NOREF
NORWEGIAN PEACEBUILDING RESOURCE CENTRE

Report
August 2013

The Future of the Middle East and North Africa

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Executive summary

Despite the expectations born of the Arab Spring 30 months ago, the outlook for the Middle East and North Africa (MENA) region looks much more clouded today. The crisis in Egypt has underlined the difficulties of democratic governance within an Islamic context, the struggle in Syria has worrying regional implications and the problem of economic regeneration heightens the atmosphere of general regional concern. More than this, the current situation reflects once again the ways in which the MENA region is of global significance as major powers become involved in regional economic and political challenges. The global implications have been worsened by repeated policy failures by major powers as they have missed opportunities to influence regional outcomes effectively. As a result, the Iranian nuclear issue has now become enmeshed in the Syrian crisis and in the new sectarian divides that split the region. Many national and regional problems remain from the past, however, not least the issue of Israel's relations with its diplomatic and strategic neighbourhood and the wider but related issue of U.S. inability to play an even-handed role. The result is that the outlook also remains gloomy, not because regional problems cannot be solved but because past prejudice continues to constrain the ability of major powers with interests in the region to participate in their solution.

Introduction

Despite all the hopes launched two-and-a-half years ago, on the back of the "Arab Spring",[1] the immediate and medium-term future of the Middle East and North Africa (MENA) region is increasingly overcast with uncertainty and insecurity. Many factors within and outside the region have contributed towards this discouraging outlook, and the purpose of this paper is to provide a systematic review of the factors that need to be taken into account in seeking to foresee what may lie ahead within the next five years.

Before beginning to address this in concrete terms, however, two caveats must be entered here. First, what occurred two years ago was undoubtedly a paradigm shift, in the Kuhnian sense, and requires us to develop new concepts to understand what actually happened – something that Western leaders seem to have failed to do.[2] Second, forecasts of this kind are necessarily linear projections of past trends into the future, yet, in reality, paradigm shifts are often unpredictable.

One of the major reasons for this has been provided by Nassim Taleb and Mark Blyth, when they pointed out that sociopolitical and financial-economic systems are "grounded in complexity, interdependence and unpredictability" (2011).[3] When such systems are artificially constrained by policy initiatives designed to ensure stability, they are ultimately rendered extremely fragile by the tensions created by the risks and challenges that accumulate but are not released because of this search for stability – by

1 The term "Arab Spring" is increasingly disliked in the MENA region because it is seen as a Western label attached to what was intrinsically a uniquely Arab experience. In the same way, the terms "Jasmine Revolution" and "Tahrir Revolution" are rejected in Tunisia and Egypt respectively. Instead, regional commentators prefer "Arab Revolution" or "Arab Intifada". The term is used here purely for the reader's convenience.
2 Thomas Kuhn (1962, 1969) argued that, in science, progress occurs through radical shifts in structures of interpretation. Furthermore, such shifts are incommensurate: the new structure of meaning cannot be interpreted in terms of its predecessor. His concept has since been applied to the political and social sciences, although the requirement of incommensurability does not apply, as different structures of meaning can and do coexist and can be interpreted, the new by the old.
3 The concept of complexity versus linearity has been widely theorised in international relations in terms of chaos theory and catastrophe theory (Bosquet and Curtis, 2011) and modelled as fitness landscapes (Geyer and Pickering, 2011) or as complex adaptive crisis systems (Lehmann, 2011).

domestic regimes and their external supporters as well. Ultimately, such systems become "prone to Black Swans – that is they become extremely prone to large-scale events that lie far from the statistical norm and were largely unpredictable to a given set of observers". (Taleb and Blyth, 2011; 33).

In other words, the accumulated tensions and challenges which have not been resolved but, instead, artificially repressed in the search for stability then suddenly erupt in unpredictable ways. In the wake of such events, policy-makers often seek to attribute blame for the failure to anticipate the Black Swans that have occurred; pointlessly, since by their very nature they are unpredictable, except for the fact that the dominant purpose of policy – stability – has in itself been a primary progenitor of the crises that have erupted. In addition, Taleb and Blyth point out that subsequent analysis usually identifies catalysts as causes, thus, through such misapprehensions, preparing the way for the next catastrophe.

The forecasts below are bound to be obliged to plead guilty to both categories of error, simply because they rely on projection and cannot account for Black Swans. The tendency towards error, of course, increases exponentially with the passage of time, so that short-term forecasting is more reliable than its medium-term correlate. In effect, therefore, the only reliable aspect of what is said below relates to the trends that can be identified rather than proposed outcomes, but, even there, unpredictable and unexpected events over time render their reliability ever more suspect as we move into the future.

In addition, the nature of policy formation – which, from the constructivist point of view, is a human activity, operating on an environment that itself is largely the consequence of human perception rather than objective fact, amplifies the uncertainties, for the prejudices of policy-makers are themselves, in effect, versions of the Black Swan phenomenon. Just consider the ways in which neoconservative assumptions have determined the environment for pre-emptive intervention in the last decade, for example. In addition, consider the ways in which those assumptions have become increasingly normative in the contemporary European world, despite their evident lack of utility or validity.[4]

This paper, therefore, will address the international, regional and national environments in which the MENA region operates. It begins with the assumption that the region is of global importance because of its centrality to the global energy industry and because, geopolitically, it is a shatterbelt[5]: a zone of inherent tension and potential conflict because of its importance to global power blocs. Geoeconomics, geopolitics and geostrategy will therefore form the first level of analysis, which will consider the potential for inter-bloc tensions as a result of the crises in the MENA region. This will be followed by intra-regional relations in the context of the Arab Spring, as the second analytical level. The third level of analysis will consider issues at a national level in the Gulf, the Levant and the Maghrib. This will also include the Israeli–Palestinian issue, the worsening crises in Egypt, Tunisia and Libya, and the Syrian debacle.

Global concerns

The events of the Arab Spring were triggered off by a global economic crisis, and economic concerns will underpin events in the region in future. Alongside such issues, however, the geopolitical location of the MENA region will inevitably ensure its global role in the future as it has in the past. Outside powers, however, also have choices about how they interpret such static concerns, so that the MENA region has crucial geostrategic significance for external powers as well.

The economic dimension

The actual trigger for the Arab Spring was a sudden rise in food and energy prices to their highest level ever, which provoked riots throughout the MENA region because of widespread poverty and inequality there. Behind this lay a more basic concern: the economic restructuring of the region in the wake of the debt crisis of the 1980s had been predicated on neoliberal economic development theory. This was encapsulated in the "Washington Consensus" and subsequently amplified by "new institutional economics", as promoted by the International Monetary Fund (IMF), the World Bank and other international financial institutions with the encouragement of the U.S. and the European Union (EU). It is worth noting that policy outcomes had been disappointing over the previous 20 years.

These policies, which required liberalisation and openness of trade and currency regimes to global markets, together with the reduction of the role of the state within the national economy, may well have improved macro-economic performance. However, they had significantly adverse effects on micro-economic consequences, such that unemployment, poverty and income inequality had increased in all countries in the region beyond the Persian Gulf. Unemployment, for instance, ranged between 15% and 20% of workforces throughout the region, with youth unemployment reaching 30% or more. The reforms had also had the unexpected effect of stimulating corruption, largely because of the unaccountable and authoritarian nature of the regimes involved.

Their effects had also been worsened by the global financial and economic crisis that had begun in 2008, particularly affecting Europe and the U.S.; the EU is the major trading partner of the MENA region. Between 30%

4 The Anglo-French intervention in Libya comes to mind, as does the French intervention in Mali, enthusiastically backed by the UK, together with the reassertion of "Enlightenment values" in recent years in a revival of the doctrine of "reluctant imperialism" (Mallaby, 2002; Cooper, 2002).

5 The term was coined by Saul Cohen in the 1950s to refer to a region of innate conflict between West and East as a consequence of "containment" (Cohen, 2008).

(Gulf states) and 70% (Morocco and Tunisia) of all regional trade is with the EU. Europe is also the major investment partner for the region and its economic crisis was inevitably reflected inside the MENA region. Thus, sovereign wealth funds saw their capital base decline by 15% in 2009 to $1.5 trillion, whilst direct private foreign investment had declined throughout the MENA region from $61 billion in 2007 to $40 billion in 2008, and remittances fell by 7.2% in 2009 (Joffé, 2010).

MENA countries, therefore, were ill prepared for the food price crisis at the end of 2010 and for the political crises that followed. Inevitably, the disruption caused by radical political change compounded the effects of the global economic crisis, with the result that the region suffered significant economic declines. According to the World Bank (2012: 37), although gross domestic product (GDP) in the region (including oil-producing states) rose by 1% in 2011 and was expected to have risen by 3.8% in 2012, national variations were significant. Thus, Egypt saw a decline of 0.8% in GDP whilst oil producers, such as Algeria (+2.5%), Iran (+2%) and the Gulf (+6%), all saw rises in GDP. For non-oil economies, the crisis was particularly severe: tourism receipts fell by 30% in Tunisia, 40% in Syria and 24% in Lebanon, whilst foreign investment flows more than halved in the Maghrib and the Levant from $22.7 billion in 2010 to only $9.5 billion in 2011.

The same patterns have been maintained over the past two years and are likely to persist in the future as well; thus, as oil prices rose by a further 3% in 2012 to an average of $107 per barrel, declines in GDP in Yemen, Syria and Iran (as a result of sanctions) probably held regional GDP growth to 0.6%, although it is expected to grow at 2.2% in 2013 and at 3.4% in 2014. Selected national projections are shown in Table 1.

Table 1: Past and projected GDP growth rates (%)

Country	2012	2014
Algeria	2.6	3.6
Egypt	1.4	4.6
Iran	0.8	1.5
Jordan	2.1	4.5
Lebanon	3.6	4.5

Source: Business Monitor International (2013b)

However, against the apparent optimism of these figures must be set the fact that population growth rates in non-oil economies generally outstrip economic growth, with the result that populations constantly grow absolutely poorer. In addition, budget deficits are unsustainable and have eaten severely into foreign reserves in the countries most seriously affected by the disruption attendant upon the Arab Spring, particularly Egypt and Tunisia. In Egypt, foreign reserves fell from $36 billion in 2011 to $15 billion in 2013, although in Tunisia an IMF loan of $1.67 billion maintained reserves at about $8.6 billion in 2013, compared with $7.5 billion in 2011.

Budget deficits, however, worsened everywhere. Thus, Egypt had a budget deficit of 9.2% of GDP ($130 billion) in 2011, which was expected to have reached 10.6% ($166 billion) in 2012. In 2013, it will be 10.7% of GDP. The budget had been balanced by drawing down foreign reserves, which fell to $20 billion in November 2012 (Business Monitor International, 2013a,b). Tunisia faces budget deficits of 8.6% of GDP in 2013 and 8% in 2014, compared with a deficit of 9.4% in 2012, again at the cost of foreign reserves, which were reduced by 9.3% in 2012 to only $6.2 billion.

Not surprisingly, both Egypt and Tunisia will have to have recourse to the IMF, with Egypt seeking $4.8 billion in standby support – delayed because of the current unrest there – and Tunisia requesting $560 million. Tunisia is also seeking a loan of $1.87 billion. However, one of the most surprising aspects of the MENA crisis, now in its second year, has been how relatively little aid has been provided to the countries most affected by it. Thus, the U.S. promised Egypt $1-billion-worth of debt forgiveness and an additional $1 billion of loan guarantees alongside its annual aid of $1.5 billion, but that was all, apart from $170 million promised to Egypt at the start of March 2013 by the new secretary of state, John Kerry. Even though U.S. aid to Egypt continued after the military coup in early July 2013, there was no significant increase in the sums made available, although the proposed IMF loan of $4.8 billion remained suspended. Saudi Arabia, Kuwait and the United Arab Emirates did provide an additional $12 billion in aid to support the coup against Egypt's failed Muslim Brotherhood administration, compared with an estimated $8 billion from Qatar and the promise of a further $2 billion from Turkey to the embattled Morsi government before the coup.

The European Union has promised €5 billion in aid, provided Egypt accepts IMF conditions for the $4.8 billion standby loan, and has actually provided €100 million. The EU's External Action Service has proposed to facilitate €6 billion in loans from the European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD) – €1.7 billion and €1 billion respectively have now been authorised – together with additional grants of €1.24 billion on top of the €5.7 billion planned for the next five years for the Mediterranean region. However, these sums will become available only against promises to promote democracy in the region (*Daily News*, 2013). To date, the only funds actually disbursed to the MENA region seem to have totalled €35 million, despite the increasingly desperate economic situation that countries there face.[6]

6 An indication of the EU's commitment is provided by the High Representative's proposals for engagement in March 2011. See High Representative for Foreign Affairs and Security Policy (2011).

The EU does now have €700 million available as new funding through its SPRING (Support for Partnership, Reform and Inclusive Growth) programme, but little has yet been disbursed (European Union, 2013). Relatively small sums are also available through the G8's Deauville programme, but little seems to have been disbursed.

In effect, the continued unrest in many MENA states is going to have serious economic consequences, as will the persistence of the economic and financial crisis in Europe. One obvious factor will be unemployment, as Table 2 makes clear. It is in the countries where change has been at its most radical that unemployment – and, by extension, the need for external support – is at its most critical. However, it is precisely to these countries that the least help seems to be available, either from the developed world or from the oil-rich states of the Gulf; Gulf states have made promises, but little aid has actually been forthcoming, except in the case of Egypt.

Table 2: Past and projected unemployment rates 2011–2014 (% of labour force)

Country	2011	2012	2013	2014
Algeria	9.9	9.5	9.4	9.2
Egypt	12.0	14.0	14.0	13.0
Jordan	12.1	12.5	11.5	11.0
Morocco	8.5	8.5	8.2	8.0
Tunisia	18.9	18.7	18.2	17.8

Source: Business Monitor International (2013a,b)

The problem, however, is not simply a question of aid. More fundamental questions need to be asked about the kind of economic development sought for the non-oil economies in the MENA region. Nevertheless – as is also the case with the European financial and economic crisis – it seems that past (and failed) economic orthodoxies are not to be questioned. Instead, they are to be reinforced, despite the negative effects that they have had, by international financial organisations, by the EU and the U.S., and, ironically enough, by some of the new governments now in power, not least that in Egypt. As has proved to be the case with the euro zone crisis, Western governments seem incapable of escaping from the ideological constraints of neoliberal economic theory, despite the fact that it has proved to be a failure, in the developing world, at least, ever since it was introduced in the 1980s, in the wake of the debt crisis then. The outcome, therefore, is ineluctable: within five years, even worse unrest predicated on economic desperation throughout the MENA region is inevitable.

Nor does oil income guarantee that oil-rich states will not suffer from parallel problems, even if they have avoided them until now. Leaving aside the case of Iran, where the economic outlook is artificially distorted by sanctions imposed by the EU and the U.S., the other high-capital-absorbing states – Iraq and Algeria chief amongst them, given their large populations – face the constant uncertainty of fluctuating prices, especially as shale oil and gas production may significantly affect the global pricing structure of the oil market and the regional structures of natural gas markets. Low capital absorbers – the Gulf producers, in effect – face other dangers, both technical and social. One of these is that most Gulf governments have bought social peace at the price of massive consumer subsidies, which now mean that the average minimum price at which they can profitably sell their oil has risen dramatically in the past two years. In the case of Saudi Arabia, for instance, that minimum price level is now believed to be around $95 per barrel.

Amongst the technical problems is the fact that energy consumption among the Organization of the Petroleum Exporting Countries (OPEC) is rising,[7] so that the Arab OPEC producers' export potential (and thus revenue-earning potential) will decline. Indeed, the Gulf region may well be short of gas by 2030 and the United Arab Emirates already has to depend on gas exports from Qatar through the Dolphin pipeline. Beyond this, shale oil and gas from the U.S. may also challenge Gulf dominance in world oil and gas markets, although this is a double-edged sword, given the higher production costs involved in North America. In addition, the ongoing problems of the oil curse will worsen over the next five years, so that the social consequences of a hydrocarbon-based economy will persist, especially that of providing effective employment options through the development of a viable private sector. Thus, although different in nature, the economic outlooks for Gulf oil producers are likely to contribute to adverse political outlooks as well.

The geopolitics of the future

One of the most significant aspects of the MENA region in the past has been its role as a key shatterbelt region. Not only is it the repository of the world's richest reserves of oil and gas, but it is also strategically located across one of the world's most important trade routes. The MENA region contains 52.0% of the world's conventional oil reserves and 42.4% of its conventional gas reserves. It produces 36.1% of the world output of oil and 20.4% of its gas (BP, 2012). As the U.S. Department of State pointed out in an internal memorandum in 1945, it represents a "stupendous material asset" (US Department of State Memo, August 1945) and, not surprisingly, the U.S. has not permitted any other power to dominate the region ever since.

The Mediterranean – of which the Maghrib and the Levant form the southern shore – carries 30% of the world's

7 For example, although in 2011 the MENA region generated 20% of the world's natural gas, it also consumed 12.5% of the world's output, an amount that doubled in size between 2005 and 2010. On a linear projection of this rate of increase in production, the region will become a net importer of gas by 2016. A similar linear projection of oil consumption, which doubled between 2003 and 2007, suggests that the region will cease to export oil within 15 years if there is no significant expansion in reserves (BP, 2012).

maritime trade by volume, including 25% of its maritime oil trade. It is thus a strategic line of communication, a SLOC in Pentagon parlance, and forms part of the U.S.'s global maritime strategy of ensuring freedom of navigation, with the U.S. 6th Fleet located in the Mediterranean and the U.S. 5th Fleet in the Gulf. Little will occur to change that reality in the next five years, even though most oil and gas produced in the Gulf now flows eastwards towards China and South East Asia. China does not yet have a viable blue-water navy with which to contest U.S. domination of the high seas.

The MENA region also forms the southern periphery of the European Union and, as such, is an integral element in the EU's border security, which has been progressively projected into the region since the 1990s. Today, littoral states along the south Mediterranean rim are seen as essential partners in protecting Europe from the threats of transnational terrorism, smuggling, international crime and illegal migration, as the 28 members of the EU seek to prevent unwanted migration as well as violent overspills from the MENA region. In effect, the European Union has securitised its external relations with MENA states, particularly since 2001.

Thus, in 2011 there were 20.5 million non-EU nationals in the EU, 4.1% of a total population of 502.5 million (Eurostat, 2012). Of these, perhaps 6.5 million originated from the MENA region, together with an unknown number of illegal migrants from the MENA region itself as well as from sub-Saharan Africa, Central Asia and South Asia. It is these migrant flows that the EU looks to the countries around its southern rim to control, a population pressure that will increase over the next five years as instability in the MENA region grows (Joffé, 2008).

Geostrategic considerations

In addition to these static factors that will continue to dominate the attitude of external powers to the MENA region, there are dynamic factors as well that reflect the perceptions and strategic assumptions of policy-makers about the potential role of the region within their global concerns. One of these concerns the status of the U.S. within the region. With the end of the bipolar relationship of the Cold War, in which the MENA region was a surrogate arena for the struggle between West and East, there was a generalised assumption that the global order would be one of hegemonic stability. The U.S. was seen as the global hegemon, in an era in which geoeconomics, with the U.S. economy dominating world economic affairs, was to replace geopolitics and geostrategy, now subordinated to U.S. control.

In his State of the Union address in 1991, President George Bush senior announced this new world order, but, within a decade, it began to become evident that the order over which he had presided was, in effect, a transition. In the MENA region, in particular, early assumptions of U.S. dominance, in the wake of the 1990–1991 intervention in Kuwait, began to be challenged by Salafi-jihadism, especially from Afghanistan and the Gulf. The subsequent U.S.-led interventions in Iraq (2003) and Afghanistan (2001 and 2006) underlined the limits of American hard and soft power. More significantly, they were paralleled by the growth of the economic power of China and South East Asia, whilst behind them stood India. At the same time, Russia emerged under the Putin regime as a revitalised, oil-rich state.

Table 3: Oil exports from the Middle East and North Africa, 2012 (thousands of barrels per day)

Country/region	Middle East	North Africa	Total imports
United States	1,080	341	10,587
Europe	2,261	1,577	12,488
Asia-Pacific	14,421	404	25,998
China	2,900	221	7,162
India	2,474	89	3,871
Japan	3,543	18	4,743
Singapore	1,119	8	2,963
Other Asia-Pacific	4,385	68	7,259
Total exports	**19,699**	**2,604**	**55,314**

Source: BP (2013a)

The Eastern demand for imported energy, which is forecast to grow at 2.2% per year up to 2030 (BP, 2013b), has meant that other powers from the Asia-Pacific region now have an acute and growing interest in MENA affairs, as the dominant importers from the MENA region, particularly from the Middle East (see Table 3). Those states which are traditionally allied to the U.S., such as Japan and South Korea, are untroubled by U.S. hegemony in the MENA region, if it means regional stability and security of supply. However, for those states that do not enjoy such a relationship, there are growing anxieties that U.S policy imperatives may not accord with their own, even if, as with China, there is little strategic vision beyond ensuring access to energy resources and transit security for the commodities thus acquired.

The implications of multipolarity

In other words, an incipient multipolar world is emerging, in which other states, driven by their need to ensure access to MENA energy, cannot accept what they may perceive as a U.S. diktat over regional affairs. Over time, this latent conflict is bound to become reified, even if the states concerned do not develop overtly conflicting agendas. This has already produced at least one potential clash, over Chinese plans to develop a blue-water navy, which the U.S. sees as a threat to its own chosen objective of ensuring freedom of navigation. In fact, Chinese concerns are focused on the issue of energy transit security, but the U.S. sees wider objectives concealed behind the issue itself

(Al-Rodhan, 2011). One consequence of this has been current U.S. sensitivity, matched by Chinese truculence, over the South China Sea dispute.

There have been other consequences, too, in that disputes within the MENA region have now become triggers for renewed great-power tensions. Two such disputes come to mind and will be discussed further below. One is the current tension over Iran's alleged plans to construct nuclear weapons, which ranges Western powers, especially those within the P5+1 group, against Russia and China. The result has been a constant drag on Western initiatives aimed at compelling Iranian compliance with Western demands over ending its purification of uranium. In any case, the election of a new president in Iran, Hassan Rouhani, who is a former nuclear negotiator and far more emollient than his predecessor, Mahmoud Ahmadinejad, may see an easing of tensions over this issue, especially if the U.S. is prepared to compromise and to alleviate the sanctions regime it has installed. Mr Rouhani, however, is a long-standing colleague of the Iranian Supreme Leader, Ali Khamane'i, so not too many concessions can be expected from Iran, despite the change in leadership. China and Russia, whilst supporting the idea of compliance with Iran's commitments under the Nuclear Non-Proliferation Treaty, do not support some of the more extreme actions that have been proposed to enforce compliance.

Thus, in 2012 Russia proposed a step-by-step approach and a road map for negotiations, which the U.S. has resisted. It should also be noted that Iran is an observer-member of the Shanghai Cooperation Organisation (SCO), which is led by China and Russia. Iran has, as a result, an alternative global support base which is not dominated by the U.S. and other major Western powers. Of course, the international scene is far more complex than it was during the Cold War, as international law and treaties have created much more sophisticated patterns of engagement through new international organisations. Nonetheless, it is not too difficult to discern the outlines of a new power bloc which resists the single-power hegemony of the 1990s and the 2000s and will become more assertive in the next decade as the underlying interests of its dominant members – particularly China, India and Russia – differ ever more from those of Western powers. Little imagination is required to see this as possibly defining the contours of a new Cold War.

This, however, is a minor immediate concern in the context of interactions among the great powers concerning the MENA region. A far more serious dispute has erupted over the sequelae to intervention in Libya in 2011 sponsored by the United Nations Security Council. The fact that an intervention premised on "responsibility to protect" the civilian population in Libya ended in regime change has persuaded both Russia and China, as permanent members of the Security Council, to resist further application of that principle. This has appeared most acutely over the question of the civil war in Syria, where Russia, in particular, but with overt Chinese support, has resisted all proposals of direct intervention through the United Nations, insisting on face-to-face negotiations between the protagonists instead. It is a measure of the change in the international scene towards multipolarity that Western powers, led by the U.S., had to acquiesce, very reluctantly, in the Russian proposals as they threatened to move towards direct intervention. In practice, all Western states have also proved to be very reluctant to engage in direct intervention, with the UK government, for instance, admitting that it could not do so because of a lack of domestic support for such a policy. They have preferred to leave such action to their surrogates in the Gulf: Qatar and Saudi Arabia.

The problems of Israel and transnational terrorism

There are two further dimensions to the global geostrategic field that also deserve mention here. One is the ongoing struggle against transnational terrorism, which has recently been revived in a new form by the U.S. through its increasing use of drones to attack alleged terrorist leaders in Yemen and, latterly together with France, in Mali (Schmitt, 2013; defenceWeb, 2013). Both initiatives rely on the cooperation of adjoining states – Saudi Arabia and Niger respectively – and both seem certain to excite populist anger against American regional policy. However, neither has excited much concern amongst the U.S.'s global allies and it is worth raising the question of why this should be.

The major reason for this is that there is a consensus throughout Europe and the Americas that the narrative of global terrorism as a military threat – to be countered by military measures – is now the dominant discursive approach within the media and the political sphere. It is associated with a resurgence of the generalised belief in the primacy and universality of "Enlightenment values" throughout the developed world. In other words, despite their political defeat, the narrative of the neoconservative movement in the U.S. in the last decade has now become the normative narrative of the West. It has been reinforced by the alleged failure of the Arab Spring, as perceived in the development of moderate Islamist movements and governments – particularly in Egypt, after the recent army-backed coup there, and Tunisia, given the polarising effects of the assassinations of two secular political leaders, which have been blamed on the dominant Islamist movement, Ennahda – and the new ascendency of Salafist movements throughout the MENA region.

This intellectual approach is certain to become more entrenched in the years to come and will interact with the sharpening divisions in the MENA region between Islamist and secularist movements as the consequences of the events of 2011 evolve. This will further deepen the ruptures that already exist between majority opinions in the region and Western policy-makers, strengthening those who believe that Western policy is essentially hostile. These divisions will be further entrenched in regional perceptions by the second dimension of geostrategy: Western engage-

ment in the ongoing dispute between Israel, the Palestinians and Israel's Arab neighbours. Despite the fact that the peace process that emerged from the Oslo Accords in 1993 is moribund, Western politicians insist on reviving it; the new U.S. secretary of state, John Kerry, has made it the centrepiece of his Middle Eastern policy.

However, neither Israeli politicians nor leading Palestinians consider that it can be or should be revived in its present form, and the new wave of Arab politicians approach the whole issue as if it were a time bomb, threatening regional stability – which it does. Although the second Obama administration has been able to force the new Netanyahu government to revive the peace process negotiations, it will be able to bring only the discredited Palestinian Authority along as a partner, leaving the real Palestinian voices – Hamas and Fatah-Tanzim – in the wilderness, so that no agreement will be enforceable. This is not least because Israel will not concede on crucial issues: Jerusalem, refugees and the right of return, and settlements. Any Israeli government knows that Israeli public opinion is profoundly uninterested in concessions for peace. Nonetheless, Mr Kerry was able to force the two sides to meet in early August, if only to discuss an agenda for future talks, by persuading Israel to release long-held Palestinian prisoners. However, there is much scepticism about meaningful negotiations as a result. Hamas remains profoundly opposed to the talks, despite the pressure it is under from the new Egyptian authorities in the wake of the military-backed coup in Cairo in July.

In such circumstances, the idea that the peace process can be revived is totally illusory; this could happen only if Israel were to make real concessions, which will not happen. Yet the United States' regional position and ability to dominate the normative discourse within the Middle East depends more acutely than ever before – because of the changes wrought by the Arab Spring – on its ability to generate a viable and fair outcome to the crisis between the Palestinians and Israel. Over time, therefore, U.S. influence will wane as Arab populations see their scepticism over the role of Western states entrenched, a tendency that will be enhanced by U.S. ambivalence over the removal of President Morsi from power in Egypt and the potential marginalisation of the Muslim Brotherhood there. This can only heighten the role of other external powers in the region – for example 'Chindia' or the BRICs, given their energy interests in the MENA region[8] – especially if they can offer what the U.S. cannot: an equitable outcome to the core dispute between Israel and the Arab world which is not determined by Israeli military power (see Benn, 2013). At present, however, they do not seem to be aware of their potential role or wish to fulfil it.

The regional dimension

This geostrategic setting is reflected within the region itself; thus, Middle Eastern powers, in particular, have aligned themselves into two arcs according to the external allies they have sought: the famed Shi'a "arc of extremism", named by Tony Blair (2006), involving Iran, Syria, Hizbullah in Lebanon and, increasingly, Shi'a-led Iraq; and an allegedly moderate alternative that also has a sectarian tinge, the Sunni "arc of moderation", bringing together Gulf Cooperation Council states and Jordan under Saudi leadership. It is a diplomatic division that is increasingly being articulated in sectarian terms, with the Shi'a being deliberately marginalised within the Arab states of the Gulf. In the past, of course, Egypt under Gamel Mubarak would also have been a member of the group, but, today, Egypt sits uneasily between the two arcs of states, seeking to bridge the gulf between them but increasingly dependent on Gulf Arab (Sunni) financial support. North African states are equally uneasy onlookers, being dominated by their concerns with Europe and having little leverage over the geopolitics of the Middle East.

Allied to this is the fact that the multipolarity amongst the external patrons of MENA states is mirrored by a growth in multipolarity inside the MENA region as well. In part, this reflects the fragmentation of the region as a result of the end of the Cold War in 1989, such that five sub-regions have replaced the old unitary region, which consisted of the Arab world, with Turkey and Iran as non-Arab outliers. Now Turkey and Iran are at the hubs of the new regions of the Caucasus and Central Asia respectively, in addition to their roles as dominant states in the Eastern Mediterranean and the Gulf. In the Gulf, Saudi Arabia contests Iranian hegemony, whilst Egypt seeks a new role for itself after the Arab Spring as a Sunni alternative to Saudi Arabia, and Algeria and Morocco challenge each other over control of the Maghrib.

The potential split inside the Middle East between allegedly extreme and moderate states, quite apart from reflecting a sectarian divide, also, as suggested above, neatly aligns the states involved with their external patrons. Thus, the Sunni arc looks westwards and the Shi'a group is forced eastwards instead, even though some of its members would like a rapprochement with the West, provided the terms were right, whilst others find themselves dragged into regional conflict, such as Hizbullah's involvement in the civil war in Syria.[9] The irony is that, in effect, a situation not unlike that which prevailed during the Cold War has now been re-created, in which, quite apart from its own very real problems, the MENA is once again fulfilling the role of acting as a surrogate arena for wider inter-bloc tensions at the global level as well, justifying its description as a shatterbelt in the present-day world. This is a situation which will continue until external powers find a way of

8 'Chindia' is China and India; the BRICs are Brazil, Russia, India and China as the poles of a new, multipolar world order.
9 However, it should be noted that Hizbullah's major intervention in Syria to date has been at Qusayr, a border town with a predominantly Shi'a population derived in large part from Lebanon.

adjusting their own priorities to accommodate the tensions between them.

The division also revolves around the two key areas of conflict inside the Middle East: the Iranian nuclear issue and the internal conflict inside Syria. At the same time, each conflict engages other regional states as well, the Iranian nuclear issue bringing in the Arab Gulf states, and Syria dragging all surrounding states (Israel, Lebanon, Turkey, Iraq, Jordan and Saudi Arabia) into its civil war. In effect, the two issues have become the central point of what has become known as "the second Arab cold war"; the first pitted Saudi Arabia and its supporters against Nasserist Egypt in the 1960s over the issue of the civil war in North Yemen. Both issues seem intractable and their resolution will, once again, depend on external powers, as a closer analysis of each reveals.

The Iranian nuclear issue

Superficially, this issue is straightforward: Western powers and Israel believe that Iran is seeking to acquire nuclear weapons; Iran insists that it seeks a peaceful nuclear power programme, to which it is entitled under the Nuclear Non-Proliferation Treaty, to which it is a signatory. The issue has been complicated by additional factors: first, Israeli bellicosity, which has threatened unilateral action to end Iran's nuclear programme, come what may, if Iran accumulates more than 240 kg of uranium enriched to 20% U235; and, second, Iranian refusal to allow the International Atomic Energy Authority in Vienna unrestricted access to its nuclear sites, despite its obligations under the Additional Protocol to the Treaty, which it has also signed.

The situation is also complicated by two further factors, one intrinsic to the region and the other extrinsic to it. The intrinsic factor is the fact that the Arab Gulf states have long feared what they perceive as Iran's expansionist ambitions in the Gulf region, both as a Shi'a state and as a consequence of its own revolutionary objectives. They regard Iran as responsible for much of the regional unrest, particularly in Bahrain, given the sectarian divides there that have flared up since 2011, and in Yemen, where, with very little evidence, they hold Iran responsible for the al-Houthi rebellion. However, were it not for Western concerns, particularly those of the U.S., these tensions across the Gulf would be a purely regional factor that could have been settled by prolonged negotiation, which Iran has tried to promote since 1989. The recent presidential elections which have brought Hassan Rouhani to power suggest that tensions with Western states might ease. Mr Rouhani, an experienced diplomat and former nuclear negotiator, enjoys the confidence of the Supreme Leader, Ali Khamane'i, yet is also responsive to Western concerns. His primary objective will be to ease the U.S.-imposed sanctions regime without conceding essential positions on Iran's sovereignty over the nuclear issue. Success in that respect, however, depends on American willingness to reduce tensions.

Global implications

These form the extrinsic factor, which is both more nebulous and much more serious. Since 1979, the U.S. has had no diplomatic relations with the Islamic Republic of Iran and has placed Iran under various sanctions that have been significantly amplified in recent years, as part of the pressure designed to make Iran submit to international demands with respect to its nuclear programme. Indeed, there are very powerful pressures inside the U.S. that make any question of meaningful rapprochement between it and Iran quite impossible, whatever the formal diplomatic discourse emerging from Washington might suggest. Iran, which would welcome formal diplomatic relations, believes that the U.S. is, in reality, bent on regime change inside Iran. It therefore refuses any concessions until it is reassured that this is not the case; the Obama administration, however, is constrained from offering such reassurance because of its domestic audience.

Iran is confirmed in its obduracy by the fact that, although the United Nations Security Council has authorised coercive action against Iran, two of the permanent members – China and Russia – have constantly sought to encourage negotiation and have prevented even harsher measures being adopted. In addition, it has been able to circumvent the most extreme pressures, particularly over oil sales, by exploiting its Asian links, especially to India, which has bought large amounts of discounted Iranian oil. Further reassurance has been provided by the growing evidence of extreme reluctance in the U.S. to contemplate military action or to allow Israel to do so, quite apart from the evidence of increasing distaste for military action within Israel's security services and military establishment.
The result of the current situation is that the inability of either side to accommodate the anxieties of the other (despite recent hints of a moderation of the sanctions regime against Iran in return for an Iranian concession on the refining of U238 ore, particularly above the 20% purity level) means that the dispute has become a metaphor for the wider confrontation at a global level, as well as over Israeli ambitions in the region, and that this could worsen in the years to come. Thus, in effect, a dispute that primarily involves Iranian perceptions of the country's own security becomes, instead, a symbol of a much more profound crisis at a global level. Exactly the same process applies to the other key regional dispute, the Syrian civil war.

The Syrian civil war

The Syrian civil war, which began in early March 2011, has been remarkable in many respects. First, up to November 2011, the demonstrations in Syria were not only countrywide but peaceful in nature. They called, it is true, for the replacement of the regime, but it was quite clear that this was a demand that was negotiable, at the beginning, at least. The regime made the fundamental mistake of using maximal violence against the demonstrations from the start. This strategy was, no doubt, based on its experiences in 1982, when it faced a similar movement of domestic

opposition that turned violent and culminated in the destruction of Hama. As a result, within five months of the start of the 2011 demonstrations, an armed resistance began to appear as desertions from the Syrian armed forces began and as, more slowly, Islamist extremists took over the brunt of the fighting. Second, from the very beginning of the struggle, the Assad-led Ba'athist regime posed as the protector of Syria's minority groups – Christians, Alawites, Druze, even Kurds, and the economic elites – against the "threat" of the Sunni majority. This was extremely effective, particularly when it used the Shabiha[10] as a means of setting tribe against tribe and to excite sectarian tensions. One consequence of this has been to render the majority Sunni opposition more radical and more willing to accept the support of Islamist and jihadist groups coming from Iraq, Libya and Saudi Arabia. This development has been aided by the chronic fragmentation of the opposition to the Assad regime. The opposition has, as yet, been unable to create a unified and disciplined movement. To date, up to 100,000 people are believed to have died, several major Syrian cities have been severely damaged and over 4.5 million Syrians are either displaced internally or refugees in surrounding states. By the end of 2013, the United Nations High Commission for Refugees expects the number of refugees to reach 3.5 million, compared with 1.8 million at the time of writing. The war is estimated to have cost Syria $60 billion to $80 billion to date – one-third of its pre-war GDP – according to Paulo Pinheiro, the United Nations commissioner investigating human rights abuses there, in his report to the General Assembly in late July 2013.

Third, from the very beginning of the conflict, surrounding states have been drawn in. Iran has had close links with the regime ever since 1980. Despite Assad's heterodox Alawite origins, Iran has recognised Syria as a state governed by a branch of Shi'ism. The original relationship developed out of a shared hatred of the Ba'athist regime in neighbouring Iraq, which had, by then, attacked the newly formed Islamic Republic. It has, since then, hardened into a complex formal alliance, with Iran providing up to $5 billion in aid towards the beleaguered Syrian regime, together with sophisticated anti-opposition security facilities and training and weaponry for the Syrian armed forces. Ironically enough, since the collapse of the Saddam Hussein regime in Iraq a decade ago, Iraq has become not only a conduit but also a resource for the Syrian regime as a result of the Iranian link, although, on the other hand, Sunni groups inside Iraq are actively supporting the armed opposition as well, in a reflection of the incipient civil war developing inside Iraq itself. Syria has also received increasing, if covert, support from Hizbullah in Lebanon, both because of its role in fostering the movement in the past and because of Iran's long-standing engagement with it.

Ranged against the Iran–Syria–Hizbullah axis are Saudi Arabia, Qatar and Turkey, each state with its own reasons for opposing the Assad regime. Jordan, incidentally, whilst it sympathises with this moderate coalition, is desperate to distance itself from the struggle, for fear of being drawn in, as is Lebanon, not least because of the very large and growing numbers of Syrian refugees the two countries house. Ironically enough, the opposition is in part based on personal antagonism between ruling groups; all three had good relations with Syria up to the outbreak of the demonstrations there two years ago. All three were, however, antagonised by the Assad's regime's brusque rejection of offers of mediation that they made. Then more substantial reasons hardened the antagonism into active support for the rebellion. Turkey objected to the sudden influx of refugees and the implications of regional instability caused by the conflict; Qatar and Saudi Arabia objected to the enhanced role that Iran and the Shi'a acquired as a result of the conflict, and to the growing threat to Syria's Sunni population.

All three have either been prepared to allow arms to flow into Syria or actively provided weapons to their favoured resistance groups. This development has further fragmented the resistance. Saudi Arabia, for example, will not support any group connected with the Muslim Brotherhood, whereas the Brotherhood is Qatar's favoured partner. However, neither has yet supplied arms of a type that would seriously threaten the Syrian army's military dominance, although the opposition, despite its fragmentation, has taken control of much of the land area of the country and disputes control of at least one major city, Aleppo. The real issue is what the international backers of the different groups in Syria, both pro- and anti-regime, intend to do. That is still not clear.

The global dimension

Once again, the imperatives of the Sunni and Shi'a arcs of alliances have been asserting themselves, although in a much more overt way than has been the case in the crisis over Iranian nuclear ambitions. Thus, China and Russia, in another illustration of contemporary multipolarity, have obdurately opposed all moves in the United Nations Security Council to impose sanctions on Syria or authorise intervention under the principle of "responsibility to protect". The primary reason for this has been their acute concerns about the UN-sponsored NATO intervention in Libya in 2011, which turned into regime change, as the UK, France and Qatar exploited the cover the United Nations had provided to eliminate the Qaddafi regime.

Both states are resolute supporters of the principle of the sovereign immunity of states. China, in addition, also fears that the same actions could conceivably be undertaken against it over the issue of the Uyghurs or of the Tibetans.

10 This is a paramilitary movement derived from the criminal Alawite gangs in Lattakiya. Its members are used as the regime's "enforcers" and have been responsible for many of the massacres of civilians that have been reported. It is termed "shabiha" (ghosts) after the cars – Mercedes Ghosts – that its leading members used to drive.

Russia has also been the ally of the Assad regime since the Soviet Union signed a treaty of friendship with Syria in 1980 and still considers Syria to be part of its "near abroad". It is the main source of arms for the Syrian army and has argued that negotiation is the only way in which the Assad regime could end without provoking a sectarian civil war in its wake. The irony is that, after two years rejecting such an initiative, the U.S. now seems prepared to consider this approach as one possible way forward. It is an irony that is compounded by the fact that Washington is increasingly reluctant to become militarily engaged in Syria, notwithstanding its promises to do so if chemical weapons were used in the conflict, despite congressional enthusiasm for escalating U.S. engagement. Washington, in short, is coming to accept that, however distasteful it might be, the Assad regime might well remain in power.

However, at the same time, Washington, with the enthusiastic support of the UK and France, still seeks the regime's destruction and, with its European partners, has been supplying non-lethal equipment to the opposition. Some months ago, as a result, there were hints that all three might soon supply lethal equipment as well, despite their growing fear that such supplies might fall into the hands of Islamist extremists – their objective enemies. Now, however, this seems increasingly unlikely, given the reluctance of the Obama administration to allow such an escalation, and domestic obstacles to such a development in Europe as well. However, the United States' dislike of the Assad regime has a long history, grounded in the latter's opposition to Israel – although Syria has, ironically enough, acted as a guarantor of the regional security structure for many years, despite its normative antagonism towards Israel. The U.S. also dislikes Syrian activities in Lebanon and holds it ultimately responsible for Hizbullah and for the assassination of Rafik Hariri in Beirut in 2005. Its decision not to intervene with lethal equipment, therefore, indicates the scars left by previous interventions in Iraq and Afghanistan; the administration is desperate to avoid repeating such an experience in the future.

France sympathises with that position as well, despite its earlier enthusiasm for armed intervention. Syrian opposition leaders in Paris in late July were greeted with fine words but left empty-handed. The UK's position is slightly more difficult to understand but appears to revolve around growing domestic opposition – within the ruling Conservative Party – to its new-found enthusiasm for regional intervention and support for U.S. policy. Although the UK government persuaded its European counterparts to remove the EU arms embargo on Syria, it was notable that, shortly afterwards, the British prime minister made it clear that the UK would not supply lethal equipment there, despite its earlier promises to do so. None of the partners in the anti-Assad coalition seems, in short, to be too clear about the consequences of their engagement, but it seems obvious to their critics – now dominant inside government in Washington, Paris and London – that, if they opt to supply arms to the opposition, they will promote the break-up of the Syrian state once the Assad regime collapses and, worse still, will supply arms to their objective enemies amongst the Islamist extremists who now dominate within the anti-Assad resistance.

Outcomes

The major reason for this is that there is no single interlocutor on the Syrian side that can coordinate oppositional activities. Most importantly, the interlocutor chosen by Western powers, the Syrian National Coalition, has little purchase with the Free Syrian Army's command structure and no purchase whatsoever with the growing and increasingly powerful Islamist opposition, particularly with the Jabhat al-Nusra, the most active and professional element inside it, which seems to share its jihadist ideology with al-Qaeda affiliates in Iraq. The result will be that, if the Assad regime falls or retreats to its Alawite redoubt around Lattakiya, there will be an internal struggle between the majority Sunni movements and the Islamists over the future of the state. It is a struggle which is likely to be as prolonged as, and even more violent than, the struggle currently under way against the Assad regime itself.

There are likely to be other consequences, too. First, surrounding states are bound to intervene, supporting their own preferred candidates to succeed the Assad regime: Qatar with links to the Muslim Brotherhood; Saudi Arabia with links to Salafists; Iran, probably with Russian support, seeking to reconstruct a post-Assad military regime; and Western powers vainly supporting secularist elements certain to be marginalised by the growing strength of sectarian groups. In addition, there is a strong likelihood that groups such as the Kurds – already effectively independent – will seek closer links with Kurds in Iraq (there have already been contacts) and Turkey, to Turkey's considerable displeasure, especially as the Erdoğan government is now seeking a permanent ceasefire with the Kurdistan Workers' Party (PKK) in Anatolia. Even the Druze, up to now quiescent, are beginning to consider a post-Assad future. Similarly, the Sunni tribes of western Iraq will seek closer links with tribal brethren over the border in Syria.

In short, Syria is set to become a political vacuum of stupendous proportions in the middle of the Levant, with incalculable consequences for regional stability. In essence, the failed French initiative of the 1920s, involving ethnically defined and sectarian statelets, may become the de facto outcome, thus destroying Syria as the last bastion of Arab nationalism. It will be impossible for Lebanon to continue to stand apart from the struggle and there have already been clashes in Tripoli pitting Sunni groups against each other, as well as cross-border clashes setting Hizbullah against Syrian Sunni oppositionists. Nor will Jordan escape unscathed, as extremism will seep over its borders within the growing Syrian refugee populations there. The only possibility of avoiding this will be a negotiated end to the Assad regime – which the United Nations envoy, Lakhdar Brahimi, is attempting once again – but

that will require a fundamental change in Western policy, which, despite the tentative rapprochement between the U.S. and Russia, is not yet on the agenda. Nor does it seem likely, given the policy vacuums in Washington, Paris and London, to take place before the situation degenerates to such an extent that it is no longer possible.

Other regional crises

Nor are these the only regional crises that have global implications. Transnational terrorism continues to be a major concern, in the Arabian Peninsula and in the Sahel, partly because of the national outcomes of the Arab Spring. The Western Sahara crisis, as a surrogate for the struggle between Algeria and Morocco for regional hegemony, is continuing into its 38 year. Both have significant external dimensions, involving the U.S. and the EU, and both have implications for the export of hydrocarbon energy from the Gulf and the southern shore of the Mediterranean.

Transnational terrorism

Despite the 14 years of the "war on terror", the Salafi-jihadist phenomenon has not been eradicated but has transmuted into new forms. Old-style al-Qaeda affiliate movements still exist in Yemen and in the Sahel, whilst the original movement, based in Waziristan under the Egyptian jihadist leader Ayman Zuwahiri, has effectively been neutered, although it still enjoys a precarious symbolic existence. In recent years, however, a series of new movements, often derived from nationalist Salafist movements, have emerged which do not formally share the global agenda directed primarily against Western states but seek instead the re-Islamisation of the MENA region as their primary objective.

Given the new political atmospheres generated by events of the Arab Spring, such movements have enjoyed a degree of freedom of action that they have not known before. They have also been politicised and, in some cases, have adopted ever more extreme jihadist agendas, which verge on being terrorist in nature but have not, as yet, excited Western reaction, despite the growing concerns voiced in Europe and in the U.S. Emblematic of such movements is Ansar ash-Shari'a, which has emerged in North Africa as a loose network stretching across the region, apparently from Yemen, and penetrating into the Sahara as well. It is most active in Libya and Algeria and is suspected of being involved in attacks on Western embassies in Libya and Tunisia.

In Yemen, al-Qaeda in the Arabian Peninsula (AQAP) has also developed a new agenda, after being forced out of Saudi Arabia by the security forces in 2010. First, it has cemented its place inside local society by forming alliances with local tribes, thus guaranteeing itself tribal protection against moves against it by the government or the U.S. Second, it has abandoned its original agenda of simply confronting government forces or attacking Western interests, seeking instead to capture ground. During 2012, it was successful in implanting itself in Aden-Abayan Province, where it captured control of the provincial capital, Zinjibar, and smaller towns surrounding it.

It proclaimed that its objective was to improve local living conditions as well as creating an Islamic society. Eventually, it had to be forced back into tribal territories by army action. It has not, however, been disbanded and continues to be a threat to the stability of the Yemeni state and a potential threat to Saudi Arabia as well. Nobody has forgotten the attack on the Abqaiq processing facility in 2006, which almost succeeded. Had the facility been destroyed, half of Saudi Arabia's production capacity would have been put out of action for an indefinite period, with enormous implications for world oil price and supply. Despite Saudi action in neutralising AQAP, the potential threat remains.

Much more immediately serious, and a portent for the future, is the situation in Mali and in the wider Sahel and Sahara. This is a legacy of the Algerian civil war in the 1990s. In 1997, a new Salafi-jihadi group emerged from the detritus of the Groupes Islamiques Armés (GIA) as the latter was dismantled by Algerian army action. This was the Groupe Salafiste pur la Prédication et du Combat (GSPC), which confined its attacks to the Algerian security forces and survived in Kabylia, along the northern littoral to the east of Algiers, by forcibly tithing the local population, kidnapping local leaders against ransom and robbing post offices and banks.

In 2003, the group created a southern branch, which engaged in a spectacular kidnap of 33 European tourists, who were eventually ransomed by European governments. Meanwhile, the group itself settled into a new redoubt in the old salt mines of Taoudenni in northern Mali, with the acquiescence of local Tuareg notables. There, under an old jihadist, Mokhtar Belmokhtar, the group began to integrate itself into the smuggling networks across the Sahara and to extend its activities into neighbouring Mauritania and Niger, where it attacked Mauritanian outposts and took French hostages from the uranium mining town of Arlit in Niger. Other hostages were also taken, some from Polisario camps at Tindouf and others from among tourists attending a music festival in Mali. They were all held for ransom, although, on at least one occasion, a hostage was killed when his government (in this case the UK government) refused to authorise the payment of a ransom.

The group also began to acquire a jihadist tinge to its rhetoric and to attract local recruits, particularly from Mauritania and from the local Tuareg population. However, given its remoteness, the group never attracted the kind of hostility that such groups would have done elsewhere, even after it formally declared itself allied with al-Qaeda in 2006, as al-Qaeda in the Islamic Maghrib (AQIM), a declaration that al-Qaeda itself endorsed with alacrity. In reality, it was not seen by outside powers as a threat, despite the attention it attracted from the Pentagon's Africa command structure, Africom. In addition, Algeria, as the dominant

regional state, was loath to let other powers become involved, as the Algerian security forces sought to infiltrate the movement and split it from the inside.

In 2011, the Libyan civil war caused a major change in power relations in the Sahara because, as a consequence of the collapse of the Qaddafi regime, vast amounts of illicit arms began to circulate throughout the Sahara. At the same time, Tuareg mercenaries, recruited by the Qaddafi regime, drifted back to Mali and, resentful of their defeat in Libya and highly armed, sought to create an autonomous Tuareg state, Azawad, inside Mali instead. The initiative, begun by the Mouvement National pour la Libération de l'Azawad (MNLA) in March 2012, coincided with a collapse of the Malian government in Bamako and thus easily succeeded. However, the MNLA soon found that it had competition.

AQIM had, meanwhile, undergone an amicable split into two, with the new movement, consisting of non-Algerians, mainly Mauritanians, adopting the name Mouvement pour l'Unicité et le Jihad en Afrique de l'Ouest (Mujao) but following essentially the same agenda as AQIM. At the same time, a new movement, Ansar ed-Din, formed amongst Tuareg Islamist sympathisers. The three Islamist movements then took advantage of the MNLA rebellion against the Malian government, seizing control of major towns in the liberated areas, including Gao, Kidal and Timbuktu, where they created strict Islamist administrations. They also seized seven Algerian diplomats in the region, thus incidentally attesting to continued Algerian involvement in Sahelian affairs. The response to these developments by the United Nations and local regional organisations, such as the African Union and the Economic Community of West African States (ECOWAS), was leisurely, to say the least, as they prepared an intervention force to be ready for action in September 2013, 18 months later.

In January 2013, however, the three Islamist movements made a sudden sweep southwards, with the evident intention of trying to seize the Malian capital itself. This provoked an immediate French intervention, with UK support and, more covertly, U.S. backing as well. The French move was predicated on a perceived potential threat to French uranium interests in neighbouring Niger and on French support for the beleaguered Malian government. A small but well-armed force of 4,000 French soldiers, accompanied by a Chadian force 2,000 strong, with Malian army reinforcements and supported by French aircraft based in Chad, forced the Islamist movements northwards and out of the towns in Azawad. Mopping-up operations, which have involved the death of the AQIM leader, Abdulhamid Abu Zayid, are ongoing.

In the midst of these operations, in late January, Mokhtar Belmokhtar, who had been forced out of the AQIM leadership in 2012, organised his own group to carry out an attack on a BP–Statoil–Sonatrach gas-processing facility at In Amenas in eastern Algeria by the Tunisian–Libyan border. The attack, which had been designed to capture Western hostages for ransom, was foiled by a brutal Algerian response, but 33 hostages died, as did 27 of the attackers (three others were captured). The incident was clearly an attempt by Mokhtar Belmokhtar to highlight his significance to the movement and, despite rumours that he himself had been killed in early March in operations around Kidal in northern Mali, he appears to have rejoined AQIM.

Despite what appears to have been a decisive French intervention, the problem of residual Islamist movements in the Sahel has not been resolved. The remnants of such movements will persist and will require constant monitoring and control. The African Union and ECOWAS eventually took over responsibility for this in mid-2013, with French support, but the real regional power will be Algeria, despite recent presidential elections in Mali, designed to restore the credibility of central government there. It is notable that both the UK and France are seeking improved security relationships with Algeria, as they know that, unless Algiers can be persuaded to act, both European states will be saddled with the Sahel problem for years to come. Ironically enough, even though U.S. drones will monitor the Mali situation from Niger under a new status-of-forces agreement with the Nigerian government signed in February, it will be around Algeria that regional security now revolves.

The Western Sahara issue

Indeed, Algeria remains key to the other major regional issue in North Africa, the situation in the Western Sahara. Morocco has occupied the region since November 1975 and remains in control of 80% of the old Spanish Sahara. Since 1991, there has been a ceasefire between Moroccan forces and those of the Polisario Front, the Western Saharan independence movement created 20 years before. At least 150,000 Sahrawi – the descendants of those who fled the region when Morocco occupied it – continue to reside in a series of refugee camps around the Algerian town of Tindouf. The ceasefire is monitored by a United Nations force, MINURSO, which was originally charged with establishing who would be entitled to vote in a referendum for self-determination.

The referendum is still pending because of a fundamental disagreement between Morocco and the Polisario Front about its purpose. For Morocco, its purpose would be to confirm Moroccan sovereignty over the region; for the Polisario Front, backed by Algeria, the purpose would be to establish what Sahrawi feelings were about independence for the region and the creation of a Sahrawi state there. Despite talks organised by the United Nations at Manhasset on Long Island, no solution to this situation has yet been found. Behind the dispute lies a more basic issue, that of hegemony over the Maghrib, for the Western Sahara is a metaphor for competing Algerian and Moroccan claims in this respect.

Meanwhile, inside the Western Sahara itself, now under Moroccan administration, the local Sahrawi population has

increasingly voiced its resentment at the failure to hold the UN-authorised referendum on self-determination. The crisis came to a head in November 2010 with a protest camp at Gdiem Izik, which was broken up by Moroccan security forces with several deaths. Some 20 people were tried in a Moroccan court for involvement in the riot in February 2013. In 2011, there were riots at Dhakla over anti-Sahrawi action by the Moroccan population now present in the Sahara as well.

It is most unlikely that there will be any significant change in the Western Saharan situation over the next five years. Morocco will not yield on its belief in its sovereign rights over the territory, and it actually occupies the territory; Algeria will not abandon its call for a referendum on self-determination or its support for the Polisario Front. Outside powers consider Morocco to be a factor for stability inside the Maghrib and will not, therefore, bring pressure to bear on Morocco to concede the referendum. European powers, led by France, generally support the Moroccan case, and the U.S. will not intervene either. At the same time, there is growing recognition of Algeria's importance to Western security, given the crisis in the Sahel, and this might lead to greater pressure being brought to bear on Morocco to compromise. This is most unlikely to have any effect and, in the final analysis, Morocco is seen as so central to Western security interests that such pressure will be abandoned.

The national arena

The national arena is dominated by the aftermath of the Arab Spring and the sequelae of the authoritarian practices of governance that had characterised the MENA region before it took place. Regional states had been neopatrimonial, depending on personalised links of patronage and clientage rather than on patterns of impersonal citizenship, and neoprebendal, in that private elites exploited the state in financial terms, through either rent-seeking or corruption. They had also been subject to hidden and unaccountable control of the political process by the security services or the army or by a dominant ideology articulated through a single political party under the control of personalised regimes. Civil society, where it had been tolerated at all, had been carefully monitored by the state and was seen as a device to perpetuate regime control, not as a mechanism to limit the power of the state.

The revolutions of the Arab Spring appeared to remove dominant regimes but often, in reality, did not do so, instead merely removing the figureheads of the regimes in question while leaving their cores intact because of their hidden, unaccountable natures. Only, perhaps, in Tunisia was a regime eliminated through peaceful demonstration, and then largely because of the refusal of the Tunisian army to engage politically in the crisis sweeping the country in early 2011. In Libya, a regime was effectively removed by main force, together with external help from NATO and the United Nations, as well as by engagement by France, the UK, the United Arab Emirates and Qatar.

In Egypt, however, the regime has remained in place, embodied by the Supreme Command of the Armed Forces (SCAF), which although it has stood back from government, nonetheless was quite prepared to warn the Egyptian president if he overstepped the mark, as it did at the end of February through the minister of defence, General Sissi. The Muslim Brotherhood in Egypt sought to populate the bureaucracy with its own appointees and so offended the secularist majority that the latter called for a second revolution to remove the Brotherhood from power, although the Islamists had previously been seen as the objective ally of the army. Eventually, after further warnings and a clandestine attempt by the Morsi presidency to remove the army leadership from power, the army moved against the regime on July 3rd, arresting the leadership of the state and of the Muslim Brotherhood.

Brotherhood outrage at the undemocratic removal of an elected national leadership led to demonstrations calling for it to be reinstated. These are still ongoing despite considerable loss of life. The army command, however, enjoys widespread public support and clearly intends to marginalise the movement whilst organising a rerun of the electoral and constitutional process. Public opinion, outside the Brotherhood, was so infuriated by the movement's incompetence, and its attempts to establish a bureaucratic hegemony over the country, that it supports the army's moves. In the wider MENA region, outrage at the violent overthrow of democratic processes in Egypt has been tempered by an awareness of the calamitous performance of the Muslim Brotherhood in power and of its own embrace of democratic dictatorship. As a result, moderate political Islam has been severely discredited in the regional public eye and it is not clear which will be the major beneficiary in the future: secular politics or more extreme, Salafist versions of political Islam.

The crisis in Syria has been discussed above and is a reflection of the inability of the Assad regime to respond flexibly and imaginatively to popular protest, as well of the rigidity of its opposition in refusing a negotiated solution, as now espoused by the U.S. and Russia. In the Gulf, Saudi Arabia was determined that there should be no radical change; it and other Gulf states bought off popular resentment. Only in Bahrain, therefore, did popular protest over economic exclusion harden over the last two years into a sectarian confrontation, largely because of the refusal of the government to accept the legitimacy of the protests. Now this has been subsumed into the sectarian confrontation that dominates the geopolitical confrontation within the Gulf, pitting the Kingdom against Iran.

In Yemen, the popular protests in Change Square were submerged by splits in the Yemeni army and open resistance from the Hashed-backed Islah parliamentary opposition to the Ali Abdullah Saleh regime, compounded by three major crises faced by the state: the al-Houthi rebellion, the al-Hirak secessionist movement in the south and the activities of AQAP and other Islamist groups. Nonetheless,

the new president, Abdurahman al-Hadi, has been able to persuade secessionists and rebels to join in a national dialogue to confront Yemen's problems. The question is, however, whether or not the country has the resilience to be able to resolve the threats it faces. Many fear that its territorial integrity will fail in the face of the problems it faces.

In addition to the paradigms of regime survival, regime removal, civil war and protest subordination (this last demonstrated by events in Yemen), there was also a further paradigm of regime adjustment, most successfully practised by Morocco and imitated by Jordan. In both cases, the monarchical regimes in place made cosmetic adjustments in response to popular demand, thus seeking to marginalise the populist opposition movements that had emerged. Morocco was extremely successful at doing this, Jordan less so, as it alienated the main vehicle of resistance, the Islamic Action Front, but did not successfully marginalise it. Algeria was able to overcome popular opposition by providing substantial price support for consumer goods and then suppressing attempts to transform the protests into political demonstrations, relying in part on popular memory of the horrors of the Algerian civil war in the 1990s.

Despite the very varied patterns of popular protest, there were some common features that have considerable significance for the future. First, the demonstrations were essentially peaceful, even when confronted with state violence. Only in Libya and Syria – the two absolute autocracies in the region – did they eventually degenerate into violence. Second, the protestors' political demands were substantially the same: "The people want an end to the regime" and "Bread, dignity and freedom". What is notable about them is their universality, not their cultural specificity. Third, Islamist movements played little part, as organised movements, in the organisation of the demonstrations, even though subsequent developments may have brought them to power. Finally, the aftermaths of the demonstrations revealed a new phenomenon, the rise of Salafi movements on the political scene. Such movements had existed and had often been tolerated before but they had then been resolutely non-political. It should be noted here that these movements, although they now form a third strand within the Salafi tradition in that they are prepared for political engagement, are part of what is known as *salafiyya ilmiyya* (scientific Salafism), as opposed to the Salafi-jihadi movements linked to extremism.

Given the very different conditions – apart from timing – in which the Arab Spring developed in each country, the aftermaths must be distinguished on a national basis as well. Here it is worth noting that Islamist-dominated governments emerged through the electoral process in Egypt, Tunisia and Morocco. However, although all have proclaimed their desire to participate in pluralistic political processes, this does not necessarily seem always to be the case in practice. Thus, in Egypt, the experiment has been an unmitigated disaster. Although in Morocco the PJD (Parti de la Justice et du Développement) is a member of a five-party coalition including the Communist Party (PPS) and has just won a by-election, it faces challenges from within the political system. In Tunisia, En-Nahda is also part of a coalition and has demonstrated its flexibility, despite secularist hostility, in the government crisis that followed the assassination of the secularist left-wing leader Shukri Belaid, and during the latest crisis after the assassination of another party leader, Mohamed Brahmi, in late July 2013.

In Libya, despite expectations to the contrary, Islamist movements did not succeed in the elections in July 2012, despite considerable material support from Qatar. Instead, Libyans voted solidly for a nationalist coalition headed by Mahmoud Jibril, a former senior official under the Qaddafi regime, who was close to the former Libyan leader's son, Saif al-Islam, and subsequently head of the first transitional government in 2011. The key problem in Libya is security, as the new government seeks to integrate some of the 350 militias that emerged during the Libyan civil war into a new army and police force and to disarm the rest. This has proved very difficult and, outside Tripoli, proper order is still to be established. Benghazi is particularly badly affected and there have been 61 political assassinations to date, including one of the two lawyers who actually set off the civil war in February 2011. One by-product of this security situation is a significant growth in human rights abuses of those arbitrarily detained and accused of offences under the previous regime. A new law, the Political Isolation Law, also deprives individuals prominent in the Qaddafi regime of the opportunity of serving in a new administration. Thus Libya's professional bureaucracy, some 20,000 strong, is excluded from running the new state. Whilst understandable in terms of the abuses of the previous regime, this means that Libya is, at a stroke, deprived of most of its competent and trained bureaucrats. However, the new authorities in Libya are slowly constructing the lineaments of a state and, provided the security situation can be overcome, will succeed in creating a new and lasting constitutional order there, based on democratic participation. The security challenge is, however, a major concern and there is a growing feeling that Libya will move towards becoming a failed state if the issue cannot be resolved in the near future.

Outcomes

Against the background of the information provided above, it should now be possible to come to some tentative conclusions about the medium-term future in the MENA region.

The national level

Even though many of the most oppressive regimes in the MENA region have disappeared, the legacy of autocratic government and neopatrimonialism that characterised it will remain for many years. Thus the proper democratisation of the region will be a slow process, as the appropriate

institutions must be constructed and the remnants of autocratic political systems need to be dismantled. A large part of this process will depend on the construction of an objective and independent rule of law in the countries concerned, alongside the institution of effective procedural democracy, in terms of electoral processes and political parties to operate them.

There is no doubt that moderate Islamic parties, derived in large part from the Muslim Brotherhood, should play a significant role in these developments. However, the agenda that they will face differs very significantly from the agendas they first proposed when they entered the formal political scene in the late twentieth century. From rejecting democratic processes as un-Islamic, all such movements have now endorsed them, at least formally, and have taken part in elections as a result. Islamist parties now in government also have to learn the disciplines of quotidian government and the limited perspectives of representative democracy. The difficulty this process can present has been highlighted by the experiences of the Muslim Brotherhood in Egypt and reflects the fact that procedural democracy is not sufficient. Instead, there is a whole democratic culture to be absorbed by both secularists and Islamists – what Alexis de Toqueville called "the habits of hearts and minds" (Roper, 1989; 22) – if democratic governance is to succeed across the region.

Either Islamist movements will attempt to subvert the system, as was the case in Egypt, by seeking to control the bureaucracy or they will increasingly become vehicles through which normative party politics are articulated. In the latter case, they will, in effect, repeat the same transition made by Christian democracy at the beginning of the twentieth century. It is the latter objective that they formally espouse today and there is every reason to hope that this will continue to be their objective as electoral cycles themselves become instituted as well; not all suffer from the Egyptian Muslim Brotherhood's obsessive belief in political control. The unknown consideration here is to what extent the new Salafist political parties will undergo a similar transformation, albeit over a much longer timespan, or whether they will rather seek to transform the new political systems into ones approaching more closely the Islamic archetypes they currently espouse.

In countries such as Syria and Yemen, new political systems will emerge only after the current phases of violent confrontation have come to an end. This process may take many years in Syria, as the Assad regime gains the advantage over its adversaries, and it will certainly take several years in Yemen, as a new government replaces the remnants of the Saleh regime and as the innate problems of governance facing Yemen are confronted. In both cases, it may well be that a violent sectarian struggle will have to be resolved first. That process may re-create autocratic political systems that will not enjoy popular legitimacy of any kind. Indeed such outcomes will also affect Iraq, where the al-Maliki government is, in effect, reconstituting the dictatorial political system used with such effect by the Saddam Hussain regime but without its ideological content, sectarianism playing the same role instead.

In addition, in such circumstances, extremist non-state actors may play a significant role, as the growing ascendency of Islamist extremists in the confrontations with the Assad regime suggests. Such non-state actors also have a significant role in countries such as Libya where the state has not yet been able to institutionalise its monopoly of violence. They will not be replicas of the old al-Qaeda-style movements, although such movements will continue in the geographic margins of North Africa and the Arabian Peninsula. Instead they will try to subvert existing governments without directly challenging them, as Salafist movements are attempting to do in Libya and Tunisia today. Their ultimate success, however, will depend on the ability of MENA states to provide a viable alternative narrative of the state which satisfies the aspirations of their citizens.

It is here, perhaps, that the greatest weakness lies, for the economic processes in all states in the region, except those which are low capital absorbers – typically the oil-rich emirates of the Gulf, including Saudi Arabia – are failing. This failure lies, in part, in the external economic relations MENA states enjoy, with up to 70% of all North African trade and 30% of Middle Eastern trade being dominated by Europe. However, it also lies in the economic model they have been forced to follow, as required by the IMF and the World Bank and, behind them, by Europe and the U.S. Under current global conditions, terms of trade and investment flows continue to impoverish the MENA states. This means that a new economic crisis will inevitably confront them, given their inability to generate micro-economic outcomes that ensure increased prosperity.

The regional level

In fact, this potential and apparently ineluctable economic failure will be accelerated by Western indifference to the consequences of the adverse economic and financial circumstances faced by the states in the region. Even oil-rich states could face similar difficulties; one of the ways in which the Gulf states, for instance, avoided the political confrontations of the Arab Spring was by their ability to suddenly increase the financial support they could offer to their national populations. However, this is now predicated on the maintenance of high oil prices. Saudi Arabia, for instance, requires an oil price of at least $95 per barrel to balance its budget in the future, quite apart from the additional funding it will require to cope with its growing community of unemployed and unemployable youth. However, the growth of fracking for oil and gas in the western hemisphere may well undermine OPEC's current ability to sustain a high oil price, so that a collapse in oil prices will entail serious economic problems for oil-rich states as well.

Quite apart from this economic conundrum, external powers also have significant roles to play in at least four

regional problems: Iran, Syria, Israel and the Palestinians, and political extremism. Central to all these issues is the United States, for its dominance of Western strategy is unmistakable, despite the growth of multipolarity. However, U.S. policy is predicated on a series of profound misconceptions about what is really possible in adapting the policies of MENA states to ends of which it would approve. As a result, all four crises will tend to worsen over the next five years. Some kind of reconciliation with Iran would be possible, but not as long as Iranian leaders believe that the ultimate U.S. objective is regime change. The Syrian crisis will end in sectarian civil war unless the U.S. is prepared to embrace a negotiated solution, mediated by Russia, despite American prejudices against such an outcome. Unless the U.S. is prepared to force Israel to alter its policies towards the Palestinians, especially over issues such as the future of Jerusalem, rights of return and ending the settlements policy, negotiations with Palestinian representatives will lack credibility or will simply not take place. And the continuation of violent extremism in the MENA region – and the degree of popular support it enjoys – will be in inverse proportion to how far Western powers have succeeded in addressing the other three issues. A high degree of success, however, seems increasingly unlikely because of Western normative assumptions about the way in which the problems of the MENA region should be addressed. There is a growing scepticism about the potential for democratic governance in the region and a refusal to appreciate the nature of the economic crisis the region faces or to engage with it. Over the next five years, therefore, the problems the region faces will become more intractable and, as U.S. attention is directed ever more towards the Asia-Pacific region, Western engagement is likely to weaken or to become securitised as Europe becomes ever more neurotic about the migration problems it faces.

The global dimension

Quite apart from the question of external engagement in the region, there remains the influence of regional problems on the wider global scene. Just as regional states have divided into two halves, each reflecting the radical–moderate divide, particularly over divisions between Sunni and Shi'a and the hegemonic ambitions of Iran and Saudi Arabia, so allegiances between regional states and external patrons have developed. Thus, increasingly, as the old unipolar global order has decayed over the past decade, the multipolar order that seeks to replace it is linked to these divisions within the region. Although the resulting constellation of global power between the West and the BRICs has a superficial resemblance to the Cold War of the twentieth century, such a perception may ignore the wider skein of global relationships that has emerged in the past 20 years.

Instead, the shift reflects the failure of the United Nations to fulfil the ambition of the five allies of the Second World War of establishing a *pax hegemonica* – partly, of course, because of the splits between them that produced the Cold War. It also reflects the growing disparity between the interests of major developing nations – which were excluded from this ruling group (except for China and Russia) – and those of the developed West. Thus, competition has emerged over global energy security and energy transfer, which has led to a division of interests over relationships inside the MENA region itself. It remains to be seen if this will harden into antagonistic patterns of alliance within and outside the region over the next five years. However, Western resentment at the increasingly independent stances adopted by the BRICs leads to fears that the divisions now appearing might prove to be unbridgeable in the future.

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