming the export of hydrocarbons resources. Tribes in Mareb, Shabwa and Hadramawt have seized the oilfields in their governorates, while UAE-backed military forces, according to some of our interviewees, have controlled export facilities in Hadramawt and Shabwa since the withdrawal of al Qaeda in the Arabian Peninsula (AQAP) in 2016. The Hadi government has negotiated with the tribes and other UAE-backed forces in Hadramawt to export oil seized at the Al-Shihr facilities and in July 2016 a European oil trading firm, Glencore, secured a deal with the government to buy 3 million barrels for 40 US dollars a barrel. In Mareb, gas production has continued despite the war, with "the refinery [...] running at or close to capacity (estimated at 8,000–10,000 barrels a day) since at least late 2015". Mareb governor and strongman Sultan al-Aradah has used the money from oil and gas revenues to pay local militants and civil servants and for the provision of water, electricity and infrastructure services. In addition, property prices have peaked in the city of Mareb and electricity supply, "historically limited to around four districts, now reaches nine out of 14 districts". For the Houthis, customs and taxation make up the majority of income, reaching 1.2 billion US dollars in 2014. Before their alliance fell apart in December 2017, the Houthis and Saleh were sharing around YR10 billion (30 million US dollars) a month generated from customs collection. The Houthis also levied taxes on local markets and firms. Anecdotal accounts from Sana'a indicate that signs of wealth, including luxurious cars and houses, have become visible among Houthi leaders.

The regime has accepted this co-governance and outsourcing of its sovereignty, insofar as it has freed up valuable resources to be used elsewhere, while at the same time reminding the local population of its continued administrative presence

THE CHALLENGE OF REBUILDING CENTRALIZED STATES: IRAQ'S POLITICAL SYSTEM AS A MAJOR THREAT TO THE STATE

In contrast to what is described in the other cases studied in this report, recent developments in Iraq (military successes again the Islamic State, overall improved security and the organization of parliamentary elections in May 2018) have been described as a positive indicator that the state might be on its way towards regaining capacity and authority. However, reconstruction after decades of war and conflict is an overwhelming task. In

particular, it would require major attention to the "institutional reconstruction" of the Iraqi state, which has not yet been translated into a nationally shared and viable vision for (re)building the institutions of the state.

The inertia and corruption of the political system have been central to the crisis of the Iraqi state, both before and after the focus was put on defeating IS militarily. Interviews in Baghdad shed light on the widespread and cross-sectarian disillusionment of Iraqis with politicians and the political system in general. The political practice of the *muhasasa*, a power-sharing arrangement between the Shias, the Sunnis and the Kurds which was meant to secure minority representation, is particularly criticized by Iraqis, as it has had the unintended effect of emphasizing sectarian identity over issue-based politics. Iraqis pointed to sectarianism and its misuse for political ends as one of the reasons for the rise of IS. As a consequence, sectarianism has been somewhat delegitimized as a mobilizing tool, as evidenced in the 2018 parliamentary election campaign. Yet ethno-sectarian background remains a key determining factor in how people vote and frame their position in Iraqi society.

Although there were more than 200 parties running in the 2018 elections, the key coalitions are headed by political actors that have, in most cases, been part of the political elite since 2003, were shaped by repression during the Saddam regime and in several cases spent their formative years in exile. These coalitions were largely, although less profoundly than in the past, based on confessional affiliations, so in those cases where there was an attempt to establish a national cross-sectarian appeal, they would often put forward local candidates that matched the community's ethnic or sectarian identity.

The influence of tribal structures on politics is another element that has fed the perception of a political system where political parties are essentially engines of influence for specific actors or groups. Strong tribes can help "their" representatives get elected in return for favours after the election. Hence, while politicians are criticized for their lack of vision and national outlook, it is not uncommon to expect that a vote for a specific politician will be personally advantageous.

Many Iraqis perceive corruption, together with the lack of reform of the public sector, as the main reason for the degradation of the economic situation and the inability of the state to provide basic services. Corruption is indeed entrenched in all aspects of the politico-economic system, with politicians using their positions within the state institutions to access revenues stemming from oil and to build patronage networks that extend into the military and the private sector. The practice of using public employment or promotions as rewards for loyalty (including hiring unqualified people based on their political or sectarian affiliations) constitutes a major problem and has led to a bloated and, in some cases, incompetent public

workforce. For many Iraqis, the development of the private sector is therefore seen as a possible way not only to create jobs, but also to challenge the political status quo, as it would loosen their dependence on politicians who have been using public sector employment in exchange for support.

The Iraqi state is federal, but the fragmentation and lack of capacity in the Iraqi central state has led to calls for greater local autonomy, most notably by the Kurdish Regional Government (KRG). The independence referendum in September 2017 strained relations between Erbil and Baghdad and led to the Kurdish being forced out of Kirkuk. At the same time, the KRG has experienced recurrent protests over (the lack of) public salaries, maladministration and corruption. Likewise, serious protests erupted in July in the southern part of Iraq, starting in Basra, over the lack of services, especially water and electricity, as well as corruption and the lack of jobs. These protests have been directed at the entire political elite, including the Popular Mobilization Forces (PMF), and have demonstrated that the feeling of alienation from the political elite unites all sectarian and ethnic groups in Iraq.

The low voter turnout in the 12 May election of approximately 45 per cent is a warning sign that the Iraqi population has lost trust in the democratic system as a means of holding politicians accountable and achieving real change. Moreover, while Muqtada al-Sadr's victory can be seen as an indication that voters have opted for an anti-establishment and anti-corruption agenda, it remains to be seen how this will affect the Iraqi state-building project.

Religion and politics: Religious diversity, political fragmentation and geopolitical tensions in the MENA region

HAMZA MEDDEB, SILVIA COLOMBO, KATERINA DALACOURA, LORENZO KAMEL & OLIVIER ROY

MENARA Working Paper, No. 7.

Growing concern over the Middle East and North Africa (MENA) region and more specifically over matters of religion and politics urges us to take a closer look at the relationships between these areas of interest. This report has a special focus on social change, politics and conflicts, and on the ways in which they are shaping religious beliefs in the MENA region in the post-2011 period; it also pays particular attention to forms of religiosity and their impact on political dynamics. By focusing first on the analysis of new forms of religiosity in Muslim societies, we aim at providing a better understanding of patterns of religiosity and processes of secularization. We then turn our attention to the fragmentation of political Islam to grasp the plurality of trajectories taken by the different Islamist movements in Tunisia, Morocco and in Egypt, and by other radical movements (ISIS, al Qaeda and affiliates). It is our contention that understanding the future of Islamist movements is all the more crucial due to the fact that political Islam has been and remains a dominant ideological trend and a prominent socio-political actor in the region. Lastly, while shedding light on the broader post-2011 geopolitical trends, we focus our attention on the internal developments of Shia Islam, the future prospects for religious minorities, and Israel.

The 2011 Arab uprisings play a pivotal role in our analysis and their influence should not be overlooked, as they can reveal much about the significant dynamics that organize the relationships between religion and politics in the Middle East, and about the emergence of new forms of religiosity and innovative understandings of Islam among the Muslim youth. The pluralization and diversification of the religious field that these emerging trends exemplify also illustrate the profound transformations that societies in the region have experienced in terms of demographics (there are now massive shares of young people in the countries' total populations), rampant urbanization, spreading globalization and increased access to new information and communication

technology (ICT). The renegotiation of relationships between state and religion that derived from these changes represents a formidable challenge to the region, where postcolonial states have either administered or even held a monopoly over religion since the 1960s.

The wars and conflicts that have torn the Middle East apart have also rekindled geopolitical rivalry between Saudi Arabia and Iran, bringing the issue of sectarianism to the forefront

The major ideological trend in the Middle Eastern political and social landscape, political Islam, has undeniably undergone many challenges since 2011. Its vicissitudes have included winning elections and gaining power in the 2011–12 electoral campaigns, the subsequent withdrawal of Islamist movements after the overthrow of Mohammad Morsi in Egypt, the stepping down of the Ennahda movement in Tunisia, and finally the engulfing of large parts of the region in conflict. These developments have unmistakably challenged political Islam and Islamist movements, affecting their ideological tenets, their views regarding relationships between religion and politics, their political practices and most of all their fluctuating popularity. Yet, because each movement has had to adapt to its unique national context, Muslim brotherhood-affiliated movements ended up following different paths, and each trajectory contributed in its own way to current regional situations. The politicization of the Salafi movement and the creation of Salafist political parties to run for elections is one such example. The emergence of militant Islamism is another illustration and allows us to examine the ways in which jihadi groups have taken advantage of the vacuum left behind after regimes were overthrown, weakened or torn apart by conflict-fuelled divisions. As for the "Islamic State" organization, if its influence in Egypt and in Tunisia was limited, it took hold of large territories in Syria, Iraq, Libya and Yemen, reviving an old utopian idea (i.e. the creation of the Caliphate) and bringing jihadism to the forefront. There is no denying that this radicalism poses a serious threat to other forms of political Islam, as it feeds on internal infighting and on regional destabilization.

The wars and conflicts that have torn the Middle East apart have also rekindled geopolitical rivalry between Saudi Arabia and Iran, bringing the issue of sectarianism to the forefront, or between Qatar and Turkey on one hand and Saudi Arabia and the United Arab Emirates (UAE) on the other. The alliance formed by Qatar and Turkey has shown support for Islamist movements in Tunisia, Libya and Egypt, whereas the Saudi Arabia and the UAE alliance backed the Egyptian coup d'état financially and politically and provided support to restoration forces in Tunisia and Libya. These external interventions and support for different sectarian groups and ideological trends have shaped local power struggles and fuelled divides in a region marked by overlapping divisions and lines of conflict. This report closely examines the

effect of Iranian sectarian policies on Shia communities in the Arab world, as well as their internal divisions. Making religion a tool in pursuit of political struggle and geopolitical competition has led to the spread of all kinds of extremism, to the further polarization of local conflicts in Syria, in Iraq and in Yemen and ultimately has put in jeopardy the very existence and future of religious minorities. To sum up, this report sheds light on the three main dynamics that are reshaping the relations between religion and politics in the region today: first, the pluralization of forms of religiosity that has created a diversification within the religious sphere and a resultant need to renegotiate state–religion relations. Second, the transformation of the landscape of political Islam that has been represented by different trajectories taken by Islamist movements, balancing between moderation and radicalization in the case of Muslim Brotherhood-affiliated movements, political participation and apolitical positioning in the case of Salafists and global versus local in the case of the jihadi movements. And last, the impact of the geopolitical landscape on reshaping the relations between religion and politics within the second branch of Islam, Shiism, and within the Christian communities that represent the most important minority in Muslim-majority societies, as well as within the Jewish-majority society in the region, Israel, and the prospects for the Israeli-Palestinian conflict.

THE RELIGIOUS SPHERE AND NEW FORMS OF RELIGIOSITY IN THE MENA REGION

Since 2011, fixation on the rise of radical Islam has upstaged the underlying forces at play within the religious sphere in the Middle East, and overshadowed the dynamics that structure relationships between religion and politics in the region. Fostered by the MENA countries' demographic transformations and the globalization of knowledge and information, a more individualized and diverse religious sphere has emerged as a result of new forms of religiosity that exist both outside the realm of state-controlled institutional Islam and independently of political Islam.

There are reasons to believe that the decline of militant Islamism that occurred during the 1990s in the aftermath of the Algerian civil war and the growing clash between those sorts of movements and authoritarian regimes, along with the rampant repression of Muslim Brotherhoods throughout the Arab world, have contributed to the emergence of novel forms of religiosity represented by the growing number of new popular figures such as TV preachers and female preachers (dai'yat movement) and by the growing phenomenon of massive youth participation in Islamic charity work and social activism. Indeed, while the interest of the younger generations in holistic ideologies, be they nationalistic, leftist or Islamist is dwindling, new forms of religiosity are being championed. In fact, the

years preceding the Arab uprisings stand out – we observe an increasing diversity of religious forms distinct from movements related to political Islam: preachers with a style similar to American televangelists who are looking to promote moral values based on piety, discipline and self-esteem; Salafist and neofundamentalist movements that seek to resuscitate a traditional reading of religious texts; and a new social Islamic activism that is competing against official religious institutions in preaching, religious education and for the provision of social services and charity work.

These new forms of religiosity that mark an increase in religious practices and their associated symbols (Islamic veiling or headscarves, the burkini, halal dating, religious education, Koranic schools, websites dedicated to e-fatwa and e-preaching) demonstrate the dynamism of reIslamization or Islamic revivalism, which represents a means to many ends: on an individual level, it enables social mobility, self-fulfilment and well-being for the new educated and practicing middle classes who, unlike traditional people, are looking to combine Islamic values with modern lifestyles; while on a collective level, it contributes to the construction of a conservative society by means of individual piety and not through the establishment of an Islamic state. The rise of this new "Islam of the market" is based on codes of good conduct that emphasize religious symbols and seek to expand Islamic revivalism, not just into education through Koranic schools and religious courses but also into consumption and leisure activities. Pop singers, along with Islamic rap stars and heavy metal Muslims, provide good examples of the reconciliation between Islamic music and Western modernity, and so are places of leisure such as beaches and hotels that offer an alcohol-free environment and prayer rooms. The "burkini" worn by many women on beaches in the Arab world is a reflection of the compromise between faith and modernity, religiosity and Western lifestyle. Besides, this alliance of faith and modernity is not specific to one type of Islam, as it is common to both Shia and Sunni communities.

Many researchers readily agree that these dynamics illustrate a shift from Islamic-specific views of the world, and their associated obligation-oriented understandings, to new post-Islamist, inclusive ways of thinking that both acknowledge the existence of multiple interpretations of norms, and compromise over the performance of religious practices. In this view, post-Islamism shows that political projects have been relinquished in favour of new forms of piety that are more focused on salvation and morality in everyday life. This shift explains why charismatic preachers without formal Islamic religious training successfully promote a "faith and fun" religiosity, and can compete with the supreme guide of the Muslim Brotherhood or with the sheikhs of al-Azhar. It also helps understand why new trends in Islamic fashion are supplanting more traditional and austere Islamic forms of dress.

ISLAMIST PARTIES PERFORMANCE IN ELECTIONS SINCE 2011

MOROCCO
Parliamentary (2011)
Justice and Development Party -JDP
Muslim Brotherhood affiliated party
Votes: 27,08%
Seats: 107 of 395

Parliamentary (2016)
Justice and Development Party -JDP
Muslim Brotherhood affiliated party
Votes: 27,88%
Seats: 125 of 395

TUNISIA
National Constitutional Assembly (2011)
Ennahda
Muslim Brotherhood affiliated party
Votes: 37%
Seats: 89 of 217

Parliamentary (2014)
Ennahda
Votes: 27%
Seats: 69 of 217

EGYPT
Parliamentary (2012)
Democratic Alliance for Egypt
Muslim Brotherhood affiliated coalition led by Freedom and justice party
Votes: 37,5%
Seats: 235 of 508

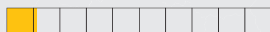
Islamist Bloc
Salafi party led by Al-Nour Party,
Votes: 27,8%
Seats: 107 of 508

Parliamentary (2015)
Al-Nour Party
Salafi party
Votes: 27,8%
Seats: 11 of 596

ALGERIA
Parliamentary (2012)
Green Algeria Alliance (MSP-Nahda-Islah)
Muslim Brotherhood affiliated alliance
Votes: 5,09%
Seats: 47 of 462

Parliamentary (2017)
Nahda-FJD
Muslim Brotherhood affiliated alliance
Votes: 3,70%
Seats: 15 of 462

LIBYA
General National Congress (2012)
Justice and construction
Muslim brotherhood affiliated movement
Votes: 10,27%
Seats: 17 of 200 (80 for political parties and 120 for individuals)



Results updated until October 2017.
Data compiled by Hamza Meddeb.
Created by CIDOB.

Since the 2000s, "evangelical" Islamic preachers, such as Amr Khaled, Khaled al-Guindy and, more recently, Moez Masoud, have come forward as representative figures of a casual religiosity, and whose messages are disseminated via ICT to a large audience throughout the Arab world. These preachers aim to address young people with a global awareness with a discourse focused on moral values, piety, virtue and success in life that breaks free from the outdated teachings of ulama that emphasize punishment and Judgement Day. These new preachers appear on television and on the Internet, and they hold seminars in the Arab world as they hope to chart a third way distinct from both classical religious messages and the politicized discourse of Islamism. They embody a sort of "Islamic revivalism" that does not seek the politicization of society. This is in contrast with the historical objectives of Islamist movements who abide by the dictates of the Muslim Brotherhood and which aim to Islamize society through the state. They seem to answer a need for piety shared equally by the middle classes and the new bourgeoisie that has emerged in the Arab world as a result of the liberalization and globalization of the economy. Without conflating the political with the religious, nor denying access to the material goods of consumer society, these preachers insist that the youth develop their own moral compass when it comes to consumerism.

Yet this post-Islamist religiosity is also described as "light preaching" (da'wa diet) or "airconditioned Islam", and is deemed religiously inconsistent by sheikhs of al-Azhar and at the same time as too "a-political" and conformist by proponents of a more political Islam. It represents a post-Islamist dynamic that illustrates the growing autonomy of believers in shaping their own religious practices and an autonomy that, as a central element of secularization, reflects the scope of the diversification and individualization experienced in the religious sphere over the past twenty years, and the extent to which each of these trends is tied to the social and demographic changes that have occurred in the region. In fact, a new generation is taking over and is changing faces: half of the Middle Eastern population is under twenty-four years old, two thirds are under thirty years old, and 70 percent of the population in the MENA countries now live in urban areas. This new generation is a reflection of the demographic changes that have marked the region. In other words, young people are more educated than their parents and they are little inclined to respect traditional authorities. Gender relations also tend to be more egalitarian as girls' now have improved access higher education, get married later in life, bear fewer children and are able to enter the job market. Young people are becoming more self-sufficient as nuclear families are supplanting extended ones. This new generation is also more open to the world: they are more likely to learn foreign languages, to be connected to the Internet and be active on social media. Moreover, as they become the dominant generation, the

chances are that they will come to assert their commitment to individual freedom and rebel against authority – in particular, against the classical religious authorities – all the more so because they are struggling to find their place within society in a tough economic climate. In turn, this could encourage further diversification of the religious sphere. Since the 1990s, more individualistic and less warring (or not belligerent at all) forms of religion have emerged as the Islamist utopia was running out of steam and large collective projects were failing to deliver on their promises. These versions of religiosity are less interested in establishing an Islamic state than they are in forging compromises, in combining different forms of beliefs, practices, lifestyle choices and participation in public life.

Meanwhile, the development of neo-fundamentalism or Salafism contributes to this more individualist re-appropriation of Islam. Interestingly, Salafism and post-Islamist religiosity share the same concern for the moral purification of customs and local cultures. The former is occupied with weeding out bid'ah (heresy), calling for a return to the word of the Koran and to the time of the Prophet. The latter deems religion useful as a way to prevent the overt modernization and Westernization of societies. However, disagreements exist and changes do occur. In contrast with the ideology of the Muslim Brotherhood, Salafism advocates, for instance, a strict and literalist application of the Koranic message that subjects human behaviours and conducts to certain norms (i.e. dividing things into licit or illicit/halal and haram). Salafists discard any kind of traditional culture, even "Muslim culture", rejecting as they do so arts, theatre, poetry, music and even architecture by destroying tombs and historical buildings. Neo-fundamentalism aims at reconstructing imagined roots of Islam that will rebuild the community from within. In a sense, it formulates a new identity for people who feel themselves to be oppressed, marginalized and victims of injustice. This focus on norms combined with the dissociation between culture and religion, along with globalization, explain the capacity of neo-fundamentalism to expand beyond the MENA region and into Western societies.

Moreover, the individualization of the religious sphere and the growing autonomy of believers in shaping their religious practices are things happening alongside the return of popular forms of religiosity that have reinforced the many national and traditional modes of expression of Islam among different social classes – for instance North African Sufism in the Maghreb region. Despite the attempts of the regimes in the Maghreb to homogenize Sufi spirituality, the practices of the Sufi orders have always been broad and diverse, ranging from "classical" orders close to scriptural Islam, popular religiosity with heteroclite practices, and, more recently, the emergence of liberal and modern spirituality promoting universal values depicted by critics as "Soufisme à l'Américaine" (American-style Sufism), particularly en vogue among upper classes. And yet, with respect to the Arab world,

the religiosity of a large share of the younger generation needs to be approached in a nuanced manner, for it is plural, hybrid and represents many interpretations of religious practices that range from the most radically conservative to the most liberal forms of belief. Often, practices still build on personal interpretations of what Islam stands for as a religion and belief system. Overall, it is fair to say that the individualization of religion has influenced the pluralization of the religious sphere, which in turn is challenging both the state and the movements affiliated with political Islam. This leads to contestation of the legitimacy of the religious establishment, which has a long tradition of making deals with the de facto powers in the region, and hence appears to such powers to be a serious challenge. The co-optation of the religious establishment is no longer an effective way to rebuild the legitimacy of the regimes in the region. Furthermore, individualization of religion has gone hand in hand with the formation of a broader religious market, in which religious establishments are less able to compete and to influence people's beliefs.

Since the 1990s, more individualistic and less warring forms of religion have emerged as the Islamist utopia was running out of steam and large collective projects were failing to deliver on their promises

The crisis in state-religion relations

Paradoxically, the Islamic revivalism that has fostered the individualization of religion since the 1990s has also contributed to the de-legitimization of traditional religious institutions which, prior 2011, used to serve as moral backing in the political regimes' fight against Islamism. Historically, Islamist movements had challenged traditional ulama, and denounced the fact that they provided religious endorsements to authoritarian regimes. With Islamic revivalism, the rationale for dissent is less politically grounded and more prosaically interested in damaging the traditional authorities. The assertiveness of new, self-taught preachers who have followed atypical career paths, and the circulation of religious knowledge in uncontrolled ways via the Internet, conferences, social media and television channels are a case in point. Indeed, this diversification within the religious sphere has increasingly challenged the authority of official religious voices. In the same way, the growth of religious products (books for a general audience, CDs, Muslim fashion clothing etc.), as well as in religious pilgrimage, tourism, recreation and leisure is setting the stage for a new faith-based market that eludes the control of traditional and official religious authorities.

This diversification contrasts with the efforts made by Arab governments to control the religious sphere, whether it be through the delimitation of Islamic organizations' freedom of action, as in Egypt, Algeria and Morocco, or through heavy restrictions on religious discourse, appointment of imams,

administration of mosques and religious education to avoid dissenting voices, as in Tunisia. In fact, in the case of Egypt, the Mubarak regime was unable to monopolize the religious sphere, and had to put up with Islamic organizations such as the well-established al-Gami'yya al-Shari'yya and al-Da'wa al-Salafiyya (the Salafist Call). In exchange for certain leeway, these movements refrained from criticizing the government and its policies. In Morocco, tension was also high between the monarchy and the ulama, despite the religious legitimacy of the king and the co-optation of dissenting religious voices: the prevailing "forced obedience" of the 1990s later turned into a "silent dissent" in the 2000s. In Tunisia, statecontrolled yet weak and de-legitimized religious institutions have kept their monopoly over the religious sphere. The bottom line is that across the MENA region, the autonomy of religious institutions has always been a challenge that has shaped relations between the state and the religious sphere in different ways depending on each state's historical trajectory.

The Arab uprisings nevertheless altered the political and institutional balance and led to the end of the state's heavy-handed control over the religious sphere. The distrust of official imams and religious institutions that had been discredited by their collusion with fallen regimes left room for formerly banned organizations and movements to move in and take control of mosques. While in Egypt, for example, imams and more broadly al-Azhar protested the "brotherhoodization" of the Ministry of Religious Endowments and feared that the Muslim Brotherhood might take control of religious affairs, in Tunisia, a battle for the control of mosques opposed the imams who had been appointed by the government against those appointed by Salafist movements or chosen by members of the mosque. These episodes illustrate the prevailing unruliness of the religious sphere at a time when the scope of public space was widening, which in turn allowed a plurality of actors to protest and express their opinions.

The rise of jihadi movements, the closing down of the political space in Egypt after the coup and the launch of the fight against terrorism in 2013 in many Arab countries meant that the state returned to its old habits and tried to regain total control over the religious sphere, most evidently in Egypt and Tunisia. The al-Sisi regime in Egypt indeed opted to ban Friday prayers in many mosques and other smaller places, so as to evict the Muslim Brotherhood from the religious sphere and reduce the influence of affiliated organizations. This decision entailed a drop in the number of unlicensed imams. At the same time, the Ministry of Religious Endowments limited its recruitment to preachers who had qualified through the religious establishment of al-Azhar and other state institutions, massively increasing the ranks of imams from 76,000 to 96,000 in order to cover Friday prayers in all of Egypt's 80,000 mosques. The war that the al-Sisi regime is waging against the Muslin Brotherhood to regain control of the religious sphere is extreme-

ly costly and there is no guarantee of success. Yet, considering the lack of human and financial resources, the ineluctable pluralization of the religious sphere and more generally because of globalization, the odds are against the successful return of a state-monopolized Islam. If it were to return, the chances are that it would generate negative side-effects such as distrust in imams and in official institutions, similar to the situation that existed prior to 2011. Wanting to listen to a trustworthy discourse, worshippers are already turning to independent organizations and thus contributing to the growth of a parallel religious sphere available via social media and religious studies "online educational courses", such as those by Dar el-Emad in Egypt or Imam Malik's Salafist University in Tunisia, which are extremely popular across the entire Arab world.

The existing religious pluralism testifies to the diversification of Islam-related identities, which goes to show that the dominant patriarchal and authoritarian political culture is being challenged throughout the Arab world. This may well be a harbinger of an autonomous political sphere leading to democratization. The 2013 Egyptian coup d'état illustrates the power of that momentum, as the new regime rushed to thwart efforts towards diversity and pluralism so it could reinstate patriarchy and authoritarianism. It also explains why the al-Sisi regime is continuously seeking to gain full control of the religious sphere. These efforts by the establishment may well be doomed to failure in the long term, for resistance is building and society is starting to rail against blindly following religious leaders who act merely as spokespersons for the political authorities.

The thousand-year-old institution that is al-Azhar is well aware that the regime may yield to the temptation of organizing an official Islam to better control it; and although al-Azhar sheikh supported the military removal of President Morsi for fear of a hegemonic Muslim Brotherhood, he still refuses to be made a tool by the political authorities, and opposes state control of al-Azhar.

Since 2011, Sufi orders have gradually reappeared in the political sphere of the Maghreb after decades of maintaining a low profile. The need of political parties to mobilize Sufi networks in electoral competition in Tunisia on one hand, and on the other, the attempts of authoritarian regimes in Morocco and Algeria to adapt to the new domestic and regional challenges in order to stabilize their rule in a climate of weakness in formal political institutions have opened the floor for Sufi orders to increasingly engage in the political sphere. Furthermore, Algerian–Moroccan competition and the economic ambitions of Morocco in Sub-Saharan Africa have pushed the authorities of both countries to strengthen transnational Sufi networks connecting these nations to those further south. The training of imams from Europe, sub-Saharan Africa and the Maghreb is considered a way to promote and export the Moroccan "brand of Islam".

This brand is still ill defined; it focuses, however, on a concept of "spiritual security", based on containment of dissenting religious actors, promotion of Sufi orders and a genuine management of the diversity of the religious sphere by the state through a mix of control and co-optation of various religious trends. Despite the support of Sufi orders to authoritarian regimes in Algeria and Morocco to counter the forces of political Islam, the promotion of Sufism cannot be reduced to a simple co-optation or instrumentalization of these actors by the regimes. Sheikhs and orders have been able to pursue their own political vision, showing in some cases a rapprochement with Islamists or propagating messages that are not necessarily in line with the official discourse of the regimes. The post-2011 context (democratic transition in Tunisia and authoritarian upgrading in Morocco and Algeria) has enhanced the visibility of the Sufi orders in Maghreb politics and expanded their margin for manoeuvre in a climate of diversification within the religious sphere and fierce competition with Salafism, Hizb Tahrir and other Islamist trends. In other words, it stands to reason that, since the Islamic religious sphere exhibits such a diversity of ideas, actors and organizations, then national efforts to enforce strict and monolithic policies are less likely to succeed and more prone to generating ineffective and counterproductive sideeffects. Creating an effective control mechanism requires the recognition of this diversity and to set out clear rules in terms of consensus and inclusivity.

Material factors for the MENA region: Energy trends

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Despite the divergent energy contexts found among the countries of the Middle East and North Africa (MENA) – in terms of energy mix, dependence on foreign resources, demand profiles and penetration of renewables – several trends continue to shape the energy landscape across the region, with potentially far-reaching economic implications. Such trends include increasing energy demands, shale gas abundance, the increasing role of gas in the energy mix and the growing liquefied natural gas (LNG) trade, as well as the energy transition that is taking place, albeit slowly, driven by renewable energy.

Currently unsustainable increases in energy demand (more than 5 percent per annum growth in most MENA countries), for electricity in particular, are likely to put more pressure on fossil fuels. This will continue to limit export capacities and eventually result in lost revenues. Fossil fuels (oil and gas) dominate the energy mix, especially in exporting countries, with their share ranging from 80 percent to almost 100 percent in some countries. Whilst their importance in the energy mix is still expected to persist in the future, the share of fossil fuels, oil in particular, might shrink proportionally due to energy mix diversification through alternative sources. Countries in the region will have to adapt their energy policy choices in order to keep up with their economic development aspirations, should the current energy situation and the pace of demand growth persist into the future. The key equation to be solved involves successfully decoupling energy demand and economic growth.

MENA countries face serious energy policy challenges, especially in the light of low oil prices, below 50 dollars a barrel, resulting in an urgent need to diversify their energy sources. The abundance of shale gas and the growing LNG trade are also having an impact on oil and gas prices and shifting the geopolitics of gas markets. The energy transition (the shift from an energy system which relies primarily on non-renewable energy sources to a more efficient, lower-carbon energy mix) will play a considerable role in the region's economies. Despite the slow uptake of renewables, especially in energy exporting countries, the outlook remains promising, particularly in view of plans and programmes put in place by various countries in the region. Once deployed on a larger scale, renewables will lead

to important energy savings and generate other socio-economic benefits. The transition can be expected to have a positive impact both on oil and gas exporting countries, by helping to maintain export capacities and eventually guaranteeing government revenue streams, and on energy importing countries, by reducing dependence on foreign energy sources by exploiting locally available, renewable energy sources. This, in turn, could contribute to economic development and thus stability in the region.

ENERGY OVERVIEW IN THE MENA REGION: UNSUSTAINABLE GROWTH IN ENERGY DEMAND

The MENA region, which includes some of the world's largest fossil fuel-producing countries, has been an important player in the supply of energy (mainly oil and natural gas) worldwide. The region as a whole exported 1,074 million tonnes of oil equivalent (Mtoe) in 2014, roughly equivalent to half of its total production. Overall, the countries in this region can be classified into two main categories: net energy importers and net energy exporters. With the exception of Algeria and Libya, all southern and eastern Mediterranean countries are currently net energy importers. In particular, the dependence rate on foreign resources in Jordan, Lebanon and Morocco is more than 90 percent. Conversely, all of the Gulf Cooperation Council (GCC) countries, plus Iran and Iraq, are energy exporting countries, in addition to the aforementioned Algeria and Libya.

As far as energy production is concerned, the region's production (mainly oil and gas) accounted for around 16 percent (2,148 Mtoe) of total world energy production in 2014. Whereas world energy production has increased on average by 1.9 percent during the 1990–2014 period, the region has witnessed relatively higher production levels, with an average annual growth rate of 2.4 percent during the same period. Saudi Arabia alone accounted for 29 percent of the entire region's production in 2014, followed by Iran (15 percent), Qatar (10 percent), the United Arab Emirates (UAE) (9 percent), Kuwait and Iraq (8 percent each), and the others accounting for the remaining 21 percent.

Crude oil production in the region has seen continuous growth. The region's production accounted for around 37 percent (34.4 billion barrels of oil) of total world oil production in 2016. A share of 36 percent has been maintained over the years, albeit with an annual increase of 1.9 percent on average of production during the 1990–2016 period in absolute terms. Saudi Arabia has led the region in terms of production, with 36 percent of total production at the regional level (representing 13 percent of world oil production, with more than 12 million barrels of oil per day), followed by Iraq (13 percent), Iran (13 percent) and the UAE (12 percent), with the remainder shared among the other countries, mainly Qatar, Algeria, Oman, Egypt and Libya.

CONCENTRATION INDICES FOR KEY VARIABLES BY COUNTRY FOR THE MENARA STUDY AREA

Country	Population concentration (2015) %	Population change concentration (1975-2014) %	Rainfall concentration %	Productivity concentration %	Energy demand concentration %
Algeria	93	97	57	92	89
Bahrain	62	56	2	43	27
Egypt	94	9	65	93	87
Iran	83	94	27	65	65
Iraq	84	90	34	65	72
Israel	48	41	16	30	26
Jordan	87	90	28	87	75
Kuwait	87	86	5	78	38
Lebanon	54	40	10	26	31
Libya	97	99	60	96	93
Mauritania	93	100	35	80	99
Morocco	70	89	27	58	74
Oman	89	99	21	90	74
Qatar	81	85	4	75	38
Saudi Arabia	94	98	22	85	78
Sudan	90	98	43	63	96
Syria	71	76	26	60	68
Tunisia	77	86	34	67	60
Turkey	72	81	11	24	54
UAE	91	96	12	80	54
West Bank	48	41	16	30	26
Western Sahara	93	100	7	93	99
Yemen	80	94	24	80	82

The region's share of world gas production has grown as production volumes have increased on average by 6.1 percent annually during the 1990–2016 period. The region's production accounted for around 22 percent (about 772 billion cubic metres) of total world gas production in 2016. At the regional level, Iran and Qatar accounted for the largest share, with 50 percent of the regional gas production, followed by Saudi Arabia (14 percent), Algeria (11 percent), the UAE (8 percent) and Egypt (6 percent), with the remainder split mainly between Oman, Libya, Bahrain and Kuwait.

The region is endowed with vast reserves of oil and natural gas. This positions the region favorably to play an important role in global energy supply. According to BP energy statistics, the region is host to 51.5 percent (879 billion barrels of oil) of global proven oil reserves as of 2016. Saudi Arabia stands as the leading country in the region in terms of reserves, accounting for 16 percent (267 billion barrels of oil) of global proven oil reserves as of 2016. At the regional level, reserves are concentrated in the following countries: Saudi Arabia (30 percent), Iran (18 percent), Iraq (17 percent), Kuwait (12 percent), UAE (11 percent), Libya (6 percent) and Qatar (3 percent).

As for natural gas, the region hosts 47 percent (87 trillion cubic metres) of global proven gas reserves as of 2016. Iran and Qatar are the leading countries in the region in terms of both reserves and production levels of natural gas. Together they account for 31 percent (57.8 trillion cubic metres) of global proven gas reserves as 2016. At the regional level, reserves are concentrated in the following countries: Iran (38 percent), Qatar (28 percent), Saudi Arabia (10 percent), UAE (7 percent), Algeria (5 percent) and Iraq (4 percent), followed by Libya, Egypt and Kuwait (2 percent each).

The MENA region contains around 12.5 billion tonnes of coal reserves, representing about 1.1 percent of the world's total as of 2016. The majority of these coal reserves (lignite) are located in Turkey. Coal production reached around 72 million tonnes in 2016 (99 percent of which is in Turkey). As for exploration in the region, there remains potential overall for further increases in reserves (mainly oil and gas) in the future. Most areas in the southern Mediterranean, for example, especially offshore, are either under-explored or unexplored. Unconventional hydrocarbon resources development activities are still in the early stages in the region. In the Mediterranean region, for example, current activities continue to focus on resource assessment and exploration. (…)

ENERGY DEMAND IN THE MENA REGION

The rapid increase in energy demand, for electricity in particular, is arguably the most notable trend in the region. Driven by economic development and industrialization, population growth and the increasing need for water desalination, the skyrocketing energy demand has pushed

countries to revisit their energy strategies. Most of the countries will have to adjust their policies to cope with this unsustainable growth in demand for energy, which might pose serious problems by reducing export levels of hydrocarbons and thus putting constraints on governments' budgets, and eventually impact economic growth in the region.

Driven by economic development and industrialization, population growth and the increasing need for water desalination, the skyrocketing energy demand has pushed countries to revisit their energy strategies

Accounting for around 29 percent (more than 622 Mtoe) of total energy production in the region, Saudi Arabia led the region in energy exports, with more than 405 Mtoe (65 percent of domestic energy production) in 2014. Relatively speaking, Qatar and Kuwait exported around 80 percent of their domestic energy production, and Iraq almost 70 percent. However, energy export trends are expected to change drastically in the near future if energy consumption continues at its present rate (TPES increasing annually by 4.5 percent), thereby leading to reductions in export capacities in order to meet increasing domestic energy demands.

The MENA countries accounted for around 8 percent (1,047 Mtoe) of world TPES in 2014, whereas this share was only 5 percent of TPES in 1990, with 511 Mtoe. Whereas global energy demand has been increasing by around 1.9 percent on average annually, the increase was much larger in the MENA countries – 4.5 percent annually – during the 1990–2014 period. Two countries (Saudi Arabia, 214 Mtoe and Iran, 237 Mtoe) accounted for the largest share, with 42 percent of TPES in the region, followed by Turkey (11 percent), Egypt (8 percent) and Algeria (6 percent), with the rest accounting for the remaining share of 23 percent.

By sub-region, the GCC countries seem to have the highest energy demand growth rates. For instance, Qatar and Oman witnessed the fastest growth in energy demand, with annual average rates of 8.3 and 7.6 percent respectively during the 1990–2014 period. Much of this energy demand can be observed at the electricity sector level, where very high electricity demand growth rates are recorded. Significant growth rates in electricity demand were seen in Oman, Qatar and UAE, with 10.4, 11.5 and 10.4 percent respectively during the 1990–2014 period. All other countries had rates ranging between 5 and 10 percent annually.

The MENA countries accounted for around 6.5 percent (1,423 terawatt hours, TWh) of world total electricity consumption in 2014, while their share in 1990 was only 3.2 percent (or 344 TWh). Whereas global electricity demand has been increasing by around 3.8 percent on average annually, the increase was much larger in the MENA countries,

with 7.8 percent annually during the 1990–2014 period. In 2014, Saudi Arabia accounted for the largest share of electricity consumption, with 20.4 percent (291 TWh) of total electricity consumption in the region, followed by Iran with 16.5 percent (234 TWh), and then Turkey with 15 percent (220 TWh), Egypt with 11 percent (152 TWh) and the UAE with 7 percent (102 TWh).

On a per capita basis, electricity consumption rates vary significantly across the region. On a regional level, electricity consumption stood at an average of 2.7 megawatt hours (MWh) per capita in 2014, slightly lower than the world's average. However, some countries in the region have the highest per capita rates in the world, mainly the GCC countries. Bahrain has the highest rate of electricity consumption per capita (19.2 MWh), more than double the average rate for OECD countries and six times higher than the world average. Qatar, Kuwait, UAE and Saudi Arabia are also above the average rate for OECD countries. The lowest per capita consumption rates in the region are in Palestine, Syria, Morocco, Sudan and Yemen.

The demand for electricity in the region is expected to increase due mainly to economic development and population growth. The gap in electricity consumption on a per capita basis between the countries might narrow somewhat. For example, countries with very low per capita consumption rates might see their rates go up (especially in the light of increased energy access and the exploitation of locally available resources, mainly renewables), and energy efficiency measures might be deployed in countries with higher rates. Nevertheless, the gap is likely to remain high across the region.

Therefore, the increasing demand for energy is likely to have far-reaching implications for economies of the region. Some countries, including Saudi Arabia, Qatar, Kuwait and Iraq, export more than half of their energy production. However, these countries might see their export capacities shrink should the current energy demand trends be maintained. In GCC countries, for example, rising energy demand, driven by huge development projects in the domestic, service and infrastructure sectors, as well as growth in industrial consumption, mainly the steel, aluminium and petrochemical industries, is expected to put pressure on government budgets and reduce hydrocarbon export potential, thereby resulting in a loss of foreign exchange revenues. In this respect, the UAE and Kuwait have already become net importers of natural gas, and other GCC countries (e.g. Oman) have seen their gas exports constrained by rapidly increasing domestic energy demand. In order to meet growing natural gas needs, Bahrain plans to increase imports of natural gas. Saudi Arabia is also expected to become a net energy importer in the near future, if current consumption patterns remain the same.

Given these dynamics, especially the skyrocketing energy demand, countries in the region are revisiting their energy strategies in order to ensure that they support economic growth. In addition to adopting some demand-side management measures, especially energy efficiency, energy mix diversification, mainly through renewables, is gaining momentum and being put forward as an alternative to meet the growing energy demand. The role of natural gas is also gaining momentum, and it together with renewables will constitute the major energy sources in the power sector.

Embeddedness of the MENA in economic globalization processes

ECKART WOERTZ & IRENE MARTÍNEZ,

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Middle East and North Africa (MENA) countries are laggards in terms of trade integration and investment flows. Henry and Springborg and other scholars have pointed out that the MENA region has fallen behind other world regions in the age of globalization, especially emerging markets in Asia, but also in Latin America. This assessment chimes in with the resource curse literature. Economies of resource abundant countries tend to focus on non-tradables as a result of Dutch disease and an effective appreciation of the exchange rate. They also maintain political structures and practices that are hampering economic development, such as resource capture by elites, corruption, rent seeking and educational shortcomings.

An analysis of trade patterns reveals a prevalence of oil and gas exports in many countries of the MENA, while manufactured goods dominate the import side of their balance sheets. Yet there are some striking differences and also evidence of diversification. Gulf countries such as Saudi Arabia, the United Arab Emirates (UAE) and Qatar have built up thriving heavy industries in petrochemicals and aluminum. Dubai has pioneered diversification into trade, logistics, services and tourism and has inspired copycat projects in other Gulf countries, but also beyond, in such unlikely places as the Kurdistan Region of Iraq and Morocco. Morocco has the largest global phosphate reserves. It has moved up the value chain by investing in fertilizer production and other chemical industries, as the Gulf countries have done in the case of petrochemicals. There is considerable light manufacturing in Morocco, Tunisia, Egypt and above all Turkey, ranging from car manufacturing and car supplies to textiles and food processing.

Henry and Springborg observe considerable differences in MENA states' interaction with economic globalization, ranging from "bunker states" that concentrate economic prerogatives in the hands of the state (Algeria, Iraq, Libya, Syria, Sudan and Yemen) and "bully praetorian states" that leave some room for initiative to the private sector and associated rent seeking activities (Egypt, Tunisia and Iran) to the globalizing monarchies in the Gulf, Morocco and Jordan and precarious democracies in Lebanon, Turkey and Israel. The MENA region is more diverse than it often seems. A differentiation according to various levels of resource and labour endowments is necessary,

ranging from the resource abundant/ labour poor states (Gulf Cooperation Council [GCC], Libya) to the resource abundant/ labour abundant ones (Algeria, Iraq, Iran) and the resource poor labour abundant countries (Jordan, Morocco, Tunisia, Lebanon). As mineral production in Syria, Yemen and Sudan has been affected by conflict and maturing oil fields, the status of these countries increasingly resembles that of resourcepoor/ labour-abundant countries, too. Turkey and Israel, the only Organisation for Economic Cooperation and Development (OECD) countries in the region, are set apart by higher incomes and their diversified economic structures. (...)

GLOBAL EMBEDDEDNESS: HEAVY INDUSTRIES (GULF, TURKEY AND MOROCCO)

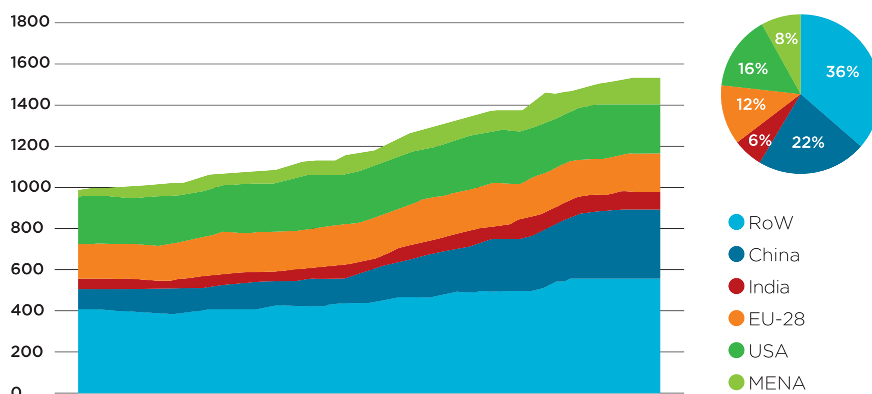
In the 1970s the nationalization of oil industries in the MENA heralded the end of vertically integrated international oil companies. Spot markets for oil and petroleum products developed to mediate between formerly integrated parts of the supply chain. Gulf countries sought to move beyond the upstream sector and enhance the value chain of their oil production by investing in downstream industries and distribution networks. They established major petrochemical companies such as Saudi Arabia's SABIC and the UAE's Borouge. Such companies have undertaken foreign acquisitions and joint ventures. SABIC's takeover of British Huntsman Petrochemicals, US GE Plastics and Dutch DSM and investments of the Abu Dhabi-based International Petroleum Investment Company (IPIC) in Austrian Borealis and Spanish CEPSA are cases in point. Petroleum demand for transport has levelled out or is declining in OECD countries.

It might suffer further with the proliferation of electric mobility, not only in the OECD countries, but also in emerging markets such as China, as some interlocutors of the business community pointed out during our interviews in Kuwait. In contrast, demand for petrochemicals is projected to grow over the coming decades. As their use does not immediately lead to harmful emissions they are not as controversial in climate debates as the burning of hydrocarbons in transport and industry. Hence the diversification strategy into petrochemicals offers longer-term perspectives for the Gulf countries. Saudi Aramco, for example, has sought to integrate refining and petrochemical production more closely with its Rabigh deep conversion refinery that it has built in a joint venture with Japanese Sumitomo.

Since the 1980s there has been a dramatic shift of global petrochemical production capacities from OECD countries to emerging markets, especially the Gulf countries and Asia. OECD countries had a 75 per cent market share in 1980. This share declined to 37 per cent in 2010, while the share of the Middle East and China grew to 13 per cent and 17 per cent respectively. This trend in the Gulf region is buoyed up by access to cheap feed-

stock, but also by increasing demand in the region and the proximity to the booming Asian market. The industry has increasingly moved towards more value added and naphta-based production. Natural gasbased ethane is no longer readily available as a result of rising domestic natural gas consumption. This has led to natural gas shortages and import needs in every Gulf country except for Qatar. So far petrochemical growth rates in the Middle East and Asia continue to be stronger than in OECD countries, even after the shale revolution has led to a reinvigoration of the US petrochemical industry in the Gulf of Mexico, as a former Italian energy executive pointed out in our interviews. The concentration of petrochemical industries in the Gulf also offers potential advantages for carbon capture and sequestration, as plants are in close vicinity to oil fields where the injection of carbon dioxide could be used to maintain reservoir pressure.

TOTAL PRIMARY ENERGY DEMAND, BY REGION/COUNTRY



Beyond petrochemicals, other energy-intensive heavy industries have also contributed to economic diversification. The Gulf countries doubled their aluminum production between 2010 and 2017 and are now the second largest producer after China, which dominates global markets with a share of 55 per cent. The UAE, Bahrain and Saudi Arabia are the largest producers, followed by Qatar and Oman; only Kuwait has no aluminum production. Together Gulf countries represent over 8 per cent of global production. They have also reduced their import dependence on steel.

The MENA region is rich in oil and gas, but poor in iron ore, coal and other minerals that have played crucial roles in industrialization processes. To safeguard feedstock supplies Gulf countries have acquired access to mining production of alumina and iron ore in distant places such as Guinea,

India and Mauritania. Turkey has chosen a different approach. It has become the largest global importer of scrap metal to feed its steel industry, which has doubled production since 2004.

The MENA region is an important source of global fertilizer production. It (mainly Israel and Jordan) produces 10 per cent of world potash and nitrogen-based ammonia and 25 per cent of phosphates, a figure that does not even include the recently launched Al-Jalamid project in Saudi Arabia. The dominance of the MENA in the phosphate sector is likely to grow. Morocco alone commands threequarters of global reserves according to the International Fertilizer Development Center and the US Geological Survey (USGS), which have massively upgraded their reserve estimates for the country. Syria, Tunisia, Algeria, Egypt and Saudi Arabia have also significant reserves, and in Iraq's Al Anbar province phosphates amounting to 9 per cent of the global reserve base have been discovered. This makes Iraq the second most resource-rich country after Morocco. MENA's dominance in global phosphate reserves is much more pronounced than its well-reported share of global oil and gas reserves. Phosphorus is an essential macronutrient for fertilizers and, as it is an element, it cannot be substituted, unlike the production of nitrogen fertilizer from natural gas for example. Phosphorus is essential for global food security. Hence the MENA dominance of global phosphate reserves carries longterm strategic implications. As with Gulf petrochemicals, Morocco and Saudi Arabia have sought to enhance the value chain of a primary commodity by moving downstream and producing more value-added products such as fertilizers and phosphoric acid.

The large energy needs of domestic heavy industries contribute to skyrocketing domestic energy consumption in Gulf countries, alongside residential demand. Except for Qatar, all Gulf countries have a natural gas shortage. As a remedy they have recourse to liquified natural gas (LNG) imports or burn fuel and crude oil in power plants. The domestic demand growth threatens to compromise oil exports and revenues. This has led to diversification attempts into renewables and nuclear energy, especially in the UAE and Saudi Arabia. The introduction of these new sources in the local energy mix entails close cooperation with international providers and presents another aspect of integration in economic globalization dynamics.

GLOBAL EMBEDDEDNESS: FINANCE (GULF, LEBANON, MOROCCO, TURKEY)

Until 1975 Lebanon was a major banking hub in the region, but in the wake of Lebanon's civil war and the oil boom, this distinction has passed on to the Gulf countries. Bahrain and the UAE have established bespoke international financial centres to attract business. Qatar has tried to do the same and the formerly closed stock market of Saudi Arabia was opened

to foreign investors in 2015. MSCI upgraded the stock markets of UAE and Qatar in 2013 and included them in its emerging market index. This led to increased interest by international investors, although some of them chose not to invest and allow for the minimal tracking error, given the small share of both countries in the MSCI index, as interlocutors of the Kuwaiti stock exchange pointed out in our interviews.

Globally, financial markets have on average a balanced structure of equity, bond and bank financing. In comparison, MENA financial markets are heavily skewed towards bank financing, with a share of around 60 per cent. Bond markets are especially underdeveloped. While bank financing dominates, access to it depends on political connections. A practice of name lending is widespread. Receiving bank loans can be challenging for small and medium sized enterprises (SMEs).

Bond and equity markets have grown, however. Gulf stock markets have opened up internationally and bonds from the Gulf countries have enjoyed considerable interest from international investors in an environment of low interest rates. Despite these examples of disintermediation, bank lending remains prevalent across the MENA. In Turkey over 90 per cent of financial assets are held by banks. The role of capital markets in Turkey is limited and non-bank financial institutions are underdeveloped, notwithstanding the country's level of economic development and its OECD status. However, in recent years, foreign banks have gained more access to Turkey's financial sector as a result of a series of acquisitions. This limits the risk of market concentration as market power is more evenly distributed between private domestic, foreign-owned and stateowned banks.

Lebanon is a special case, as it relies on capital inflows, mostly from overseas Lebanese and Gulf countries to finance its huge current account deficit. Foreign direct investment (FDI) inflows alone were 5 per cent of gross domestic product (GDP) in 2015 and as high as 12.3 per cent in 2005. Lebanon has a very substantial stock of FDIs compared with its small population and GDP size. The Gulf countries dominate FDI stocks in the region with their capital-intensive projects in heavy industries. Turkey also has high levels, but its stocks have decreased since 2010.

This leading group is followed by Egypt, Lebanon and Morocco. Dubai Islamic Bank was the first modern Islamic bank when it was founded in 1975. Today Islamic banking has developed into an important niche market in the Gulf, which is the largest Islamic banking centre in the world, ahead of Malaysia, Iran and Western Europe. With around 15 per cent annual growth Islamic banking is one of the fastest growing sectors of the industry. This growth comes from a low statistical base and will probably slow down in the future. Yet there is considerable growth momentum today, given the large Muslim populations with growing interest in this kind of banking. Internationalization of the industry, however, is hampered by

different national regulatory standards and divergent views on details of Sharia compliance in key markets such as Malaysia and the Gulf. The closure of HSBC's Islamic banking division Amanah in six key markets, among them Dubai, to where it had moved its headquarters only a few years before, is indicative of limits to growth and profitability in the sector.

The term sovereign wealth funds (SWFs) was first coined by Andrew Rozanov in 2005. Since then this type of investor class has witnessed steep growth in the wake of the oil boom of the 2000s and large current account surpluses in Asian exporter nations. However, it still trails far behind the assets of Western banks, pension funds and insurance companies. Apart from Libya all MENA SWFs are located in the Gulf region. Algeria and Iran manage their more modest foreign assets mainly via their respective central banks, as does Saudi Arabia with the Saudi Arabian Monetary Agency. Older and larger funds such as the Abu Dhabi Investment Authority and the Kuwait Investment Authority follow a more passive portfolio investment approach, while others such as Mubadala and the relatively young Qatar Investment Authority undertake strategic investments, can pursue controlling stakes in companies and also invest in private equity.

According to Sovereign Wealth Fund Institute data, the Middle East's SWF assets represented 37 per cent of global SWF assets in 2014. The main recipient of these investments has been the European Union (48 per cent), with about half of that share going to the UK. The US and Asia followed with 16.6 per cent 10.4 per cent respectively. China and Taiwan accounted for over threequarters of the Asian investment share.

Morocco is an interesting case of financial south–south globalization. It has sought to establish itself as an intermediary between Africa and Europe and has strengthened business relations with sub-Saharan Africa (SSA). SSA is the only region of the world with which Morocco has a trade surplus. Moroccan companies have established themselves in strategic sectors such as telecommunication, pharmaceuticals and agro-alimentary industries. Before 2005, Moroccan banks had only a limited presence in SSA, focusing on Guinea, Mali and the Central African Republic. Since then there has been rapid expansion, helped by the retrenchment of French banks in SSA, the increase of trade flows from Morocco to West Africa and the weak activity in the Moroccan domestic market. The overseas expansion of Moroccan banks has relied on the acquisition of local banks, whose local deposits largely fund the newly acquired subsidiaries. The assets of Moroccan banks in SSA typically range between 3 and 7 per cent of host countries' GDP, with the largest concentrations in Senegal, Burkina Faso, Mali, Niger, Côte d'Ivoire, Benin and Gabon. Morocco's push into SSA has helped Casablanca to become a regional financial centre. In the MENA it is ranked right behind Dubai and Abu Dhabi and ahead of Tel Aviv. Most remarkably, Casablanca is also rated first in Africa, unseating Johannesburg. (...)

GLOBAL EMBEDDEDNESS: LOGISTICS (GULF, EGYPT, MOROCCO, TURKEY)

In terms of logistics five developments in the MENA stand out: (1) The rise of super-connector airlines in the Gulf and Turkey, (2) Morocco's interconnections with SSA, (3) the rise of container traffic in the Gulf, (4) the lasting importance of the Suez Canal and other chokepoints for global trade and (5) Turkey's importance as a gas and trade transit hub.

Gulf airlines are a mixed bag. Many are only of regional importance and can be rather sleepy operations, such as Saudia Airlines, Gulf Air or Kuwait Airways, but the three airlines that have pursued the super-connector business model have developed into major players in global aviation: Emirates Airlines, Qatar Airways and Etihad. Their business strategies aim at becoming transit hubs for the long-haul routes between Europe and Asia. Two billion people live within four hours' flying time from the Gulf and twice as many within seven hours.

Since 2006, Emirates Airlines has tripled its passenger numbers and Etihad and Qatar Airways have seen even steeper growth. The Middle East had a 9.6 per cent share of the international passengers market in 2016. Gulf airlines lead global aviation growth, both in terms of new airline capacity and revenue passenger kilometers, a measure that reflects how many of an airline's available seats were actually sold. The average age of their fleets (5.4–6.4 years) is less than half that of their American and European competitors and the three super connector airlines constantly rank among the top ten airlines in global rankings. The sector is crucial for economic diversification and feeds other related sectors, such as tourism and trade services. A study by Oxford Economics in 2014 quantified the direct and indirect contribution of aviation to Dubai's GDP at 26.7 per cent of GDP and 21 per cent of employment. Turkish Airlines, too, has adopted the super- connector model. Like the Gulf airlines it seeks to conquer market share in transit traffic between Europe and Asia. With many exotic destinations in Central Asia and Africa it is now the airline with most destinations globally. Its passenger numbers skyrocketed within a decade from 17 million in 2006 to 61 million in 2015.

The regional competition between the super-connector airlines has raised questions about their long-term growth prospects. It has been doubted whether Qatar Airways is in fact profitable and there have been reports about a possible merger between Emirates and the smaller Etihad that the companies denied. Established airlines in the US and Europe that have been ruffled by the Gulf carriers' success have blamed them for thriving on fuel subsidies, low wages and unfair labour practices and have lobbied their governments to undertake protectionist and retaliatory measures. The Gulf carriers have denied such accusations but clearly feel the political headwinds. More danger could come from the economic front: with growth

in global aviation it becomes increasingly profitable to provide direct connections between smaller destinations, making the whole super-connector model potentially superfluous. Many of the new plane orders of airlines now encompass planes for such medium sized connections, rather than huge airplanes for super-connections such as the Airbus 380 or the Boeing Dreamliner. Airlines that are domiciled in countries with large domestic markets in Europe, North America and Asia also have entered a number of alliances that could threaten the Gulf airlines that are domiciled in city states without such domestic market advantages.

The Middle East had a 9.6 per cent share of the international passengers market in 2016. Gulf airlines lead global aviation growth, both in terms of new airline capacity and revenue passenger kilometers

Super-connectors apart, Morocco increased its air traffic by 160 per cent in the wake of the EU-Morocco open skies agreement of 2006 and has become a regional hub for air traffic in Africa. The national air carrier, Royal Air Maroc (RAM), developed its network of African flight destinations from six in 2003 to 30 in 2014 and from these 30 cities there are 45 more connections to other countries in Africa, making Morocco a hub between Africa and Europe and attracting logistics companies such as DHL. Currently 55 per cent of RAM's destinations are to African countries and they provide 25 per cent of the company's turnover. Apart from its geographical location fertilizer exports are a major reason for Morocco's interest in Africa as the representative of a Moroccan research institute pointed out in one of our interviews. African fertilizer usage per hectare trails way behind other world regions. The continent will need to use more fertilizer to increase agricultural production and feed its rapidly growing population. The state-owned phosphate company OCP launched a bespoke subsidiary for Africa in 2016. It hopes to replicate the steep growth of its fertilizer exports to other agricultural producers such as Brazil and India.

Led by Jebel Ali Port in Dubai, some Gulf countries have developed into major shipping hubs, especially for container traffic. Jebel Ali is a primary entry point to the Gulf and the wider MENA market. Other significant ports include Jeddah, on Saudi Arabia's Red Sea coast and Khor Fakkan on UAE's coast with the Indian Ocean. Sharjah, the neighbouring emirate of Dubai, also has a large harbour. In 2015, Jebel Ali was the world's ninth busiest container port with 15.6 million TEU, only surpassed by Singapore and Chinese ports and ahead of European ports such as Rotterdam, Antwerp, Hamburg and Valencia, which were more important operators only a decade ago. With the completion of the East–West

railway line in Saudi Arabia, over time Jeddah may be able to compete more efficiently with Jebel Ali. Currently Jeddah ranks 36th world wide in terms of container volume (4.2 million TEU), Port Said in Egypt 41st (3.6 million TEU) and Sharjah in the UAE 44th (3.4 million TEU).

When the Suez Canal was completed in 1869 it revolutionized global trade by cutting the distance between Europe and Asia by 43 per cent. For Egypt it is a major source of hard currency revenues and a catalyst for FDI in sectors and economic zones that develop around it. Around 10 per cent of the world's shipping traffic and 22 per cent of its container traffic passes through the canal. The same is true for 5.6 per cent of global oil and petroleum product supplies, which is equivalent to 9.2 per cent of the world's maritime oil traffic.

Due to its strategic location, the Suez Canal has become one of the world's most important chokepoints for food and oil trade. A recent report by Chatham House highlights its importance for trade between Europe and several Asian economies. One-third of South Korea's wheat and maize is imported via the Suez Canal and MENA wheat imports that pass through the canal grew by 120 per cent between 2000 and 2015. The Suez Canal also forms part of one of China's One Belt One Road maritime routes. There are only limited alternatives as the detour around the Cape of Good Hope is time- and fuel-consuming and thus expensive. The Netherlands and the Mediterranean countries of Europe also rely heavily on trade via the canal.

The New Suez Canal is expected to increase direct revenues from shipping, but world trade figures are still sluggish and falling oil prices have made it more attractive for some ships to take the detour via the Cape to avoid the canal's hefty transit fees. To increase the economic impact of the canal, Egyptian authorities are initiating new economic zones, factories and logistics facilities around it.

With the Blue Stream pipeline Turkey has developed into an important destination for Russian gas. The expected completion of the Trans-Adriatic pipeline in 2020 and possible future pipeline projects could transform Turkey into a gas trading hub between Russia, Central Asia and Europe. Middle Eastern gas from Iran, Iraq and the Levant could also be fed into the Turkish transit system, depending on the development of reservoirs, international agreements and the security situation. If the abandoned South Stream pipeline project via the Black Sea to Bulgaria is replaced with a successor project, Russian gas transits to Europe via Turkey could also increase. Such a successor project is currently being discussed between Turkey and Russia. Via the Strait of Bosporus Turkey is also the primary access point for trade from the Black Sea region, most notably the substantial wheat and barley exports of Russia and Ukraine that have superseded European and US exports in recent years. (...)

GLOBAL EMBEDDEDNESS: AGRICULTURAL AND FOOD TRADE (ALL MENA)

The MENA region is the world's largest net importer of cereals. Its agricultural production cannot be increased substantially for lack of water and arable land, while its population growth will only level out after 2050. The reliance on food imports will persist and even grow, especially for water intensive cereals and fodder products. The widespread rhetoric of self-sufficiency and efforts to increase cereal production are not sufficient to counter this trend. In many cases such efforts will fall short for lack of the necessary natural resource endowments. Saudi Arabia actually phased out its wheat production between 2008 and 2015.

This import dependence is perceived as a strategic liability by MENA countries, especially at times of conflict or market turbulence. This was the case in the wake of the global food crisis of 2007/2008 when agricultural exporter nations such as Argentina, India, Vietnam and Russia declared export restrictions out of concern for their own food security. Beside the traditional grain exporter countries (North America, Eurasia, Argentina and Australia), tropical countries such as Brazil (poultry, corn and soybeans), Malaysia and Indonesia (palm oil) and rice exporters such as Pakistan, India and Thailand have gained increased prominence over the past two decades.

To ameliorate concerns about import dependency the cash-rich oil exporters among the MENA countries announced agricultural investments abroad in the wake of the global food crisis of 2007/2008. They hoped to gain privileged bilateral access to food production, often in food insecure countries such as Sudan or Pakistan. Actual implementation of such controversial projects has fallen short of the media announcements. Many projects were not launched at all or only at a fraction of the announced scale. When the Gulf countries actually put money on the table it was rather for established agricultural export nations such as Australia or Argentina and in the downstream sectors of food processing and distribution. Saudi state-owned SALIC, for example, joined forces with international grain trader Bunge in 2015 and took over a majority stake in the former Canadian Wheat Board when it was privatized. The upstream acquisition of farmland was less interesting by comparison, as it is politically controversial and economically challenging in many developing countries.

Beside the deep integration of MENA countries in global food and cereal markets via the import side, some of them are also major exporters of fruit and vegetables. Turkey and Morocco are the only MENA countries that have an agricultural trade surplus in value terms. Like the other MENA countries they are cereal net importers, but export other foodstuffs. Turkey is the seventh largest agricultural economy globally. It is the world's biggest

producer of hazelnuts, apricots, figs, cherries, quinces, raisins and poppy seeds, the second largest producer of melons, watermelons, strawberries and leeks and the third largest of lentils, apples, cucumbers, green beans, green peppers, chestnuts and pistachios. Morocco, Tunisia and Egypt are also substantial exporters of fruit and vegetables to the EU. Morocco is also one of the world's largest producers of strawberries. Tunisia increasingly manages to develop direct marketing channels for its olives, instead of wholesaling them to Italian olive oil producers. Despite considerable trade liberalization with the EU, quantitative restrictions for some agricultural products remain in place. MENA producers also struggle with EU food safety standards that have to be overcome to access European markets. In our interviews a Kuwaiti investment official was sceptical whether Morocco and Tunisia would be able to grow their agricultural production without better water management because of growing water scarcity. He also questioned whether the North African countries had benefitted as much from their improved market access to the EU as initially expected.

The MENA region is the world's largest net importer of cereals. Its agricultural production cannot be increased substantially for lack of water and arable land, while its population growth will only level out after 2050

Material factors for the MENA region: Data sources, trends and drivers

MARTIN KEULERTZ, MARK MULLIGAN, ECKART WOERTZ, EMANUELA MENICHETTI & SVEN BISCOP

MENARA Methodology and Concept Papers, No. 3 (2016)

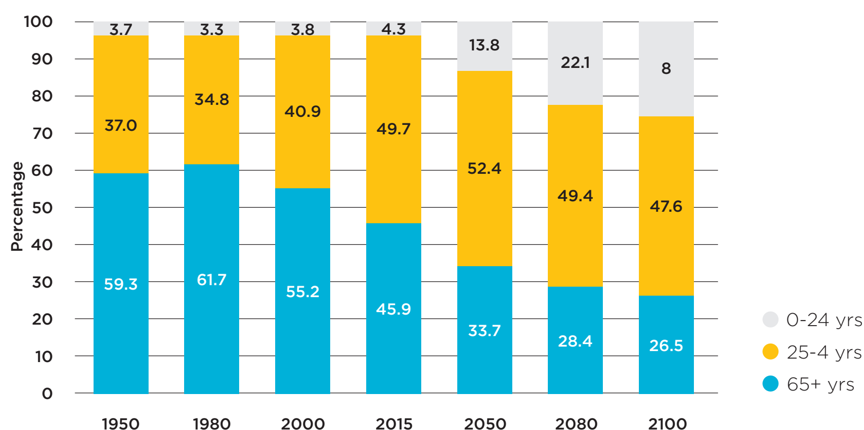
KEY DEMOGRAPHIC TRANSFORMATIONS FOR THE MENA REGION (1950-PRESENT): POPULATION GROWTH, URBANIZATION, YOUTH AND MIGRATIONS

The MENA countries have been growing fast. While in the 1950s, the total number of people in the MENA countries totalled 102-134 million, the number almost tripled to 303-339 million in 1990. In terms of population growth, the MENA countries were affected by strong migration patterns. While North African countries grew organically by almost 2-3.5 percent per year, the West Asian countries of the MENARA project experienced significant differences thanks to the political-economic developments in the region. While the Occupied Palestinian Territories saw a net loss of population during the Arab-Israeli wars (with increases seen again later), Jordan and the Gulf states experienced population growth patterns of 10-20 percent growth. The Hashemite Kingdom of Jordan was particularly affected during the Arab-Israeli wars; the Gulf states saw a strong net population increase from 1975-1985 when demand was high for foreign workers in the hydrocarbon industry.

The MENA region's population is growing fast. Its population has doubled in the three decades since 1980. In 2015, the total number of people living in the MENA countries is 493 million. It is expected to add another 110 million people by 2030, which translates into an average annual growth rate of 1.8 percent. This is almost twice the global population growth rate of 1 percent. In 2050, it is estimated that the total number of people living in the MENA countries will be 730 million. It is therefore one of the fastest-growing regions in the world, and this growth will put immense pressure on national resources and the environment.

Another important trend in the demography of MENA countries is rapidly increasing urbanization. The MENA region has the fastest-growing urban populations in the world, with approximately 70 percent of inhabitants living in cities. The urban hotspots are the GCC countries, Egypt and Tur-

key. The latter two are home to the region's only two mega cities (defined as more than 10 million people), Cairo (18 million) and Istanbul (14 million), which are both growing, yet much less rapidly than their South and East Asian counterparts. While Cairo is predicted to reach 24 million, Istanbul is predicted to grow to 16 million by 2030. However, the MENA region is also home to cities in the second category of large urban settlements (5-10 million inhabitants). These cities are Tehran, Jeddah and Baghdad. In terms of age structure, the MENA region is defined by young people. One-third of the population is younger than 15 years of age. This will further increase population pressures in the region when these youngsters reach childbearing years and enter the labour market.



The MENA region also has a history of international and regional migration. There are three types of migration patterns. The first is forced migration and internal displacement as a result of crises and conflicts across the region, particularly in Iraq, Libya and the Syrian Arab Republic. The second is economic migration within the region and transiting through the region, with the particular destinations being Europe, as well as towards Gulf countries. In recent years, North Africa has become a hub for transiting migrants from Sub-Saharan Africa, who seek to enter Europe via the illegal and dangerous crossing of the Mediterranean Sea from Libya and Egypt. In addition, Syrian refugees have entered Europe through Turkey, Greece and the Balkans. Third, there is a movement of (regular and irregular) labour migrants both within and from outside the MENA region. These migrants come from Sub-Saharan Africa, East and South Asia and even the countries of the former Soviet Union, seeking employment in GCC countries but also in Lebanon, Jordan, Egypt and Morocco.

KEY ENVIRONMENTAL DRIVERS FOR THE MENA REGION (1960-PRESENT): POPULATION GROWTH, CLIMATE CHANGE, WATER SCARCITY, SOIL DEGRADATION AND FOOD AVAILABILITY

The environment in the MENA region has been a concern for many scientists and decision-makers in recent decades. As Allan notes, "the MENA region had in practice run out of water [...] in the 1970s". Water resources (both surface and groundwater) have been gradually depleted, leaving the region heavily dependent on the world market to procure food. These "virtual water imports" have allowed the MENA region to enjoy a "form of food and water security" thanks to readily available food from global food bowls such as North and South America. The MENA region is and will remain the largest importer of staple food commodities such as wheat, soy, sugar, rice and animal feed. Without access to the world market, the MENA region would face a dire future. Although some academics have pointed to climate change as a reason for the outbreak of the war in Syria, one should treat environmental factors with caution. The dismal environmental situation in the MENA region undoubtedly contributes to political, social and economic problems. However, environmental factors are not the root cause of political and social unrest, only contributing factors. The same is true for increasing levels of land degradation. About one-third of Arab land is severely degraded due to overuse of pesticides, mono-cropping and over-exploitation of land resources for grazing and crop growth.

Environmental factors take a heavy toll on the region's ability to achieve food and nutrition security. Dependence on the world market especially raised eyebrows among decision-makers during the 2007-08 and 2010-11 food price spikes. As some researchers have noted, the volatility of food prices could increase the vulnerability of the region to future price shocks. Arab governments have been among the most agile investors in farmland in developing and industrialized countries. This so-called "land grabbing" has been heavily criticized by the international community due to its murky nature. Although Arab governments were linked to a wave of investments in land in the post-2008 period, very few (if any) investments materialized. Moreover, climate change will also take a toll on the region. Recent studies suggest that a changing climate could lead to increased incidence of heat waves leaving areas such as the Gulf states uninhabitable for human beings. In many ways, environmental factors may be the crucial bottleneck for economic and social development in the coming decades. (...)

Available historical environmental data is scarce. The only database which provides historical data on water resources is Aquastat. Yet the most useful and comprehensive data is available on water resources availability

(ground and surface water, water through infrastructure) and water per capita. This data has been collected since 1960, and WP3 intents to use those indicators. Data on irrigation expansion is scattered and unreliable, while data on crop yields is generally not available. Data on land use change is available via FAOSTAT. For the MENA region, land use change means in particular urbanization. However, urbanization trends have not been mapped by any database. Only raw data is available, which could be mapped by WaterWorld.

Data on water per capita shows that 15 out of 18 MENA countries are experiencing water scarcity

An important material environmental factor in MENA countries is soil degradation. The degree of soil degradation and the degree of soil erosion is available from GLASOD, which was launched in 1991. On water, the general trend is declining water availability per capita due to population growth. While most of the MENA countries were abundantly endowed with water resources in the 1960s and 1970s (with the exception of the GCC countries, Palestine and Libya), availability has sharply declined since the 1980s. Other environmental data shows a very alarming current picture. Historical data is mostly non-existent, hence the analysis should focus on current trends and some future indications of how climate change, for example, may worsen environmental factors in the MENA region.

Climate change is a threat multiplier that can increase or decrease the threats posed by water and food shortages and by land degradation. Climate change is sure to have an impact in a region so defined by climatic extremes. Even small changes in rainfall and temperature can make a difference to regions that are already extremely hot and dry. These differences can be positive and negative. For example, rising sea levels may put the Nile Delta in Egypt at risk of flooding. Whilst climate change will increase temperatures globally, changes in rainfall patterns are much more complex and uncertain and some regions may become more dry whilst other regions become more wet. This may also change over time, such that increased dryness is followed by increased wetness or vice versa. The key effects of climate change will be to undermine business as usual and to force agriculture, infrastructure and populations to adjust to new and newly changing conditions. No two projections agree on how rainfall will change, so we will need to consider not adaptation to a particular future but adaptability and resilience to any reasonable future. The figures below from the WaterWorld Policy Support System indicate projected increases in rainfall for much of the African MENARA hydrological region, particularly the mid to upper Nile, with decreases in rainfall expected for the North African coast. Combined with increases in temperature (and thus evaporation), these will lead to increases in available water for the southern hydrological region but decreases for the northern hydrological region. Further

work is required to understand to what extent these changes balance out over basins and to what extent annual changes are evenly spread or highly seasonal, all of which have important hydrological implications. (…)

Data on water per capita shows that 15 out of 18 MENA countries are experiencing water scarcity. Eight countries are even facing absolute water scarcity below 500 cm3/capita. The most waterabundant countries are Iraq, Iran and Turkey. Moreover, Egypt's share of the Nile may further decline due to dam construction in East Africa, which means its water per capita availability may drop further during the timeline of the MENARA project. Despite increasing water scarcity in the MENA region, the Global Hunger Index shows that food availability and nourishment levels have actually increased in all MENA countries. Only Iraq has seen a decrease in food security levels, mostly due to political issues like the multilateral UN embargo that lasted from 1990-2003. Yemen is considered seriously food insecure but has improved from alarmingly food insecure. Egypt, on the other hand, is exposed to moderate food insecurity.

The most important driver of environmental degradation in the MENA countries is population growth and subsequent migration to urban areas. Economic growth in the GCC countries has attracted millions of people from within the region and beyond, which places further constraints on limited natural resources in the hyper-arid areas of the MENA member states. Prime agricultural land has been used for urban development in places such as Jordan, Lebanon, Tunisia, Syria, Egypt, Morocco, Iraq, Iran and Algeria. Due to protectionist policies aimed at food self-sufficiency, the majority of the MENA countries are over-exploiting their environment. Moreover, conflict in Syria, Yemen and Iraq has displaced millions of people, putting environmental constraints on certain hotspots such as Jordan, Lebanon, Turkey and Egypt.

The mirage of regionalism in the Middle East and North Africa post-2011

RAFFAELLA A. DEL SARTO & EDUARD SOLER I LECHA

MENARA Working Paper, No. 18.

It is often noted that regionalism is not well developed in the Middle East and North Africa (MENA): existing regional cooperation platforms have remained largely ineffective, political integration is lacking and the level of regional trade has remained low. Thus, although the MENA region has witnessed a proliferation of regional cooperation mechanisms since the mid-1940s, with the Arab League being the oldest functioning regional organization worldwide, there is a clear mismatch between the levels of formalized cooperation and the level of regional integration. Even the Gulf Cooperation Council (GCC), formerly heralded as the most successful sub-regional cooperation forum, is experiencing a severe crisis prompted by the boycott of Qatar by Saudi Arabia, Egypt and the United Arab Emirates.

The paper assesses the extent to which the uprisings provided opportunities for regional organizations to play a greater political role and the ways in which they amplified tensions among the organizations' members, eventually preventing them from becoming politically relevant. While we consider the 2011 Arab uprisings an important turning point, we maintain that subsequent regional developments opened a significant window of opportunity for regional cooperation and cooperative security mechanisms that previously had been closed. But the uprisings also increased the level of regime insecurity amid shifting threat perceptions, thus modifying the preferences of the different actors when dealing with regional organizations.

Thus, as the mirage of regionalism quickly faded, political developments in the region after 2011 hindered the emergence of regional integration and cooperation in the medium to long term. Examining the roles played by regional organizations in the MENA region post-Arab uprisings highlights the mismatch between weak regionalism, that is, regional integration steered by political elites, and growing regionalization trends, that is, the growing societal and partly cultural interconnectedness of the region. During the uprisings, Arab populations – together with

events in the region – became increasingly interconnected. While this development for a brief period overlapped with regional cooperation initiatives undertaken by political leaders, the divergent interests of key Arab regimes and their concern with their own survival in a threatening regional environment meant that regionalism and regionalization soon parted ways. The paper thus shows that the uprisings prompted a number of important changes in the regional order, temporarily forging some political regional cooperation but eventually preventing the development of any meaningful regionalism. Concurrently, the factors that had traditionally limited regional integration remained in place and even increased in strength. (...)

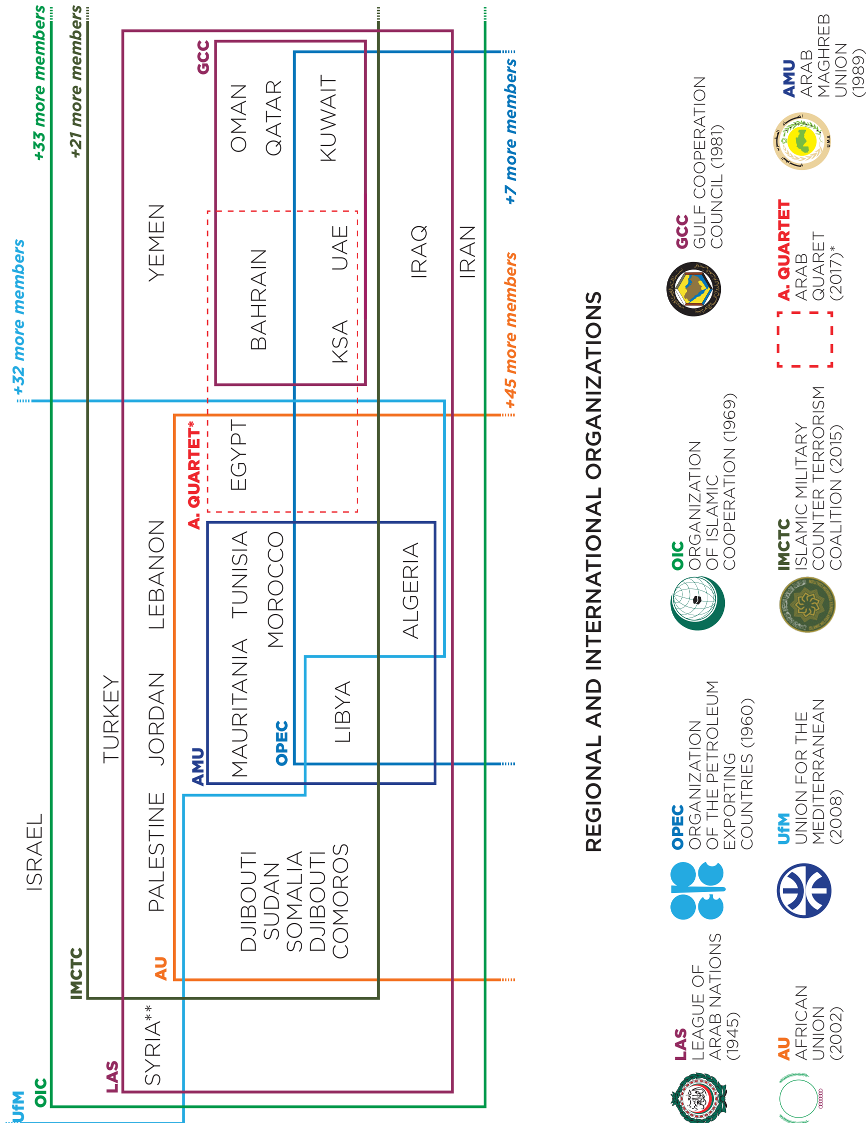
The uprisings also increased the level of regime insecurity amid shifting threat perceptions, thus modifying the preferences of the different actors when dealing with regional organizations

THE ARAB UPRISINGS: ENCOURAGING OR PREVENTING REGIONAL COOPERATION?

The popular protests that led to the ousting of several long-lasting Arab autocrats certainly ushered in a period of transition in the MENA region, with the outbreak of civil war in Syria, Libya and Yemen only increasing the level of instability and uncertainty. At least temporarily, these developments seemed to encourage a number of actors to seek greater regional cooperation via the established regional organizations. But the Arab uprisings and their aftermath also affected the regional order in a number of significant ways, which actually prevented the emergence of regionalism in the medium to long term. Most importantly, the region has witnessed a number of important power shifts and reconfigurations, together with the emergence of new conflicts.

These have been described as the “New Middle East Cold War”, the “New Arab Cold War”, the “New Arab Wars” and “intersecting conflicts”. An increased sense of regime vulnerability, the manipulation of collective identities (most notably the Sunni–Shia divide), the emergence of different jihadi groups, together with the competition between Islamism and pan-Arabism for popular support (which the former seemed to win) soon prompted a competition for hegemony among regional powers while providing new opportunities for a number of global and regional actors to meddle even more in Middle Eastern affairs. Concurrently, whenever actors were not able to take full control of already established organizations, they promoted alternative forms of regional cooperation, resulting in a proliferation of “liquid alliances”.

REGIONALISM AND BEYOND: MAPPING REGIONAL AND INTERNATIONAL ORGANIZATIONS IN THE MENA



** ARAB QUARTET was not a formal organization, but a coalition of countries promoted by Saudi Arabia to boycott Qatar under alleged accusation of supporting terrorism.*
*** Syria has its membership suspended from LAS, OIC and UfM since the beginning of the civil war in late 2011-mid 2012.*

Created by Cristina Sala & Oriol Farrés (CIDOB).

Significantly, other key features of the regional order that have contributed to the weakness of regionalism in the Middle East remain unchanged. Most Arab regimes continue to be characterized by weak domestic sovereignty and a lack of legitimacy, which in some cases only intensified. Equally, the region remains dominated by inward-looking coalitions, marked by a reliance on economic self-sufficiency, state and military entrepreneurship, illiberalism and nationalism. In some cases, for example in Egypt, the role of the military has become even more entrenched. Importantly, the introduction of neo-liberal economic reforms in the MENA region in recent decades has not resulted in the emergence of "regionalizing logics" in most cases. While the reforms led to the restructuring of political and economic power around neo-liberal cliques, the basic features of the old model, including corruption and rent-seeking patterns, have been maintained. At the same time, most MENA states have remained preoccupied with regime survival: insecurity and threat perceptions still appear to be the main drivers of cooperation and conflict in the MENA region post-Arab uprisings, with the collapse of several Arab regimes only reinforcing the sense of insecurity among those who have survived.

The regionalist momentum in the MENA region from 2011 to 2013 dissipated rather quickly thereafter. Initial expectations were soon disappointed and regional organizations in the MENA became hostages to the dynamics of regional fragmentation

A final factor to consider is the role of institutions and their relationship to shared cultural or social norms. Given the existence of a number of formal institutions and the high degree of societal and cultural interconnectedness, the weakness of regionalism in MENA is not supportive of the main tenets of socialization and practice approaches. The long history of the Arab League in particular, which was built around a (real or invented) sense of shared identity and pan-Arabism as a political exercise, indicates that institutionalized cooperation does not necessarily forge common practices and processes of social learning. Or, alternatively, it is possible that common practices at the institutional level may have emerged but that they were not "thick" or meaningful enough to generate change in the form of peaceful and cooperative relations among members. In this context, two propositions are relevant. The first one is the need to differentiate between regionalism as a deliberate and conscious policy of states and regionalization as the outcome of processes of societal or economic interaction. In the Arab Middle East, processes of regionalization, usually based on, or facilitated by, a common language, certainly occur. Highly integrated media markets, the circulation

of people and weapons, and the existence of transnational networks of various types (including Islamist networks, jihadi groups, migrant labour communities and refugees) are certainly important indicators. What is more, during and after the Arab uprisings, the societal and cultural interconnectedness of Arab populations seemed to increase, as noted above. The "Al-Jazeera effect", the role of social media and the interlinkage of events in the region during the uprisings are cases in point. The level of regionalism, however, has remained low, in spite of the temporary increase in regional political initiatives. The second proposition validated by the Arab uprisings and their aftermath is that a shared regional identity and a sense of "we-ness" – whether given or arising as a product of social learning – are not sufficient conditions for the emergence of efficient collective regional institutions. However, accelerated processes of regionalization during the Arab uprisings may have exerted additional pressure on MENA governments to engage in regional cooperation, at least temporarily. In any event, both propositions highlight the importance of political entrepreneurs and agency, which may strategically employ the sense of "we-ness" on the one hand, and existing institutions on the other hand, to forge regional cooperation. (...)

While the Arab uprisings provided a significant opportunity for the strengthening of regional cooperation, the regionalist momentum in the MENA region from 2011 to 2013 dissipated rather quickly thereafter. Initial expectations were soon disappointed and regional organizations in the MENA became hostages to the dynamics of regional fragmentation. The uprisings and the subsequent power shifts in the region rekindled old rivalries and created new ones, and the increased level of insecurity further impeded the emergence of any meaningful regional integration and cooperation. Concurrently, many key features that had prevented regional integration before the Arab uprisings remained in place and even became stronger. In addition to inter-state competition, these include the inward-looking and illiberal nature of many regimes and their lack of legitimacy. However, the Arab uprisings also demonstrated the pronounced interconnectedness of the region in terms of the flow of ideas and the movement of people, with these societal and cultural linkages increasing post-2011. While the growing regionalization trend may temporarily have exerted pressure on Arab regimes to cooperate, the subsequent disconnect between regionalism – the state-driven process of regional cooperation – and this societal and partly cultural interconnectedness may well exacerbate the legitimacy deficit of many regimes in the MENA region in the medium to long term.

The paper highlighted a number of crucial patterns that are shaping the region and are likely to continue to affect it. Firstly, intra-regional conflicts of unprecedented intensity among the members of regional organizations

not only translate into the paralysis of these institutions, they may even put their very survival at risk. Secondly, new, flexible and potentially short-lived forms of cooperation have arisen, mostly aimed at tackling single threats or issues. And thirdly, bilateral alliances between like-minded regimes become as important as, or even more significant than, regional blocs.

What does this tell us about the emerging regional order in the Middle East? Although it may at first appear to be a contradiction, the trend in the realm of regional cooperation indicates that the region is increasingly fragmented and interconnected at the same time. This observation reflects the mismatch between failed regionalism and growing regionalization trends. Secondly, in terms of regionalism, the contours of the MENA region are increasingly blurred. Different sub-regional dynamics increasingly intertwine and expand, such as those in the Maghreb and those in Africa, while the Maghreb and the Mashreq are increasingly connected to the Gulf. Concurrently, some sub-regions are seemingly turning into the borderlands of specific regional cores, with some players in the Gulf emerging as such cores.

What remains to be seen is whether the Arab League, the Arab Maghreb Union and the Gulf Cooperation Council – and perhaps also the African Union and other regional organizations – will become a battleground where competition among regional powers is played out. If this were the case, regional organizations could gain some prominence in the process of regional reordering. Alternatively, these organizations could become even more marginal, losing power to ideological or interest-based alliances that might transcend the region's boundaries.

The governance of migration and border controls in the European-North African context

JEAN-PIERRE CASSARINO & RAFFAELLA A. DEL SARTO

MENARA Future Notes, No. 13. (2018)

With the substantive growth of migration from the Middle East and North Africa (MENA) region to Europe after the Arab uprisings, the issues of refugees, migration and border controls have moved to the top of the agenda of European policy-makers (and publics), as well as of the international community at large. A number of studies have highlighted the leverage, or the potential leverage, that MENA states have been acquiring vis-à-vis European states on the issue of migration over the last decade. Considering the high degree of interdependence between the two sides, the leverage held by MENA countries mainly results from Europe's attempts to co-opt MENA governments in the management of migration flows to Europe and thus to "socialize" MENA states. After the Arab uprisings, Europe's incapacity or inability to manage the influx of refugees and migrants internally, together with the threat and urgency ascribed to the "migration crisis" in Europe, only added to the power of MENA states to impose conditions on Europe.

Against this backdrop, this paper identifies a number of trends in the responses of MENA states to the issues of migration and border controls, particularly vis-à-vis Europe, by focusing on two interrelated aspects. First, it highlights the rather usual approach of states to "localize" international norms and practices in the realm of migration management, that is, to adapt and modify these norms according to domestic preferences and conditions. Examples are provided here from the western Mediterranean, especially North African countries. Second, we discuss the ever-growing tendency to criminalize migration and the ever-diminishing attention paid to human rights that have characterized the international governance of migration in recent years. In the light of these major trends, the paper concludes by assessing the embeddedness of the region in the international governance of migration.

LOCALIZING NORMS

The socialization of non-Western countries has often been sought by the Western community in order to claim the universalism and "effec-

tiveness" of liberal values. There is a growing literature which sets out to uncover the rationale behind this claim as well as the mechanisms aimed at exporting rules and practices in various regional settings. The main contribution of this very diverse body of literature is to draw attention to the fact that there is no stable point from which to observe international systems and analyse socialization, because we are dealing with dynamics of communication and multiple meanings for the actors involved. Various scholars have thus examined the ways in which socialization has been biased towards a predominantly Western structure-oriented approach, which discards the identity and the agency of those who are meant to be socialized. This biased approach also dismisses the voices of the socializees, treating them as "resistant" or "defective". Epstein rightly remarks that, once the socialization process takes place, change in the "adopter population" is simply depoliticized by conventional constructivist scholarship. Rejection of certain norms by the socializee is all too often "infantilized" or dismissed as a form of unmotivated "resistance" or defection. However, it may well result from a domestically localized and historically specific set of values that policy-makers should consider.

In other words, not only do socializees have a clear vision about what they want to attain through cooperation, they also turn out to be active borrowers able to reshape the reception of global norms. Here, the notion of congruence introduced by Acharya when dealing with norm localization is of paramount importance to realize that transferred norms may be readapted to local conditions. Localization makes "an outside norm congruent with a pre-existing local normative order". This process thus is not necessarily a response to demands for new norms imposed from the outside. Rather, it is a proactive strategy aimed at accommodating foreign norms and ideas to local sensitivities. Under certain conditions, local norms and administrative traditions are strong enough to ensure the selective reception of global norms, with a view to limiting their domestic social and political costs. Local norms and traditions may also be sufficiently robust to integrate the global norms into existing local systems, with a view to buttressing their authority and command.

It is important to realize that the agency of socializees and their "cognitive priors" have usually been "ignored or assumed away with simplifying assumptions", and a growing body of literature has started to pay attention to these flaws. Indeed, despite their permeability to external influences, non-Western countries have never been passive recipients. Nor can their varied capacity for "local" readjustment when faced with external pressures from their foreign "partners" be dismissed. Norm localization thus invites us to rethink a host of assumptions in international relations. Firstly, instead of detecting signs of "resistance", we may hy-

pothesize that socializees are motivated by cost minimization because of their "cognitive priors". Secondly, local structures and beliefs may be used as domestic sources of legitimation for the selective borrowing and modification of international norms. Thirdly, localization sets out to analyse the extent to which, and the conditions under which, external ideas may be "simultaneously adapted to meet local practices". Finally, by shedding light on local practices and political structures, a focus on localization processes of international norms uncovers a new investigative area beyond the mere assumption that international norms are, or ought to be, internalized.

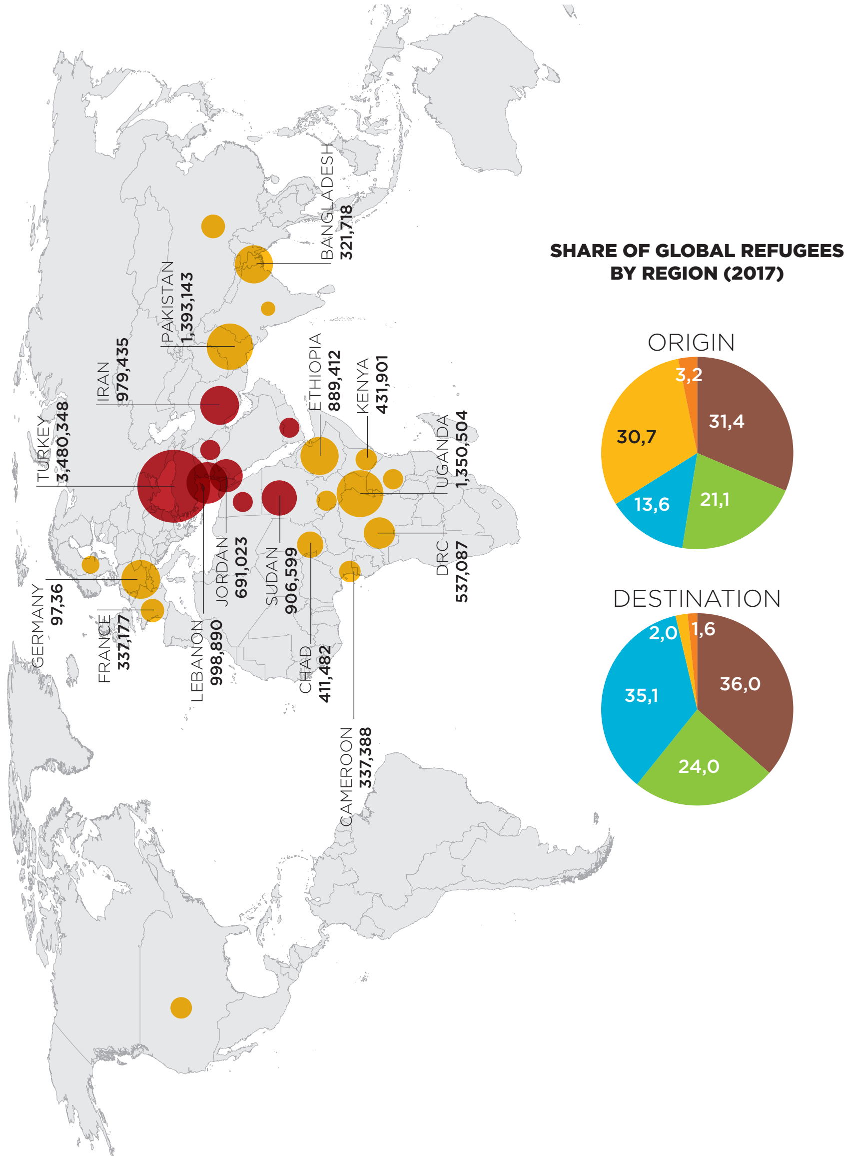
This local readjustment involves two interrelated dimensions. The first relates to the ability of the norm-recipient country to locally readjust the effects and scope of external norms transfers. The second pertains to the desire of norm-making countries and institutions to demonstrate that a transfer has effectively taken place through incentives, pressure, learning or emulation, even if each actor knows that acceptance does not always lead to implementation. Therefore, it is not so much a matter of resisting external influences or rules, as of trying to understand why normmaking countries accept local readjustments. This double-edged effect is illustrated in the next chapter with reference to the gradual involvement of some MENA countries in the international and European management of borders and migration. (...)

MIGRATION MANAGEMENT RE-APPROPRIATED

Playing the efficiency card in border control, and renewing or strengthening strategic alliances with major Western powers, have been key factors motivating MENA countries' involvement in the abovementioned regional consultative processes. For example, the managerial centrality of the state, which constitutes the cornerstone of the IAMM, has enabled the Tunisian leadership to reinforce existing forms of control exercised by the authorities over society in general and over Tunisian nationals living abroad. Indeed, the concepts of "management" and "control", as defined in the IAMM, were consistent with the desire of the former regime to discipline any form of dissent, both in Tunisia and abroad. The fight against so-called "illegal" migration allowed the regime to conceal the real causes of migration from Tunisia and to silence those who had been excluded from the Tunisian "economic miracle". The latter were generally described in the media as individuals attracted by the dream of the European El Dorado. This paternalistic and infantilizing vision, which was repeatedly adopted in Europe, made it possible to divert public attention from the real motives driving migrants' departure, namely underemployment, poverty, social discontent and political violence.

GLOBAL REFUGEE CRISIS - WHERE DOES THE MENA REGION STAND?

Circles depicted account for 85% of the total refugee population in the world. Country name and are shown for the top 15 recipients.



Note: the data for the chart is provided by UNHCR and does not include Palestinian refugees under UNRWA mandate.
Source: UNHCR, Global Trends 2017.
Created by CIDOB.

The constant reference to European pull factors also served as a rationale for the implementation of a system of control and domination over Tunisian society, with the backing of Europe and its member states. For example, Tunisian Law 2004-06, dated 3 February 2004, clearly illustrated the ambivalent use by the Tunisian authorities of the managerial discourse in the field of migration control. Strongly supported by the European Union following the adoption of the European Neighbourhood Policy (ENP) and the establishment of action plans and a road map, this law punished "those who have provided information for, planned, facilitated, assisted, acted as intermediary in or organized the smuggling of a person in and out of Tunisian territory by land, sea or air, even if no payment was received". On the one hand, it reflected the willingness of the Tunisian government to tackle the "clandestine exits" of its citizens while responding to European calls for enhanced cooperation on the matter. On the other hand, and more ambiguously, its scope encompassed not only irregular Tunisian migrants, but also those who remained in the country and who would have been aware of clandestine exits without reporting them to the authorities.

As noted by Hamza Meddeb, by adopting Law 2004-06, the Tunisian authorities "create deviance by extending the scope of the law to social categories living on the margins of legality. […] The adoption of this law allows the regime to ensure at low cost its domination and to reinforce its authority with fear". While it is true that this skilful readjustment of policy transfers from the Europe Union to Tunisia existed in other policy areas, such as trade liberalization, economic reforms, the promotion of civil society and democratization, the support that Law 2004-06 received from Europe, to the detriment of fundamental freedoms, reflected the strength of an image which the regime was able to disseminate abroad, especially with reference to the fight against religious extremism and international terrorism. As long as it could capitalize on this image, the regime knew that attempts to readjust locally policy transfers and practices from abroad would be tolerated by the EU and by its member states, either explicitly or tacitly.

Territoriality remains a key explanatory notion of past and current policy developments in North African countries. It not only refers to the space where legitimate power and legal rules are applied by the state and its law enforcement authorities. It also pertains to an area where state–society relationships can be reconfigured, altered, if not reinvigorated to overcome domestic social and political divisions.

It could even be argued that claims for territorial integrity in North Africa have been used by the sovereign as an asset to embolden its own political and symbolic centrality in a context marked by the perceptible retrenchment of the state from the economy, especially when domestic political land social tensions loom large. For example, in Morocco, domes-

tic politics, territoriality, identity and regime stability have become closely intertwined to forge a nationalistic sense of unity among "previously hostile forces behind the monarchy". From the mid-2000s up to the early 2010s, Morocco's reinforced cooperation on border controls and deportation with Spain alienated the country from its traditional sub-Saharan African partners (especially Senegal, Mali, Niger and Côte-d'Ivoire). Subsequently, the collapse of the regime of Muammar Gaddafi and the declining influence of Libya in sub-Saharan Africa opened a new window of opportunity. Morocco reactivated its "African strategy" based on a form of soft power which, incidentally, turned out to be consonant with its desire to co-opt some sub-Saharan countries with a view to narrowing Algeria's African playground and to buttressing the territorial claims of Morocco on Western Sahara.

Moreover, while the reinforced militarization of Algeria's borders with Morocco and Libya has been presented as an attempt to counter cross-border arms-trafficking and people-smuggling, it has invariably been conducive to the centrality of military power in Algeria's domestic political apparatus (the Sulta) and to opaque foreign alliances with strategic European countries, especially France, Belgium and Italy, against jihadist movements encroaching on the whole North African region. Border management implies not only a logic of inclusion and exclusion. It also engineers a sense of allegiance to the ruling authority (be it a king or a head of government), especially when territorial integrity is presented as being threatened.

In a similar vein, the former Tunisian regime of President Zine el-Abidine Ben Ali was quick to understand that appearing to be an efficient player in the field of border management would not only increase its international legitimacy in the West but also reinforce the power of the ruling party while concealing mounting social discontent and repression at the domestic level.

North African states' involvement in the reinforced control of migration and of their national borders has often been tantamount to an attempt to harness domestic territorial, societal and political challenges. In this connection, the memorandum of understanding (MoU) signed on 2 February 2017 between Italy and the Libyan Government of National Accord (GNA) headed by Prime Minister Fayez Al-Sarraj is no exception. The MoU has been officially presented as an attempt to stem migration flows en route to the EU and to reinforce the control of Libya's southern borders with technological material and financial support from Italy and the EU. That being said, one is entitled to view the hasty signature of the MoU as an attempt by the GNA to buttress its international legitimacy in the West at a time when Al-Sarraj's leadership is being increasingly challenged domestically. It could even be argued that the quest for international legitimacy and military support from the West has been the major driver for the signing

of the MoU despite the overt reticence of local municipal officials, who are wary of its disruptive implications for the country's deepening civil war.

The above examples demonstrate that reinforced cooperation on migration and border controls implies the re-codification of external relations. Moreover, it invariably brings about a reformulation of the relations between the parties involved. Today, unprecedented patterns of interconnectedness among countries located in the western Mediterranean have consolidated so dramatically that any unilateral form of conditionality (be it soft or coercive) must be carefully evaluated lest a whole framework of cooperation be jeopardized. In their bilateral interactions with MENA countries, Western countries have learned that conditionalities cannot be equated with pressures when it comes to cooperating with empowered "partner" countries, which MENA countries certainly are. Using an oxymoron, it is possible to argue that, in recent decades, cooperation on border and migration controls has become a central priority in MENA–EU relations. While being central, this priority has however remained peripheral to other strategic issue areas including the fight against international terrorism and the reinforced control of land and maritime borders. Among many others, these are critical priorities on which some North African countries have managed to capitalize to varying degrees.

Playing the efficiency card in border control, and renewing or strengthening strategic alliances with major Western powers, have been key factors motivating MENA countries' involvement in the abovementioned regional consultative processes

There is no question that the responsiveness of North African countries to the securitization of migration policies, including the adoption of legal provisions criminalizing irregular migration and border crossing, has been shaped by their respective domestic and regional concerns. Far from adopting passively the guidelines and rules transferred from the West, they adaptively and selectively transposed them to buttress their own position domestically and internationally.

Moreover, the perceptible militarization of the region has fed into the criminalization of migration policies, just as the criminalization of the "unmanaged" mobility of people (be they citizens or foreigners) has fed into the centrality of states and their law enforcement agencies. To date, the establishment of transgovernmental channels (linking MENA officials from the ministries of the Interior and Defence with their European counterparts) has resulted in the conclusion of various bilateral security agreements and arrangements and in the provision of technological and logistical military equipment. Exchanges of information and technical co-

operation in the field of identification – for example, using the Automated Fingerprint Identification System (AFIS) – constitute key elements. While it is true that identification constitutes a challenge when it comes to accelerating the removal of undocumented migrants who are found in an irregular situation in Western countries, in MENA countries, as elsewhere, cooperation on identification not only raises a host of legitimate questions about the potential use of computerized personal data, it also calls into question the various factors that motivated it and justified it. To be sure, transgovernmentalism and its modus operandi contribute to making the long-sought reform of MENA countries' security sectors a daunting challenge, especially in Tunisia.

The implications of the Syrian War for new regional orders in the Middle East

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It is not surprising that the land of Syria, which was a pivotal international and regional battleground a century ago both during and after the First World War I, today is again a regional and international battleground: literally a field of active military battles among a much wider range of warring parties. As political and military leaders from Alexander the Great and Napoleon to King Faisal up through to Vladimir Putin have all understood, this reflects Syria's historical geopolitical position as a strategic pivot around which regional and international powers have routinely competed for influence or hegemonic control of the Levant region and wider Western Asia. The defeat of the Ottoman Empire in the First World War and the assertion of British and French colonial control in the Levant gave Syria new strategic relevance a century ago, which it has maintained until today, occasionally adjusting its alliances and priorities as regional geostrategic and military conditions required.

Syria's history in its modern Middle Eastern setting reflects a pendulum-like legacy, in which Syria and the Middle East in turn shape and reshape each other within the context of international interventions. For instance, on the one hand, Western colonial interests and regional power intrigue in the Middle East shaped Syria a century ago and carved out its modern borders. On the other hand, during the postcolonial period, Syrian sovereign policies reshaped regional relations for half a century, until regional and foreign forces quickly exploited the indigenous non-violent Syrian uprising that challenged the state starting in early 2011. Syria was then reshaped by these dynamics, particularly when these forces physically entered the picture militarily and politically to generate all-out war and the fracturing of the Syrian state.

The main focus of this paper, then, is to analyse how, in particular, events in Syria during 2011–18 have helped shape new regional dynamics and orders in the Middle East. The consequences of the seven-year-long Syrian war will now become clearer and are likely to have an impact in different ways across the region for years to come. Syria represents one of the

sharpest recent examples of the interplay among local, regional and international powers whose strategic interests are constantly evolving. Syria has been at the receiving end of those dynamics since 2011, and in the imminent post-war period, the legacy and lessons of what occurred in Syria will once again reshape other parts of the Middle East. (…)

KEY DYNAMICS

Syria is not unique in most respects of its recent history, as it captures the past century of erratic state-building within individual Arab countries. Half a dozen other Arab states have also fractured in recent years, and others face serious internal and regional stresses in the political, economic, environmental and security realms. The Syrian war, however, seems to reflect some important new geopolitical dynamics in the Middle East that are likely to ripple across the region for years to come. Four in particular are noteworthy:

1) The direct, long-term intervention simultaneously of regional and foreign powers in Arab internal affairs, using military, political and economic means, which led to the reconfiguration of the role of such powers across the region, that is, the emergence of a more influential Russia, the expansion of direct Turkish and Iranian influence in Arab affairs, and the apparent downgrading of US intervention in Syria and Iraq in favour of focusing on confronting Iran.
2) The critical role of non-state actors in the form of militias and paramilitary groups that represent domestic as well as foreign interests. In some cases the lines between domestic and foreign were blurred, such as the many foreign fighters that joined the Free Syrian Army, which also enjoyed foreign state support, as well as the People's Protection Forces (YPG) and the Syrian Democratic Forces (SDF) in northern Syria that included Syrian, Kurdish and occasionally other non-Syrian elements among their fighters or supporters.
3) The sheer number of foreign fighting forces that simultaneously fought on the ground or in the air, or did so indirectly by arming, financing and training fighting forces in Syria since 2012: we can count at least twenty different states and major NSAs (e.g., Hezbollah, Free Syrian Army, Islamic State, al Qaeda, Ahrar el-Sham, YPG, SDF), and the number reaches into the several hundreds if the many smaller tribal, Islamist and secular rebel groups are counted. The transformation of an important Arab country into a virtual open international battleground where any state or NSA could join the fight to defeat or save the ruling government sets a precedent that could reverberate across the entire Middle East in forms that have appeared in Syria, or in new ones that we may not yet recognize today.

4) The fierce, often gruesome ways in which most local and foreign actors on both sides fought. These included using chemical weapons, ethnic cleansing, civilian massacres, barbaric torture and killing methods, starvation sieges and other acts that some international human rights organizations have called war crimes. The prolonged ferocity of the fighting signalled the unacceptably high cost of losing for key protagonists, especially the Syrian government, Iran and Hezbollah, whose tripartite alliance revealed a determination to prevail at any cost over the forces that sought to weaken them. Russia intervened fiercely because of what it saw as the imperative of maintaining the Assad government in power, given the pivotal role of Syria in Moscow's reassertion and expansion of its strategic interests across the Middle East. The international community reacted for the most part with a few intermittent practical responses to the sustained military brutality against both armed elements and civilians. It remains to be seen if these patterns will define the future acceptable behaviour of governments and rebels within states, as well as of foreign forces that join the fray.

THE GAME-CHANGER: NEW TRANSNATIONAL ALLIANCES

An overarching new development that largely determined the outcome of Syria's war, and which is likely to impact the region for years, was the formation of coalitions among many different kinds of actors. These included big and medium-sized regional powers, local state and non-state actors and international powers. The key regional powers are Turkey, Iran, Israel, Qatar, United Arab Emirates (UAE), Saudi Arabia and Hezbollah; local actors include the Syrian state, assorted militant or moderate Islamist/jihadi forces, Kurdish groups, local and transnational paramilitary groups, and the states of Jordan and Lebanon, whose actions are very localized, unlike, for example, the regional impact of Hezbollah; and the international powers are mainly Russia, the United States, Great Britain and France.

The most important such alliances were the Russia–Syria–Iran–Hezbollah collaboration that preserved Assad's rule, and the counter-alliance against Assad and his allies that comprised fluctuating combinations of the USA, Saudi Arabia, the UAE, Turkey, Qatar, Israel, the UK and France, most importantly. Different members of the anti-Assad alliance aimed to overthrow the Damascus government for varying reasons, but nevertheless they collectively supported the anti- Assad forces. Some supported opposition groups in order to overthrow the autocratic Damascus regime and support populist democratic aspirations. Others did so to promote their direct national interests, or to weaken the regional reach of Iran and Hezbollah by breaking up their tripartite alliance with Syria. The

Russia–Turkey–Iran collaboration was a new alliance among states that created a new negotiating process in Astana and Sochi that paralleled the Syrian Geneva negotiations; sometimes other states joined in, such as Jordan did when these four countries established short-lived "de-escalation zones" in 2018 that helped wind down the war. If the war experience is any guide, the post-war years will continue to see large and small states working together with NSAs in both enduring and temporary alliances in order to improve their strategic positions and national interests, rather than acting on their own.

Syria's history in its modern Middle Eastern setting reflects a pendulum-like legacy, in which Syria and the Middle East in turn shape and reshape each other within the context of international interventions

The legacy of the Syrian war is likely to prod external powers that seek to intervene to achieve certain desired goals in the future to use direct, sustained, military intervention inside Arab states, in close coordination with NSAs, while staying the course on the ground for years. Russia–Iran–Hezbollah did this very successfully in Syria, though obviously at great cost to Syria and themselves. Merely sending arms and offering training and indirect support to the rebels, as the anti-Assad coalition did, would now appear to be a more questionable strategy in the face of a decisive grouping such as the one that supported Assad. The poor track record of the USA, European countries including the UK and France, Saudi Arabia, Turkey and Qatar in supporting the anti-Assad rebellion might resonate with them in future instances in which they might contemplate supporting anti-government rebels in other countries. Such rebels themselves who might seek support from abroad are likely, in turn, to ask their foreign backers for a long-term commitment of substantive support, including a sustained on-the-ground presence, in view of the Syrian experience.

LESSONS FROM TURKISH AND AMERICAN POLICIES

The Syrian Kurdish experience, in particular, will resonate for years in the minds of political actors across the region, due to the policies pursued by the USA and Turkey. The erratic track record of American support to Kurdish groups – such as the SDF, which is led by the YPG and its parent Democratic Union Party (PYD) – reflects how the United States' short- and medium-term goals changed in the face of heightened direct Turkish intervention in northern Syria. The outcome of the jockeying for power in northern Syria among the Damascus government, Kurdish groups (notably the YPG-dominated and US-backed SDF) and Turkey proved less significant for direct American national interests, it seems, which is why Washington

adjusted its support to the PYD/YPG Kurds in order to balance its more important ties with Turkey.

For its part, Turkey proved to be a strong regional power that could intervene when it saw the need to do so. In this case, its national interest was to prevent the creation of an autonomous Kurdish proto-state in northern Syria. Turkey also showed that strong regional powers could evolve and change their positions as circumstances required. As Syrian Kurdish groups such as the YPG in 2017 defeated Islamic State and others in parts of northern Syria, and expanded the areas under PYD/Kurdish control, Turkey did not hesitate to change its previously harshly anti-Assad tone; it spoke less about removing Assad from power and entered into northern Syria militarily to prevent the formation of a single large contiguous Syrian–Kurdish region. During talks with Iran and Russia, Ankara also agreed to the definition of de-escalation zones in strategically important Idlib in the north-west and elsewhere around the country. Turkey's national interest was more sharply clarified, with less focus on removing Assad from power and more emphasis on preventing PYD-dominated Syrian Kurds from controlling the entire north. By mid-2018 it was evident that predominantly Kurdish groups in the north such as the SDF were exploring negotiations with the Assad government to end the war and prevent permanent Turkish control of lands in the northwest of the country. (...)

PRAGMATISM AMONG REGIONAL ACTORS

Some states exhibited bold pragmatism during the Syrian war years as they adjusted and even reversed some of their policies in the light of events on the ground. Caught between the two main camps of states that broadly pursue pro-Iranian or pro-Saudi positions, several small and large states have pursued more pragmatic policies that have allowed them to navigate among these groupings and pursue their own strategic interests. Countries such as Egypt, Turkey, Qatar, Jordan and even Russia sometimes have taken strong actions to support or to weaken Syria's government; yet they have also negotiated, or even reached, military, commercial, technological or logistical transport arrangements with a range of countries in both camps. Russian and Turkish hot-and-cold ties with Israel are a good example of this, as is the complex matrix of multi-sectoral relations and interests that link Russia, Turkey, Iran and Israel. As the war was winding down in mid-2018, Syrian government forces with Russian support were attacking rebel positions in the south near Deraa – at the same time as the Russians were negotiating with rebels and with the Jordanian government to achieve an end of hostilities and allow refugees to return to their home regions. Simultaneously, Russian officials were in touch with Israeli and Iranian officials to discuss those states' interests in the situation in southern Syria.

This aspect of the Syrian war, which might resonate across the region for years to come, is that a foreign power's sustained military presence on the ground coupled with decisive diplomatic contacts with all concerned parties has allowed it to assume a pivotal role in the unfolding events as Russia has just shown the world. The contrast with Washington's unsuccessful policies in Syria and the Arab–Israeli conflict is striking, and hints to regional powers how they might more effectively combine their military and political assets in forging successful foreign policies.

Turkey and Qatar also both supported anti-Assad efforts during the early years of the war in Syria, then eventually accommodated themselves to the continuity of the Damascus government when it was clear that Assad would remain in power; and Turkey indirectly coordinated with the Syrian government when the Russia–Turkey–Iran group established de-escalation zones in several parts of Syria in 2017–18. Turkey and Qatar seem to have expected that the government that would replace the Assad regime would be dominated by less extremist rebels with whom they have long been friendly. When their anticipations did not materialize, they stopped actively supporting rebel groups, and in Turkey's case turned their attention to direct and proxy military campaigns in northern Syria to block the formation of a PYD-dominated Kurdish proto-state.

A corollary to Russia's growing impact in the region due to the Syrian war has been the emergence of Russia–Turkey–Iran as a powerful grouping of countries that can impact some key issues in the region; these include future constitutional arrangements in Syria and Iraq, the status of Kurdish groups within Arab states, energy policy coordination in volatile times, Israeli–Iranian tensions and Middle Eastern states' procurement of nuclear and defensive missile technologies, to mention only the most obvious ones.

An intriguing development in the Syrian war that could reverberate globally in the future was the Russia–Iran–Turkey group's ability to establish a parallel track of diplomacy towards the end of the Syrian war, alongside and linked to the track managed by the UN Security Council (UNSC) and its successive mediators since the Geneva I talks in June 2012. In May 2015, Russia–Turkey–Iran launched in Astana, Kazakhstan, a series of consultations and negotiations that would continue to meet in Moscow, Geneva, Vienna, Sochi and other locations. This effort shifted the centre of gravity of the peace negotiations from the UNSC to the Moscow-led camp, at a time when Russia's military was actively attacking anti-Assad targets throughout Syria. The Astana talks eventually led to agreement on four de-escalation zones in Syria that temporarily reduced the fighting, while Moscow also took the lead in moving the negotiators towards creating a reconciliatory draft constitution for the post-war years.

The Astana process and the United Nations both repeatedly affirmed that the two tracks complemented each other, yet neither achieved its aims of ending the war and creating a political agreement for post-war transition and governance in Syria. The significant residue from this experience is that strong alliances of powerful and decisive actors that put their troops on the ground can create negotiating structures that achieve two aims: they temporarily bypass existing talks and forums in the UN or elsewhere, and they remove the constraints of UNSC vetoes that diplomacy often encounters. It will not be lost on anyone that the three decisive actors who managed the Astana process diplomacy were all directly involved in the fighting on several fronts.

DEEP STATES WILL PERSIST

Middle Eastern states with strong, decisive and usually authoritarian governments – such as Egypt and Algeria, for example – might conclude from the Syrian war that they can emulate Assad's use of brutal force against his own people and cities in the assault against local and foreign rebels. Egypt's harsh military measures, curfews, arrests and demolitions of entire neighbourhoods in Sinai is an example where a deeply entrenched, authoritarian Arab state is using immense and disproportionate force against home-grown rebels, with two notable results: the rebel threat does not seem to be disappearing in the face of persistent military attacks against it, and the rest of the world does not seem to care much about what is taking place inside Egypt in this respect. The war in Yemen is another example of Arab states (Saudi Arabia and the UAE) with foreign support (the USA and UK) using disproportionate military force against a much poorer, weaker target for years on end, without any significant objection from the rest of the world, beyond the occasional arms sales embargo by some European states including Norway and Germany; others in Europe may join the embargo, following a pan-European parliamentary vote to do so.

Not only did most of the world respond in a low-key manner to Syria's hardline military response to rebels and civilians alike; some countries, including the USA and Russia, directly participated in the fighting that assumed brutal proportions in Raqqa, Aleppo, Eastern Ghouta and other places. This raises an issue that only started to be seriously considered globally and regionally in early 2018: what forms of reconstruction will take place in Syria after the fighting ends? Who will provide most of the financing? Who will manage the process of planning the rebuilding and distributing lucrative contracts? The lesson from the war again suggests that those countries whose troops fight on the ground for years on end will control the post-war process in all its political and commercial dimensions.

We will need many years to discern the nature of the future Syria. Specifically, will post-war reconciliation and agreement on a new constitutional transitional process lead to a Syria whose political governance will perpetuate the top-heavy, centralized state model of the last fifty years of Assad family rule? Or will it open a path towards more participatory and accountable governance? Most indicators to date suggest that the world broadly accepts President Assad remaining in power – if the war ends, and Syria's 12 million refugees and internally displaced nationals can resume a normal life. This conclusion derives from foreign states' behaviour during the war years, the governance and power trends in areas that were under state control in 2018, and the prevalent international indifference to how Syria emerges from its war. In other words, the message that will be heard clearly across the Middle East is that the world will not care or intervene if you brutally attack your own people or weaker neighbours, as long as you do not use chemical weapons, carry out localized genocides against minorities or threaten the world with terrorism or refugees.

The poor track record of the USA, European countries including the UK and France, Saudi Arabia, Turkey and Qatar in supporting the anti-Assad rebellion might resonate with them in future instances in which they might contemplate supporting anti-government rebels in other countries

This highlights a bigger issue that permeates most Arab countries (with the exception of wealthy energy producers) with top-heavy central governments that monopolize power: they suffer the same vulnerabilities that surfaced to drive the 2011 Arab uprisings and that hardline Islamists and foreign countries exploited in Syria to generate a full-blown war. These vulnerabilities comprise disenchanted citizens who suffer increasingly difficult life conditions in the socio-economic, political and material realms, and who eventually rebel against the state's policies. The uprisings, including Syria's, have generated discussions across the region since 2011 about whether top-heavy Arab autocratic systems might respond to their citizens' stirrings. The common issues that defined most uprisings, including Syria's, still prevail across the region and have deteriorated in most cases; these include vulnerabilities in socio-economic disparities, state legitimacy, citizen dignity, coherent national identity, environmental viability and sustainable economic development.

Syria's war experience suggests that hardline military responses to citizen political activism are a viable, if costly, option for Arab states that must decide whether to address their weaknesses through structural reforms in the direction of good governance or through repression anchored in "security" imperatives. Syria's recent experience (along with that of Egypt,

Bahrain, Saudi Arabia and Yemen) indicates that most foreign countries will support harsh clampdowns on citizen rights across the Arab region if these are contextualized in the wider context of the "war on terror" or the battle to roll back Iranian influence.

UNCERTAINTY FUTURE FOR ISLAMISTS

The Syrian war was the most important recent laboratory in the Arab region for the conduct of Islamist groups and their acceptance among Syrian society. Syria tested both militants such as al Qaeda and Islamic State in Iraq and Syria (ISIS), and more pragmatic and non-violent "moderates" such as the Muslim Brotherhood and dozens of smaller local and national groups. How the full range of Islamists fared in Syria should impact how they are perceived by populations and governments across the Middle East. The war years have resulted in double-edged consequences for Islamists of all kinds, whose anti-government activism, like that of secular opposition forces, seems likely to end in failure. Tens of thousands of hardline jihadists in the al Qaeda or ISIS would had five to six years in Syria to organize, train, coordinate and plan for the future, and some remain openly or covertly active there in pockets in the north-west and the south-east – though these will almost certainly be wiped out by state action by 2019.

Post-war Syria presents massive new constraints to new attempts by such groups that may seek to repeat the recent attempts to carve out territorial domains where they effectively enjoy sovereignty, as witnessed in the case of ISIS and, to a lesser extent, al Qaeda and its local Syrian offshoots including Jabhat al-Nusra and Hay'at Tahrir al-Sham. The Syrian experience suggests that for regional and global powers, countering growing threats from militant jihadists anchored in self-proclaimed statelets will remain a higher priority than addressing the threats that emanate from vicious states or collapsing socio-economic orders.

Beyond the fate of the hardline jihadi Islamists, the Syrian war also leaves unclear the fate of the "moderate" and more pragmatic Islamists, such as the Muslim Brotherhood, that have usually been willing to engage in political activity according to rules set by the state (Morocco, Kuwait, Tunisia, Egypt and Jordan are good examples in recent decades). These have faced harsh crackdowns since 2013 in Egypt and the UAE in particular, while their support from Turkey and Qatar remains erratic. Their failure to make headway as elements in the Syrian opposition leaves them as a future unknown quantity in Arab political life. This might portend new rivalries within Sunni Arab communities across the region, where different political Islamists that will emerge in these countries might try to gain legitimacy and ruling authority, which would reflect in part the Islamists' poor showing in Syria

ANNEX 1

Analysis of the MENARA fact-finding missions (2018)

Mustafa Kaymaz, Anna Busquest & Eduard Soler i Lecha

This report aims to provide an analysis of the interviews conducted under the scope of the MENARA Fact-Finding Missions. Three questions were asked to each respondent: (1) Which are the traditional or new actors that will shape the future of the Middle East and North Africa? Why? (2) Which are according to you the three main risks and the three main opportunities that the MENA region is facing? (3) Do you envisage a more or a less active European Union in the MENA region in the years to come? And what would you expect from it? This report was produced to make quantifiable and analyzable the responses given to these three open-ended questions. (...)

THE SAMPLE

There are 269 respondents in the sample. In addition to their responses to the said three questions, the dataset contains information on gender, country where the interview was conducted, region of origin, age and professional category. The distribution of respondents is as follows:

Gender: Although respondents are not representative of the population, it reflects the male-dominated elite class. Nevertheless, the number of female respondents in the sample will allow us to make comparisons. This variable will enable us to see if there are gender differences in perceptions regarding influential actors, risks and opportunities, and the role of and expectations from the EU.

Gender	Frequency	%
Female	53	19.70
Male	191	71.00
Missing	25	9.29
Total	**269**	**100**

Country: The country data shown in Table 2 represents where the interviews were conducted. This variable will help us identify the effect of geography on one's perceptions. We've grouped them in sub-regions when relevant.

Country	Frequency	%
Egypt	24	8.92
External (UK, Hungary, Russia, Canada, India, Switzerland, USA, China, Italy, Spain, Belgium, France)	66	24.54
Gulf (Qatar, Saudi Arabia, UAE, Kuwait, Oman)	27	10.04
Iran	15	5.58
Levant (Iraq, Lebanon, Syria, Israel)	51	18.96
Maghreb (Algeria, Tunisia, Morocco, Libya)	54	20.07
Sahel (Mali)	21	7.81
Turkey	11	4.09
Total	**269**	**100.00**

Region of origin: This indicates whether a respondent is originally from the MENA or other regions (Non-MENA). This variable will help us understand differences, if any, between people of the region and external observers (e.g. diplomats).

Region	Frequency	%
MENA	173	64.31
Non-MENA	84	31.23
Missing	12	4.46
Total	**269**	**100.00**

Age Group: Despite not representing the predominantly young demography of the region, the sample is representative of the age group of the decision-makers both in and out of the region. Nevertheless, it contains a significant number of young people which data will provide us if any, the generational gaps and differences of perceptions and expectations.

Age Group	Frequency	%
18-35	75	27.88
35-65	182	67.66
Over 65	12	4.46
Total	**269**	**100.00**

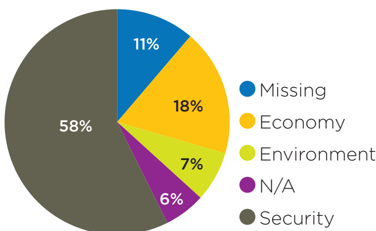
Professional Category: Next table indicates the professional categories of the respondents. It includes close numbers of the civil and public sectors. This variable will provide insights into the differences, if any, among people of various areas such as public officials, private sectors, and members of civil society, intellectuals, opinion makers, and activists.

Professional Category	Frequency	%
CSO, Intellectuals and Opinion-Makers, and Activists	115	42.75
Private Sector	22	8.18
State and Government Officials	130	48.33
Others	2	0.74
Total	**269**	**100.00**

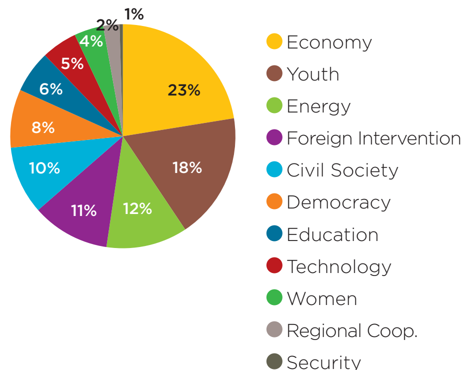
WHICH ARE ACCORDING TO YOU THE THREE MAIN RISKS AND THE THREE MAIN OPPORTUNITIES THAT THE MENA REGION IS FACING?

We first categorized the risks provided by the respondents into three groups: economy (such as to poverty, income inequality, lack of diversification, decreasing oil prices, etc.), environment (such as while climate change, water scarcity, etc.), and security conflicts and wars, nuclear power competition, foreign intervention, armed non-state actors, etc.). In case the respondent did not provide any risks or opportunities, the answer was coded as N/A. We then codified the opportunities in their order provided by each respondent. Then, we followed the same procedure as we did in the first question to combine the risks and opportunities under separate variables. After removing empty cells, as some respondents provide only one or two risks and/or opportunities, our sample increased from 269 to 373. Missing cases occurred due to the respondents who provided only opportunities or risks.

RISKS MENTIONED

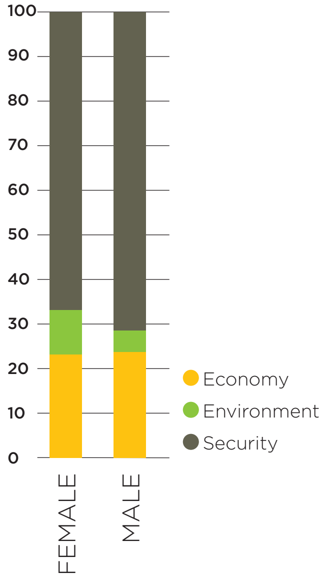


OPPORTUNITIES MENTIONED

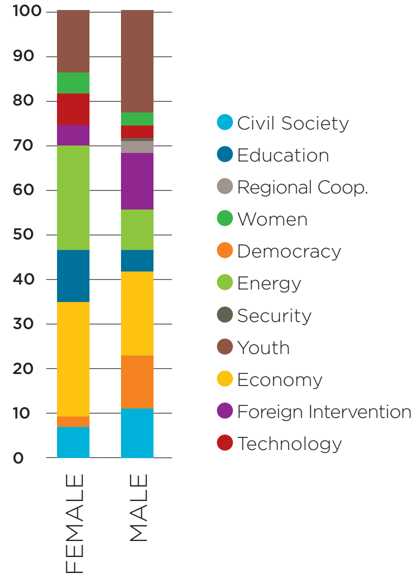


a. **Gender and risk/opportunities**: The proportion of environmental concerns is slightly higher among female respondents than that among males. Democracy's and youth's proportions are higher among males compared than that among females while economic opportunities, education, and energy have higher percentages among females.
b. **Location of interviews and risk/opportunities**: Environmental concerns are absent in interviews conducted in Turkey and less mentioned in Gulf countries and Iran while their proportion is the highest in Egypt. civil society as an opportunity has a higher proportion in the interviews conducted in Iran, Turkey, Maghreb, and External countries while having a lower proportion in the Gulf, Levant, and Egypt. Democracy also has a higher percentage in Iran, Turkey, and the Sahel but a lower percentage in Egypt, the Maghreb, and Levant. Economic opportunities have higher proportions in Egypt, the Levant, and Gulf and lower proportions in the Sahel and Turkey. Energy, on the other hand, has higher percentages in the External, Maghreb and Sahel, countries but lower percentages in Iran and the Gulf and is completely absent in Egypt. While women's proportion is higher in Egypt, they are not mentioned in the Levant, Iran, and Turkey.
c. **Age group and risk/opportunities**: The risk distributions are almost identical among age groups 18-35 and 35-65 while the percentages of economic and environmental risks are slightly higher among those over 65. Compared to the age groups 18-35 and 35-65, the proportions of economic opportunities are lower among those over 65. Education, on the other hand, has a lower percentage among the age group 35-65. Another interesting finding is that foreign intervention is mentioned as not perceived as opportunity by younger and older respondents. Regional cooperation's percentage is higher among the age group 35-65 but lower among the age group 18-35 while being absent among those over 65. Finally, it is interesting that youth has a higher proportion among the age group 35-65 than both age groups 18-35 and over 65.
d. **Professional category and risk/opportunities**: The 'CSO members, intellectuals, opinion-makers, and activists' and 'state and government officials' have similar risk distributions while the private sector category has a slightly higher percentage of security risks at the expense of environmental risks. Civil society is absent in the private sector category while the economy has a higher proportion in the same group. Compared to the other two groups, the 'state and government officials' category as a lower percentage for democracy as an opportunity. Foreign intervention, on the other hand, is absent in the private sector category. Finally, compared to the other two groups, the CSO members, intellectuals, opinion-makers, and activists have lower percentages for women and youth.

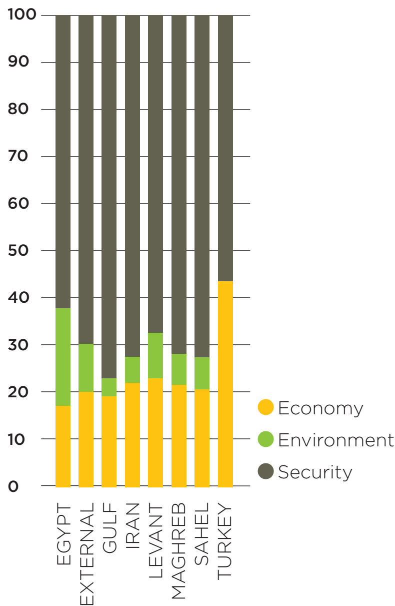
RISKS BY GENDER



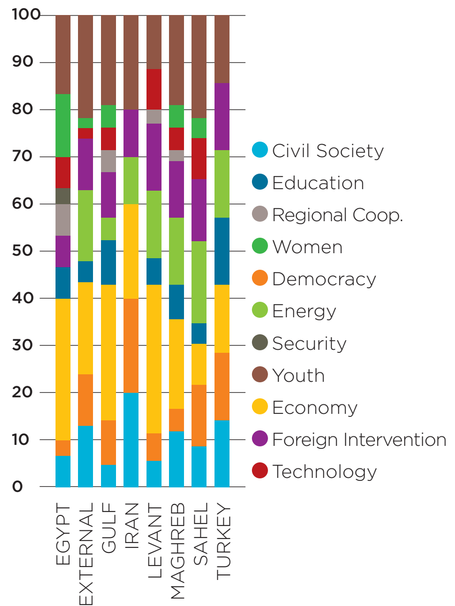
OPPORTUNITIES BY GENDER



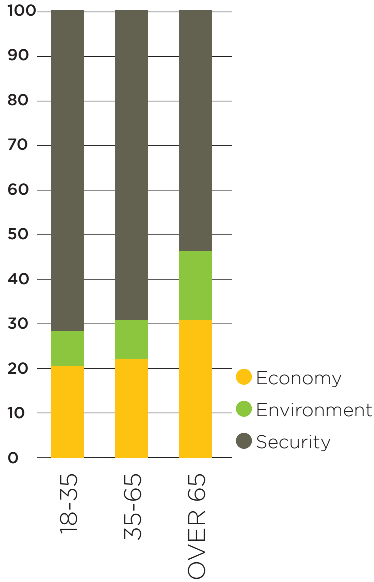
RISKS BY COUNTRY



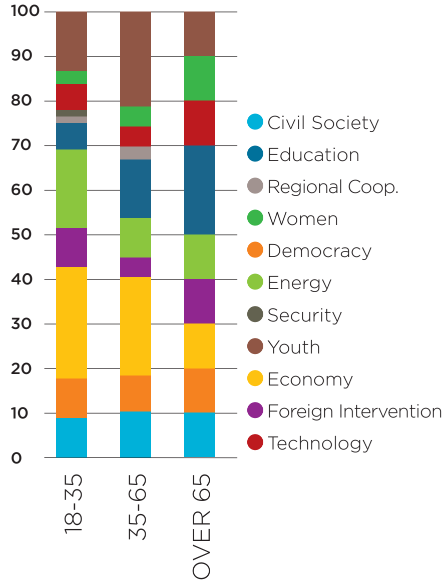
OPPORTUNITIES BY COUNTRY



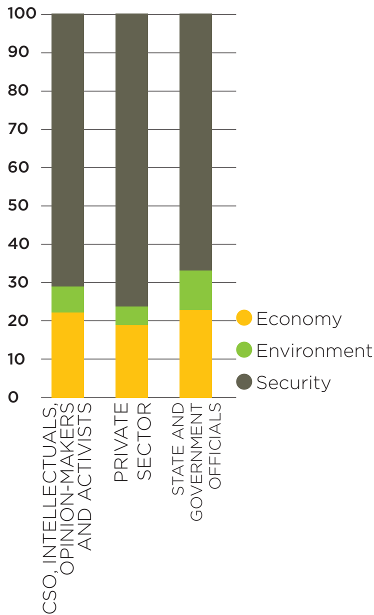
RISKS BY AGE GROUP



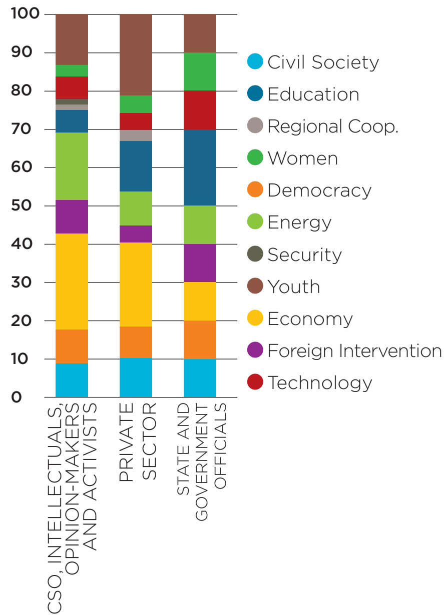
OPPORTUNITIES BY AGE GROUP



RISKS BY PROFESSIONAL CATEGORY



OPPORTUNITIES BY PROFESSIONAL CATEGORY

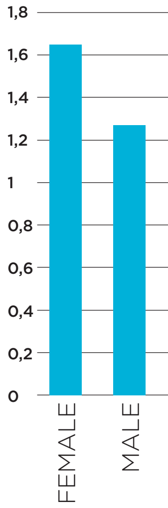


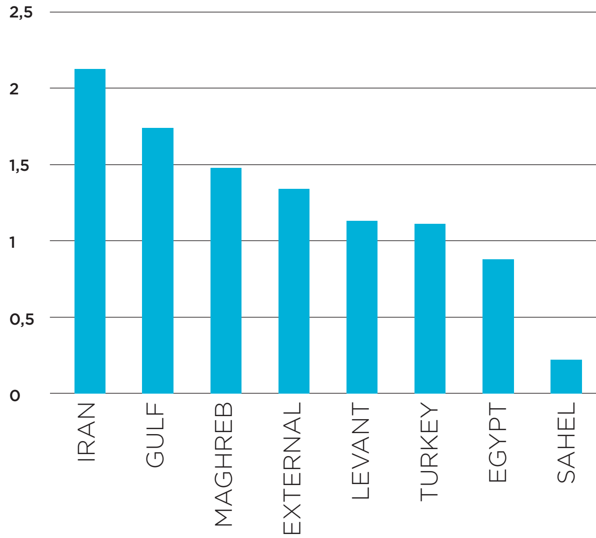
WHAT IS THE LEVEL OF HOPE ON THE FUTURE OF THE MENA REGION?

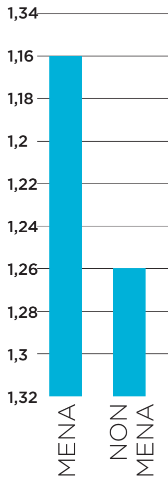
This section provides the level of hope observed among the participants as to the future of the MENA region. We codified the responses that either mentions that “there is no opportunity” or list risks without mentioning opportunities as “0”. If the number of risks provided is higher than that of opportunities, the code is “1”. Code “2” means that the respondent listed equal numbers of risks and opportunities. The responses containing a higher number of opportunities than risks were given “3” while those mentioning only opportunities but no risks were coded as “4.” Finally “N/A” means the respondent did not give an answer to the question.

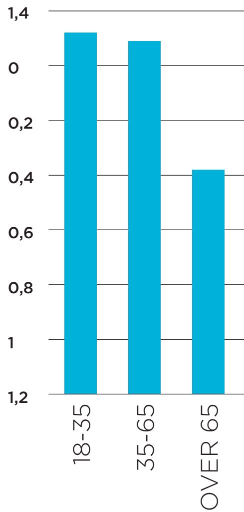
The average level of hope in our sample is 1.29 that is a view closer to pessimism but still containing elements of hope. The following tables and figures show the average level of hope among subgroups of responses based on the gender, region of origin, age group, and professional category of respondents as well as the country where the interview was conducted.

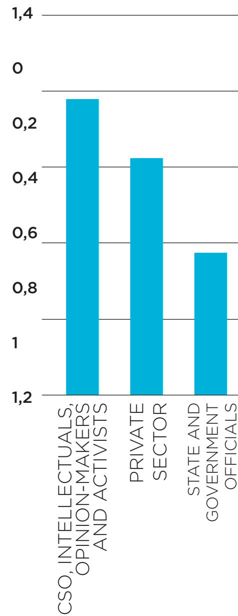
a. Gender and average level of hope: The level of hope among female respondents was above the general average while being lower among males.
b. Location of interview and average level of hope: The level of hope was highest in interviews conducted in Iran and the Gulf while it was lowest in Egypt and the Sahel.
c. Region of origin and average level of hope: The levels of hope among those of MENA origins and external observers were close to the general average while it was slightly higher among the former and lower the latter.
d. Age group and average level of hope: The level of hope among those over 65 was lower than the general average while it was slightly higher than the average among the age group 35-65.
e. Professional category and average level of hope: There is a more hopeful private sector and a less optimistic state and government sector.


LEVEL OF HOPE BY GENDER
1,8
1,6
1,4
1,2
1
0,8
0,6
0,4
0,2
0
FEMALE
MALE


LEVEL OF HOPE BY COUNTRY
2,5
2
1,5
1
0,5
0
IRAN
GULF
MAGHREB
EXTERNAL
LEVANT
TURKEY
EGYPT
SAHEL


LEVEL OF HOPE BY REGION
1,34
1,16
1,18
1,2
1,22
1,24
1,26
1,28
1,3
1,32
MENA
NON MENA


LEVEL OF HOPE BY AGE GROUP
1,4
0
0,2
0,4
0,6
0,8
1
1,2
18-35
35-65
OVER 65


LEVEL OF HOPE BY PROFESSIONAL CATEGORY
1,4
0
0,2
0,4
0,6
0,8
1
1,2
CSO, INTELLECTUALS, OPINION-MAKERS AND ACTIVISTS
PRIVATE SECTOR
STATE AND GOVERNMENT OFFICIALS

Middle East and North Africa Regional Architecture: Mapping geopolitical shifts, regional order and domestic transformations (MENARA) is a research project that aims to shed light on domestic dynamics and bottom-up perspectives in the Middle East and North Africa amid increasingly volatile and uncertain times.

MENARA maps the driving variables and forces behind these dynamics and poses a single all-encompassing research question: Will the geopolitical future of the region be marked by either centrifugal or centripetal dynamics or a combination of both? In answering this question, the project is articulated around three levels of analysis (domestic, regional and global) and outlines future scenarios for 2025 and 2050. Its final objective is to provide EU Member States policy makers with valuable insights.

MENARA is carried out by a consortium of leading research institutions in the field of international relations, identity and religion politics, history, political sociology, demography, energy, economy, military and environmental studies.

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This work reflects only the author's view. The European Commission is not responsible for any use that may be made of the information it contains.