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The Middle East in 2015 and Beyond:

Trends and Drivers

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Paul Salem examines the daunting socioeconomic, political, and cultural challenges facing Middle Eastern countries in the years ahead and the systemic trends driving these challenges.

Four years after the uprisings that broke the mold of the old Middle East, 2015 promises to be another year of tumultuous change. The eruptions of 2011 unleashed decades of pent-up tensions and dysfunction in the political, socioeconomic, and cultural spheres; these dynamics will take many years, if not decades, to play themselves out and settle into new paradigms and equilibriums.

In 2014, four Arab countries—Syria, Iraq, Libya, and Yemen—sank decisively into the ranks of failed states with no longer any effective central authority over the expanse of national territory. ISIS arose as the largest radical threat in the region's modern history, challenging political borders and order and proposing political identities and governance paradigms. Sunni-Shi'i conflict intensified throughout the Levant and reached Yemen; an intra-Sunni conflict also pitted supporters and opponents of the Muslim Brotherhood. Egypt rebuked its previously ruling Islamists and elected a military officer as president who has prioritized security and economics and cracked down heavily on dissent. Tunisia's secular nationalists and Islamists found a way forward with a new constitution and inclusive national elections. Jordan and Lebanon have managed to maintain stability despite massive refugee inflows. A cautious Algeria maintained its status quo, reelecting an aging president to a fourth term. And Morocco continued its experiment in accommodation between a powerful monarchy and a government led by the moderate Islamist PJD party.

Palestinians tried both negotiations and militancy against Israeli domination but got nowhere with both strategies, while their own deep internal divisions continued. Israeli leaders clung to an untenable status quo with no long-term vision, whether for a two-state or a one-state or any viable-state solution. Saudi Arabia and the United Arab Emirates upped their role in regional politics while Qatar's role waned. In Turkey, Erdogan won the presidency and moved to consolidate his power, but he has struggled with the Kurdish issue and

has sharp disagreements with the United States and Europe over the rise of ISIS and with Russia and Iran over the fate of Assad. Tehran's pragmatists and hard-liners struggled over the future direction of Iran, with much hanging on the fate of the P5+1 nuclear negotiations. The hard-liners kept up their support for Assad, Hezbollah, and Shi'i militias in Iraq, extending their reach to support for the Houthi forces in Yemen.

2015 promises to be no less turbulent than 2014, as domestic and regional dynamics continue to play out. Underlying this turbulent kaleidoscope of change are a bewildering number of trends and systemic drivers that originally broke the mold in 2011 and continue to put intense pressure on political and socioeconomic structures. Of course, trends and drivers are potentially distinct, but drivers often trigger trends, and trends over time are liable to become drivers in their own right. Below are few key trends and drivers to keep an eye on, and that are likely to shape events in 2015 and for many years to come.

I. Trends and Drivers

The Battles of the Youth Bulge. Prime among these is a demographic youth bulge of historic proportions that burst the precarious piping of the old political and socioeconomic structures and will continue to overwhelm the social and institutional orders of the region for some time. Two thirds of the population is under the age of 30 and their search for jobs, identity, and empowerment will fuel the tumult of the region for many

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years. Economies are not creating jobs fast enough to accommodate them; governance structures are not opening up sufficiently to include them; and their search for identity has spurred movements as disparate as pro-democracy civic action, radical nationalism, and messianic dreams of a revival of the caliphate. This bulge will take at least a couple of decades to work—or break—its way through the system.

Power Shift toward the Populace. Advances in technology and communication have led to a power shift from once all-dominant states to an increasingly informed, powerful, and demanding populace, both as communities and individuals. They have access to the global web of information and communication; they can build virtual societies and communities of identity and interest; and they can mobilize and coordinate. With this knowledge and power come demands for recognition, participation, voice, and influence. This power and these demands have erupted in many political

and militant forms and have led to political change in some countries and civil war in others. They fueled the uprisings of 2011 and populate the armies of ISIS. Although some societies and states will learn how to manage these new realities better than others, the power shift is deep and ongoing.

Women Empowerment and Male Backlash. The power shift from states to people also includes a power shift—or long overdue equilibration of power—from men to women. Women have benefitted from the same trends that have empowered populations in general. The old dominance of men—enforced by restriction of access to information, mobility, and mobilization—has been undone by the same changes in technology that have affected society in general. Although only in a few cases, as in the strong women’s movement in Tunisia, has this power been directly harnessed and organized, the backlash against this empowerment has been strong, from the patriarchal repressiveness of the Muslim Brotherhood, seeking to herd women back into traditional roles of mother and homemaker, to the wholesale brutalization, exploitation, and enslavement of women advocated and implemented by ISIS.

Moderate Economic Growth, Severe Unemployment. Overall economic growth in the Arab countries is projected by the IMF to be around 3.8% for 2015.² Even before the uprisings, growth in Egypt was respectable, at about 5% annually. But this growth was not accompanied by a commensurate growth in jobs, and new wealth was dispro-

portionally accrued by the upper income group. Unemployment for the MENA region, officially at 11.1%, is the highest of any other region of the world, and youth unemployment is around 30%.³ Some of the oil-rich economies of the Gulf have made great strides in diversifying their economies—some becoming global hubs for trade—and increasing their national employment numbers, and all of the Arab countries, including the large non-oil economies, have tremendous talent and capacity in their young labor pool. But none of the large non-oil countries like Egypt or Morocco have been able to undertake the domestic reforms that would enable them to surge as manufacturing and innovation hubs and achieve the high levels of economic and job growth achieved by Turkey or China over the past decade.

Not Enough Land, Not Enough Water. Conflict and instability in the Middle East is partly driven by narrow and dwindling land and water resources. These conditions will only worsen in the twenty-first century as demographic growth, urbanization, and climate change take their toll. With 6% of the world’s population, the MENA region only has 1% of global renewable water resources.⁴ In the Arab countries, almost all the river water comes from outside the region—Turkey’s use of the Tigris and Euphrates heavily impact agriculture downstream in Syria and Iraq, and Ethiopian plans for a great dam threaten Egypt’s Nile inflow. Underground water tables continue to drop precipitously; Sanaa will be the first major world capital to run out of water. Changing weather pat-

terns have also taken their toll. The uprising in Syria was partly caused by droughts that sent hundreds of thousands of destitute Syrian farmers into northern towns and cities. Only 4.3% of the region's vast land expanse is arable,⁵ with the remaining 95% made up of desert and narrow arable strips being challenged by rapid urbanization.

Oil: Curse or Cure. In the past, Spain used the windfall discovery of gold in its South American conquests to maintain an imperial status quo and proceed grandly into a long decline, while England built on its conquests to increase trade and innovation and lead an industrial revolution. The region's black gold has been used by some countries, as in Iran, Algeria, and Saudi Arabia—like further afield in Russia—to maintain a status quo, but the UAE has demonstrated that a temporary resource windfall can be leveraged to create tremendous economic change and build global hubs for trade, investment, and even tourism. The present challenge is in Egypt: will Gulf funding be used to paper over economic dysfunction, or will Gulf support—as well as Gulf know-how—be used as leavening and leverage to undertake dramatic economic reforms and spur the Egyptian economy toward high, sustainable, and export-led growth?

Failing and Resurging States. Twenty percent of Arab states have failed in the past few years, others are teetering, some have

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adapted, and still others have regrouped to reassert old power. The failed states—Syria, Iraq, Libya, and Yemen—have in common conditions of low national unity, but they have failed for different reasons. Syria and Iraq could have avoided collapse through basic power sharing and accommodation in the political system and institutions of the state. Libyans have ample resources but Qaddafi left them with hardly any state institutions or political system to work with. Yemen was collapsing even before the uprisings, mainly due to plummeting water and economic resources that aggravated regional and tribal divisions and rickety governance structures. Greater Sudan had failed and broken apart before the uprisings, with the breakup legitimized with the birth of an independent South Sudan, but both south and north today are struggling with challenges of basic stability. Lebanon teeters on the brink, but has managed to maintain a precarious calm through political power sharing and repeated putting out of brushfires, carried out by the national army. Saudi Arabia and Algeria are able to provide enough econom-

ic satisfaction to postpone dramatic political demands, although Algeria might face the hardest challenges if oil prices continue to drop. In Egypt, the military surged back into power after a widespread public rejection of Brotherhood rule, but state stability in Egypt is challenged by strong security threats in the Sinai and elsewhere, deep economic needs, and unresolved political tensions.

State-Backed and State-Wannabe Non-State Actors. Hezbollah for the past 30 years pioneered the role of non-state actors in the modern Middle East. With backing from Iran it rose to dominate Lebanon and project power against Israel and recently into the Syrian civil war. One can say that Fatah and Hamas were earlier examples, but they were fighting to regain a state they had lost, not rising to challenge a state they were part of. Today ISIS is the Sunni response. It controls territory the size of Jordan and has the resources and cohesion to be around for a long time. Hezbollah is a non-state actor fully backed by a state, Iran; ISIS is a non-state actor that quickly announced that it was establishing a state, the Islamic State. The Houthi movement in Yemen is the latest non-state actor to develop the ambition and capacity to dominate a state. Kurdish militia are part of a federal state in Iraq, but are fighting for autonomy in Syria. Dozens, even hundreds, of Shi'i and Sunni militias and militant groups are challenging state authority or waging internal war, from Mauritania through Tunisia, Libya, and Egypt, through Syria and Iraq and all the way to Yemen. A few, in Syria, are

non-Islamist, but rather nationalist groups fighting to unseat the Assad dictatorship and build a new republican Syria in its place.

Paradigms Lost. The Arab uprisings of 2011 heralded that the past paradigms had broken, but this created a scramble for new paradigms, and to date no new paradigm has emerged as paramount. The old paradigm of repressive authoritarianism and quiescent populations, in exchange for socioeconomic development, broke down in the face of slow and unequal economic growth, growing popular empowerment, and worsening government corruption and repression. The initial uprisings inarticulately threw up outlines of a paradigm of democratic, pluralistic, and socially just government. The Muslim Brotherhood proposed a paradigm of Islamist government. The military in Egypt is proposing a neo-nationalist paradigm in which order and economic growth are paramount. The Moroccan king might be on the road to evolving a constitutional monarchy. Lebanon and Tunisia are managing precarious but pluralistic and power sharing political systems. The Gulf countries emphasize the primacy of rapid economic progress. Abu Bakr al-Baghdadi is going all the way and proposing the reestablishment of the caliphate—albeit in his own twisted and murderous terms. Three years ago, Arab public opinion was resonant with a loose paradigm of popular empowerment and accountable and inclusive government; today it is a bickering Babel of competing paradigms. Until the region settles on a governance para-

digm—as Western Europe did, albeit after centuries of conflict—this cacophony of visions and ideologies will continue to bedevil the region. In the long run as this century develops, democratic and inclusive government—whether as constitutional monarchy or republican democracy—will probably be the only sustainable paradigm.

Political Islam and Secular Nationalism.

These have been the best of years and the worst of years for political Islam. The Muslim Brotherhood (MB) had the biggest victory in their 80-year history in Egypt, followed by their greatest defeat. Their one-year rule created a popular backlash and a resurgence of secular nationalist sentiment, which defense minister Abdul-Fattah el-Sisi rode to a large electoral victory. The MB also rose in Tunisia to head the first post-uprising government, but also caused a backlash and ended up losing the 2014 elections to the secular nationalist Nidaa Tounes coalition. Two years ago, it appeared that the MB was the future, as it was winning post-uprising elections and receiving backing from Turkey and Qatar and acceptance from the United States and Europe. But the Brothers' brief stint in power in Egypt and Tunisia lost them much of their appeal and luster and turned wide publics against them; it also triggered a strong backlash from the military in Egypt, while the Turkey-Qatari pro-MB axis was robustly coun-

tered by a Saudi-UAE alliance to counter the MB. Although nationalism has lost much of the ideological clarity it had several decades ago, in the face of strong Islamist narratives that seek to rearrange community and society along religious lines, there has been a resurgence in some countries of attachment to the broad outlines of nationalism that base community on attachment to the nation-state and the constitutions, institutions, and laws that it promulgates.

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The Sunni-Shi'i Divide. Even hackneyed clichés are often true, and the conflict between Sunni and Shi'i movements, states and non-state actors, has proven so far to be the defining regional conflict of this century. As ideological conflicts of right and left receded

in the last decades of the twentieth century, the politics of sectarian and communal identity rose to the fore. And as Egypt's power waned and the power of Saudi Arabia, Iran, and Turkey rose, so too did proxy contests among them instrumentalizing religious identity as a lever of foreign policy. The conflict has torn Iraq and Syria apart, is in the process of dismantling Yemen, and continues to shake Lebanon and Bahrain. Part of the conflict is a natural domestic process of groups demanding political rights and power sharing against authoritarian regimes; part of it is Iran and its rivals jockeying for power in the Middle East. In the absence of inclusive political institutions and vibrant civil societies, sectarian narratives will continue to drive political mobilization. Until Iran decides whether it is a revolutionary state or accepts the norms of international relations, and until Iran's differences with the GCC and other regional players are better resolved, this sectarian conflict will continue to fuel instability in the Middle East for years or decades to come.

The Intra-Sunni Divide. The Sunni states, while worried about Iran, have also bitterly divided over support for, or opposition to, the Muslim Brotherhood. Saudi Arabia, the UAE, and Egypt, as well as Kuwait and Bahrain, are decidedly on the latter side, with Turkey and Qatar very much on the former. The falling out came to the fore in the events of Egypt in the summer of 2013. They have almost led to the expulsion of Qatar from the GCC, and have broken the potential of a broad Turkish-Arab alliance.

This has divided efforts to support the Syrian opposition and only emboldened Iran, whose allies and clients remain united.

Broken Regional Order. The Middle East is one of the few regions without any semblance of a regional security, economic, or political order to contain conflict and manage its intra-regional affairs. The Arab order that existed—albeit flimsily—for most of the second half of the twentieth century broke down in stages, largely as a result of Egypt's decline after 1967. Assad's Syria bolted first and allied with revolutionary Iran after 1979; Syrian influence allowed for the rise of Hezbollah and the subordination of Lebanon into the Iranian-Syrian axis in the 1990s. The United States destroyed the Ba'athist regime in Iraq and handed over Baghdad to Iranian influence after its intervention there between 2003 and 2011. The Yemeni capital of Sana might be the next to realign. Attempts at building a regional cooperation order, at least between Arabs and Israelis, after the Madrid conference in 1991 came to naught. Today, there are various axes within the region, but no movement toward building any architecture of regional order. Prospects for Israeli-Palestinian and Israeli-Arab peace seem a wistful memory of the twentieth century. Arab-Iranian relations are at their worst ever; and prospects at least for deep Arab-Turkish partnership have also been derailed by recent events.

Changing Fortunes within the International Order. The Middle East has been a much-trammeled region in the internation-

al order. After half a millennium of Turkish Ottoman rule, it came under Western domination in the interwar period. After World War II it fell into the bipolar domination of the U.S. and Soviet orbits. For a brief couple of decades after the collapse of the USSR, U.S. domination was paramount. But U.S. imperial overreach in Iraq and Afghanistan, as well as an economic crisis at home, led to a marked retreat of U.S. power from the region during the Obama administration. A re-assertive Russia and rising China have cooperated to challenge U.S. dominance in the UN Security Council and challenge U.S. policy, particularly in regard to Syria. Over the longer term, changes in global energy markets will render the Middle East, especially the Gulf, of less strategic importance to the United States and of acute interest to Asia—China in particular. The revolution in shale oil extraction is moving the United States away from energy dependence and turning it into an energy exporter. As such, the decades of critical U.S. dependence on

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in the region are already grappling with the changing dynamics of global power shifts; the waning of an external hegemon creates its own instabilities. Whether the region will find a new pattern of stable relations as global power shifts East remains to be seen.

Barbarism and Civility. ISIS has unleashed the nihilistic genie of barbaric violence as a scorched earth policy to destroy any civility or order that existed before and sow the seeds of its new order. Barbarism and the glorification of death is also a heady psychological force that has its own attraction, especially to desperate and brutalized youth who have found little succor in life and are attracted to the scorching flame of sacred rage. ISIS propagandists are aware that this bloodlust is dormant in the unconscious, and have used the pornography of violence to excite and recruit followers from around the world. Right next door, Lebanon, a society that has been through the orgiastic bloodletting of civil war, clings as doggedly to civility, pluralism, tolerance, and a celebration of life. In the theaters, cultural clubs, and coffeehouses of Beirut, as well as in many cities throughout the Arab world, young and old decry and deride the mad barbarism of ISIS and insist on social coexistence, as well as an enjoyment—not destruction—of life.

State and Civil Society. Civil society remains a key deficit in the Arab world. It played a key role in pushing back against an Islamist hegemony and pushing

forward a political transition in Tunisia. It is essential in keeping the complex Lebanese social system together and inching forward. It played a key role in Egypt and other countries in 2011, demanding a new way forward. But in countries where civil society was weak, it was either overtaken by better organized Islamist movements, more powerful sectarian divisions, or a resurging state. In the attempt to rebuild national stability, whether in Egypt or elsewhere, it is important to realize that civil society is an ally in reclaiming public space and social power from divisive Islamist or sectarian narratives, and is a key factor in creating stable and sustainable state structures. Both the Mubarak regime in Egypt and the Assad regime in Syria were deeply skeptical of civil society and preferred Islamist organizations to fill up social space. This ultimately weakened the state and weakened state-society cohesion. In the long run, a healthy civil and political society provides the living link between state and society and provides the bedrock for state stability and the main antidote for radical movements.

Refugees without Borders and Population Transfers. The population outflow from Syria has already caused the largest humanitarian disaster of recent times and changed the demography of Lebanon, Jordan, Iraq, and Turkey in long term and unpredictable ways. The conflicts in Libya and Iraq have also caused massive population movements into neighboring countries. If Yemen continues to unravel, an outflow of desperate refugees from there could heavily impact

Saudi Arabia. With continuing conflict and tighter natural resources, the challenges of massive population movements could be a key challenge of the coming decades.

II. The Middle East in 2015: Looking for White Swans

The region will continue to furnish the world with well more than its fair share of crises. The West took about five centuries to transition from medieval to “modern,” working through its wars of religion and battles to establish national identities and state borders, transform worldviews, try out radical ideologies, and eventually evolve toward stability, coexistence, and liberal democracy. This only occurred after two devastating world wars and genocide in the twentieth century. The Middle East started its profound transformation roughly a century and a half ago. It will take more than a few years to work itself out. In the short term, extrapolating into 2015, the time horizon might be close enough to venture a few estimates. First, I do not mean to imply that the Middle East will be defined only by crisis. The majority of countries in the region, from Morocco to Iran, will likely maintain basic stability while working through various political, social, and economic challenges. Only a minority, including at least Syria, Iraq, Yemen, and Libya, will predictably continue in deep crisis.

Morocco’s experiment with uneven power sharing between a powerful monarchy and a government led by the moderate Is-

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lamist PJD is likely to continue. The king enjoys strong legitimacy, and the combination of actions that he took early after the uprisings—pushing through a liberal constitution, on the one hand, and allowing the PJD to head a multiparty government of limited power and under his supervision after they won the elections, on the other—seems to have struck a sustainable balance for now. Morocco’s main challenges will be in creating jobs and boosting living standards for its population.

Algeria was the Arab Spring eruption that didn’t go off. It has many of the same authoritarian, political, and socioeconomic tensions that led to eruptions in other countries, but the recent memory of civil war between Islamists and the state, as well as ample oil resources, kept the lid on. But falling oil prices, a restless and young population, and an unresolved succession after the ailing Bouteflika will mean that 2015 could be a difficult year for Algeria. Tunisia almost broke down in 2013 but made great strides in 2014, passing a consensus constitution and holding parliamentary elections, which the secular nationalists won. The country is about to hold presidential elections. In 2015, it should begin to reap the rewards of its political progress, with a new president, government, and parliament in place. Although secular-Islamist tensions and security threats from radical groups operating across the Libyan border will continue, Tunisia should be able to begin focusing on the core socioeconomic is

sues that were a big part of the December 2010 uprising in the first place.

Libya is likely to sink deeper into civil war in 2015. Like in Syria, Iraq, and Yemen, there is a strong radical Islamist surge and battles involving various Islamist, tribal, and proto-nationalist armed groups, but unlike them, there is no central government authority—for better or for worse—to speak of. Whether Libyan groups can walk back from all-out conflict and take advantage of the precarious political processes and institutions that have been there, albeit almost in virtual form, since the revolution against Qaddafi, is hard to predict. And whether Egypt, the Arab League, or the international community can play a stabilizing role is hard to see given the regional proxy competition that the Libyan situation has elicited, with Qatar and Turkey supporting one side and Egypt and the UAE apparently supporting the other. The only way forward is to encourage de-escalation and a return to the political process, and the provision of support to the nascent and vulnerable political and security institutions of the central government.

Egypt will continue to face enormous security challenges, especially in Sinai where Ansar Beit al-Maqdis has declared its allegiance to ISIS, and daunting socioeconomic challenges. Egypt must also reconcile the liberal and democratic goals trumpeted in the new constitution with the realities of police crackdowns and repression. President Sisi has emphasized the real security threats facing Egypt, and has made difficult and important economic decisions by tackling the long postponed subsidy reform challenge and launching a wave of major economic initiatives, some with generous Gulf aid and some with national investment. And if Sisi's government continues to move boldly on economic reform and encouraging investment, it could trigger very significant and valuable levels of economic growth.

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But Sisi also has to decide on the long-term political system in Egypt. The failed and many would say dangerous interlude of

Muslim Brotherhood rule created a public backlash and granted him strong public support and a long honeymoon, but in the end a country as large, oil poor, and publicly empowered as Egypt will require evolution toward a more institutionalized and interactive political system. The constitution is right to insist that religion should be left out of politics, but Egypt should take advantage of the coming period to reopen public space for parties and individuals that accept these rules of the game, and work toward gradually building a workable two-party (or multi-party) system. The postponed parliamentary elections would be a good place to start.

Sudan was a country that failed even before the Arab uprisings over questions of identity, political Islam, and resources; these differences were expressed in conflict between the north and south and the north and Darfur. Whether Sudan's experience is directly relevant to Yemen, Syria, Iraq, and Libya or not, it dealt with its main fault line through formal partition and the establishment of the (albeit very troubled) state of South Sudan. The conflict over Darfur has been tentatively de-escalated through negotiation. But (northern) Sudan remains mired in poor governance, high levels of corruption, and recurring intra-regional conflict. Omar Bashir, president of an Islamist government since 1989 and wanted by the International Criminal Court, has announced that he will run again in the presidential elections

slated for April 2015. Sudan, the most fertile of the Arab countries, rich in minerals, and having benefited over the past decade from a boom of oil exports, will continue to face the challenges of poor governance with more than half of its population of 40 million living below the poverty line.

In the Levant, Syria and Iraq will face the largest challenges. Iraq at least has a potential path forward with a new prime minister and government and some recent experience of power sharing. But the Sunni uprising against the abuses of Maliki's rule and the consequent rush of ISIS into Iraq's second city Mosul and much of its Sunni regions have created conditions that are going to be difficult to roll back. In 2015 the new government will have to work hard to regain Sunni and Kurdish trust. It has to resolve disputes between Baghdad and Erbil that are still holding back central government budget transfers to the KRG civil service and Peshmerga fighters. And it has to regain Arab Sunni trust by reforming the Iraqi national army, sharing power and resources, and considering federalism and an Arab Sunni national guard. Iraqis have wide regional and international support to beat back ISIS; whether they will manage to do so and regain national unity will be the main challenge of 2015.

Sadly, Syria seems destined to continue down the road of ruin in 2015, but the coming year might also see some turning points. 2014

was the heyday of the rise of ISIS, but it also saw a reentry of the United States into the Levant and the establishment of a coalition to carry on a long fight against ISIS. This war is prioritized first in Iraq, but might spread more to Syria in 2015. In the coming year, the armed force that the United States and its allies are training is supposed to come on line and into Syria. If it makes any headway

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against ISIS, it is also going to come to blows with the Assad regime. The Obama administration will have to decide whether it can stick to its current policy of keeping regime targets off limits; many of its own military leaders, and all of its regional allies, insist that it cannot. Developments in the array of forces and interventions in Syria in 2015 could create new realities on the ground. On

the political track there is unlikely to be a revival of the U.S.-Russian Geneva process. But the UN envoy to Syria is pushing for a policy of local ceasefires to de-escalate parts of the crisis, while Russia is holding its own meetings with some opposition figures possibly to propose a partial deal that will see Assad remain in office and in control of the security forces but share other elements of power with a new government that includes members of the opposition. The Syrian conflict seems set to go on for years, but military and political developments in that fluid situation might continue to surprise, creating at some points more devastation and bloodshed and at others new potential opportunities for negotiation, de-escalation, and the search for a final political settlement. ISIS and Jabhat al-Nusra are likely to remain dominant forces in much of Syria, but could be increasingly constrained if the U.S.-regional alliance can stand up an alternative armed force and include some regime targets on its target list. Sunni support for the coalition and its appointed rebels will grow mainly in recognition that the alliance is serious about political change, the departure of Assad, and a new inclusive political order in Damascus. The removal of Maliki and an inclusive government was the precondition for the war against ISIS in Iraq; it has to be so in Syria as well.

Lebanon and Jordan are the small states struggling to survive the maelstrom raging next door in Syria and part of Iraq. Despite deep sectarian and political divisions, as well

as a massive Syrian refugee inflow, Lebanon has managed to weather the Syrian storm so far. Part of the reason is the recent memory of civil war and a political system that despite its obvious dysfunctions is nonetheless fully inclusive. Lebanon is still without a president since the last president's term ended in the spring, and has not managed to hold parliamentary elections since the last ones were scrapped in 2013. Parliament just auto-extended its mandate into 2017, raising the risk that neither presidential nor parliamentary elections will be held next year. Meanwhile, the power sharing government headed by Tammam Salam is likely to continue crisis management through 2015. Hezbollah's engagement in Syria has put the country at risk, and both ISIS and Jabhat al-Nusra have declared that Lebanon and fighting Hezbollah there is part of their battle plan. This has led to spillover clashes and car bomb attacks in several parts of the country; but it has not led to a general radicalization or mobilization of the Lebanese Sunni community. The army, in some cases cooperating with Hezbollah, is gaining more capacity in protecting the border with Syria and putting out brushfires when they occur. The massive refugee population is a great burden on the social service infrastructure of the country, but has not been a major security problem so far. If at some point significant numbers of refugees become armed and mobilized, that could completely upset the precarious balance that has been preserved so far. After Iraq, Lebanon is the country most at risk from the Syrian conflict.

Jordan went through a serious period of uncertainty in the early stages of the Arab Spring in 2011 and 2012 when public demands for inclusion, social justice, and political change were paramount. However, after the descent of Syria, Libya, and Iraq into civil war, and the reaction against the rise of the MB in Egypt and the specter of ISIS and Jabhat al-Nusra in Syria, most Jordanians have rallied back around the state, not wanting to risk the collapse that demands for wholesale change brought about

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in neighboring countries. Jordan will continue to face its own socioeconomic challenges of spurring growth and creating jobs for its population, managing and caring for the large Syrian refugee population, containing the threat from radical pockets in some of its towns, and managing the volatile border with Syria. But there is general awareness of the need to maintain stability in a turbulent neighborhood, and the state has ample support from the GCC, United States, and other international partners.

In the Israeli-Palestinian space, the two societies will continue to suffer from the conflictual and unresolved nature of their embrace. Palestinian society remains deeply

divided physically between the West Bank and Gaza, politically between the Islamists of Hamas and the nationalists of Fatah, and strategically between the two dead ends of negotiation and armed resistance. Whether the early sparks of a potential third intifada will lead to another full-blown uprising in 2015 will have to await the coming months, but whether even a third uprising can change realities on the ground and deter Israel from doubling down on occupation and indefinite bantustanization is doubtful.

It is hard to predict how the Israeli-Palestinian conundrum will end, but it will not end well. Decades of occupation, expropriation, and disempowerment of a growing population in the absence of an inclusive political settlement can only end in more intense conflict. The Palestinian house remains in disarray. The recent attacks in Gaza led to the formation of a “national unity” government between Fatah and Hamas, but they have also put off long overdue parliamentary and presidential elections. In Israel, Netanyahu might call early elections in 2015, but appears wedded to a right-wing platform of supporting further settlements and opposing any progress toward a real two-state solution in which Palestinians might have sovereignty over their territory and affairs.

Among the GCC countries, oil wealth, economic diversification, generous public outlays, and national employment policies, as well as strong security policies, are likely to

continue to provide for basic domestic stability. Saudi Arabia and Oman might both face succession events in 2015; they should proceed smoothly but might lead to new directions in leadership. Saudi Arabia's two main worries will be from the potential spillover of ISIS radicalism into the Kingdom and the impact of events in Yemen—especially the takeover of Sana by the Houthi movement; it will also continue to worry about the influence of Iran, which now dominates four major Arab capitals (Baghdad, Damascus, Beirut, and potentially Sana) and does not seem to be reining in its regional interventions and ambitions.

Saudi Arabia and the UAE will continue to be proactive in their foreign policies. In Egypt their political and economic support of the government will continue, and in Syria they have joined in the effort to fight ISIS and support and train the Syrian moderate opposition forces, but they will also insist that Assad's departure and a new political order in Damascus be a key part of any strategy in Syria. Within the GCC, pressure on Qatar will continue to further distance it from the Muslim Brotherhood and political Islam in general, although differences are likely to remain over Libya and Egypt.

Bahrain will continue to grapple with tensions after the putting down of protests by the Shi'i majority in 2011. Parliamentary and

“Decades of occupation, expropriation, and disempowerment of a growing Palestinian population in the absence of an inclusive political settlement can only end in more intense conflict.”

local elections being held this month will provide some political space, but the main opposition party has boycotted the poll. Tensions are not likely to lead to major disruptions in 2015, but the country will remain vulnerable to volatile Sunni-Shi'i relations.

Kuwaiti politics will continue to be energetic, but the expectation of major change that accompanied the early days of the Arab Spring has ebbed, as in Jordan and other countries. And Islamists also lost significant ground in the 2013 elections after initial optimism that with the rise of the MB in Egypt and Ennahda in Tunisia they too would rise to dominance in the Kuwaiti parliament. Most Kuwaitis, like in Jordan, are now wary of the chaos that has overtaken neighboring countries, and are more likely to work within the system than push for radical change.

In the Arabian Peninsula, Yemen has dan-

gerously turned the corner from tenuous transition to national breakup. Yemen was already faltering, with dwindling water and energy resources, sharp regional and tribal divisions, and a weak central government. But the major surge of the Houthi movement—its takeover of the capital and its dictating of political terms—has broken the tenuous transition. It has decisively favored arms over politics, deepened sectarian and regional divisions, and opened the way for further external influence. The impact of the Houthi surge on national unity is similar to the impact of the ISIS surge on tenuous Iraqi politics, although the Houthi movement, with growing support from Iran, is reproducing the Hezbollah model in Lebanon of dictating national political terms through the force of arms. In 2015, Yemen will have to struggle to maintain a national political process. Although a new government has been formed, the Houthi rise has also caused a surge of al-Qa'ida in the Arabian Peninsula, and troubles in Sana have led to more calls from Aden for the south to secede fully from the union. Yemen struggled valiantly to hang together after the revolution of 2011; 2015 might be the year when tenuous unity finally comes apart. Yemen risks descending into the chaos of Libya and Syria, with similar repercussions for Yemenis themselves and for their neighbors. Already, although the Houthis are not really a proxy of Iran, they have been gaining growing support from Tehran, and

if it needed, Iran could build up a strong proxy presence in northern Yemen—similar to what it has in Lebanon and the Levant. If it chose, Iran could use this new foothold to challenge Saudi Arabia from the south.

In Turkey, President Erdogan has weathered the multiple challenges that came his way: youth protests, fallout with the Gulen movement, collapse of his Middle East policy, and corruption scandals. He won decisively in the local and presidential elections of 2014, and is looking to the 2015 parliamentary elections as a path to redrafting the constitution and greatly expanding the

“Yemen struggled valiantly to hang together after the revolution of 2011; 2015 might be the year when tenuous unity finally comes apart.”

powers of the presidency he won this year. Gone are the slogans of “zero problems with neighbors;” in its place is a Putinesque pugnaciousness both in the region and internationally and a strong whiff of imperial nostalgia. The new presidential palace in Ankara is indeed imperial in grandeur, and he named the new Bosphorus bridge that he will inaugurate in 2015 after Sultan Se-

lim, the sixteenth-century Ottoman sultan who beat back the Persian Shi'i Empire. In 2015, Erdogan's insistence that the war on ISIS cannot proceed without a clear policy against Assad and other elements such as a no-fly zone and buffer zone might gain traction with the United States; on the other hand, his refusal to relieve Kobani early on caused a strong Kurdish backlash in Turkey and set back his efforts to maintain Kurdish electoral support and conclude a deal with PKK leader Ocalan. It remains to be seen whether he will mend fences with Saudi Arabia and the UAE over his refusal to recognize the new government in Egypt; even Qatar has softened its position on the issue.

In Iran, much will depend on the outcome of this month's nuclear talks. Success in the talks will lead Iran one way, while failure will lead in another. Success will give a boost to President Rouhani and the pragmatists and will strengthen their political base through lifting sanctions, stabilizing relations with the international community, and leading Iran toward rapid economic recovery. This might not change Iranian regional policy, which continues to be run through the Revolutionary Guards and under Khamenei's direct sway, but it might be a sea change in Iran's domestic development. If the talks fail, this could cripple Rouhani's presidency and redouble the power of the hard-liners. A middle ground, which both Rouhani and Obama might prefer if the talks fail, of extending the talks or unilaterally committing to restraint, might be difficult given the re-

cent Republican victory in the United States and the position of the Iranian right wing, which is waiting for an opportunity to scuttle Rouhani's bid to normalize relations with the West.

Iran's regional policy, led by the Revolutionary Guards, continues to expand and founder at the same time. In the past three years, Iran's proxies in Baghdad and Damascus have lost control of their countries and control now only rump states. In Syria, Iran had to send Hezbollah and its own commanders, trainers, and valuable resources to save the Assad regime from collapse; this effort has stretched Hezbollah and Iran, but Iran has shown no serious interest in real political change in Damascus as a way out of the crisis. Whether increased U.S. and allied involvement in Syria in 2015 will have an impact on that position remains to be seen. In Iraq, Tehran finally had to accept U.S. military re-intervention and jettison Nuri al-Maliki. Whether the Iranian right wing can countenance real Sunni inclusion and empowerment in Iraq as a necessary part of the fight against ISIS will also await developments in 2015. Meanwhile, a new gain has opened up for Iran in Yemen, where the Houthi movement has moved from its northern stronghold to take over the capital and dominate the political process. The movement is not a real proxy of Iran like Hezbollah or the current Assad regime are, but it has received political and some material and military support from Iran and its proxies. The trouble for Iran—and indeed its

“The trouble for Iran is while its influence is expanding in the region, its policies are leading to the collapse of once-functioning states and to explosive sectarian tensions.”

some insight and perspective in trying to comprehend the rush of events that preoccupy one on a daily basis.

Endnotes

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² <http://blogs.wsj.com/middleeast/2014/10/07/imf-lowers-growth-expectations-for-middle-east-north-africa/>

³ <http://issuu.com/world.bank.publications/docs/9781464804076>

⁴ http://www3.weforum.org/docs/ME10/WEF_ME10_RiskReport.pdf

⁵ <http://data.worldbank.org/indicator/AG.LND.ARBL.ZS/countries/1W?display=graph>

neighbors—is while its influence is expanding in the region, its policies are leading to the collapse of once-functioning states and to explosive sectarian tensions. The pragmatists in Iran recognize this, but whether they will gain any ground in 2015 to influence this destructive course of affairs is doubtful.

Denouement

The Danish atomic physicist Niels Bohr wisely remarked that “prediction is very difficult, especially about the future.” But contemplating the future and its possible drivers and scenarios, while imperfect and destined for great error, can be also a healthy exercise in trying to understand the present and consider options in creating a better future. I hope that the ideas, drivers, and scenarios presented in this essay are engaging to the reader and might help provide at least

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