THE RETURN OF THE PAST

STATE, IDENTITY, AND SOCIETY IN THE POST–ARAB SPRING MIDDLE EAST

UZI RABI

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A Note on Transliteration

Ensuring uniform transliteration of terms in Arabic and Persian and the other languages of the region is not an easy task. In this book, I have used the common English of the names of known individuals and countries, as well as words that have gained common usage in English.

For example, Gamal Abdel Nasser instead of 'Nasir', 'Qaida' instead of 'Qa'ida', 'San'aa' instead of 'San'a', 'Hussein' instead of 'Husayn', Hosni instead of Hosni, Houthi instead of Huthi, etc. In Arabic transliterations, diacritical marks for long vowels have been left out; the *ta marbuta* is not shown; the *shadda* is indicated by doubling the consonant containing it; both the *dal* and the *dhad* are transliterated with a "d" and the *dhal* is transliterated with a "dh." The plural of transliterated terms is formed with an "-s." Additionally, there are no diacritic marks on Turkish names throughout the text.

This book makes use of the term "Islamic State" and not *Daesh*. *Daesh* was the name of the organization before it declared itself to be the Islamic State in June 2014. This is not a semantic debate, since the name has a significant meaning. World leaders were careful not to use the term "Islamic State" for fear that by calling it that, they might unwillingly recognize such an entity. Yet, this political correctness prevents this phenomenon from being seriously addressed.

Introduction

The events of the Arab Spring provoked a dramatic shift in the geopolitics and political culture of states and societies in the Middle East. Previously conceived paradigms within Middle Eastern studies and the social sciences failed to grasp the tectonic shifts within the Arab body politic. The airing of grievances by the Arab people, following generations of iron-fisted authoritarian regimes, culminated in popular protests which gave way to their ouster. In conjunction with these political changes, the region underwent a process of significant social-political upheaval, perhaps the most important since the formation of modern nation-states after the First World War. The turbulence experienced by the Arab world is still in progress—and this will have long-term implications for the Middle East in the 21st century.

The changes that beset the region entailed the formation of a new order and new mechanisms for studying and researching the Middle East. Therefore, it seems best to gain insight into the changing socio-political realities of the Middle East: this is the focus of this book. Even if it is difficult to provide an orderly and systematic roadmap for the new direction of the Middle East, the ongoing implications of the Arab Spring make it clear that the wisdom and practices of the 20th century that were previously considered to be basis of analytical and academic study of the region, have now become null and void. Much of the Western conventional wisdom focused on the centrality of the Arab-Israeli conflict as the primary problem in the region. Yet, this institutional and academic focus on the Arab-Israeli conflict led to an inability, on the part of governments and experts, to take into account other centers of influence within the Middle East.

Primordial identities of tribe, clan, and sect, as well as transnational identities, such as the role of the wider Muslim *umma*, and the role of political Islamist movements, were viewed primarily through universalist and Saidian discourses.[1] The universalist discourse on democratization, liberalization, and

market capitalism which proliferated both in the academy and in the halls of power failed to consider the particularism inherent in the history, tradition, and culture of the Middle East. The six chapters of this book, therefore, offer a revised map of the Middle East and its territorial, demographic, cultural, sociopolitical, and strategic aspects.

The first chapter, "The Despotism of the Revolution," discusses the waves of protests that swept the Arab world from late 2010 and came to be called the "Arab Spring." The discussion in this section draws on the changes and evolution in Arab political culture during this era of protest. The chapter will also discuss the construction of and decline of the Arab security state, based on the links between state security forces, the military, and ruling elites. This system of control, which also co-opted merchant bourgeoisie and led to a new corporatist capitalist class of oligarchs that was wedded to the regime and included the wider members of the regime's extended family, invoked the ire of protesters from Tunis to Damascus, and from Cairo to San'aa. These authoritarian states, buttressed by secret police forces (the *mukhabarat*) which served as a bulwark against public dissent and as a mechanism to coup-proof the regime, provided the stability which allowed Arab autocrats of 20th century to extend their life expectancies. This also provoked a backlash. The sclerotic old regimes, in many cases in their second generation of rule, had become immune to change, unable to deal with the challenges of the rapidly growing youth in their countries, as well as the profound technological changes in social networking. These networked civilians presented a new set of challenges to the centralized state, as they broke the power of the rulers and created a new political landscape. The utilization of social media served as an important tool to both disrupt entrenched authoritarian states and organize the political opposition. When revolution did come and the masses did oust the long-standing autocrats from power, there remained a gap between the desires of the revolutionaries, and their ability to apply the political changes that they desired. This was partially due to the disparate nature of the protesters, who were united by the singular goal of ousting the leadership from power. But it also had to do with the lack of a coherent political program and divergent interests of the protestors once the autocrat had been ousted, which led to the protracted instability that has grippied the region. Yet, the revolutions themselves served as a warning to Arab autocrats, showing that the masses of protesters in the Arab city squares were not part of a transient episode.

The chapter also highlights the particularism of the revolutions in countries like Tunisia and Egypt, countries with homogenous populations which did not have deep social divisions between rival ethnic groups, and alternatively countries like Libya, Yemen, and Syria, where the protests against the ruler eventually turned into bloody and horrendous civil wars that broke the fragile ethnic-religious mosaics in their respective countries.

The second chapter, "On States and their Disintegration—An Anatomy of Failed States," discusses the fragmentation and increasing ethno-sectarianism of Middle Eastern states, including Iraq, Syria, Libya, and Yemen. It addresses the deepening ever-present primordial fissures between tribe, religion, and state and the ways in which scholars interpreted this interplay. It was also the story of the eclipse of the Arab revolutionary idea and the victory of traditional ties and pre-revolutionary patterns of politics and organization that won out over the "hard" postcolonial state. In the aftermath of the Second World War, Arab intellectuals sought to create the foundations for a new Arab national movement. Seeking to implant their own ideas and expel their colonial masters, Arab nationalism served as the unifying force for the creation of the postwar Middle East. Ruling over states, that, with few exceptions (Egypt), were artificial and colonial creations, nationalist leaders proclaimed a new era of Arab independence and neutralism.

The revolutionary regimes consolidated their legitimacy by renouncing the shackles of tradition and implementing socialist command economies based on the Eastern European format. The postcolonial modernization programs that many Arab states undertook, blending Arab nationalism and Arab socialism, failed in their grand designs, leaving in its wake state-centered authoritarian regimes. The states that they ruled, tribal, multi-sectarian, and highly unstable, were held together by the power of coercive mechanisms: the security forces, repression, and deft political deal-making. The resulting instability following the ousting of leaders was linked to the inherent problems in managing the postcolonial state. When the leader who had been instrumental in holding together his respective polity fell, the state descended into chaos, strife, and civil war. The relationship between the ruler and ruled also poses questions for the future of Middle Eastern studies. The analytical tools which scholars and practitioners have used to study Arab states in the aftermath of the Arab Spring must be brought into question. The mechanisms which scholars have used to analyze the Middle East, adhering to the Euro-centric model of the state as a "black box," failed to account for many particularistic characteristics that are prevalent within Middle Eastern societies, including sub-national and trans-national identities.[2] Therefore, additional modes of analysis including culture and community must become instrumental tools in observing political change throughout the Middle East.

The third chapter, "The Shi'i Revival—The Rise of the Islamic Republic of Iran," tells the story of the renewed tensions between the two great traditions of Islam. The chapter identifies the final decades of the 20th century as a formative period in the revitalization of the Sunni–Shi'i rivalry. The Islamic Revolution in Iran (1979) and the rise of revolutionary Shi'ism sparked by Ayatollah Khomeini and the Iran–Iraq War (1980–1988) posed a severe challenge to Iran's Sunni Arab neighbors and rearticulated ancient rivalries

between Arabs and Persians, and between Sunna and Shi'a. The cultural and religious rivals—Sunni Arab states and Shi'i Iran—flexed their muscles in a titanic struggle with serious geopolitical implications. This geopolitical rivalry has instrumentalized religion as a tool for the respective sides to expand their influence throughout the region, frequently using proxies as a means to avoid direct confrontation. This new "cold war" between Sunna and Shi'a, Iran and its allies and Saudi Arabia and theirs, has provided the backdrop for the current conflagrations in the region. The wave of Arab Spring uprisings only served to enhance and expand a process that was already underway, utilizing the battlegrounds of the region's failed states, in Yemen and in Syria, as a cockpit for the evolving regional struggle.

The fourth chapter, "The Islamic State: The Caliphate's Iraqi Roots," will also touch on the rise of the Islamic State through the cockpit of evolving sectarian tensions, specifically in the aftermath of the 2003 American invasion of Iraq. The chapter argues that the development of the Islamic State was a fusion between ex-Ba'thist security forces and Salafi-jihadi radicals who coalesced around the Jordanian-born jihadi Abu Mus'ab al-Zarqawi. These groups weaponized sectarian tensions within Iraq, specifically American support for the Shi'i-led Baghdad government gaining the support of many disaffected Sunni's in the western tribal regions of Iraq. The start of the Syrian uprising and subsequent civil war provided an opportunity for the jihadi remnants from Iraq to reconstitute themselves utilizing the disorder that Syria provided them. As the Islamic State began to coalesce in Syria and Iraq, it preyed on the grievances of the local population against the Alawite-dominated Syrian regime and Iraq's Shi'i-dominated government led by then Prime Minister Nouri al-Maliki. Through its grotesque, brutal, and nihilistic acts of barbarism, and eventually with its territorial conquests, at its height controlling a population of over twelve million people, the Islamic State became the most extreme manifestation of the Sunni–Shi'i conflict.

The fifth chapter, "Arab Spring and Regional Politics," analyzes the rise of non-Arab regional powers within the Middle East system, specifically Turkey, Iran, and the success of Arab monarchies at beating back the challenges of the Arab Spring. The rise of non-Arab powers, the states in the so-called Middle Eastern "periphery" have gained in stature as conflagrations have shaped their Arab neighbors, using their growing influence to expand their own agendas in weakened Arab states, most prominently through Iran's expansionist foreign policy in Lebanon, Syria, Iraq, and Yemen, and Turkey's neo-Ottomanist foreign policy, which included generous support for Muslim Brotherhood-affiliated political Islamists, and its subsequent overreach in Syria. The chapter will also address the changing geopolitical orientations between Israel and the wider region. The changing regional balance of power coupled with the civil war in Syria and Iranian aims to consolidate

control from Iraq, through Syria, and to the Mediterranean Sea have initiated an alliance of convenience between Israel and the Arab Monarchies, specifically Saudi Arabia, Bahrain, and the United Arab Emirates. This has also seen a de-emphasizing of the Palestinian–Israeli conflict and has led to changing conceptions of Israeli foreign policy, particularly considering its past relations with countries in the region.

The sixth chapter, "The Middle East and Outside Powers," outlines the changing regional system within the Middle East and its relationship with the "Great Powers." This includes the rise of a more multi-polar international order, which has seen the decline of American influence and the rapid rise of Russian power within the region. This will be framed within changing orientations within the wider international system writ-large and the evolving priorities within American and European foreign policies. The Obama and Trump administrations have led American foreign policy toward "Nation Building at Home," in the aftermath of the Great Recession forcing a reordering of American grand strategy in the Middle East. The Obama administration's policy of retrenchment coupled with increased Russian assertiveness have set the stage for a new geopolitical equilibrium.

The Return of the Past: State, Identity, and Society in the Post-Arab Spring Middle East was published in the midst of the dramatic changes in the Middle East. The Arab region stands at the center of these changes. I hope that this book will expose the reader to some of the "secrets" of the changing Middle East and enable a more balanced view of the developments in the region.

NOTES

1. Saidian discourses refers to the ideas expressed by the Palestinian-American scholar and literary critic Edward Said, most prominently argued in his book Orientalism. For more see Edward Said, *Orientalism* (New York: Pantheon Books, 1978).

2. The concept of the state as a "black box," as the formative layer of analysis within the international politics was formulated by the American political scientist Kenneth Waltz in his work *Man the State and War*, and the explained further in his *Theory of International Politics.* Waltz's theoretical treatment of the state, assuming them to alike, competing within the anarchical international system does not consider cultural, religious, or historical processes when analyzing states, instead viewing them as a unitary phenomenon. For more, see, Kenneth Waltz, *Man the State and War: A Theoretical Analysis* (New York: Columbia University Press, 1959) and Kenneth Waltz, *Theory of International Politics* (Long Grove, IL: Waveland Press, 1979).

Part I

PUTTING THE ARAB SPRING INTO CONTEXT

HISTORY, STATE, AND SOCIETY

The Arab Spring was a moment of significant political and societal upheaval. Yet, the hopes for increased democratic and political participation leading to a more liberal and pluralistic Arab world were quickly quashed by increased instability, political fracturing, and the rise of fragmented and failed states. Some hoped that the Arab Spring would be the catalyst for a new "democratic wave" akin to the democratic transitions that swept Latin America and the former Soviet bloc countries at the end of the cold war. But instead of leading to a flowering of democracy, the Arab Spring gave way to increased instability. What has been crystalized following the events of the Arab Spring has been the fundamental fissure between Arab governments and their ruling classes, and the ruling bargains that had governed political life since the postcolonial period. The fall of dictatorial Arab republics whose rule had been based on repression, coercion, and the impact of ruling coalitions and alliances, gave way to the turmoil of the Arab Spring.

More importantly, the universalism that prevailed in public commentary on the Arab Spring obfuscated the fundamental differences in Arab societies from the rest of the world. It underscored the "otherness" of the Arab world and the importance of religion in political life as well as confessional, sectarian, tribal, regional, and local identities, all of which play significant roles in addition to national identity. While there was significant discussion on the subject of "Muslim or Islamic Democracy," and the new evolving synthesis based on the "Turkish model" of Recep Tayyip Erdogan, the subsuming of religious and cultural factors framing political analysis of the Middle East through Western norms and models has forced the reassessment of how scholars and practitioners analyze the Middle East. Rapid, bloody, and tumultuous political change in the Middle East has not been without precedent, but what made the Arab uprisings so significant was the impact and the voice of citizens, who took to the streets to advocate for a new ruling bargain with their governments.

Chapter 1

The Despotism of the Revolution

The ousting of political rulers has been a common occurrence in the history of the modern Middle East. An observation of the numerous military coups in the Arab world shows the prevalence of political instability throughout the region from the post-colonial period to the present day. The Arab Spring, therefore, did not occur in a vacuum. However, the political processes that came to the forefront in 2010–2011 served as a breaking point from the past, as they were based on the unique challenges posed by Arab populations to their authoritarian governments. This was based on a new set of political, cultural, and technological factors including the usage of social and mass media. The changing political dynamics and the relationships between the Arab ruling elite and their societies provided the blueprint for the popular protests during the Arab Spring. The resulting protests sought to redefine the social orders of Arab countries which led to political instability as political Islamists, jihadis, and liberals, all marginalized elements of the previous regimes, tried to use the winds of political change to enhance their own power. While the initial stages of the Arab Spring were met with heightened expectations for democratic change, the political instability and the rise to power of political Islamists provoked a significant backlash.

The typical mechanism for political change in the Arab world had been the tried and tested military coup with Junta officers, under Arab nationalist and socialist guise, usually overthrowing Western-backed monarchies or civilian regimes. The first Arab military coup in the postwar era occurred in Syria in 1949, with Hosni al-Za'im assisted by Adib al-Shishakli overthrowing the nationalist government of Shukri al-Quwatli. This coup was then succeeded by several upheavals, the most notable being Egypt's Free Officers Revolution of July 1952, which served as the opening salvo for what became a series of nationalist coups in Iraq (1958), Yemen (1962), and Libya

(1969). This overlapped with the process of de-colonization, specifically in the French-controlled *Maghrib*, which included the granting of independence to Morocco and Tunisia (1956) and culminated with the Algerian War of Independence (1954–1962).

However, the story of a true popular revolution did not materialize in the Middle East until the dramatic events of the Iranian Revolution in 1979. Iran is not an Arab state, and its political culture and societal structures differentiated it from its Arab neighbors, including its large left-wing movements (*Tudeh*), its growing and educated middle classes, and above all the influence and impact of politically inclined Shite clerics, bucking the trend of centuries of political quietism. All of these factors played an important role in the revolution, headed by Ayatollah Ruhollah Khomeini, who was able to unite Iranians of disparate political backgrounds, eventually consolidating power and marginalizing his political opponents in the form of the Islamic Republic of Iran.

Against the backdrop of revolutionary upheaval in Iran, and as a means to entrench their control of their own polities, Arab autocrats enhanced their coercive mechanisms fearing a recurrence of the same scenario. This led to a consolidation of Arab states' security bureaucracies into full-fledged police state (*dawlat mukhabarat*). While these processes began before the events of the Iranian Revolution, the development of new strains of political Islamists and their growing popular support further enhanced the growth of a triangular relationship between autocratic elites, the military, and the security services.[1]

The uprisings that swept the region from the end of 2010 showed substantial changes in Arab political culture, namely the willingness and ability of the Arab masses to organize and protest against the ruling elite. The drama and revolutionary tumult which began in both Tunisia and Egypt displayed the cross-sectoral nature of these popular uprisings. The old ruling elite, most of whom had come to power via coups, were shocked by the widespread public discontent and resentment against them. Arab autocrats did not consider the public an actor powerful enough to shake the foundations of their states. Equipped with 20th-century frameworks of their *mukhabarat* states, using repressive techniques to crush public dissent and patronage networks and social programs to co-opt sectors of their respective countries, Arab leaders believed that past mechanisms of coercion would continue to work. But they did not have the relevant tools to obtain the upper hand in this confrontation. The Arab societies were moving towards the "revolutionary reality," a term coined by the eminent sociologist Charles Tilly, referring to a situation in which an existing regime becomes a target of allegations from rival political groups that pose a real threat to its continued leadership and leads to the introduction of political and ideological alternatives.[2]

The Arab Spring served as a mechanism for the masses to expresses their grievances and advocate for political change, rising up against repressive autocrats. Yet to call them revolutions would be a step too far. According to Theda Skocpol, the Harvard political sociologist in her landmark book *States and Social Revolutions*, a true revolution is one that changes the social and societal structures of their particular states. The resulting uprisings undoubtedly shook the foundations of the Arab states to their core and forced social scientists to grapple with how to study political change, theories of democratization, and the trajectory of Middle Eastern Studies writ large (a topic which is addressed in chapter 2 of this study). But what cannot be denied is that the uprisings fostered a new opening, allowing the Arab people themselves to become *real* political actors in their own fate. The crowds that gathered in city squares shared their grievances as they demanded popular sovereignty. This coupled with the evolving grassroots nature of politics, enhanced by the impact of social media, gave a "voice" to those who had been previously left out of the political arena and redrew the political map of the Arab world.[3]

PROTEST AND REVOLUTION IN THE ARAB WORLD

The causes of the popular uprisings throughout the region were not rooted to a single particular cause, but rather a confluence of a number of socio-economic and political factors. One particular socio-political aspect that was significant in the changing trajectory of Arab politics was the breaking and the erosion of the social contract that had bound Arab autocrats and their populaces together for nearly a half a century. When Arab autocrats rose to power, they initiated what Mehran Kamrava terms "ruling bargains," where states, usually through corporatist and socialist elements, provided the means for state development and modernization.[4] This phenomenon was especially prevalent in Nasserist Egypt, Ba'thist Syria and Habib Bourguiba and Zine al-'Abidine Bin 'Ali's Tunisia. This "ruling bargain" or "Arab social contract," formed the centerpiece of state–society relations till the events of the Arab Spring. The Arab state would provide its citizenry with free education, advances in healthcare, construction of public works, in exchange for their political pliability and support. This of course initiated the building of political institutions to ensure the survival of the regime, including political parties for channeling support for modernization projects, associations of bureaucrats who staffed the civil service, and a network of intelligence agencies to oversee political control.

The apogee of this process was the rule of Egyptian President Gamal Abdel Nasser, who created the mechanisms that his successors, Anwar Sadat and Hosni Mubarak would utilize. After ascending to power and crushing

his political opposition, most prominently the Muslim Brotherhood, Nasser brought to bear the mechanisms that solidified his control over the Egyptian political system. This included constructing the National Rally and then later the Arab Socialist Union (ASU), later in Mubarak's time to be renamed the National Democratic Party (NDP) a political party, but in reality, a bureaucratic mechanism for co-opting a loyal base of support for his regime within the bureaucracy, and later on the capitalist business elite. Nasser also reformed the education system, expanded public universities, and founded literacy programs in Egypt's poor countryside. The result was an influx of university graduates who were guaranteed jobs in the states expanded bureaucracy, creating a new class of workers who owed their existence to the largesse of the state. These practices were followed throughout the Arab world, by both Habib Bourguiba in Tunisia, and Hafez al-Asad in Syria. But as time went on, the statist, socialist, top-down command economies began to liberalize, injecting looser export controls and market liberalization programs. As a result, these policies created a class of immensely wealthy oligarchs whose wealth was tied to the ruling regime, and frequently included members of the ruler's own family.

Arab populations in the years preceding the Arab Spring looked at countries that previously lagged behind them in all facets of economic development, subsequently surpassing them, noticing the wanton corruption and waste that was occurring before their eyes. Yet, even though there was growing dissatisfaction with the conduct and tenor of Arab authoritarian regimes by their own populaces, authoritarian states showed great resilience in beating back challenges to their continued rule. Yet, the cocktail that would eventually lead to the uprisings was already beginning to bubble to the surface. The dissatisfaction with the ruling autocrats combined with a demographic shift, what demographers termed the "youth bulge," led to a growing class of young Arabs who, following their graduation from high school and university, could no longer find the jobs that had been promised to their parents and grandparents.[5] The rising youth unemployment put severe pressure on labor markets[6] and as a result unemployment rates rose. Another factor that played a part in strengthening these socio-demographic processes was the growing gap between the expectations and aspirations of Arab youth. In the two decades prior to the events of the "Arab Spring," the standard of living had risen and many citizens acquired higher education and "connected" to the world via the Internet and social networking. Many of them developed expectations for an improvement in their own financial situations based on the promise of economic reform. Instead, they looked on in despair as state-backed crony capitalism proliferated under the guise of economic reform, while they themselves were struggling with the day-to-day hardships of life. Young Arabs found it difficult to marry and establish families, instead

staying with their parents because of economic problems. Throughout the Arab world, frustration mounted against the ruling elites. Egyptian society, one of the youngest societies in the Middle East, was an illustrative example of this reality. According to the 2010 United Nation's Human Development Report, around 25 percent of Egyptians were between the ages of 18 and 29, and a significant portion of these young people were university graduates.[7] Many of them were forced to work odd jobs for a living, sometimes menial work. This situation was aptly described by the Saudi journalist Waheda al-Huwaider in a poem titled "When" (*'indama*), which describes the serious socio-economic pressures in the Arab world: "If you studied five years in primary school, three years in junior high, three years in high school and four or five years at the university, only to find yourself working at the vegetable market afterwards; don't worry! It is a sign that you live in an Arab state."[8] Indeed, a similar reality could be found in most Arab countries.

THE CATALYST: FROM THE TUNISIAN PERIPHERY TO THE HEART OF THE ARAB WORLD

Revolutions are often symbolized and epitomized by a defining cultural figure or event. In the case of the Arab Spring, it came in the person of Muhammad Bouazizi—a young Tunisian fruit vendor from the peripheral town of Sidi Bouzid.[9] On December 17, 2010, he set himself on fire, protesting ongoing abuse from local authorities who had closed down his unlicensed market stall, taking away his livelihood.[10] His action came to symbolize the heavy-handed and authoritarian nature of Bin 'Ali's Tunisia, sparking a wave of public protests that spread across the country, ultimately culminated in Bin 'Ali's downfall and flight from the country on January 14, 2011. Bouazizi's personal protest inspired protesters, particularly youth in the Arab world, who identified with his private struggle and desperate efforts to survive under an authoritarian, corrupt, and unemployment-ridden society.[11] Within a short period of time, popular protests in Egypt and other countries turned Bouazizi into a symbol of protest against authoritarian regimes in the Middle East and North Africa.[12]

Upon learning of Bouazizi's self-immolation, hundreds of inhabitants of Sidi Bouzid went to the streets. This tragic story helped fuel popular anger and resentment against the authorities. Protests ignited across the country and reached the coastal areas and the capital, Tunis. As the demonstrations spread, they took on a purely political dimension with protesters airing their grievances, agitating against the lack of transparency and accountability of the government, and its endemic corruption. This was especially the case on the part of President Bin 'Ali and his extended family, including his wife

Leila Trabelsi, and her relatives, who were notorious for their hedonistic and lavish lifestyles.[13]

The fact that mass protests erupted in Tunisia—a country renowned for its repression—made it clear that the barrier of fear had been crossed. This had a lasting impact on the political psychology of the region. Throughout the 20th century, Arab Middle East did experience a large number of protests, but these demonstrations never led to a mass-mobilized popular uprising that toppled a nation's leader. The uprisings that swept the region from the end of 2010 indicated a substantial change.

States in the region and the international community looked on in astonishment as events unfolded, not only because of the protests in Tunisia and Bin 'Ali's ouster, but because Tunisia had been viewed as an unlikely place for the spark to ignite. Unlike its neighbor, Algeria, Tunisia had not experienced a bloody war of national liberation against its colonial master, France. Tunisia was viewed as a moderate, pro-Western state, and a state whose economy was, to a large degree, oriented with Europe. In other words, in the eyes of both locals and Westerners, Tunisia was not prone to calamity. Its socio-economic situation as a relatively small country (11 million), with a European-level population growth rate of less than 1 percent per year, and its relatively progressive record with respect to the position of women in society, economics, and politics—contributed to the perception that Tunisia was relatively immune from political upheaval, especially compared with other states in the region.

During the 1990s, Bin 'Ali's regime had provided the Tunisian public with an impressive degree of prosperity. Foreign investment in the country increased as did the standard of living, as phased neoliberal economic reforms decreased state involvement in the economy and lowered the share of agriculture as a percentage of Gross Domestic Product (GDP), coupled with a rise of service sector-related industries.[14] The remittances sent by Tunisians who lived and worked abroad, primarily in France and the Gulf, improved the lives of many of their family members back home. These socio-economic circumstances allowed Bin 'Ali to continue to rule the country with an iron fist and to strengthen the grip of the state security services. But there were also structural inhibitions that held back Tunisia's economic growth. Unemployment, especially for young Tunisian university graduates was pervasive, as they could no longer count on being hired by state-owned institutions or the civil service. This, coupled with the implementation of liberal economic reforms, forced the private sector to bear additional hiring burdens, but they were unable to absorb Tunisia's youth into the labor force. According to the Tunisian National Institute of Statistics, most Tunisian firms were small and private, and based primarily on unskilled labor, leaving university-educated graduates outside of the workforce.[15] As a result, youth unemployment in

2008 sat at 30 percent, more than double the real unemployment rate of around 14 percent.[16] There was substantial divergence between the state educational system and vocational training, with entrants to the labor force unable to fulfill the needs of economy. However, this was not a problem that was confined to Tunisia, but was a region-wide problem as the region's discontented youth had a substantial impact on the trajectory of the Arab Spring.

The economic situation in Sidi Bouzid, Bouazizi's hometown, a town in Tunisia's economic periphery, away from the more affluent coastal region, reflected the situation of millions of youths throughout the Arab world where unemployment and lack of economic opportunity were pervasive. Scarce job opportunities, coupled with the residual effects of the global economic downturn and cronyism of the ruling elite, forced the Arab world's youth to look for alternative sources of income outside the formal economy. Tunisia's black market flourished with youths engaging in fuel smuggling from Libya, while others performed physical labor or worked odd jobs. Bin 'Ali's attempts to establish a semblance of democracy and political pluralism only increased the public's bitterness and cynicism. Muhammad Bouazizi's protest was therefore the spark that ignited the fire of what would become the mounting political, economic, and social discontent. The arrogant response of government officials and the extreme violence displayed by the security forces in trying to suppress the protests encouraged the spread of the additional protests to other areas of the country. Within just a short time, Bouazizi had been identified as a freedom fighter and had become the symbol of the revolution, whose final result was the overthrow of the ruler of Tunisia. On January 4, Muhammad Bouazizi died of his wounds, becoming the martyr and symbol of what became known as the "Jasmine Revolution."[17] On January 14, 2011, without prior warning, President Bin 'Ali and his family left the country. The news of Bin 'Ali's flight shocked the Tunisian public, as well as his relatives and political opponents. Something significant had happened in Tunisia: a sitting ruler had been ousted by public protests. What is more, the waves of protest would not be confined to Tunisia alone but would actually set sail across the region, washing up on the shores of countries including Egypt, Algeria, Yemen, Bahrain, Jordan, and Libya.

The regional turmoil that shook the Middle East ushered in the restructuring of the socio-political order, which had for decades been dependent on the alliance between elites and the business cronies, the military, and the security forces (*mukhabarat*). The autocratic leader was at the apex of the authoritarian state and governed through a pliable political party that served as a mechanism for enacting and dispensing patronage. This, in conjunction with the army and the powerful security forces, which secured the regime, formed the mechanisms for governing. However, the Arab Spring and the assertion of popular demands by Arab citizens enabled citizens, for the first time, to

become real political actors, forcing autocrats to consider their opinions and desires. This fundamental change has forced a continuous reassessment and restructuring of the power dynamics within Arab States.

The dramatic events that took place in Tunisia and Egypt revealed the challenges that the masses posed to their governments and the rupture of the forces that linked governments and the populations that they ruled. These governments promised on their ascension to power, to be republican regimes (*jumhuriyya*). The so-called republicans and their promises of prosperity through rapid development, blending statist industrialization in conjunction with a large welfare state, eventually fell victim to corruption and inefficiency. The ousting of the old guard allied with monarchial or elite-driven ruling cliques, eventually gave way to a new elite, allied with the ruling parties of these Arab authoritarian states, such as the National Democratic Party (NDP) in Egypt, the Democratic Constitutional Rally (RCD) in Tunisia and the Ba'th parties in Syria and Iraq. These ruling parties served as the epicenter of the development of state-capitalist cliques, giving lucrative government contracts to regime allies and their business cronies. These parties also served as the vehicle for the grooming of the next generation of autocratic elites, the sons and daughters of the "Arab Presidents for Life." This "inheritance of power" (*ta'with al-sulta*) served as a continuation of monarchical rule, under republican guise.[18] Political dissidents and critics nicknamed these regimes *jumlukiyya* a combination of the words *jumhuriyya* (republican) and *mulukiyya* (monarchical), coined by the noted Egyptian-American sociologist Saad al-Din Ibrahim, who was a professor at the American University of Cairo and a political dissident against the Mubarak regime.[19] Ibrahim used this term to describe the political regime and the nature of elections in Egypt and to assert that Egypt was ruled in a pharaonic manner. Thus, it comes as no surprise that President Mubarak was nicknamed "pharaoh" by his adversaries, alluding to the power and status the Egyptian presidents had wielded over the state, in their rule over its institutions and population.[20]

From the outset of the Arab Spring, the protesters took aim at the corrupt nature of the ruling system and its assorted beneficiaries. This was different from the anti-colonial nature of the Arab revolutions such as the one carried out by Egypt's Free Officers in 1952 and its copycat coups which followed in the succeeding decades. The young protesters of the Arab Spring carried a different message, seeking to root out public corruption and the blatant abuses of power that were pervasive in authoritarian police states. While, this does not necessarily mean that the protests lacked an anti-imperialist element, the main message of the protests was that Arab citizens across the region had lost confidence in their rulers. While in the past, Arab leaders sought to blame their domestic troubles on nefarious foreign forces, namely the West, Israel, or the United States, this solution could no longer guarantee the political

survival of Arab regimes. If they did not put socio-economic policy high on the agenda, they would not be able to placate their restive publics any longer, and would face the consequences.

THE NEW MEDIA—A MEANS OF PROMOTING THE PROTEST

The phenomena of citizens gathering in public squares highlighted the weight of the younger generation: its weapons were radically different from the ones who had overthrown regimes in the 20th century. Armed with digital literacy, they made extensive use of online social networks, which proved to be a powerful tool in organizing, spreading messages, which were integral in the success of the protest movements. The use of virtual networks helped to overcome the centralized means of control held by governments and channeled power into the hands of the crowd by allowing the young protesters to seize the initiative.

The Arab uprisings were also buoyed by substantial changes in the media and technological landscape in the Middle East. The rise of mass market satellite television stations, Qatar-based *Al-Jazeera* in particular, together with online social networks, gained prominence before the outbreak of the uprisings. Most regimes in the Middle East had long recognized the potential danger of the Internet to political stability, but they could not effectively censor information. State security services' methods of repression had not caught up to the rapidly expanding technological innovations and the de-centralized nature of social networks and Internet, which allowed for the rapid diffusion of information. As a result of mass usage of both mobile phones and the Internet, state security services and their censors found it increasingly difficult to censor the information their citizenry began to receive, with possibilities for the public to have access to alternative sources of information via the Internet. These sources ranged from standard websites to forums and personal blogs. Coupled with social networks like Facebook and Twitter, which enabled millions of users to organize effectively and gather within a limited timeframe, protesters had distinct advantage in being able to quickly mobilize in the face of government resistance. A portent of things to come in the Arab Spring and newfound impact of social media were the Green Movement protests in Iran, following the rigged presidential elections of 2009. Social networks in Iran, especially amongst young educated bourgeoisie who formed the backbone of the 2009 protests, were aided by social media as an organizing tool and disseminator of information. However, the role of networking during the protests in Tunisia and Egypt was even more central than in Iran.[21] For example, one of the Facebook pages associated with the protests in Egypt was titled

"We Are All Khaled Said," the name of the young Egyptian who was beaten to death by the police in Alexandria in June 2010.[22] The page contained updated information about organized protests and comments by protesters encouraging each other to continue the "firm stance" (*sumud*). Additionally, it contained calls for mass demonstrations after Friday prayers under the title of "The 4th of February 2011—the day of Mubarak's departure."

While traditional media undoubtedly played a role in fostering the revolutions, it was the rise of social media as an alternative source of information that allowed citizens to bypass state censorship, enabling the growth of political awareness amongst Arabs throughout the region.

"We could protest for two years here, but without videos no one would take any notice of us," a relative of Bouazizi told an *Al-Jazeera* reporter.[23] Indeed, the dissemination of web videos documenting the demonstrations in Sidi Bouzid was decisive in spreading the protest and turning Bouazizi into a source of inspiration. Tunisian authorities tried to prevent the circulation of this kind of video, but to no avail.[24] The increasing use of social networks highlighted their unique potential. Despite the social and political diversity of the demonstrators, social networking enabled people who had never met each other to quickly create a plan of action. In this way, an uprising was made possible even without an imbedded hierarchical organization, united by one common goal which was "The people want the overthrow of the regime" (*al-sha'b yurid isqat al-nizam*).

The centrality of the media in disseminating ideas and promoting revolutions is a familiar phenomenon in world history, from the printing press that enabled Martin Luther to spread his Protestant ideas, to the cassette tapes that spread Ayatollah Khomeini's sermons, to the messages broadcast by West German TV stations to East Germany that led to the fall of the Berlin Wall in 1989. In the Middle Eastern context, it was the *Al-Jazeera* television network that emerged as the revolutionary player in the media landscape. Established in 1996 by the Qatari government as a mouthpiece for its growing international ambitions, the station established a reputation tackling hot-button issues in a sensationalist manner, such as al-Qaida hostage videos or the latest Usama bin Laden audiotapes. Through its broadcasts, *Al-Jazeera* became the *bête noir* of the Middle East's autocrats, exposing bureaucratic and political corruption. Its influence on Arab public discourse from its founding substantial, so much so that during a visit to Doha, Egyptian President Hosni Mubarak exclaimed his surprise to his Qatari hosts during a tour of *Al-Jazeera*'s then spartan and sparse television studio exclaiming, "All this trouble from a matchbox like this!"[25] While *Al-Jazeera* rapidly expanded beyond its more modest beginnings, its impact on Arab political culture and its discourse expanded with television programs with names such as *Bila Hudud* (without borders) and *al-Itijah al-Mu'akis* (the opposite direction),

introducing the public to fierce debates on current events, creating new media discourse in the Arab world.[26]

The impact and utilization of social media during the uprisings prompted many to label the uprisings as "the Facebook and Twitter Revolutions."[27] However, these networks were no more than a tool at the service of the revolution. It unified cross-sectoral demands of protests, advocating for transparency, dignity, and social justice reflected the newfound political awareness of the Arab body politic. Facebook and Twitter gained their importance as a mechanism to disseminate the messages of the revolution rapid speed, but at the same time it created a leaderless revolution that became vulnerable to alternative agendas. As a result, this vacuum in leadership and the lack of political prowess of the demonstrators allowed for the hijacking of the revolutions by better organized and more competent forces.

The protests against corrupt autocrats were a watershed moment in the creation of a new political climate. Fearless young people crowded into Tahrir Square in Cairo and Avenue Habib Bourguiba in Tunis. Their willingness to sacrifice their lives on the altar of resistance against tyrannical rule signified an important upheaval in the political cultures of these states. The image derived from the events in the squares—that of citizens exercising their natural rights at the risk of imprisonment and even death—led many to assess that the power of the people was on the rise. The people flocking to the squares consisted mostly of the young, urban, middle, and lower classes, which are a central component of the demographics of the region and the component in which a great deal of frustration had built up owing to economic hardships, corruption in the political system, and restrictions on political activity. The successful uprisings in Tunisia and Egypt served notice to the outside world of the common unifying factors of dislocated youth and larger transnational Arab identities that had previously been dismissed by scholars and practitioners. The ability to spread and identify with these region-wide problems, using common political tropes, through the platforms of Facebook, Twitter and others, allowed for the development of a common narrative against the ruling despots.[28]

DEMOCRACY AND ISLAM: A TANGLED ENCOUNTER

At the start of the Arab Spring, the protesters were seen as part of a larger revolutionary process that would be able to spur the Arab world toward liberal democracy. After the breaking of the barrier of fear and oppression, many concluded that the longing for freedom would succeed in the toppling of the old order, and in a similar fashion to the revolutions of 1989 in Eastern Europe would bring about a wave of democratization. However, it

soon became clear that a successful uprising would not be able to alleviate fundamental, structural problems. A "magic touch" would not be able to heal the socio-economic and socio-political ailments, which were the cause of the crowds gathering in public squares calling for the ousting of rulers. The success of the protesters and the overthrow of an oppressive regime did not ensure a stable transition to democracy. The declaration of Wael Ghonim, a leader of the protesters in Egypt on January 25, 2011, "Now our nightmare is over. Now is the time to dream," pointed at the huge gap between the desired goal of the protestors and the actual reality.[29] In their feelings of euphoria after the dismissal of the former ruler, the protesters expected their successes to be translated into practical terms as quickly as possible. The solidarity and consensus that had ruled in Egypt during the protests was captured by the slogan, "the people want the overthrow of the regime." This gave way after the ousting of the ruler and gradually disappeared into a wide range of orientations and practices, as the goal of the protesters had been achieved. As we have learned from history, a transition from an autocratic system to a democratic one does not take place overnight. The formation of a democracy is not a sudden dramatic event, but an ongoing process, requiring political compromise, negotiation, and power sharing between opposing forces. Although the French Revolution toppled the absolute monarch in a fraction of time, democracy did not "storm in" overnight, as the people stormed the Bastille. Moreover, the overthrow of the French monarch was followed by years of Jacobin terror, public executions, and tyranny, which eventually culminated by the end of the revolutionary upheavals with the rule of Napoleon Bonaparte and his empire. It took nearly one hundred years after the Revolution of 1789 for France to become a stable democratic country. Likewise, the Russian and Iranian Revolutions were succeeded by periods of instability and conflict, as the revolutionary forces clashed with weak provisional governments, eventually leading to their ouster. These post-revolutionary fluctuations, between political actors jostling for political power are salient characteristics in the period after intense political change, and the immediate aftermath of the Arab Spring was no different.[30]

The focal point of attention during the Arab Spring was the uprising in Egypt, a country which throughout the modern history of the Middle East has served as the vanguard for trends in modernization and mirrored the political changes sweeping the Arab world. The events in Egypt, a spontaneous uprising of the Facebook and Twitter generation, pushed for the ouster of Mubarak and his family. Among the protesters, there was a consensus about what to do with the corrupt ruler and his family; they agreed to freeze the assets of the Mubarak family and the officials of his regime, while imposing a severe sentence against them. The demonstrators in the squares demanded Mubarak's removal and Egypt's military leaders gave in to them.

The history of revolutions has shown that the overthrow of brutal totalitarian regimes such as Tsarist Russia and Communist Romania are a violent and bloody undertakings, and that velvet revolutions, such as the one that split Czechoslovakia, are exceedingly rare. Tsar Nicholas II and his family during the Russian Revolution of 1917, and the Romanian dictator Nicolae Ceausescu and his wife Elena during the anti-communist revolution of 1989, are examples of the revolutionary fervor of the masses. This was something that Hosni Mubarak and his sons, 'Alaa' and Gamal were to experience, although they were able to escape with their lives.

The groups that formed the backbone of the political protests, particularly in Egypt, provide some insight into the true desires of the protesters, specifically as to what political change they actually wished for. An observation of some of the most prominent agitators for political change in Egypt, particularly the group *Kifaya*, shows that the group was highly illiberal in its outlook and did not seek to turn Egypt into a liberal-democratic state. *Kifaya*, or "enough!" in Arabic, were primarily geared to stopping the inheritance of power (*ta'with al-sulta*), from Hosni Mubarak to his son Gamal. The members of *Kifaya*, who formed some of the most vocal opposition to Hosni Mubarak, were comprised primarily of Nasserists and secular nationalists, but not liberal democrats who wanted Egypt to be a multiparty liberal democracy.[31] The name "*Kifaya*" elucidated an inherently negative demand, unifying protesters against Mubarak and his regime, but without an alternative program for the day after the regime's fall. This also dovetails with *Kifaya*'s successor, the *Tamarrud* (or "rebellion") petition that led to the mass protests against Muhammad Morsi during the summer of 2013. *Tamarrud* cast itself as a democratic petition advocating an agenda agitating against President Morsi and his increasing authoritarian diktats. But in reality, it supported the intervention of the military against the Muslim Brotherhood and Morsi's ouster. *Tamarrud* was comprised of many former members of the *Kifaya* movement who were actively supportive of the military intervention, with one of its activists noting to the British newspaper *The Observer*,

> I don't call what happened a coup. The army took its cue from the people. They had many previous chances to do what they did but they didn't take them. But once millions of people went out and started chanting for the army to step in, they took their orders from us. The army did not take over power. They were merely a partner in the democratic change we were seeking.[32]

In the aftermath of the initial events in Tahrir Square at the beginning of 2011, Tarek Masoud, an American scholar of Egyptian background, likened the attempt by the Supreme Council of the Armed Forces (SCAF) to stabilize Egypt after the fall of Mubarak, to the task of steering Egypt between "the

Scylla of democracy and the Charybdis of military government."[33] Yet, the events of July 2013 showed that the military itself had never really sought to transition to any kind of multiparty democratic system, but instead was waiting for the people's popular demand, cloaked in the guise of popular sovereignty and democratic demands to take action. At the inception of protests in Arab squares throughout the region, much of the commentary focused on the democratic nature of the protests and the cross-sectoral alliance of citizens who advocated ousting Arab autocrats. Many commentators believed that the Arab Spring was the beginning of the so-called "fourth wave" of democratization. In fact, a considerable amount of academic study had been spent trying to understand the lack of democratic norms in the Arab world and its persistent inability to democratize. This was especially true after waves of democratization in the Mediterranean and the communist revolutions throughout the Soviet bloc which led to the large-scale adaptations of multiparty democracy, a phenomenon that the political scientist Samuel Huntington called the "third wave" of democratization.[34] The end of the Cold War led to proclamations of the "end of history," a phrase coined by the political scientist Francis Fukuyama in his landmark essay in *The National Interest*, and his subsequent book *The End of History and the Last Man.* In it, Fukuyama argued that the triumph of liberal democracy and capitalism had in effect ended the great ideological and political clash of the 20th century leading to the universalization of liberal democracy as the government of choice.[35] Yet, there was one region which was continually left behind, the Middle East. Scholars of democratization, such as Larry Diamond and Eva Bellin, tried to answer the question why democracy hadn't penetrated the Arab world and why authoritarianism had such a lasting presence. Scholars frequently pointed to the economic factors, particularly the statist and rent-based economies, and the tribal orientations in conjunction with the coercive mechanisms of Arab states, which allowed for the continuation of authoritarian rule.[36]

Indeed, democracy was one of the key demands of the Arab protest movements, but this demand was not the only one, and certainly not the most developed one. In any case, the process as a whole, viewed through Western eyes, resembled events that had occurred in Europe and as a result, developments in Arab countries were assumed to be liberal and democratic. Quite a few processes in different Arab countries were given incorrect diagnoses. For example, Western analysts tended to identify activist protests as "peace camps."[37] More than one Western observer made an artificial distinction between the masses of young people who were leading protests and the Islamic elements taking part in the protest, which complicated the picture. Oftentimes, young people participated in secular protests, while at the same time being active in Islamic movements. Yearning for democracy was not necessarily accompanied by the desire to become ideologically or culturally

Western. In fact, when polled in numerous political surveys, most Arabs routinely answered that democracy is the best form of government, overwhelmingly. Yet, the conception of democracy throughout the Middle East does not fall in line with the Anglo-American idea of secular democracy. Instead, most people in the Middle East would prefer and, in many cases would relish, an enhancement of religion within the political space, balking at Western terms of secularization. It was into this space that Egypt's Muslim Brotherhood most prominently utilized democratic and liberal terminology but did not advocate the values associated with it. This of course was emblematic of the Brotherhood's short and troubled reign under President Muhammad Morsi. Morsi and the Brotherhood pursued a policy that was characterized by a majoritarian understanding of democratic norms, refusing to consider the rights and privileges of parliamentary, religious, and ethnic minorities.[38]

On "the day after" and in the midst of a complex political process and a new electoral system, it became clear that movements of political Islamists hijacked the political capital produced by the revolution. In Egypt—the most important Arab country—these movements mercilessly beat their secular opponents and the results of the parliamentary elections showed the depth of change that had taken place. In the Egyptian context, this not only included the Muslim Brotherhood but also the Salafi Party *Hizb al-Nur* (The Party of Light), which received in excess of 28 percent of the vote and the second largest number of seats following the Brotherhoods' Freedom and Justice Party. This was not only confined to Egypt as Tunisia, Morocco and even Kuwait soon realized that the positions of political Islamist and Salafist movements had been strengthened significantly. The revolutionary dynamics that swept the Middle East embodied a structural problem from the beginning. Although this proved the existence of a civil society in many of the Arab countries, the protesters had neither an organized platform nor a common goal for the future of their respective countries. People went to the streets to see "change" of the status quo. What this "change" meant was interpreted differently by the different factions of society. The main demands during the revolution were economic, merged with a general demand for political change. In some cases, the revolutionary wave pretended to bear the character of an advanced and modern struggle for modernization, but in practice it fed into traditional tensions between religious, ethnic, or tribal groups. For example, Bahrain's protest movement reflected a struggle between the Shi'i majority (about 65 percent of the population of the archipelago) and the ruling Sunni minority. In Saudi Arabia, significant protests erupted in the Shi'i majority Eastern Province, the sight of the kingdom's most substantial oil reserves. In Yemen, the call for reform and regime change reflected, among other things, the desires of the people of the south to cut the umbilical cord that connected them to the north. They tried to re-establish South Yemen, as it had existed until 1990.

In Libya, the protests against Qaddafi's regime blossomed in the Cyrenaica region, which had historically been a rival region of Tripolitania, the latter being the stronghold of Qaddafi and his loyalists.

Yet, perhaps the most important and politically significant part of the protest was the ability of Islamist movements to use the political opening to assert themselves. In the face of the inexperienced youth organizers, frequently from the small urban upper-middle classes, mainstream Islamist movements such as the Muslim Brotherhood in Egypt and *Al-Nahda* in Tunisia seized the political opening. The Brotherhood and *Al-Nahda* had stood in the wings waiting for decades to enter the political sphere. The relationship between the Brotherhood and *Al-Nahda* and their respective states, however, are not uniform. *Al-Nahda* and its precursor movement the Movement for Islamic Tendency (*Mouvement de la Tendance Islamique*, better known by its French acronym MTI) had experienced substantial crackdowns before being subsequently banned in Tunisia since the early 1990s, and its leadership, most prominently its charismatic leader Rashid al-Ghannushi, had been exiled, mostly to France and Britain. The Muslim Brotherhood on the other hand had been accorded a *modus vivendi* with the Egyptian state, taking a limited role in politics, while focusing its activities mostly on religious outreach (*da'wa*) and its significant social services and education work.[39] This began during the presidency of Anwar Sadat (1970–1981), who allowed the Brotherhood an avenue to return to public life after the brutal crackdowns of his predecessor Gamal Abdel Nasser. Sadat utilized the Brotherhood during his period of political consolidation to balance against Nasserist elements on Egypt's university campuses and in the bureaucracy.[40] Yet, his policy changes also allowed for greater latitude for the Brotherhood to expand its influence. Egypt's economic liberalization in the 1970s under President Anwar Sadat known as *Infitah* allowed for the creation of a new capitalist business class, many of whom were affiliated with the Brotherhood. The Brotherhood and other mainstream political Islamist movements had always been highly capitalist in their economic outlook and much of its upper-level leadership came from Egypt's old and affluent landowning and pious mercantile classes. It was the Brotherhood's outright opposition in 1954 to Nasser's land reform drive that served as one of the factors that precipitated the bloody crackdown against the group.[41] Even with the Brotherhood's opposition to the Camp David Accords, the Brotherhood remained a consistent force in Egyptian social life, frequently delivering social services to areas where the Egyptian government did not operate, particularly during Hosni Mubarak's tenure as president. In the political sphere, the Brotherhood began to move in a limited manner towards contesting a small number of parliamentary seats, reaching its peak of eighty-eight seats following the 2005 parliamentary elections, which were fraught with widespread voting irregularities.[42] While

the Brotherhood lost most of their electoral representation in the subsequent 2010 election, their grassroots support and social organization still proved to be a significant tool and boost when the political openings of the Arab Spring arose.

Tunisia's *Al-Nahda* Movement rose out of the dissident Islamic movements in the 1960s and 1970s. Greatly influenced by the Muslim Brotherhood, the initial movement (*al Jama'a al-Islamiyya*) formed as a social movement, opposing Tunisia's founding President Habib Bourguiba's strident secularist and socialist reforms. Gaining a foothold on Tunisia's university campuses by contesting student elections, the group, by the late 1970s known as the *MTI* began to face severe restrictions, including regulations forbidding its leaders Rashid Ghannushi and 'Abd al-Fattah Muru from preaching in local mosques. As the group began to move underground, according to Anne Wolf, they began to attract more public support. However, by the late 1980s following a short *denouement* as Zine al-'Abidine Bin 'Ali ascended to the presidency with promises to liberalize and modernize the country, the *MTI* applied for political status which was rejected by the Tunisian authorities. Changing its name to *Harakat Al-Nahda* literally, the Renaissance Movement, Tunisia's Islamists began to face increasing government crackdowns which resulted in most of its leadership moving abroad. With the leadership of *Al-Nahda* abroad, a divergence began to grow between activists on the ground and the leadership abroad on questions of ideology and of policy. Yet, when the Arab Spring arrived and Tunisia witnessed the end of Bin 'Ali's rule, *Al-Nahda* had the political capital, won after years of repression, and put it to use.[43]

The democratic openings that came with the political turmoil of the Arab Spring allowed for Islamists to play a central role. These movements in Tunisia and Egypt chose to participate in the popular protests gaining unprecedented recognition at home and abroad. Their status as long-standing opponents of the government strengthened the leaders of Islamist organizations and allowed them to return from exile. The fact that they had been denounced and persecuted by "the old regime" gave them broad public support because of their "clean" image, particularly their stances against corruption and in favor of increased social welfare benefits. With their increased political capital and enhanced reputation, Islamist parties and organizations made it attractive for citizens to join their ranks.[44]

An example of the hijacking of the revolution (*ikhtitaf al-thawra*) was perhaps best shown by the actions of the Muslim Brotherhood. One of the Muslim Brotherhood's most significant figures, Yusuf al-Qaradawi, a preacher who had spent decades living abroad in Qatar, widely considered one of the world's most important Sunni jurists, came back to Egypt in order to give a speech in Tahrir Square after the fall of Mubarak. Al-Qaradawi had been persecuted by the Egyptian government for threatening to undermine

it. He delivered his last sermon in Egypt in September 1981, on the eve of the assassination of Anwar Sadat. This dramatic event was followed by a wave of mass arrests carried out by the regime against members of the Muslim Brotherhood and other Islamic extremists. In the days before the ouster of Mubarak, Shaykh al-Qaradawi made an ostentatious appearance alongside protesters and issued a fatwa which stated that participation in demonstrations, particularly in Friday protests, was a religious duty. Through the Arab satellite channel *Al-Jazeera*, the Sheikh called on the Egyptian people, including imams, preachers, and journalists to join protests on Friday unreservedly and to "live in dignity or die as martyrs."[45] In a frontal assault on Egyptian President Hosni Mubarak, al-Qaradawi called on the president to leave immediately: "Shame on you! Ruling for 30 years! Let go of this people. Dozens were killed in one day, you cannot stay." He added: "No-one can stop history from happening. Stand up and leave, in my name and in the name of all Egyptians, in the name of thousands of Muslim clerics in Egypt and in the world, I call on you to leave your country." Al-Qaradawi, who also stood at the head of the International Union of Muslim Scholars, turned to the protesters and said: "I call on the demonstrators not to attack Egyptian security personnel or state institutions. I hope that tomorrow will be better than yesterday. Continue on the path of non-violent demonstrations until you receive the crown of victory."[46]

Political developments in Tunisia and Egypt (and even in Morocco, although the monarchy's political structure was left untouched) after the overthrow of the ruler, showed the increased influence of Islamic political movements and led many to assume that in the short term to medium term, parliaments in most Arab countries would be dominated by them. The actions of Islamic movements were put to the test after years of promises about their intentions. These movements went to the streets of the Middle East in the 20th century with the slogan "Islam is the solution." They criticized the strongholds of secular dictatorships and monarchies, pointing to poverty and corruption in Arab states as proof of the faulty policies of the ruling elite. Now they had to prove that while in power, they could offer a solution to these same problems. However, in most cases they proved incapable of managing the day-to-day governance of their respective countries.

The victories of Islamic parties in the elections in Tunisia and Egypt put the issue of compatibility between Islam and democracy to the test. Despite repeated statements by the leaders of these movements that they are committed to the norms of democracy, in religions based on divine law, particularly in Islam, tension exists between religion and the state. The basis of the tension between the secular and religious legal codes is rooted in Islamic conception of sovereignty, especially who has the authority to make laws. If the source of sovereignty is God and God is the source of law, how can it be that

the body chosen by human power enacts laws that contradict or override the laws of God? In other words, the laws of the state, and the secular legal code and religious laws have often clashed with each other and have demonstrated that in the Middle East of the 21st century, the question of authority and the issue of popular sovereignty versus divine sovereignty have determined the behavior of societies and countries. Moreover, the built-in discrimination against women and non-Muslim minorities in Islamic religious law contradicts the essence of democracy, and this contradiction often causes new tensions in society. The trend of Christian emigration from the Middle East was not a new phenomenon, but the Arab Spring and the rise of political Islam increased the exodus of the region's Christians, primarily to the West.[47]

An example of the considerable friction between Islam and democracy affected the status of Egypt's Coptic community. Persecution of Coptic Christians became one of the most prominent features of Muhammad Morsi's rule in Egypt from June 2012 to July 2013. Businesses were damaged, and many Christians were killed. During the riots that led to the overthrow of Muhammad Morsi, Mina Thabit, a Coptic Christian and a human rights activist in Cairo, reported that "Morsi's supporters are armed and killing people in the streets. They are targeting Copts. But if the Muslim Brotherhood had remained in power, we would have the same violence and much more because he would use the institutions of the country, the army and the police, against us."[48] It is not surprising that during this period, the immigration of Coptic Christians to the West increased. The new leadership in Egypt under 'Abd al-Fattah al-Sisi sought to ameliorate the relationship between Muslims and Christians by focusing on the rehabilitation and reconstruction of churches destroyed during the riots in Egypt. Harkening back to the close ties that had grounded the Coptic Church and its respective popes, Al-Sisi sought to reach out to the Coptic community, especially after significant acts of violence had targeted their community, most notably the Maspero incident, where dozens of protesting Copts were gunned down near the headquarters of the Egyptian public television broadcaster next to the Nile corniche. Al-Sisi announced that he fully recognized "the importance of the national and historic role of our Christian brothers," but even so, the Copts still taste the bitterness of violence perpetrated by Muslims, and ethnic and religious frictions continue to play a role in Egyptian society.[49]

Another fundamental issue at the center of public discourse was the role of religion in public life. The freedom of religion, freedom of tradition, and freedom of conversion are values that conflict inherently with Muslim religious law, and more specifically the absence of a separation between church and state. While news and media commentators frequently opine on the secular nature of Arab states such as Egypt, Syria, and Tunisia, this definition does not stand in the face of critical scrutiny. All of these respective states

require the president to be a Muslim, and while the leaderships were all at least implicitly secular, they all utilized religion as a means to enhance their regimes. The freedom to criticize religion or the freedom to make statements contradictory to religion is considered problematic. Members of political Islamic movements zealously opposed anyone who dared to speak ill of religion, and Islamic extremists went as far as to murder people they believed to be infidels.

The two main political Islamic groups, *Al-Nahda* and the Muslim Brotherhood showed a difference in their political outlook and pragmatism in their relations with opposition political parties and their ability to enact political compromise. Following the first open and fair elections in Tunisia, *Al-Nahda* won a majority in the Tunisian parliament, and formed a "troika" government headed by the *Al-Nahda* candidate Hamadi al-Jibali, together with the two main secular opposition parties *al-Tawakkul* and the Congress pour le Republique (CPR). But in the aftermath of widespread instability, rising Islamist extremism, and the assassination of two prominent secular/leftist politicians Shukri Bil'id and Muhammad Brahimi, Tunisia plunged into political crisis with mass protests against the government. The negotiations that followed, led by the National Dialogue Quartet, whose efforts would later win the 2015 Nobel Peace Prize, offered a way out of the maelstrom that allowed *Al-Nahda* to save face, initiating a new constitution, while also allowing for Tunisia to push ahead with its political transition toward democracy. *Al-Nahda* resolved following the negotiations, *not* to contest the upcoming presidential elections, instead allowing for the transition to a technocratic government headed by Prime Minister Mahdi Jum'a. *Al-Nahda*'s strategy, and specifically that of its leader Rashid Ghannushi, showed its flexibility and ability to compromise within the confines of the Tunisian political system, even as he faced considerable opposition from within his own party. Ghannushi's pragmatism and ability to work within the political system contrasts significantly with the Muslim Brotherhood's ham-fisted and authoritarian approach to government during their tenure in power.

Following the election of Muhammad Morsi, the candidate of Freedom and Justice Party, the electoral front of the Muslim Brotherhood, his administration was plagued by consistent problems. These included clashes between the Brotherhood and its allies and remnants of the former regime. The Brotherhood adopted a decidedly illiberal line, seeking to emasculate the Egyptian judiciary and clashing with elements within the army. Morsi's policy to try and draft a new constitution without judicial interference coupled with Brotherhood's views of religious minorities provoked a significant backlash from many quarters of Egypt's secular elite which eventually ended with protests in the summer of 2013 that led to his ouster and the rise of Egypt's current military regime led by General 'Abd-al Fattah al-Sisi.

These revolutions were characterized by an opposition that lacked leadership and clear and coherent principles. The unifying factor—the need for denouncing the corrupt dictator and his loyalists—disappeared after his fall. Unlike the Islamic Revolution in Iran in 1979, the Arab Spring did not revolve around a single charismatic leader that was able to guide a particular political program during the fraught transition period like Ayatollah Khomeini, who was about to bring "salvation" to the country and was merely waiting for the right moment to execute his revolutionary plan. The masses in Tunisia and Egypt stood up against their rulers out of hopelessness and deprivation. They demonstrated their bitter frustration over the increasingly difficult situation more effectively than they pointed out the flaws in the system of government.

"THE DOMINO EFFECT"—IF THE SPHINX FALLS, WHO WILL NOT BE AFRAID?

The rulers of Arab countries watched in disbelief at what was taking place in Egypt and Tunisia. When asked about the possibility of a similar scenario in their own countries, most of them would say "it will not happen to me." These rulers, from Syria to Bahrain explained that Tunisia and Egypt are special cases. Some rulers tried to face the threat by implementing preventive measures. An example of that can be found in Algeria, where a brutal crackdown against Islamists led to a decade long civil war, which only ended in 2002 following a civil concord law which gave amnesty to the Islamist guerillas. About a week and a half after the outbreak of riots in Tunisia, the protests—albeit smaller in scope and intensity—spread to the neighboring country of Algeria. The reason that the Algerian government did not fall was partly due to President 'Abd al-'Aziz Bouteflika's fast response to the protests: he ordered the lifting of the state of emergency in the country—which had been enforced for nineteen years—and initiated some institutional reforms aimed at addressing elections, and female representation in political parties and other institutions.[50] Shortly afterwards, the protests spilled over to Jordan. Protesters raised vigorous demands for reforms to improve government performance in order to move the country towards a true constitutional monarchy. In other words, they insisted on constraining the power of the royal family in favor of a democratic government. King 'Abdallah dissolved the government, opened discussions with representatives of the Muslim Brotherhood, and raised initiatives that would appease the demonstrators. Even in Kuwait, protests began in February 2011 and continued in intervals throughout the year. The protests against the government's misconduct and the deteriorating economic situation in the country led to the resignation of

the prime minister in November 2011. Prime Minister Nassir al-Sabah dissolved parliament unilaterally, claiming that the serious situation in the country and corruption in the government required new elections.[51]

Shortly after the outbreak of violence in Tahrir Square, a wave of riots also spread to Libya and Yemen. Demonstrations erupted in Libya in the second largest city, Benghazi, led by opponents of the dictator Mu'ammar al-Qaddafi, who had ruled over Libya since 1969. These demonstrations soon turned into riots with the situation developing into a fully-fledged civil war. The war took on the character of a power struggle between the various tribes that make up the Libyan society. The fighting between Qaddafi's troops and the rebel forces claimed the lives of tens of thousands of soldiers and civilians, and also led to international intervention. In September 2011, the UN declared that it recognized the "National Transitional Council" (the political wing of the rebels), which was established in Benghazi as the legitimate representative of the Libyan people. A month later, Qaddafi was captured during an attempt to escape and was brutally executed.

Waves of protest in Yemen visited Change Square in the capital of San'aa in January 2011 and took away what little legitimacy was left of 'Ali 'Abdallah Salih's regime (1978–2012), which had ruled Yemen for more than three decades. Tens of thousands of demonstrators came out to protest in face of the difficult economic situation, rising unemployment, and government incompetence. They demanded the immediate resignation of President 'Ali 'Abdallah Salih. Salih signed an agreement for the transfer of power to his deputy, 'Abd Rabbu Mansur al-Hadi in November 2011 and on February 25, 2012 Salih resigned. Salih became the fourth Arab leader who was ousted from power since the beginning of the wave of uprisings in the Arab world.

Syria was one of the last countries to be hit by the effects of the "Arab Spring," yet the impact of the protests would be more dramatic in this country than in any other. The protests in Syria started in March 2011 and soon led to a cruel civil war and a bloody battle between the opposition forces demanding to eradicate the Asad regime and factions loyal to the Syrian president.

Soon it became evident that a considerable difference existed between countries like Tunisia and Egypt, which were witness to mass resistance, and countries like Libya, Yemen, and Syria, which were witness to violent struggle that turned into fierce civil wars. While Tunisia and Egypt are countries with relatively homogeneous populations—predominantly Sunni Muslim—and did not suffer from deep social divisions or rivalries between ethnic groups, this was not the case in Syria, Libya, and Yemen. The wave of protests that swept through these countries spread over the complex ethnic-religious mosaic, raising renewed tensions between tribal and ethnic groups that had been dormant for a long time. These countries quickly became the scene of a bloody civil war.

The Arab Spring also provided the spark that ignited primordial tensions and sectarian rivalries which were based on old tropes and fears which were utilized by regimes and their political rivals. The expression of these fears was made easier through new platforms afforded by new technological advances in both social media and satellite television. Many emphasized, to a fault, the impact of social media in enabling and connecting thousands of people with its innate ability to encourage political action, but they failed to consider its substantial backlash. Some, such as the *New York Times*' Roger Cohen, compared the protests in Tunisia with Fidel Castro's rise to power noting, "Castro spent years preparing revolution in the Cuban interior, the Sierra Maestra; Facebook propelled insurrection from the interior to the Tunisian capital in 28 days."[52] But these same benefits, allowing for quick organization and mobilization, can also allow for the feeding of deep channels of hate, distrust, and polarization. The plethora of sources of information and the ability of regimes, non-state actors, and dissident groups to craft, disseminate, and manipulate information, frequently led to the demonization of the "other," in the Middle East, but also in the wider global context. This utilization of technological platforms to stoke the rise of sectarianism and tribalism, not only in the Middle East but in the political systems of Western states, was a significant development following the events of the Arab Spring. The proliferation of these fears through technological means was a noxious cocktail, equipping political actors and groups with the means to engage in acts of violence and mass murder. This became an integral part of the descent of Middle Eastern nations into failed states, convulsed by civil war and internecine tensions.

NOTES

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Chapter 2

On States and Their Disintegration

An Anatomy of Failed States[1]

The Arab Spring served as the catalyst for the breakdown of the Middle East's states, created primarily during the colonial era. Iraq and Syria, whose boundaries were drawn by the Sykes-Picot Agreement at the end of the First World War (and implemented during the San Remo Conference in April 1920). In Iraq, the government failed to fuse the fragmented society, and in Syria, the fortified strongholds of the Alawites crumbled and shook the Sunnis and the Kurds throughout the country. But it was not the Fertile Crescent alone that experienced disintegration and de-territorialization: Libya and Yemen, countries with a tribal-sectarian divide, also witnessed the overthrow of autocratic rulers during the events of the Arab Spring, and similar processes were put in motion.

The breakdowns in Arab states, whether they were multi-sectarian colonial creations or tribal states, have been salient features in the political ruptures following the Arab Spring.

The breaking of the state's authority and the de-legitimization of the state's very existence were further underlined by the renewed significance of ethnic, religious, tribal, and sectarian groups that had been part of the state, yet had never assimilated or integrated into it. The collapse of government systems and economic structures aroused the appetite of armed tribal militias and radical Islamic organizations, who bit off chunks of territory in abandoned areas and hastened the process of collapse. In doing so, ethnic and religious sectarianism became a major component of the regional landscape and resulted in bloody confrontations. Within the wider regional context, the continued prevalence of both sub-state and transnational identities played an important role in the disintegration of nation-states. With a history of strong authoritarian leaders such as Hafez al-Asad and Saddam Hussein, the ethno-sectarian balance of these fragile states eventually coalesced and formed around a

"hard" authoritarian strongman. These strongmen were able to subsume and crush local and transnational identities, all while crafting a centralized hard state under their authoritarian and oppressive rule. As the German sociologist Max Weber claimed in his *Politics as a Vocation*, a true state is a polity that is able to exercise "the monopoly of the legitimate use of physical force" in its territory.[2] In the Middle East, however, the lack of prevalence of classical nation-states in the European model, and instead the prevalence of patchwork *state-nations*, colonial creations with arbitrary borders, coupled with both strong transnational, and sub-national identities, has led to competing versions and ideas of what a state should be.

IRAQ AND SYRIA—"SYKES-PICOT" REVISITED

The Iraqi state, which was established in 1921 by the British, combining Arabs, Kurds, Sunnis, and Shi'is, serves as an illuminating example of the strengthening of ethno-sectarian identities, directly opposed to a single national identity. Monarchical Iraq had been a British fabrication from the beginning. By relying on a Sunni elite, primarily the *sharifs* led by King Faisal and former Ottoman officers and officials, the British sought to dictate the new Iraqi order, which would suit their imperial interests and would partly fulfill the promise they made to the Hashemite family during the First World War. The Shi'i majority, which constituted about 60 percent of the country's population, remained neglected and marginalized. Included in this majority were tribal groups that had converted to Shi'i Islam because of their proximity to the Shi'i holy cities of Najaf and Karbala. The new Iraq, led by the Sunni minority, received considerable Western support and was seen in the eyes of the Shi'i community as a Sunni-Western scheme to perpetuate the discrimination and exclusion of the Shi'i, which had been their fate since their separation from Sunni Islam.

The British also added the oil-rich district of Mosul to the Iraqi state, which was populated by Kurdish inhabitants and traditionally was oriented to the West, along the Mediterranean trade routes that linked the region with Aleppo, and then onward to Syria's and Lebanon's ports. With the colonial partitioning, the wider Kurdish nation became subdivided between Iraq, Syria, Turkey, and Iran. The Kurds are an ethno-linguistic minority, imbued with a sense of inferiority and discrimination; a minority desiring to have a state in their historic region of origin and to, at least, gain a degree of political autonomy in the new state. The British assumed that the recipe of a constitutional monarchy (a king, a constitution and political parties as was bequeathed to Mandatory Iraq) would help meld all the different identities into one cohesive Iraqi national identity and leave behind the primordial

identities.[3] But the Western-liberal approach, with its belief that a multi-layered political framework would morph into a nation-state sooner or later, did not succeed in Iraq.

The inclusion of the Kurdish minority in Iraq did not nullify the Kurdish identity, but rather situated it as the antithesis to the Arab identity of the newly formed state and served as seed for a rising Kurdish nationalism that would come to the fore as the century progressed. During the 20th century, a beleaguered relationship emerged between the Arab state and the sizeable Kurdish minority, the latter of which fortified itself in the mountainous region of northern Iraq and demanded an autonomous status that would preserve the unique Kurdish identity.

Iraq was a country without natural cohesion from the beginning. For this reason, and to obscure the fact that they were a minority in Iraq, Sunni leaders adopted the all-inclusive pan-Arab ideology during the 20th century.[4] The winds of Arab revolution that blew over the Middle East during the second half of the 20th century brought about the establishment of the Ba‘thist state in Iraq (1968–2003). These developments encouraged the advocates of Arab unity to sing a more radical tune. They viewed Iraq as the vanguard in the drive to unify the Arab nations. For instance, ‘Abd al-Salam ‘Arif, the first president of Iraq under the Ba‘thist regime (February to November 1963), defined Arab nationalism as “human nationalism and nationalism of brotherhood [. . .]. The Arabs are one nation,” he said, “and citizens of one homeland; Arab unity is our collective goal.”[5]

These slogans praising Arab unity were a tool used by Iraqi rulers seeking to create the impression of coherence in a religious-sectarian mosaic. In practice, these slogans were used to reinforce the dominance of the ruling Sunni minority in Iraq. Draconian citizenship laws introduced by the Ba‘th Party were intended to terminate the Shi‘i protest against the regime by denying citizenship to dissidents on the grounds that they privileged ethnic loyalty above Arab loyalty, and therefore threatened the Iraqi state.[6]

The “republic of fear” instituted by Saddam Hussein with the help of “the Tikrit Mafia” and the mechanisms of the Ba‘th Party created an iron-fisted rule over all of Iraq, aided by hundreds of thousands of active party members and supporters and collaborators from the general public. A combination of Iraqi and Arab nationalism, which was based on the glory of historical Babylon, gave legitimacy to Saddam’s rule, but for the persecuted Shi‘i and Kurdish communities it was synonymous with Sunni dominance and their cruel exclusion from the corridors of power. Iraq, as stated above, had from the beginning been a Sunni Arab initiative. Fractures in the Iraqi system of oppression, resulting from the mechanisms of the police state in the early 1990s (after the removal of the Iraqi army from occupied Kuwait during the events of the Gulf War), gave rise to Kurdish and Shi‘i rebellions in the north

and south of the country. Although these rebellions were suppressed, they exposed the inherent weakness of the Iraqi state structure.

Even before the invasion of Iraq and the overthrow of Saddam Hussein in April 2003, US officials, assisted by the exiled secular Shi'i opposition and people like Ahmad Chalabi, leader of the Iraqi National Congress, were planning the future of Iraq. The main effort was directed towards uprooting the strongholds of the old regime, including the dismantling of militias, the army and the presidential guard. Paragraph 7 of Iraq's new constitution, approved by referendum in October 2005, stipulates that "any entity or program that adopts, incites, facilitates, glorifies, promotes, or justifies racism or terrorism or accusations of being an infidel (*takfir*) or ethnic cleansing, especially Saddam's Ba'th in Iraq and its symbols, under any name whatsoever, shall be prohibited." "New Iraq" introduced a different flag in 2009,[7] redesigned the national memorial sites, and promised to compensate for generations of "lost time."[8]

Indeed, the Ba'th Party, which had ruled the state with an iron hand for decades, disappeared from Iraq's political landscape but this did not erase grievances in Iraq. On the contrary, the policy of "de-Ba'thification" became a legal means for the new Shi'i government to exclude Sunnis from political participation and to relentlessly persecute political opponents of the government. The obsessive hunt for loyalists of the "old regime" and the destruction of Saddam's national memorial sites became the main objective of the Shi'i government in Baghdad. In fact, the US government had from the beginning feared the dangers of the "de-Ba'thification" process and in 2004 tried to promote a national dialogue, which would include Sunnis and even former passive supporters of Saddam's regime in the government of the "New Iraq." An interim constitution drafted by L. Paul Bremer III, a senior US official in Iraq, declared Iraq a federal state that gives veto rights to minorities.[9] These steps were intended to appease the Sunni community and bolster the political forces in Iraq. However, these actions were seen by the ruling Shi'i in Iraq as the beginning of a return to Ba'th control, this time sponsored by the Americans.

The terrorist bombings in the holy cities of Najaf, Karbala, and Al-Kazimiyya, and the wave of political assassinations of Shi'i leaders during the period of 2003–2004—including Muhammad Baqir al-Hakim and 'Izz al-Din Salim—increased the fears of the Shi'a and turned Iraq into an arena of bloody struggle. On the eve of elections in January 2005, militant Sunni organizations warned members of the Sunni community not to take part in the elections. In comparison with the relatively high voter turnout rates amongst the Shi'is and the Kurds, the absence of Sunni notables at the polling places on Election Day was evident in January 2005.[10] During 2006, Shi'i Prime Minister Nouri al-Maliki intended to develop a "national dialogue" with the

aim of stopping the Sunni rebellion, but it was considered "too little and too late." At the beginning of his second term, which began in December 2010, al-Maliki received harsh criticism because of his sectarian policies. Al-Maliki performed in accordance with Iraq's political heritage of authoritarianism; his regime relied extensively on "his own kind" and identifies parts of society as avowed enemies because of their different ethnic-religious background. *Ta'ifiyya* (sectarianism) has always been the main foundation of modern Iraq and one of the main sources of national strife. Since Sunnis were discriminated against in the new reality, they began to view the "new Iraq" as a Shi'i project built under the auspices of the West.

This deepened the divide between the Sunni and Shi'i communities in Iraq and came to reinforce Kurdish aspirations for increased autonomy and even outright independence. Already during the 1990s, and with American support, Kurdish autonomy was formed in the northern part of the Iraqi state, and in April 2003, after the fall of Saddam Hussein, this region became a *de facto* state. The phenomenon of a Kurdish minority striving for self-determination in Iraq and the renewal of exchanges between Iraqi Kurds and the Kurdish communities in neighboring Syria, Turkey, and Iran was another harbinger of the disintegration of nation-states in the Fertile Crescent. Amongst the Kurdish communities in various Middle Eastern countries, especially in the Arab countries, a discourse emerged on the validity of the territorial boundaries of nation-states. The term "Kurdistan," which had been a forbidden word in Turkey, Iraq, Syria, and Iran, has now become a common term used by Kurds to describe a region comprised of several parts—North Kurdistan (Bakur), South Kurdistan (Başur), West Kurdistan (Rojava), and East Kurdistan (Rojhelat).[11] On June 30, 2014, Masoud Barzani founded the Kurdistan Regional Government (KRG) and announced that he intended to hold a referendum on the independence of the Kurds. Barzani believed that Iraq's disintegration was an indisputable fact and that conditions are ripe for Kurdish independence. Yet, Kurdish ambitions ended up backfiring. Buoyed by territorial gains, they expanded their territory and area of influence southwards and west towards the frontier with Syria causing great alarm in both Baghdad and Ankara. Yet when the referendum proceeded as planned, with the Kurdish people voting overwhelmingly for independence, the backlash was swift and the retribution considerable. Kurdish *peshmerga* forces were pushed out of the city of Kirkuk and then out of Kirkuk province, allowing the Baghdad government to take control of the region's vital oil reserves. What emerged in the aftermath of the referendum was the political manipulation and machinations of Iranian forces, led by the commander of the Iranian Revolutionary Guards *Quds Force*, General Qassem Soleimani. Soleimani who was able to split the two major Kurdish parties—the Kurdish Democratic Party (KDP), headed by the famed Barzani family and the Patriotic Union of Kurdistan

(PUK), allowing the Tehran-backed Baghdad government to effectively quell the threat of Kurdish independence. Members of the Talabani family, which effectively controlled the PUK, brokered a deal with the Iranians, which was said to have included a substantial payout. Soleimani's deal sealed the fate of the Kurds as many of the PUK forces laid down their weapons and offered weak resistance to the oncoming Iraqi forces allowing them to break through the Kurdish lines. While the Kurds could not outrun the geopolitical maneuvering and betrayal within their own ranks, the substantial rise of Kurdish nationalism and self-confidence has crystallized a new comprehensive Kurdish identity, which even the failed referendum cannot curb. While the road ahead for Kurdish independence has become harder and more perilous, the unified Iraq identity which had been forcibly imposed since the colonial period has been expunged from the public consciousness.[12]

Syria is the case of a "strong" state which was, in the last decades of the 20th century, perceived as a model of stability and strength, but which broke to pieces during the events of the Arab Spring. As the Syrian uprising expanded into a full-blown civil war, the conflict served to enhance and exacerbate ethno-religious tensions leading to the creation of sub-states and autonomous enclaves ruled and controlled by various rebel groups and factions struggling for survival against each other and the Syrian government. Syria, like Iraq, was the result of the attempt to create artificial states in the Middle East. In Mandatory Syria, the granting of priority status to minority groups by the the French to counter the Sunni majority, led to the integration of minority groups, particularly the Alawites into the military, an institutional evolution that would eventually result in members of their confession capturing the state. Severing Lebanon from the Syrian orbit and Syria's fragmentation into sub-national entities (i.e., Damascus, Aleppo, *Jabal al-Duruz*, the Alawite state, and the Alexandretta region) was intended to serve imperial interests and enable easier control by the French Mandatory power. This policy was designed to detach Syria from regional linkages, especially Arab nationalism, which the French perceived as a British device designed to roll back French influence in the Eastern Mediterranean basin. The French mandatory power preferred to preserve their reliance on the traditional leaderships of the various ethnic, cultural, and religious groups in Lebanon. This policy resulted in a divided nation, leaving behind a problematic political tradition to a state-in-making.[13]

Syria was, from the beginning, a state that suffered from a lack of cohesion and natural legitimacy. Thus, it was not surprising that, since it became an independent state in 1946, Syria was the scene of power struggles between ethnic, religious, and sectarian groups, which were exacerbated by class tensions and geopolitics. Frequent changes in government leadership in the first

decades after independence have revealed the "Syrian paradox," an inherent weakness resulting not only from constant power struggles, but also from its lack of clear orientation. This paradox was famously illustrated by the scholar of Syria and journalist Patrick Seale, in his book *The Struggle for Syria: A Study in Arab Politics*, which outlined and analyzed the multifaceted, and at times internecine struggle between Syrian factions and outside powers for influence within the country.[14] The "struggle" over Syria's identity, and its geopolitical orientation, was compounded by the lack of a shared cohesive identity, which made it difficult to exist as a unified political entity. Therefore, it is not surprising that Syria has, from its foundations, been grappling with questions of identity between ideas of pan-Arabism, Arab nationalism, and the idea of "Greater Syria (*Surya al-Kubra*)," supporting the absorption and annexation of Lebanon as articulated by the Syrian Socialist Nationalist Party (SSNP). The establishment of a union with Egypt in February 1958 (the United Arab Republic) was an expression of Syria's failed attempt to utilize the growing power of Egypt's charismatic President Gamal Abdel Nasser as a tool to escape from its own relentless internal power struggles. The union with Egypt was short-lived, and by 1961, the troubles returned until the rule of Hafez al-Asad, who took power after an internal power struggle within the ruling Ba'th Party in 1970.

Asad and much of his ruling clique were not members of Syria's Sunni majority, but instead were members of the syncretic Alawite sect based in Syria's Mediterranean coastal region near the city of Latakia. During the colonial period, for the Alawite minority and for Syrians of the rural periphery, military service had been the main channel to achieve social and economic mobility. With their outsider status, viewed by the Damascus and Allepo-based elites as heretical for their religious beliefs and long relegated to the societal margins, the Ba'th party in particular was embraced by many of these upwardly mobile Alawite army officers. The Ba'th Party served the logical home for them because of its pan-Arab and largely secular nature making the spread of Arab nationalism and Arab political unity of its central messages. These messages, described by the political scientist Malik Mufti, were designed to obscure the demographic inferiority and the heterodoxy of the Alawites under the banner of Arab unity.[15] The ascent of the Ba'th Party to power in Syria in 1963 was an appropriate framework for this, and for the stabilization of Syria. Yet, from the outset the Ba'th was plagued by infighting between the civilian leadership of the party led by its charismatic founder Michel Aflaq, and the military wing of the party known as the Revolutionary Command Council (RCC) led by Salah al-Jadid and Hafez al-Asad. The RCC eventually ousted the civilian Ba'th, exiling Aflaq and his followers, with Jadid taking the reins of power. But this did not last long, as Asad, Jadid's Defense Minister, was able to consolidate power and rise to power

under his "Corrective Revolution," in 1970. Under the leadership of Hafez al-Asad (1970–2000), Syria sought to balance its own national interests with those of the larger Arab bloc and its view of itself as the standard bearer of the wider Arab nationalist movement. But the internal clash of ideology and identity, combined with Ba'th efforts to obscure religious sectarian divides in the name of secularism would never come to pass, and were consistently bubbling under the surface.

Sami al-Jundi, who was Syria's ambassador to France in the early 1960s, and a man who also served as a minister of parliament in several governments (though later denounced as a traitor, imprisoned and exiled from Syria), aptly expressed his disappointment with the Ba'th Party in his writings of the late 60s. Al-Jundi stated that while the ideology of the Ba'th had been a breath of fresh air at its foundation, it had morphed into a brutal military regime. Army officers misused the ideals of the Ba'th, and while striving to strengthen the authoritarian power, they expelled the Ba'thist civilian leadership. Al-Jundi blamed tribal and sectarian thought-patterns for the failure of the Ba'thist ideal. He concluded by saying that, apparently, there was no ideology that had the power to make the Alawites and Sunnis in Syria abandon their primordial loyalties.[16]

Indeed, the Sunni majority in Syria's major cities continued to view members of the Alawite elite as a culturally and religiously inferior minority and found it difficult to accept their political supremacy. Thus, the regime did not enjoy religious legitimacy and could not bridge the cultural-religious gap, and this disparity eventually led to a revolt by the "Muslim Brotherhood" factions in the northwestern city of Hama. Like in Iraq, the ruling force in Syria was also a minority community in the country, trying to consolidate power by brutal repression, turning the country into a police state. The political turmoil and subsequent uprising in Hama in 1982 was harshly repressed by the regime, and the country remained "quiet" for decades. The "Hama rules," as journalist Thomas Friedman coined it, were "not rules at all" but rather a precedent set down by the authoritarian regimes of the Middle East in the 20th century, brutally crushing any dissent.[17]

But what began in March 2011 as a socio-economic protest by the marginalized Sunni rural sector turned into a bloody civil war. Bashar al-Asad lost his grip on the country and focused instead on preserving his power in the major cities. The splintered opposition, however, failed to produce unified and effective leadership to lead the struggle. The struggle between the regime and its opponents, that began to resemble a war between gangs, saw occasional horrific massacres, comparable to ethnic cleansing. At the same time, the country has become a magnet for Salafi[18] jihadi organizations which swallowed up property in abandoned areas and conducted a struggle to uproot the "infidel regime of Bashar al-Asad."[19]

In June 2011, the various opposition forces gathered and drafted the "Antalya Declaration." This statement reflected the intention to establish a multi-ethnic Syria, not necessarily Arab, and to "search for solutions that would save Syria from oppression and place it on the road to freedom and dignity."[20] In the following months it became clear once again that its intentions clashed with reality. The way in which communities stayed within their own four walls—the Druze in Horan—the Kurds and Arabs in al-Jazira, and the Alawites along the coast in Latakia and Tartus—showed that primordial identities were as strong as ever. Nationalism, according to Ernest Gellner, gains greater legitimacy in societies in which there is a correlation between the framework of the state and cultural identity.[21] The Syrian case presented the opposite picture. The events of the Arab Spring in Syria actually deepened religious and ethnic conflicts and led to the collapse of the Syrian state.

The collapse of the Syrian state illustrates what happens when states fail. This historic tragedy is of immense proportions—there have been high casualties (more than 500,000), a large number of internally displaced persons (about 6.6 million), and a massive exodus from the country (about 5 million).[22] These phenomena have become a source of instability for neighboring countries. The border between Syria and Lebanon has become a "no man's land" where the breakdown of order works in the service of terrorists and smugglers rather than refugees of war trying to flee to Lebanon (and other neighboring countries such as Jordan and Turkey).[23] Besides the damage that the war inflicted on Syrian refugees, it has also created enormous pressure on the neighboring countries hosting refugees. The heavy financial burden found expression in increased prices, growing unemployment and rising tension between the refugee population and the residents of these countries; in Lebanon and Jordan for example. These tensions became a source for more instability in the Middle East after the Arab Spring.

LIBYA AND YEMEN—STATE FAILURE AND THE TRIBAL STATE

Other parts of the region have also experienced the breakdown of states and the phenomenon of de-territorialization. Libya and Yemen, both states based on tribal-sectarian foundations, witnessed the overthrow of autocratic rulers during the events of the Arab Spring. Destructive processes have unfolded, turning these states into an arena for bloody existential battles between different forces and ideologies. After the fall of Qaddafi, Libya experienced a rapid collapse of its power structure, which in many ways illustrated one of the familiar dynamics of the Arab Spring: the opposition camp, before the fall of the dictator, appeared to be cohesive, but after his fall it became evident that there were deep

disagreements between the various components. Ethnic and geo-economic divisions flooded the Libyan landscape and tore apart the fabric of the state, which during the reign of Qaddafi had been considered stable and strong.

Libya, a country which covers 1.75 million square kilometers, is a unique case of a country with strong tribal structure and tradition, which had historically not been united under one political regime. Provinces that had made up the later independent Libya (mainly two major regions—Tripolitania and Cyrenaica) had been under Italian control on the eve of the First World War. The Italian interest had been mainly in the strategic positions along the coast, but the periphery refused to accept the yoke of a foreign occupier. The greatest resistance to the Italians was in the Cyrenaica region, where the tribes that were united under the "Sanusi Sufi Order" fought back.[24] Spontaneous attempts to establish a united front against the Italians in Tripolitania were unsuccessful, as the Italians exploited tribal rivalries and conflicts in Tripolitania and reached understandings with Idris, the chief of the "order," who saw the relationship with the Italians as a means to preserve his religious leadership.[25]

The events of the Second World War had significant implications for the future of Libya. Some of the most important battles in North Africa between the Allied and the Axis powers took place in Libya. The British, who took over Cyrenaica and Tripolitania in 1943, stressed the need to maintain law and order in Libya and postponed any discussion on the future of the area until after the war. Despite the lack of a nationalist movement, Libya stood on the brink of independence at the end of the Second World War, mainly thanks to Italy's defeat. In 1951, Libya gained independence and became the first North African country to receive this status. Sayyid Idris al-Sanusi, who had agreed to support the British during the war and provided them with tribal support, became the first king of Libya. At the time of Libya's independence, it was a federal kingdom, a unification of three ancient regions—Cyrenaica in the east, Tripolitania in the west, and Fezzan in the southwest.[26]

Qaddafi's *coup d'état* in September 1969 put an end to the Libyan monarchy and established the "Socialist Arab Republic of Libya." "Qaddafi's Libya" became another Arab state armed with the message of Arab unity and led by an autocratic dictator. Like other dictators, Qaddafi ruled over a police state. With the help of revenues from oil (discovered in 1959) and with reliance on loyal tribes, he unified the machinery of the state and expanded the bureaucracy. Qaddafi ruled Libya with an iron fist for more than four decades and was careful to present an image of social cohesion revolving around a strong and efficient regime. This façade was not enough to mend the regional, ethnic, and tribal divisions in the country.

Qaddafi's fall revealed this façade and exposed the bloody internal struggles that contributed to the rapid collapse of the power systems in Libya. It is not surprising that, from the beginning, the protests against Qaddafi had

a significant regional dimension. Benghazi, the capital of the Cyrenaican coastal strip, the cradle of anti-colonial struggle against the Italians and the capital of the former Kingdom of Libya (until Qaddafi's rise in 1969), led the revolt against the dominance of Tripolitania. This showed the latent frustration after the decades of discrimination against the Cyrenaica region, in spite of its historic and economic "rights."[27] Attachments to ancient geographical divisions became more acute by the end of 2013 when groups in Cyrenaica expressed their desire to establish a federal or autonomous entity in Libya. During the ceremony in which this new framework was declared where members of the local government swore an oath, the crowd proudly waved Cyrenaican flags. Separatists in the Fezzan desert region also vowed to form an autonomous region in the south of the country. Plans to establish a federation (e.g., an autonomous body that would include the regions of Cyrenaica and Fezzan) were raised occasionally, as were similarly done in other failed states (namely Iraq, Syria, and Yemen), but these attempts indicated only that the will to be separate and unique was stronger than the will to unify.

Besides the historical divisions and rivalries, Libya also has vast abandoned areas. The control over these territories was quickly seized by armed tribal militias, who sought to establish their own political status in the midst of the crumbling Libyan state. The ethnic divide between Arabs and African minorities caused friction that turned into a brutal civil war in the western and southern parts of Libya.[28] Libya was also plagued by the growth of Salafi-jihadi movements during the continued upheavals. The attack on the US Consulate in Benghazi by the terrorist organization *Ansar al-Shari'a* in September 2012 made clear that Libya "after Qaddafi" would face a similar bloody road ahead as her "sisters" Iraq and Syria were facing before her.[29] These and other militias violently took control of the strategic and economic resources of the country. Thus, for example, an armed militia from the area of Tarhuna (50 km south of Tripoli) took over the international airport and forced the government to order the release of its leader held in prison. The oil ports in Cyrenaica, Ra's Lanuf, and Sidra, were major targets for attacks by armed militias. Their patrons had been in direct contact with international companies and had set up an independent mechanism for the sale and export of oil resources which were under their control.[30] These phenomena eroded state institutions, ruined Libya's economic resources, and completely disrupted the functioning of the transitional government. 'Izz al-Din al-'Aqil, a Libyan researcher, described the chaotic situation in Libya after Qaddafi as follows:

> All around the country, cities, towns, tribes and ethnic minorities are now choosing sides, raising the possibility of greater conflict. Across much of the west, militias running most cities have thrown their backing to the Islamists in

> Tripoli, but the cities' populations are divided. In the south this week, the Tabu ethnic group declared its backing for the Tobruk government after rival Arab tribes in the area gave their support to the Tripoli government.[31]

"Libya after Qaddafi" became known as a "stateless area," that is, a region that suffers from internal fragmentation, expanding ungoverned areas, and an increasingly chaotic reality. The weapons arsenal stored up during the reign of Qaddafi "changed hands" and made its way through an efficient smuggling system into the vast scene of bloody African and Middle Eastern conflicts.[32] The deepening involvement of external actors (such as Egypt, the UAE, and Qatar) turned Libya into a rag doll, tugged at from all sides. Foreign countries and particularistic patron–client networks took advantage of the chaos in Libya in pursuit of their own interests at the cost of the destruction of the state. As of May 2014, the country faced another civil war, involving a bloody conflict between Islamic militias and the forces of Libya's elected parliament. This war culminated in a division in the center of power: separate governments in Tripoli and in Tobruk. One observer commented on the strange phenomenon of Libya's "government" saying, "this toxic mix of internal conflict and foreign meddling is pushing the Tripoli and Tobruk governments closer and closer to armed conflict."[33] UN emissaries and human rights activists were the last remnant of those who had been caught up in the waves of euphoria that swept into Libya after the fall of Qaddafi, and they tried in vain to respond to the collapsing stability and security of the state.

After seeing the course of events in Libya after Qaddafi's fall, the initial euphoria of the Arab Spring in the West was replaced by a realization of new sober realities. Western countries, especially France and Britain, which hoped that the "new Libya" would benefit its citizens and preserve Western interests in the area, were shocked by the deteriorating situation in the country, which eventually led to the rise of Libyan affiliates of Salafi-jihadi movements. Furthermore, they worried about the flow of oil coming from Libya and how they would be able to control the surge of immigration from Africa to the European continent. The bitter lesson that the West learned in Libya after the fall of Qaddafi was probably in the back of the minds of American decision makers, when they decided not to intervene in Syria, even though "red lines were crossed" and chemical weapons were used against defenseless civilians. The declaration by US Secretary of Defense Chuck Hagel, in November 2013, that "more wars" will not fix the Syrian conflict, once again demonstrated not only the helplessness, but also the inherent contradictions in US and Western conduct in the Middle East.[34]

Libya, in the aftermath of the NATO-backed intervention, has been plagued by problems rooted in its highly tribalized and regionalized society. The breakdown of the state between rival warlords and multiple governments claiming true national legitimacy only perpetuated the primordial

problems that made Libya ungovernable, absent a strong autocratic despot like Qaddafi. Libya has become a failed state without any rules-based order or national government. Nominally, the Tripoli-based Government of National Accord (GNA) serves as the national government, but it has proved unsuccessful at expanding its territorial hold outside the coastal capital. The GNA has been opposed by the Tobruk-based government led by the Libyan House of Representatives (HoR) which has the allegiance of General Khalifa Heftar, the most prominent of Libya's numerous warlords, and the backing of the so-called Libyan National Army (LNA). What remains of Libya has been in effect a cocktail of rebel and jihadi groups, each fighting for local and regional supremacy, including groups such as *Ansar al-Shari'a* as well as groups allied with the Islamic State. "Qaddafi's order," under which Libya had been for more than four decades, disappeared as though it had never existed.

In Yemen, much like in Libya, the whirlwind of the Arab Spring has led to renewed eruptions of religious, tribal, and sectarian conflicts. Yemen, which had once been a bridgehead between civilizations and had been known as "Happy Arabia" (Arabia Felix), turned into a country characterized by lawlessness and plagued by sectarian and tribal violence.

Until 1962, and for hundreds of years before that year, the north of the country had been a traditional Imamate, headed by an Imam. It was an autocratic system, which was both religious and secular at the same time, and which relied on limited sources of income and whose power relations were based on "minimal" intervention by the state into tribal structures. The September Revolution in 1962 announced the end of the Imamate and gave rise to the independent Arab Republic of North Yemen, which pledged to root out tribal structures and was supported by Egypt's Nasser. Already in her first years, the Arab Republic of North Yemen encountered a protracted civil war between "republicans" and "pro-imamates," the latter of which was financially and morally supported by the Saudis.

The south of the country, which had for many years been under British control, experienced different developments. The War of Independence against the British ended with the establishment of the State of South Yemen (1967)—a Marxist-Leninist state, which was the only one of its kind in the Arab world. For a quarter of a century, South Yemen experienced an ongoing ideological and physical struggle with her northern "sister."[35] The unification of North Yemen and South Yemen in May 1990 was a necessary step, considering that this state, as claimed by Paul Dresch, had the appearance of a "nation" with a common language, broad geographic reach, and a written tradition. But it soon became clear that there was no unified state but rather a mere vessel that kept the two branches of power, north and south, as part of an artificial union. To use Michael Hudson's words, this created a "homeland

by force of law" (*watan shar'i*) and not a "real homeland" (*watan hakiki*).[36] At the beginning of the 21st century, Yemen and President 'Ali 'Abdallah Salih (1978–2012) faced some acute challenges. A deepening economic crisis brought Yemen, the poorest Arab country, to the point in which half of the population lived in conditions of abject poverty and one-third of the potential workforce was unemployed.[37]

In the southeast of the country, in the province of Hadramawt, the homeland of the bin Laden family, the group known as al-Qaida in the Arabian Peninsula was created (*al-Qaida fi Jazirat al-'Arab*),[38] and it formed an ideological and operational center for radical Islamic activists. Al-Qaida increased its presence in Yemen and managed to oust the central government in Shabwa, Abyan, and Al-Mukalla and took advantage of the failing Yemeni state by capturing more districts that would fall under its control. Foreign embassies, tourist groups, government agencies, and state properties were constant targets for al-Qaida. Many terrorist attacks were carried out by al-Qaida, both against Yemeni and foreign targets. This demonstrated the fact that Yemen had become a no-man's land, a territory stricken by poverty which the central government found difficult to penetrate due to the fact that it was a fertile ground for radical movements which used terrorism to combat the regime.

The stream of refugees that came to Yemen from Africa and the trends of radicalization were embodied in the Islamist Islah Party, (*al-tajammu' al-yamani lil-Islah*), the largest and most important opposition party. Some of *Al-Islah's* members had links to al-Qaida, coupled with the inflow of refugees were both developments that served al-Qaida's interests in Yemen. After the Madrid bombings in March 2004, Usama bin Laden announced that Yemen had now become al-Qaida's third most important base of operations after Afghanistan and Iraq. This statement signified the beginning of the process of al-Qaida's radicalization, since until that moment it had avoided clashes with the Yemeni police and military forces. A significant turning point occurred in 2006, when several al-Qaida members escaped from the federal prison in which they had been detained. For them, this was a signal that it was time to overthrow President Salih and time to direct action against the government of their "host country." This change was reflected not only by terrorist attacks against foreign embassies (the American and Italian embassies, for instance, were attacked in 2008) and tourist groups (a number of South Korean tourists were killed, for example, in a terrorist attack in 2009), but it was also reflected in attacks against the offices of the Yemeni government and other strategic targets such as oil installations. The group's activism also became evident by its publication of a magazine called *Sada Al-Malahim* ("the echo of battles"), first published in late 2008. This magazine called for mobilization and preached the ideas of al-Qaida. It featured

Shaykh ‘Abd al-Majid al-Zindani, a “graduate of Afghanistan,” the President of al-Iman University and the founder of the Islah Party, who called for the resignation of ‘Ali ‘Abdallah Salih and advocated the establishment of a caliphate in Yemen.[39]

Yemen faced a more severe challenge in the beginning of 2004 in the form of a Zaydi-Shi‘i uprising, led by followers of Hussein Badr al-Din al-Houthi, in the northern city of Sa‘dah, near the border with Saudi Arabia. The Houthi resistance movement was born against the backdrop of socio-political discrimination. They demanded immediate economic improvements for the Zaydi community in the north of the country. Soon, the movement garnered sympathy among thousands of young people, who had long been part of a movement named *al-Shabab al-Mu’min* (“the young believers”). Support for the movement began in Sa‘dah, and then expanded to major urban centers, such as the capital San‘aa. The movement also organized youth clubs, which hosted cultural and sporting activities alongside religious studies. In the years 1994–1995, this movement consisted of about 10,000 to 15,000 members. These clubs were established in response to the growing influence of Wahhabi-Salafist ideology in North Yemen and were designed to foster greater Zaydi awareness among young people in Yemen.[40] Yet, in the closing decades of the 20th century, the Zaydi community remained without leadership or direction given the growing penetration of strict Sunni ideology advocated by Saudi Arabia.

Al-Shabab al-Mu’min was therefore a socio-cultural movement designed as a response to the growing Salafi and Wahhabi influence in the area of Sa‘da and its surroundings. The organization, naturally, also sought to improve the socio-economic situation of the Zaydi community, but when it was founded by Hussein Badr al-Din al-Houthi, it was seen as an apolitical movement, whose activities would not pose a threat to the Yemeni government. Moreover, President Salih, who, after the atrocities of September 11, viewed al-Qaida and other Salafi-jihadi organizations as a threat to Yemen, hoped to harness the political and socio-religious power of the Houthis and their supporters in his quest for survival. At first it seemed to President Salih, who was a Zaydi himself and a member of the Sanhan tribe, that he could reach an understanding with al-Houthi and his community in order to assist them in the struggle against Salafism. But it soon became clear that the Houthi rebel camp had broader ambitions and desired to restore the government of a Zaydi Imam that had existed for more than a thousand years and had ceased to exist after the coup in 1962. The movement’s leader, Hussein Badr al-Din al-Houthi, also announced after the US invasion of Iraq in April 2003 that Salih should be viewed as someone who collaborates with the external enemy, in this case the Americans. Thereafter, the relations between the Yemeni government and the Houthi movement were at an impasse.[41]Between 2004 and 2009 no

less than six rounds of armed clashes broke out between forces loyal to the al-Houthi family and Salih's army. Hussein Badr al-Din al-Houthi was killed in 2004 and was succeeded, as the leader of the movement, by his brother 'Abd al-Malik.[42]

The events of the Arab Spring protests in Yemen and the waves that rolled over the "Change Square" in San'aa in March 2011 eroded what little legitimacy was left to 'Ali 'Abdallah Salih, who had ruled Yemen for more than three decades. Tens of thousands of demonstrators protested against the difficult economic situation, the rising unemployment, and the incompetence of the government and demanded the immediate resignation of President Salih. Salih's announcement that he would not run again for the presidency in the next elections did not satisfy the protesters, and demonstrations continued and were violently repressed by security forces. In June 2011, President Salih was seriously injured by artillery fired at the presidential palace. He was rushed to Saudi Arabia for treatment but returned to Yemen after a few months in order to sign an agreement to transfer his power to the vice president, 'Abd Rabbu Mansur Hadi, in November 2011. The agreement, drafted by the Gulf states, stated that within three months there will be presidential elections in Yemen, and specified that Salih would not run. The agreement also gave Salih and his associates immunity from prosecution. On February 25, 2012, 'Ali 'Abdallah Salih resigned from office and became the fourth deposed Arab leader since the beginning of the wave of uprisings in the Arab world.

The new president, al-Hadi, tried to appease the warring sides, but to no avail. Yemen was caught up in a bloody power struggle, which made stabilization of the Yemeni system impossible. In the south of the country, large groups of al-Qaida activists supported by local Sunni tribesmen acted alongside government forces, as well as other groups that had pledged allegiance to the Islamic State. Armed and independent tribal militias demanded redistribution of the state's resources, and others demanded that the country would be re-divided according to the borders of 1990, the year that saw the consolidation of North Yemen and South Yemen. The ousted president, 'Ali 'Abdallah Salih, tried to resume power through his native tribe, the Sanhan, and other tribes. Although he had resigned from his duties after spending several months in Saudi Arabia and the United States, Salih returned to Yemen. Moreover, with the help of his associates and his family, he resumed his political activities as head of the General People's Congress Party and renewed his influence over many military units. This time he cooperated with the Houthi rebels, who had been his bitter rivals in the previous decade, and turned his back on his allies, led by the old Islah Party and Saudi patrons. After having fought with the Houthis, Salih had actually turned them into his allies. There is no doubt that Salih used the tribal structures of Yemen in

order to bring about this change. After all, he was a member of the Sanhan tribe, one of the major tribes in the Hashid Tribal Confederation of Zaydi Shi'i origin.

Because of the alliance between Salih and the Houthis, the Houthi rebellion gained momentum and took on the goal of territorial expansion. They received logistical and moral support from Iran and elite Iranian army troops in defending their cause. These units were put at the behest of Salih's family and gained access to heavy weapons, including tanks, combat aircraft, missiles, and rockets. The seemingly strange alliance between Salih and the Houthis demonstrated the complexity of the Yemeni reality—a reality in which new alliances were made and broken based on the narrow interests of a tribe, ethnic group or community, instead of national interests.

Yemen, much like Syria, became a battleground for the larger regional proxy war which has pitted Iran and its allies against Saudi Arabia and its coterie of Sunni allies. The Saudi-backed air campaign in Yemen, overseen by the kingdom's young Defense Minister and Crown Prince Muhammad bin Salman (MbS) in conjunction with the forces of the Gulf Cooperation Council (GCC) failed to stem the tide of the Iranian-backed Houthi advance. Yemen's regional and tribal balance has proven to be a consistent problem for foreign actors seeking to impose their influence in the country. Yemen's lawless southern coast and southeast remained under the control of tribes and terrorist groups including *Al-Qaida*, *Ansar al-Shari'a*, and the Islamic State. The Saudis and their Emirati allies sought to break the alliance between Salih and the Houthis, which was always an alliance of convenience and by the end of 2017, Salih's alliance with the Houthis was all but dead. News then quickly broke that the Saudis and Emiratis sought to bring him to their side, with Yemen's former strongman expressing an openness for dialogue with his former enemies. But following his apparent volte-face, Houthi troops surrounded Salih's stronghold in San'aa, killing the former president and stifling the GCC coalition plan.

Yemeni society, in which a population of 25 million people are tribally and ethnically oriented and suffer from extreme poverty, lost the image of a state long ago. Yemen thus became the scene of bloody fighting between various forces for ideological and political survival. Yemen's position in the convoluted geopolitics of the region, as well as its own divided society, made every possible scenario for peace an unrealistic one, especially since each power center was being supported by a regional patron. This reality was bound to lead to instability and Yemen paid a bloody price for it. To its disadvantage, Yemen has become a microcosm of the larger fractures in the Middle East, namely the rift between Sunnis (al-Qaida) and the Shi'i (the Zaydi rebels) and between Arabs (Saudi Arabia) and Persians (Iran). The dream of the consolidation and stabilization of Yemen now seemed impossible.

REASSESSING THE MIDDLE EAST: HOW WERE WE SO WRONG?

For much of the 20th century, the study of the Arab world was dominated by so-called primarily British scholars or the children of American Protestant missionaries who had grown up in the region, and who were well versed in its languages, cultures, and history. Scholars such as Hamilton Gibb of Oxford and subsequently Harvard, Phillip Hitti of Princeton, Majid Khadduri of Johns Hopkins, and Malcolm Kerr of the University of California at Los Angeles (UCLA) were amongst the pioneers of Middle Eastern studies in the West. Middle Eastern politics, particularly the study of Arab politics during the cold war focused on the study of Arab political elites, and their decision-making apparatuses in conjunction with their respective ruling cliques.[43] This methodological approach served analysts of the Middle East well, as Arab regimes were consolidated around autocratic or tyrannical rulers: Saddam Hussein in Iraq, Mu'ammar al-Qaddafi in Libya, the Asad family in Syria, and the royal families of the Gulf states, and the monarchies of Jordan and Morocco.

The divide between Arab monarchies and Arab republics provides an illustration of the continued importance of primordial identities which Arab nationalists sought to whitewash and minimize, but which never dissipated within the polities of the Arab world. The foundations of Arab nationalism, the so-called *Al-Nahda*, or renaissance, which flourished at the turn of the 20th century, centered in Beirut and Damascus provided the intellectual basis for the coming wave of secular nationalist politics. Yet this "Arab Awakening,"[44] coined by the Palestinian intellectual George Antonius, was in fact a seamless transition of continued control of Sunni urban Arab notables from Ottomanism to Arab nationalism. The Lebanese-American scholar Fouad Ajami went further, asserting that Arab nationalism was,

> a fragile edifice that look past anything it did not wish to see. It was contemptuous of the hinterland and virtually silent about popular culture. It never really had a theory of political action, having inherited the remains of the old Ottoman political tradition. An easy leap was made from Ottomanism to Arabism; the new idea relied throughout on the same social base as the old, the universal of urban elites, merchants, and army officers.[45]

The creation in the post–Second World War era of ideological regimes, primarily Arab nationalism and socialism gave way to high expectations of Arab unity and political dominance under the charismatic leadership of Egypt's President Gamal Abdel Nasser. Arab nationalism, which was the great political fashion of the time, sought to recreate a "new Arab human

being" that was not the creation of foreign and colonial meddling, but instead strong, powerful, and able to exert itself in both regional and global affairs. Nasser's particular brand of charisma was particularly attractive to Arabs in states, unlike Egypt, that were not true nation-states and were the creations of European colonial designs, lacking in both institutional and cultural unity. Yet following the catastrophe (*naksa*) of the 1967 War and the precipitous decline in the influence of Arab nationalism, many within the Arab world turned towards Islam and Islamism. Arab nationalism's willful blindness to the multitude of identities that were prevalent throughout the Arab world, most prominently that of religion, sect, and tribe, coupled with its lack of a concrete political program and its reliance of populist leadership served to be its undoing. The era of Arab nationalism and its widespread attraction can be contrasted with Arab monarchies, particularly in the Persian Gulf which were built on the back of tribal solidarity and an adherence to primordial norms. Tribal monarchies such as Saudi Arabia and the United Arab Emirates have paid careful attention to the salience of local and tribal identities and integrated them, both during their period of state formation, and in the governing coalition. This process was described by the scholar Joseph Kostiner as a process of encapsulation where the state, (in this case Saudi Arabia) integrated numerous tribal practices into both government decision making and bureaucratic procedures. The retention of mechanisms of tribal consultation, including the use of elders in consultative bodies, allowed for the continuation of local and tribal base of the leadership, while also allowing for the building of institutions, while ensuring their passivity and inclusion in the affairs of state.[46] In contrast to the tribal states of the Persian Gulf, Arab nationalism sought to subsume local and primordial identities, foolishly believing that the grand and delusions of Arab nationalism would be able to supersede the identities that the Arabs had held for generations.[47]

The study of tribal and local politics within the Middle East frequently gave way, with few exceptions, to an increasingly simplistic, top-down driven approach. This was especially evident in the social sciences, where intellectuals looked to social science theories that were rooted in Western political concepts that sought to reduce the impact and salience of socio-cultural dynamics in the analysis of Middle Eastern politics.[48] The process of de-colonization, which began in earnest after the end of the Second World War, also played an important role in how scholars viewed the Middle East. The anti-colonial struggles of Arab peoples from the Algerian War of Independence to the rise of anti-colonial Arab nationalism and Nasserism, coupled with socialist modernization programs of development, were seen as a progressive development by many academics, but were generally highly illiberal, authoritarian, and virulently anti-democratic.

This was true in significant national-liberation movements, such as the FLN in Algeria which received prominent support from members of the French left, most famously Jean-Paul Sartre, and Franz Fanon, and the PLO, seen by their adoring Western supporters as progressive and democratic movements and through the lens of anti-imperialism. While some scholars explained the continued prevalence of authoritarianism in the Arab world as being rooted to Islamic tradition and Arab culture with its lack of compatibility with Western democratic traditions and liberalism, others emphasized the built-in coercive mechanisms and systematic repression of civil liberties by the police.[49] In rentier economies, specifically in the Gulf states, the explanation prevailed that economic incentives do not necessarily include civil liberties, as the oil countries relied on the Western security umbrella.[50]

Yet, perhaps the most prevalent means of analysis was the continued focus on the *nation-state*, and the state itself as the primary means of analysis, and the lack of emphasis of both transnational and sub-national identities. In the last decades of the 20th century, academic discourse focused on the victory of the territorial state in the Middle East and upheld the sustainability and resilience of the Arab country. Volker Perthes, for example, argued in his article about Syria that "the achievement of a remarkably high measure of stateness, as well as the consolidation of the regime, maintenance of its stability, and the capacity to generate substantial external rents are largely the result of the persuasive militarization of state and society, an enormous buildup of the security forces, and an almost constant preparation for war."[51] This assertion, one of many, was based on the assumption that fear of the regime's heavy hand and the imposing presence of the ruler contributed to the state's ability to crush any attempt to rebel or protest. That *Haybat al-Sulta* (meaning "fear of the regime") helped bolster the strength of the authoritarian regime is undisputed. Another argument is that these were not states built up on European-style notions of ethnic nationalism, but rather they were built up on the notion of "solidarity," a product of the social, economic, and political processes which Middle Eastern societies had undergone during the course of the 20th century. The social, political, and economic fabric of the state was composed of interest-based alliances between elite groups made and family and clan networks. Thus, the unique formula of solidarity was created and it helped forge cohesion in the country.[52] Indeed, studies have pointed to the effects of economic hardship and the "backwardness" of various Arab societies, but this would not—according to the prevailing argument—create a new reality.

Researchers who came to these conclusions were also, in part, misled by the façade of control that was fashioned by the pretenses of national unity and presupposed widespread popular support for the regime. The autocratic rulers stifled dissenting voices, which contributed to the impression that they

were able to strictly impose a national culture and even control the desires and dreams of sub-national groups. The Arab state was therefore viewed as a "strong state" owing to its army and security service, and the Arab world was reduced to a gallery of brutal dictators. In fact, Arab states were viewed as a "one man show."

In his book, *Over-Stating the Arab State: Politics and Societies in the Middle East*, Nazih Ayubi examines the problematic nature of this concept by taking several states as case studies. He suggests there is a distinction between a "hard" state and a "fierce" state, which is in fact a police state in which the society is choked by the state's security forces. He also proposes a distinction between a strong state and a repressive state, for which the internal tension and strain is so deep that the state is only able to cope with it through repression and force.[53]

Likewise, when discussing evolution of inter-state relations, the study of international relations in the Middle East was reduced to understanding the perceptions and actions of the dictators: Saddam Hussein's Iraq, Mu'ammar al-Qaddafi's Libya, the Asad family's Syria, and 'Ali 'Abdallah Salih's Yemen. The equation of power in the Arab world relied on a veteran leader, a strong loyal army, and a party mechanism that dictated the country's values. This picture was easy for the observer to comprehend. It reduced the range of action to the man at the top of the pyramid and allowed the observer to ignore the bricks in the body of the pyramid—the bricks which have now crumbled. The focus on the top of the pyramid lent itself to an overly simplistic analysis. Even if it is difficult for an observer to determine the outcome of the changing Middle East, there is one conclusion which is not in dispute: in most Arab countries, the power equation has changed and, in some cases, certain weights have been taken out altogether. Rulers had become obsessed with power management, forgetting the people in the societies they ruled over. Now new elites have emerged and the study of power relations has become more complicated, less understood, leaving much room for investigation.

The opening decades of the 21st century and the years since the events of the Arab Spring showed the glaring weakness of the "police state." It emphasizes that a new framework of analysis is necessary for looking at the Middle East, one that recognizes the different primordial identities—ethnic, tribal, religious, and ecological. The known map of the Middle East is still used, but it is in many cases sectarian rather than national boundaries are more useful to better understand the current realities in the region.

But perhaps the most jarring and lasting changes in the study of the Middle East occurred with the publishing of the 1979 treatise *Orientalism* by the Palestinian-American literary scholar and critic, Edward Said. Said's work and his legion of followers provoked sweeping changes in the analysis of the contemporary politics of the Middle East. Arguing that Western scholarship

of the Middle East was inherently essentialist and driven by a racist, neo-colonialist interpretation of Arabs and Islam, Said's ideas gained quick traction within the academy in the United States and Britain. Cast aside were any of ideas of introspective or critical interpretation of the Arab world's politics, religion, political culture, and society, marginalizing and indicting scholars such as Princeton University's Bernard Lewis, Elie Kedourie of the London School Economics, and Fouad Ajami of Johns Hopkins University's School of Advanced International Studies (SAIS). Kedourie, and Lewis especially, symbolized in the minds of Said and his followers an archaic and anachronistic school of analysis, while Ajami a Lebanese-born Shi'i, raised in Beirut and educated at the University of Washington, was seen by many Arabs as a traitor to their cause for his incisive and analytical criticism of Arab politics coupled with his lucid prose.[54] As Westerners, or people who sympathized with the West, Said contented that their analysis was tainted by their inherent biases against the Arabs they analyzed, and was driven by a view of seeing the "other" as inherently inferior.[55] This gave way to pitched intellectual battles, especially between Bernard Lewis and Edward Said who said in an interview with the Egyptian newspaper *Al-Ahram* that "Bernard Lewis hasn't set foot in the Middle East, in the Arab world, for at least 40 years. He knows something about Turkey, I'm told, but he knows nothing about the Arab world."[56] That fact that Bernard Lewis had immersed himself in the languages and cultures of the region, and was fluent in Arabic, in addition to all of the other major Middle Eastern languages (Persian, Turkish, and Hebrew), and Ajami and Kedourie as natives of the region (as a Lebanese Shi'i and Baghdadi Jew) were native speakers of Arabic language was beside the point to the Saidians. Said's sweeping condemnation of previous academic scholarship on the Middle East and his provocative pro-Palestinian views led to a politicization of the field of Middle Eastern studies and stunting of critical views of Islam, Islam's relationship with political life, and Arab political culture in general. In his review of Orientalism, the political scientist Malcolm Kerr posed an obvious question noting, "Does Said realize how insistently Islamic doctrine in its many variants has traditionally proclaimed the applicability of religious standards to all aspects of human life, and the inseparability of man's secular and spiritual destinies? What does he suppose the Ayatollah Khomeini and the Muslim Brotherhood are all about?"[57]

Said and his minions dismissed criticism of Islam and its considerable influence on Arab political life, noting that it was an "Orientalist trope to invoke the 'return of Islam'."[58] Criticism of Islam, and the growing influence of both political Islamists and Salafi-jihadis was viewed through the lens of intense Western prejudice and a collective view of the "other," but it also stunted much-needed academic debate and introspection on the changing nature of politics within the Middle East. Primordial identities, including

sub-state identities, such as tribe, sect and regional identity and transnational identities, in particular the impact of Islam on the Arab world's political culture, was seen as an inherently "Orientalist" manifestation of intellectual analysis portrayed by Said and his allies as essentializing Muslim. Yet, for all of the focus by academics on the impact and influence of secular Arab Nationalism, Islam remained a consistent and constant factor in the "secular" politics of the day, one that the Arab intellectual classes sought to obfuscate. As Bernard Lewis wrote in his 1976 article in *Commentary*, which still holds true today,

> To understand anything at all about what is happening in the Muslim world at the present time and what has happened in the past, there are two essential points which need to be grasped. One is the universality of religion as a factor in the lives of the Muslim peoples, and the other is its centrality.[59]

The ties between religion, society, culture, and politics, and the ability to look at and differentiate, and yes, criticize the so-called other were sadly missing in much of the analysis of the Arab Spring and its aftermath and owed a great deal to the influence of Said and his disciples.

Said's political activism, particularly on the plight of the Palestinians, also had a significant impact not only in academic circles but also the Washington DC foreign policy community. The Washington foreign policy establishment came to view American policy in the region through the prism of this single issue, believing that Israeli policy and Israel's treatment of the Palestinians was a significant hindrance to American foreign policy objectives. This became especially prevalent with the rise of the "peace process industry," where under every American president from George H.W. Bush onward, and their respective administrations have placed, in one form or another, the Israel–Palestine conflict at the center of their Middle Eastern policy. Many Washington bureaucrats, especially the so-called Arabists at the State Department, had consistently emphasized the centrality of Israel–Palestine issue was lynchpin of American Middle Eastern Strategy, noting that if you solve it, you can solve the Middle East.[60] An illustration of the centrality of this discourse was an article by Shibley Telhami, who placed the Arab–Israeli issue at the center of American policy, argued that the conflict "bred resentment in Arab and Muslim countries." Telhami added that American support for Israel, and its credible deterrent against the Palestinians, coupled with the rise in American unilateralism is integral part of Arab resentment against the United States, but importantly, the plight of the Palestinians is the, "prism of pain" "through which Arabs see the world."[61] While Telhami is correct in the centrality of the Palestinian issue as an important bellwether to the Arab street, Arab political rulers, while stoking the flames of anti-Israel and anti-Semitic

resentment, have always been greater realists than the West has given them credit for. Rising regional threats, including the growing expansion of Iranian power and the rise of non-state actors, including Shi'i militia groups have in the past decade, subordinated the Palestinian issue to questions of *realpolitik* and the national interest for many Arab states.

When the Arab Spring came to pass and Middle Eastern commentators and public intellectuals were asked to comment on the news of the day, the analysis and advice that was given to both news outlets and governments was based on the idea that Arab peoples were throwing off the yoke of neo-colonialism and Western involvement in their affairs, and at the same time showing that they were pushing towards a new democratic Middle East. Yet, there was a startling degree of universalism, particularly about the implementation of democracy in the Arab world. Undoubtedly, this came from both sides of the political spectrum; from the so-called neo-conservatives, who favored exporting democracy at the point of a gun, and those on the left who believed in the universalism of democracy, without taking account the particularistic aspects of Arab politics, and continually minimized the influence of Islam in political life, a viewpoint which had long been promoted by Said and his followers.[62]

The Obama administration's embrace of the protesters during the Arab Spring and their belief in their view voiced by the president himself of wanting the United States to "be on the right side of history"[63] is illustrative of this line of thought. Being on the right side of history for many intellectuals and government officials led to a quick embrace of the Muslim Brotherhood and political Islamists without considering the potential repercussions. With the exception of Tunisia, and Rashid Ghannushi's *Al-Nahda*, Political Islamists, from the Muslim Brotherhood in Egypt to its Turkish manifestation the Justice and Development Party (AKP), have all been decidedly illiberal in their times in power. The history of their particular polities (Egypt and Turkey) where they operated shaped their own views on government and governance. But while they were at least "democratic" in outlook, they based their conception of democracy on a concept of majoritarian democracy that was highly illiberal and did not operate according to democratic norms including allowing for freedom of the courts, opposition, and assembly.

In his 1992 book *Democracy and Political Culture*, Elie Kedourie argued that Arab political culture made the implementation of democracy in the Arab world impossible. Kedourie asserted that "to hold simultaneously ideas which are not easily reconcilable argues, then, a deep confusion in the Arab public mind, at least about the meaning of democracy. The confusion is, however understandable since the idea of democracy is quite alien to the mindset of Islam."[64] Kedourie's contention that Islam was incompatible with democracy presupposes that democracy is itself a universal value, and that its spread and

implementation are uniform in different regions of the world. In addition, Kedourie's argument pays specific attention to the impact and influence of Islam on Arab political culture and the subsequent impact of political Islamist groups such as the Muslim Brotherhood who were disregarded by Western academics and policymakers.

The belief that these Islamist political parties could serve as liberalizing forces, establishing pluralistic Muslim democracies was an idea that was proliferated by puff pieces in major newspapers and by major public intellectuals. Writing in the *New York Times*, Nicholas Kristof's observations at a dinner of a Muslim Brotherhood member, sought to portray the group as progressive when it came to women's rights (it is in comparison to the more hardline and puritanical *Salafi*'s, without question) and focused solely on economic development and bettering the lives of everyday Egyptians. Kristof ended his column declaring, "what's historic in Egypt today is not so much the rise of any one party as the apparent slow emergence of democracy in the heart of the Arab world."[65] Other academics and public intellectuals hailed the Turkish model of prime minister, and thereafter President Recep Tayyip Erdogan as the blueprint for Islamic democracy. Erdogan had famously said during his tenure as mayor of Istanbul, that "democracy is like a train, when you reach your destination, you get off," but his economic reforms and his deft marginalization of authoritarian Kemalist elites, specifically in the Turkish military, brought him considerable praise.[66] But many commentators believed that the new wave of "revolutions" that the Arab Spring brought to fore would serve to break the mold of continual American influence in the region, and lead to states operating independent foreign policies, outside of Washington's orbit. In his book *Obama and the Middle East*, Fawaz Gerges from the London School of Economics argued that "Egypt's revival as a pluralistic state will bring a corrective, a balancing act that allows the Arabs to be a player on the regional and international stage."[67] This assertion, of course, could not have been further from the truth. The Arab Spring did not lead to a reassertion but quite the opposite; a reassertion and further enhancement of the influence and power of non-Arab states in the region.

The downfall of autocratic rulers in some countries has been accompanied by feelings of euphoria and hopes for a "new dawn," imbued with expectations for the establishment of a pluralistic and open society. The high hopes after the events of the Arab Spring were dashed by the bitter realities of political life. Not only have the past few years shown that democracies were not established (except perhaps the first signs of a pluralistic discourse in Tunisia), but strife and civil wars have left the bloody imprint of a humanitarian disaster on the different countries. Millions of people have been displaced which endangered the stability of other states and societies in the region.

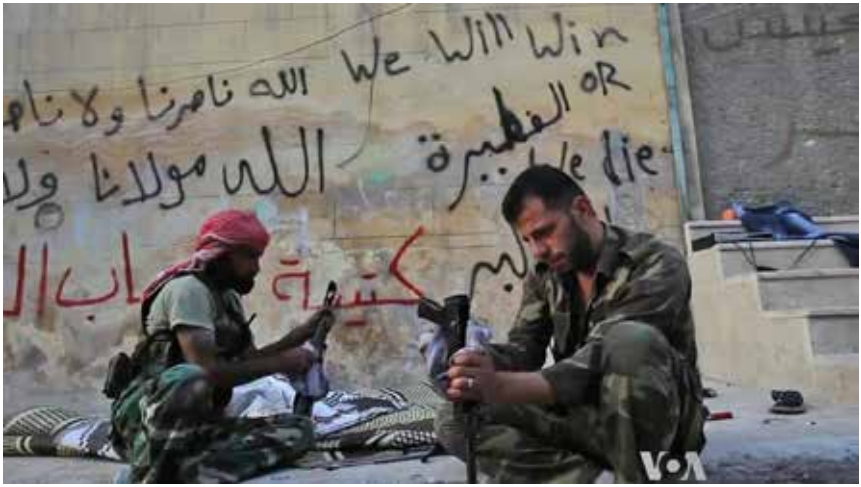

Figure 2.1 War-torn fighters of the "Free Army" taking a brief break before resuming the battle. *Source:* Voice of America.

The story of the collapse of nation-states, like Iraq and Syria in the Middle East, is also a story of the eclipse of the Arab revolutionary idea and the victory of traditional ties and pre-revolutionary patterns. In their efforts to base their legitimacy on the renunciation of the shackles of tradition, the creation of a socialist economy according to the Eastern European format and the fostering of national identity, the revolutionary regimes in Iraq, Syria, Libya, and Yemen failed miserably. Their attempts to create an "organic" solidarity, to borrow the term from the teachings of the sociologist Emile Durkheim, resulted in a salad and not a melting pot—a situation in which it was easy to distinguish the different, distinct parts of the mixture.[68]

The living body of the nation-state was teeming with sub-state cells—ethnic, tribal, familial, and regional—which were related to the state in a limited capacity, and were forced to come to terms with its coercive power. The fall of autocratic dictators gave new life to these identities and they were able to strive for autonomy in the changing Middle Eastern reality. This return to the sub-state identities was accompanied by the strengthening of sub-state actors and anti-state actors challenging the political order.[69] In these countries, where cruel and bloodthirsty dictators were toppled or weakened, the hopes of the people were dashed by the renewed deepening of the fissures of tribal and religious conflict that were turned into arenas for bloody civil wars.

As often happened in the history of the modern Middle East, this ethnic-religious polarization was also reflected in regional and international patronage ties. The different players in Syria sought to strengthen their own autonomy and connect to a regional power to gain international recognition.

While Bashar al-Asad and his camp have been supported by Russia and Iran, the different rebel groups were given aid by the Saudis and the Turks. Regional and international factors also stirred the turmoil in Iraq, Libya, and Yemen and reinforced the image of a decentralized power system characterized by bloody struggle, which was far from the picture of the "strong Arab state" of the 20th century.

NOTES

1. The academic literature offers a number of different ways to define countries in the different stages of the process of disintegration. The terms "collapsing state" or "fragile state" are often used; however, this study will analyze "failed states." For more on collapsed and failed states see, William Zartman (ed.), *Collapsed States: The Disintegration and Restoration of Legitimate Authority* (London and Boulder, CO: Lynne Rienner Publishers, 1995).

2. Max Weber, *Politics as a Vocation* (Philadelphia: Fortress Press, 1965).

3. Viera Baeova, "The Construction of National Identity: On Primordialism and Instrumentalism," *Human Affairs*, 8 (1998), pp. 1, 29–43.

4. 'Abd al-Karim Qasim (1963–1958) was an exception to this rule. He focused on Iraqi nationalism. Qasim (who was Kurdish from his mother's side) even forged an alignment with the Iraqi Communist Party in order to prevent Ba'thist Syria and Gamal Abdel Nasser from including Iraq in the United Arab Republic (UAR).

5. 'Abd al-Salam 'Arif, quoted in *Al-Jumhuriyya*, February 21, 1963. 'Arif added on another occasion that "the united Arab movement is [. . .] a movement for freedom, and the Arab socialist movement is a proper democratic movement." *Al-Jumhuriyya*, July 14, 1965.

6. Scott Ritter, *Endgame: Solving the Iraq Problem—Once and for All* (Jerusalem: Gefen, 2000) (Hebrew translation), pp. 59–61.

7. The new flag bore the stamp of the *takbir* (Allahu Akbar), but the three stars symbolizing the triangle of Arab unity (Egypt, Iraq, Syria) were removed. See "Iraq Parliament Approves New Flag," *BBC News*, January 23, 2008, http://news.bbc.co.uk/2/hi/middle_east/7203222.stm.

8. Ronen Zeidel, "From De-Ba'thification to Justice and Accountability: Iraqi Reform in a Wider Context," in *Inglorious Revolutions: State Cohesion in the Middle East after the Arab Spring*, ed. Brandon Friedman and Bruce Maddy Weitzman (Tel Aviv: Moshe Dayan Center, Tel Aviv University, 2014), p. 12.

9. Yitzhak Nakash, *Reaching for Power: The Shi'a in the Modern Arab World* (Princeton, NJ: Princeton University Press, 2006) (Hebrew translation), pp. 175–176.

10. The overall voter turnout in these elections was approximately 58.3 percent. Amongst Sunnis the voter turnout was low. For example, the voter turnout in the Sunni Anbar province was only 2.4 percent. See Shaheen Mozaffar, "Elections, Violence and Democracy in Iraq," *Bridgewater Review*, 25, no. 1 (June 2006), p. 6.

11. For a comprehensive discussion on the question of Kurdish identity and the challenges faced by nation-states, see: Ofra Bengio, "From Victims to Victors: the

Kurdish Challenge to the State in the Middle East," in *Inglorious Revolutions: State Cohesion in the Middle East after the Arab Spring*, ed. Brandon Friedman and Bruce Maddy Weitzman (Tel Aviv: Moshe Dayan Center, Tel Aviv University, 2014).

12. For more on see Dexter Filkins, "Kurdish Dreams of Independence Delayed Again," *The New Yorker*, October 16, 2017, https://www.newyorker.com/news/news-desk/kurdish-dreams-of-independence-delayed-again.

13. Ayse Tekdal Fildis, "The Troubles in Syria: Spawned by French Divide and Rule," *Middle East Policy*, 18, no. 4 (Winter 2011), pp. 134–135.

14. Patrick Seale, *The Struggle for Syria: A Study of Post-War Arab Politics, 1945–1958* (London: Oxford University Press, 1965).

15. Malik Mufti, *Sovereign Creations: Pan-Arabism and Political Order in Syria and Iraq* (Ithaca, NY: Cornell University Press, 1996), pp. 143–178.

16. Sami Al-Jundi, *Al-Baath* (Beirut: Dar Al-Nahar, 1969), p. 160.

17. Thomas Friedman, "Hama Rules," *New York Times*, September 21, 2001, http://www.nytimes.com/2001/09/21/opinion/21FRIE.html.

18. Salafism is a purist movement that sees the rightly guided caliphs (al-Salaf—Muhammad and the four caliphs who became Muhammad's successors) as a role model. At the end of the 20th century, a more extremist faction of the Salafi movement came to the fore, which strove for a Salafi lifestyle not through peaceful means—such as education and civic activity—but though jihad. They saw jihad as a war to exterminate the infidels in order to implement their version of Islam as the world religion. In this book, these groups are viewed as part of the Salafi-jihadi stream.

19. Eyal Zisser, *Suria: Meha'a, Mahapaha, Milhemet Ezrahim* (Tel Aviv: Moshe Dayan Center for Middle Eastern and African Studies, 2014), pp. 120–124.

20. Joshua Landis, "The Final Declaration of the Antalya Opposition Conference," Syria Comment RSS, June 4, 2011, http://www.joshualandis.com/blog/the-final-declaration-of-the-antalya-opposition-conference/.

21. Ernest Gellner, *Culture, Identity, and Politics* (Cambridge: Cambridge University Press, 1987), pp. 8–9.

22. Megan Specia, "How Syria's Death Toll Is Lost in the Fog of War", *The New York Times*, April 13, 2018, https://www.nytimes.com/2018/04/13/world/middleeast/syria-death-toll.html; United Nations, "Syrian Arab Republic: Humanitarian Snapshot," *OCHA*, November 2, 2015; Syrian Observatory for Human Rights, October 16, 2015.

23. "One out of five people in Lebanon is Syrian," according to the UN report, the UNHCR (United Nations Higher Commission for Refugees) September 4, 2015. Jordan faced a dramatic demographic change in 2014–2015 that affected the balance of power. According to the accepted estimate, more than a million refugees were added to approximately 6.5 million citizens of the Kingdom. Palestinians, a solid majority of "foreigners" in Jordan now made up more than half of the population, maybe even more. Alongside starving refugees, the country was infiltrated by activists of the "Islamic State," who threatened the stability of the monarchy's ethnic mosaic.

24. "The Sanusi Order" is the name of the movement that was founded in 1837 by Muhammad al-Sanusi which advocated a return to pure Islamic values. The movement's core of support was in Libya and descendants of the order ruled the country until Qaddafi's coup d'état in 1969.

25. These understandings were expressed in the "Akrama Agreement." In return for Idris' agreement to dismantle the tribes and disarm them, the Italians recognized his authority in the areas not under Italian control and the Sanusi community was relieved of property taxes. See, Dirk J. Vandewalle, *A History of Modern Libya*, 2nd ed. (Cambridge: Cambridge University Press, 2006), pp. 24–42.

26. J. Wright, *Libya: A Modern History* (New York: Cambridge University Press, 1982), p. 44.

27. Cyrenaica is the energetic center of Libya, and about 60 percent of the total resources of the country are located in its territory, which stretches from the coastal strip of Sirat to the border with Egypt.

28. For further details regarding the ethnic-tribal mosaic of Libya, see Vandewalle, *A History of Modern Libya*, pp. 14–23.

29. The attack killed the US ambassador and three other members of the diplomatic corps. The group claimed that the attack was carried out in retaliation for the killing of Abu Yahya al-Libi, one of the senior leaders of al-Qaida in Pakistan. For a comprehensive article on the subject of events in Libya after Qaddafi, see Yehudit Ronen, "The Libyan 'Arab Spring' and Its Aftermath: Challenges to State Order and National Cohesion," in *Inglorious Revolutions: State Cohesion in the Middle East after the Arab Spring*, ed. Brandon Friedman and Bruce Maddy Weitzman (Tel Aviv: Moshe Dayan Center, Tel Aviv University, 2014), pp. 243–255.

30. Ronen, "The Libyan 'Arab Spring' and Its Aftermath," pp. 243–255.

31. "Under Militia Power, Libya Closer to Failed State," *Inquirer.net*, September 10, 2014, http://newsinfo.inquirer.net/636658/under-militia-power-libya-closer-to-failed-state.

32. Jihadi organizations in the Middle East (in Sudan, Syria, and the Sinai area) and in the African Sahel (in Nigeria and Mali) benefitted from transnational smuggling networks. Weapons imported from Libya helped to enhance the position of these jihadi organizations and made their attacks on opponents at home and abroad increasingly professional.

33. Hisham Matar, "What's Left in Libya?" *The New Yorker*, January 15, 2015, http://www.newyorker.com/news/news-desk/whats-left-libya.

34. Amir Oren, "US War and Middle East Fatigue," *Haaretz*, November 17, 2013, https://www.haaretz.com/opinion/.premium-u-s-has-war-and-middle-east-fatigue-1.5291047.

35. For more on South Yemen and its foreign policy, see Fred Halliday, *Revolution and Foreign Policy: The Case of South Yemen, 1967–1987* (Cambridge: Cambridge University Press, 1987).

36. Michael C. Hudson, "Bipolarity, Rational Calculation and War in Yemen," *The Arab Studies Journal*, 3, no. 1 (1995), pp. 9–19.

37. See, for instance, the World Bank Data for the year 2011: http://data.worldbank.org/country/yemen-republic/country.

38. This organization was established in January 2009 as a merger of al-Qaida affiliates in Yemen and Saudi Arabia. The organization stated that the purpose of establishment was the toppling of the central government in Saudi Arabia and Yemen and the establishment of an Islamic caliphate in its place that would control all areas of the Arabian Peninsula. See, Alistair Harris, "Exploiting Grievances: Al-Qaida in the

Arabian Peninsula," in *Yemen on the Brink*, ed. Christopher Boucek and Marina Ottaway (Washington: Carnegie Endowment for International Peace, 2010), pp. 34–35.

39. Laura Kasinof and Scott Shane, "Radical Cleric Demands Ouster of Yemen Leader," *New York Times*, March 1, 2011, https://www.nytimes.com/2011/03/02/world/middleeast/02yemen.html.

40. Since the revolution of 1962 and the subsequent civil war, the clergy—the Zaydi Sada (the political-religious elite of the Zaydi Imami institution in Yemen) have remained more or less hidden from sight. But the new revolutionary government supported them and gave them free reign to carry out their educational and cultural activities.

41. Barak Salmoni, Bryce Loidolt and Madeleine Wells, "Conflict in Yemen Fueled by Tribalism, Religious Conflicts," Regime and Periphery in Northern Yemen: The Huthi Phenomenon (2010), pp. 94–98, http://www.rand.org/pubs/monographs/MG962/?ref=homepage; J. E. Peterson, "The al-Huthi Conflict in Yemen," *Arabian Peninsula Background Note*, August 6, 2008, www.JEPeterson.net, pp. 1–4.

42. Uzi Rabi, *Yemen–Revolution, Civil War and Unification* (London and New York: I.B. Tauris, 2015), pp. 154–156.

43. For more on top-down analysis of Arab politics: Raymond Hinnebusch, *Syria: Revolution from Above* (London: Routledge, 2001); Malcolm Kerr, *The Arab Cold War* (New York: Oxford University Press, 1971); Richard Mitchell, *The Society of the Muslim Brothers* (New York: Oxford University Press, 1993); Patrick Seale, *Asad of Syria: The Struggle for the Middle East* (London: I.B. Tauris, 1988); John Waterbury, *The Commander of the Faithful*: *The Moroccan Political Elite—A Study in Segmented Politics* (London: Weidenfeld and Nicolson, 1970).

44. For more see George Antonius, *The Arab Awakening: The Story of the Arab National Movement* (London: Hamish Hamilton, 1939).

45. Fouad Ajami, *The Dream Palace of the Arabs: A Generation's Odyssey* (New York: Vintage Books, 1999), p. 131.

46. Joseph Kostiner, "Transforming Dualities: Tribe and State Formation in Saudi Arabia," in *Tribes and State Formation in the Middle East*, ed. Phillip S. Khoury and Joseph Kostiner (Berkley: University of California Press, 1990), pp. 237–241.

47. Joseph Kostiner, "Introduction," in *Middle East Monarchies: The Challenge of Modernity*, ed. Joseph Kostiner (London: Lynne Reimer, 2001), pp. 1–12.

48. This was especially true in attitudes of Academics and practitioners towards modernization theory, which was a lynchpin of social science thinking during the 1960s. An influential work which encapsulates this line of thought is Daniel Lerner, *The Passing of Traditional Society: Modernizing the MiddleEast* (New York: Free Press, 1958).

49. Bernard Lewis, "Islam and Liberal Democracy," *The Atlantic Monthly*, 27, no. 2 (February 1993).

50. Eva Bellin, "The Robustness of Authoritarianism in the Middle East: Exceptionalism in Comparative Perspective," *Comparative Politics*, 36, no. 2 (2004), pp. 139–157.

51. Volker Perthes, "Si Vis Stabilitates, Para Bellum: State Building, National Security and War Preparation in Syria," in *War, Institutions, and Social Change in the Middle East*, ed. Steven Heydemann (Berkeley: University of California Press, 2000), p. 150.

52. See, for instance, Adeed Dawisha and William Zartman (eds.), *Beyond Coercion: The Durability of the Arab State* (London: Croom Helm, 1987); Khaldun Ḥasan Naqib, *Al-mujtama' wa-al-dawlah fi al-Khalij waal-Jazirah al-''arabiyah* (Beirut: Markaz Dirasat al-Waḥdah al-'Arabiyah, 1987); Partha Chatterjee, *The Politics of the Governed: Reflections on Popular Politics in most of the World* (New York: Columbia University Press, 2004).

53. Nazih N. Ayubi, *Over-Stating the Arab State: Politics and Society in the Middle East* (London: I.B. Tauris, 1995) pp. 447–459.

54. For more see, Fouad Ajami, *The Arab Predicament: Arab Political Thought and Practice Since 1967* (Cambridge: Cambridge University Press, 1992); Fouad Ajami, *The Dream Palace of the Arabs: A Generation's Odyssey* (New York: Vintage Books, 1999).

55. For critical interpretations of Kedourie, Lewis and Ajami see, Edward Said, "The Essential Terrorist," *Arab Studies Quarterly*, 9, no. 2 (Spring 1987), pp. 195–203; Adam Schatz, "The Native Informant: Fouad Ajami Is the Pentagon's Favorite Arab," *The Nation*, April 10, 2003, https://www.thenation.com/article/native-info rmant/; Edward Said and Bernard Lewis, "Orientalism an Exchange," *New York Review of Books*, August 12, 1982, https://www.nybooks.com/articles/1982/08/12 /orientalism-an-exchange/.

56. "Resources of Hope," *Al-Ahram*, April 10, 2003, https://web.archive.org/w eb/20150221221020/http://weekly.ahram.org.eg/2003/631/focus.htm.

57. Malcolm Kerr, "Orientalism," *International Journal of Middle East Studies*, 12, no. 4 (1980), pp. 544–547.

58. Martin Kramer, *Ivory Towers on Sand: The Failure of Middle Eastern Studies in America* (Washington, DC: Washington Institute for Near East Policy, 2001), p. 45.

59. Bernard Lewis, "The Return of Islam," *Commentary*, January 1, 1976, https:// www.commentarymagazine.com/articles/the-return-of-islam/.

60. For more on the Arabists, see Robert Kaplan, *The Arabists: The Romance of an American Elite* (New York: Free Press, 1995).

61. Shibley Telhami, "The Ties That Bind: Americans, Arabs, and Israelis After September 11," *Foreign Affairs*, 83, no. 2 (March–April 2004), pp. 1–5.

62. Examples of works that decreased the impact of religion on Arab political life include Albert Hourani, *Arabic Thought in the Liberal Age1798–1939* (Cambridge: Cambridge University Press, 1983); Orit Bashkin, *The Other Iraq: Pluralism and Culture in Hashemite Iraq* (Stanford: Stanford University Press, 2008).

63. Liz Halloran and Ari Shapiro, "Obama: U.S. Is 'On Right Side of History' in Mideast," *NPR*, February 15, 2011, https://www.npr.org/2011/02/15/133779423 /obama-u-s-is-on-right-side-of-history-in-mideast.

64. Elie Kedourie, *Democracy and Arab Political Culture* (Washington, DC: Washington Institute for Near East Policy, 1992), p. 1.

65. Nicholas Kristof, "Joining a Dinner in a Muslim Brotherhood Home," *The New York Times*, December 7, 2011, https://www.nytimes.com/2011/12/08/opinion/ kristof-joining-a-dinner-in-a-muslim-brotherhood-home.html.

66. "Getting Off the Train," *The Economist*, February 4, 2016, https://www .economist.com/special-report/2016/02/04/getting-off-the-train.

67. Fawaz Gerges, *Obama and the Middle East: The End of America's Moment?* (New York: Palgrave Macmillian, 2012), p. 151.

68. Emile Durkheim, *The Division of Labor in Society* (New York: Free Press, 1997), translated by W. D. Halls, intro. Lewis A. Coser.

69. Elie Shalhub, Khulasat 'Iraqiyya,' *Al-Akhbar* (Beirut, October 14, 2009).

Part II

THE ARAB SPRING AT THE SERVICE OF SUNNI SHI'I ANIMOSITIES

IRAN AND THE RISE OF THE ISLAMIC STATE

The schisms between Sunna and Shi'a were aided by the breakdown of states throughout the region and the reassertion of both identity and tribal politics. The origins of the conflict between the two great traditions of Islam are rooted in the early days of Islam and are focused primarily on the struggle for succession and leadership of the Islamic world after the death of Prophet Muhammad. The Shi'is have perceived themselves as the true heirs of the Prophet Muhammad, as the "partisans of 'Ali." Since that time, the Shi'a have become the secondary sect in the Muslim world and evolved into what Vali Nasr described in his book *The Shia Revival* a "dissident community."[1] In the subsequent centuries, the persecution and exclusion of the Shi'a at the hands of the Sunna exacerbated the rivalry between the two, have developed a Shi'i messianic vision based on the long-awaited return of the last Imam (the "Hidden Imam") in the End of Days.[2]

In the aftermath of the First World War, the establishment of the Arab states strengthened the Sunni dominance over the Shi'i. This was particularly evident in states such as Iraq (and Bahrain, although it gained independence only in 1971), where the Shi'i were the majority, but where the British chose to entrust the government to the Sunni elite. Both during the era of the Ottoman Empire and the Mandate Period after the First World War, Sunni elites (such as landowners, tribal dignitaries, military personnel, and senior officials) cooperated and collaborated with external powers, and thereby maintained, and further entrenched their position of supremacy.[3] Even after the withdrawal of the British and the rise of revolutionary Arab regimes, the reins of power in most Arab countries remained in the hands of Sunnis. The waves of change that befell the Middle East during the 20th century, including

the rise and fall of ideologies and regimes that adhered to Arab nationalism, were instead primarily Sunni political projects that only ever had token Shi‘i representation. In line with that, the standard bearers of Arab nationalism—Egypt, Syria, and Iraq—sought to carve out leading positions for themselves in Arab regional politics. Arab nationalism, secular and socialist in its nature, character, and origins, strengthened the prejudices held against Shi‘i Arabs: in fact, even though their mother tongue was Arabic, they were still considered "second-class Arabs." In essence, the secular Arab political movements did not overturn the superior position of the Sunna or reverse the marginalization of Shi‘i communities.

While this animus between the two sects still remains, a significant cultural and geopolitical dimension in the clash between Sunni and Shi‘i Islam is linked to the long-standing cultural rivalry between Arabs and Persians. The Arabo–Persian rivalry has been exacerbated in the closing decades of the 20th century starting with the emergence of the Islamic Republic of Iran (1979), the Iran–Iraq War (1980–1988), and ending with the fracturing of Middle Eastern states in the aftermath of the Arab Spring. The mechanisms of exclusion and discrimination against the Shi‘is were encapsulated in the fact that the majority of Shi‘i Muslims are Iranian, and as such, their desire for privileges was seen by Sunni opponents as merely a modern replica of the *shu‘ubiyya*, a reference to the non-Arab revolt against Arab rule at the dawn of Islam.[4] Arab nationalism and its leaders gave renewed vitality to this concept. For example, the Ba‘thists of Iraq used the derogatory moniker *shu‘ubi* (a person associated with the *shu‘ubiyya*) to describe Iraqi Communists who were often Shi‘a. Even the rivalry between the regime of Gamal Abdel Nasser, the Egyptian president, and the Iranian Shah in the 1950s and 1960s (especially in light of Iran's developing ties with Israel) contributed to the perception among Arabs that the Iranians should be viewed as the enemy.

The failure of secular Arab nationalist politics and the reassertion of religion in the Middle East laid the groundwork for the evolving geopolitical configurations in the Middle East, and the pitched sectarian climate, between Sunna and Shi‘a. This was further enhanced by the destabilizing aftershocks of the Arab Spring and the fracturing of Arab states, which culminated in the emergence of the Islamic State, a puritanical Salafi-jihadi manifestation of the most extreme elements of Sunni Islamists as it conquered and then governed large swaths of territory in Syria and Iraq. The Islamic State's virulent hatred of Shi‘i Muslims was an integral part of its ideology and elicited a substantial response from Shi‘i militias and Iranian-backed forces, as the Islamic Republic of Iran used this conflict to expand and further enhance its power and influence, especially in states that have large Shi‘i populations.

Both sub-state and transnational Islamist identities were brought to the forefront and accentuated by the Arab Spring and its aftermath and played a significant role in the rise of the Islamic State. This was especially within the context of local Iraqi politics and the sectarian clashes that came to the forefront after nearly a century of Sunni rule, both under the Hashemite monarchy and under subsequent secular nationalist and Ba'thist governments. Following the American invasion in 2003, the US destruction of the Iraqi states' institutions, the disbandment of the Iraqi army, and the failed attempts of de-Ba'thification, all paved the way for the entrenchment of a sectarian, Shi'i-dominated Baghdad government under the rule of Prime Minster Nouri Kamal al-Maliki. Maliki's government took retribution against their former Sunni overlords, as Iraq's Shi'i majority, who had been kept out of the corridors of power since Ottoman times, used the power of the ballot box to exact their revenge. Through corrupt policies, the Maliki government marginalized Iraq's Sunni population, cutting them out of the government decision-making process and out of the federal budgets. While the American military administration had made substantial efforts to win over Sunni elites and their tribal elders during the so-called "surge" led by US General David Petraeus, following the American withdrawal in 2010, the Maliki government saw the American restraints removed, and began in earnest to consolidate its power, with the help of allied Shi'i militias and Iran. What followed, building on the cleavages that were aided by the American invasion, was the vicious sectarianization of Iraqi politics, which sowed the seeds for the Islamic State's rise, particularly in the Sunni tribal regions that had in previous years been the epicenter of the US counterinsurgency push. In these regions, American forces had eliminated the Ba'thist and jihadi backed insurgency, by buying the loyalty of tribal elders and chieftains. The result was a disintegration of Iraq and neighboring Syria, where protests calling for the ouster of President Bashar al-Asad eventually evolved into a Civil War in 2011. It was against this background that the Islamic State was able to quickly expand, playing on Sunni grievances in order to consolidate its own power. The breakdown of the Syrian state coupled with the sectarian nature of the Maliki government allowed the surviving core of *Al-Qaida in Iraq*, later to become the core element of the Islamic State, the ability to reconstitute themselves in a weak and failing state. The group gained valuable combat capacity in Iraq fighting the Americans, and more importantly an ideological framework—the hatred of the Shi'i other, to begin their bloody march through Iraq and Syria. The rise of the Islamic State, and its ability to prey on failing and fractured states, likewise gave Iran an opening, especially in Syria, Iraq, and Yemen to expand its own interests, utilizing the rising threat of Sunni jihadi ideology to protect the substantial Shi'i minorities and entrench their own power.

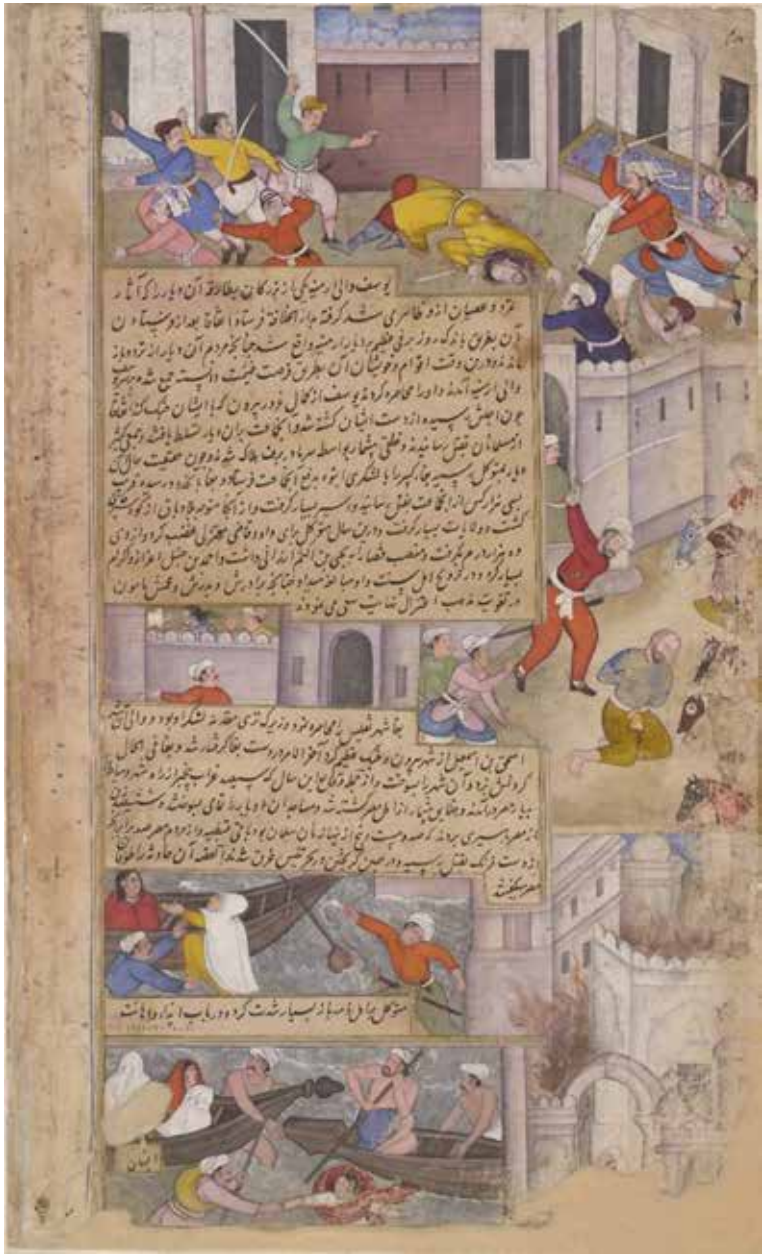

Figure PII.1 Illustration of a mural showing the destruction and sacking of the Mosque of the Imam Hussein in Karbala (present-day Iraq) at the hands of their Sunni enemies. Commissioned by the Mughal Emperor Akbar in 1591. *Source:* Commissioned by Akbar in India (1591).

NOTES

1. Vali Nasr, *The Shia Revival* (W. W. Norton, 2006).

2. Abbas Kelidar, "The Shi'i Imami Community and Politics in the Arab East," *Middle Eastern Studies*, 24(2), 1983, pp. 3–16.

3. For more on the influence of urban elites and notables see Phillip Khoury, *Urban Notables and Arab Nationalism: The Politics of Damascus 1860–1920* (Cambridge: Cambridge University Press, 1983).

4. The term is derived from the Arabic word *shu'ub* (people). It refers to a movement dating back to the 8th and 9th centuries in which Persians and Assyrians protested the preferred status of Arabs in Islam and demanded equality for all believers.

Chapter 3

The Shi'i Revival

The Rise of the Islamic Republic of Iran

If there is one year that changed the trajectory of the politics of the Middle East, it was 1979. The year was punctuated by two significant events, which had substantial repercussions on the politics of the region that are still felt today. The first was the creation of the Islamic Republic, which overthrew the Iranian monarchy and implemented a new form of Islamic government based on clerical rule, known as *Vilayet e-Faqih*, or literally guardianship of the Islamic jurist. The ideology of Khomeini's Iran was based not only on clerical rule but also integrated elements of anti-colonial and anti-Western ideology, combined with a renewed assertiveness which sought to expand Iran's influence throughout the region. An integral part of the foreign policy of the Islamic Republic was the spread of its brand of revolutionary Shi'i Islam, establishing and supporting groups with like-minded agendas such as Hizballah in Lebanon.

The second significant event was the Soviet Union's invasion of Afghanistan. The invasion of godless communists in support of their proxies in Afghanistan galvanized Muslims throughout the Arab and Islamic world. The Soviet invasion served as a galvanizing force for a new generation of Islamist activists and soon-to-be jihadis, seeking to apply the teachings of theorists such as Ibn Taymiyya and Sayyid Qutb into practice in the battlefields of Afghanistan. Among this new generation of Islamists were the fiery Palestinian preacher and scholar 'Abdallah 'Azzam, who after the invasion moved to Peshawar, Pakistan, making it his base of operations. 'Azzam and others attracted numerous young men from throughout the Arab world, seeking to participate in the jihad against the Soviets, among them Usama bin Laden and Ayman al-Zawahiri, the future founders of al-Qaida.[1] One particular country, Saudi Arabia, served as a significant recruiting ground, not only financially but with significant numbers of young men travelling to Pakistan to join the

fight. This influx of men and money was aided by a substantial conservative turn in Saudi Arabia which was crystalized by the 1979 hostage crisis at the Grand Mosque in Mecca, where extremists led by Juhayman al-'Utaybi, who supported the overthrow of the Saudi royal family, took control of the mosque. While Saudi security forces were able to clear the mosque of the insurgents after two weeks, the event provoked a conservative backlash in the kingdom and led to the increased power of the *ulama* and the religious police. The combination of the Islamic Revolution in Iran and the rise of radical Islam within Saudi Arabia's own borders forced the Saudi state to react, as the kingdom preferred to allow problematic Islamists to spread their own brand of Islam abroad. With the Soviet invasion of Afghanistan, and the rise of the Afghan jihad, the Saudi government found ample outlets to both spread their own brand of puritanical *wahabism*, while also ridding themselves of some of their society's most problematic elements.

THE ISLAMIC REPUBLIC OF IRAN—A TURNING POINT IN ISLAMIC POLITICS

Iran's Islamic Revolution (1978–1979) heralded the emergence of a new brand of political Shi'ism, overturning centuries of political quietism. The new Iranian leadership called for the export of the Shi'i revolution to the Arab-Muslim expanse and made no secret of their intentions to use the various Shi'i communities in the region—in Saudi Arabia, Bahrain, Iraq, and Lebanon—to establish bridgeheads on Iran's path toward regional hegemony. During the Iran–Iraq War (1980–1988), Iran's regional ambitions were underscored by the quote "the road to Jerusalem goes through Baghdad," which was frequently used during the Friday prayer's sermons and in the regime's propaganda.[2] In tandem, the new regime in Iran appealed to the Shi'i community in Saudi Arabia in an attempt to discredit the Saudi royal family asserting that

> the ruling regime in Saudi Arabia has wrapped itself in the Islamic mantle, but in fact they represent a shameful, extravagant and promiscuous way of life; they pursue pleasure while robbing money from the masses; they partake in gambling, banquets, drinking (alcohol) and orgies [. . .] while their political opposition is exiled to the desert; they are a regime deprived of education, awareness and culture.[3]

The intellectual basis of the new Islamic Republic's foreign policy was not purely rooted in an archaic brand of political Islam, but in a new and highly developed modern political ideology that combined Ayatollah Ruhollah

Khomeini's foundational Islamic thought on the guardianship of the jurist (*Vilayet e-Faqih*), with anti-Western and anti-colonial thought. The ideological background for the Islamic Revolution can be tied to two influential Iranian thinkers, Jalal Al-e Ahmad and 'Ali Shariati, both of whom were enraged by the rapid Westernization and commercialization of monarchical Iran, and sought to return Iran to a more traditional and authentic country. Ahmad's idea of *gharbzadeghi*, or "westoxification," attacked the "uncritical way in which western ideas had been accepted, advocated, and taught in schools (often without being properly understood); producing people and a culture that were neither genuinely Iranian nor properly Western."[4] Ahmad's ideas about Iranian culture and rootedness, and his vicious critiques of Mohammad Reza Shah's modernization programs resonated with Iranian intellectuals and with dissident clergymen. But if there was one thinker who was able to synthesize both revolutionary Shi'ism with leftist, Third-Worldist, and anti-Western thought, it was 'Ali Shariati. Like Ahmad, Shariati came from a clerical family and was educated at Mashhad University, and also at the Sorbonne, where he absorbed the latest Marxist and postcolonial theories, and came into contact with the famed leftist philosopher Frantz Fanon, whose work, *The Wretched on the Earth*, served as the bible for many Communist and Third-Worldist leaders in their anti-colonial liberation struggles. Shariati criticized the traditional quietist forms of Shi'ism which had been prevalent in the previous centuries in the seminaries of Qom and Najaf, which had been deferential to the Iranian monarchy. Instead, Shariati advocated for a new *Red Shi'ism*, in which Shi'ism was "recast in a revolutionary mold, comparable to the Marxist model, urging not quietism and immersion in the details of religious observance, but in earnest involvement in the vital and political and moral questions of the day."[5] Shariati's ideas, coupled with the general frameworks of anti-Westernism elucidated through *gharbzedegi*, gained enormous popularity in pre-revolutionary Iran, and once the Islamic Republic came to power in 1979, formed the basis of its governing philosophy and foreign policy. This was crystalized in Ayatollah Khomeini's anti-Western and anti-imperialist rhetoric, particularly his support for the "oppressed on earth" the *mostaz'afin*, which was rooted in the discourse that was initially proliferated by Shariati and Ahmad.

The influence of Shariati and Ahmad on the Islamic Republic's foreign policy manifested itself in hatred of Israel and its assiduous patronage of the Palestinian cause along with numerous anti-Western, anti-Sunni, and anti-monarchical movements, particularly in the states of the Persian Gulf that had large Shi'i minorities. The view of Shi'i Muslims throughout the Middle East as an oppressed, dissident sect in the shadow of their Sunni, brethren served as a tool for Iran to expand its influence inspiring hopes among Shi'i communities in the Arab world and encouraging them to take the initiative

and improve their position vis-à-vis the ruling elites in the Arab states. Feelings of deprivation and low self-image characterized Shi'i communities in the Arab world over the centuries. Their struggle to improve their position in the political, economic, and cultural arenas continued throughout the 20th century, but was ultimately unsuccessful as their "otherness" continued to dictate the relationship between regime and society. The transformation occurred following the Iranian Revolution. The motifs of the Islamic Revolution encapsulated Shi'i aspirations, especially the emphasis on social justice, rooted in the teachings of Ahmad and Shariati, and the denial of the legitimacy of dictatorial regimes, thereby inducing the Shi'a to reassess their position in relation to ruling elites in their respective homelands. They concluded that only political activism, sometimes revolutionary and violent, could help them realize their aspiration of gaining equal footing with the Sunnis and perhaps even propel them to a position beyond that of the Sunnis. All the Shi'i communities in "mixed states," (i.e., states with substantial Sunni and Shi'i communities such as Bahrain, Saudi Arabia, Iraq, Lebanon, and Kuwait) had experienced a degree of social, economic, and political discrimination at the hands of Sunnis. But the Islamic Revolution in Iran created a new political discourse which released them immediately from their status as a political and religious minority and gave them a newfound sense of collective self-confidence and self-worth. This was particularly evident in the eastern al-Hasa governorate of Saudi Arabia, which is home to most of its Shi'i residents. In Wahhabi Islam, the puritanical branch of Islam practiced in the Kingdom, the Shi'is are viewed as polytheists or apostates. This attitude was expressed strongly by the Wahhabis in the first days of the first Saudi state in 1801, when Saudi-Wahhabi forces pounded the Shi'i religious centers in Iraq. Karbala, one of the holiest cities in Shi'i Islam, was subjected to destruction and looting. The tombs of Shi'i saints were smashed including that of the Imam Hussein. The Saudi Kingdom's top religious officials continued to publish fatwas condemning the Shi'a, with the Saudi government discriminating against the Shi'a, not only for religious reasons but also because they were viewed as a different and inferior community in the Saudi social mosaic.[6] In the 1970s, the Shi'i community in al-Hasa Province witnessed pronounced economic deprivation. As Saudi Arabia became the leading oil producer in the world, the relationship between the state and its Shi'i minority began to fray. The Shi'is of al-Hasa Province provided the majority of non-skilled and semi-skilled labor in the refineries and extraction points. However, they did not share equally in the prosperity of the oil industry, and much of the state-controlled development was concentrated outside of areas with a high proportion of Saudi Shi'a. There was also significant discrimination as the Shi'a were kept out of the army and educational institutions. They were forbidden, for the most part, from observing *ashura* (the commemoration of the

massacre at Karbala in 680) and were not permitted to build mosques. Iran's Islamic Revolution therefore increased the political awareness of the Shi'is in the eastern region of Saudi Arabia and encouraged them to protest openly.[7]

Iranian-inspired Shi'i activists began to spread leaflets throughout the region calling for disobedience and non-cooperation with the Saudi royal family. Concurrently, they distributed Ayatollah Khomeini's speeches, for the benefit of their "fellow Shi'a across the Gulf." In November 1979, they openly marked the observance of *ashura*, in defiance of the explicit prohibition against its observance dating from 1913, the year in which al-Hasa was conquered by the Saudis and added to the kingdom. This event triggered violent protests in al-Hasa, especially in the cities of Qatif and Dahran which housed the Saudi oil installations. The protesters expressed full support for Iran's Islamic Republic and called upon the Saudi government to sever its cooperation with the United States. They also further demanded a just redistribution of oil money and an end to the continuing deprivation of the Shi'a in Saudi Arabia.[8]

The Saudi government was also concerned about other developments in the eastern part of the country. The fact that thousands of workers in the state oil company, ARAMCO, were Shi'a was a great cause of concern for the Saudis. On the anniversary of Khomeini's return to Iran, the Shi'a renewed their protests in Saudi Arabia and attacked government institutions and public buildings. The Saudi National Guard suppressed the demonstrations with an iron fist, but these events were etched in the memory of the Shi'i uprising of the eastern region.[9]

In Shi'i-majority Bahrain, the Iranian Revolution also led the Shi'a to struggle and demand more decisively their just share in the country's power centers. Bahrain—an archipelago of thirty-three small islands—was captured in 1783 by the Sunni Al Khalifa family and their tribal allies, at the expense of local tribes who had been under the protection of Persia, on the other side of the Gulf. During the 20th century, the Shi'a in Bahrain (a country in which a Shi'i majority of 65 percent is controlled by a Sunni elite) fared poorly. Members of the Shi'i community were systematically excluded from economic, military, and other state institutions. Their residential areas suffered from prolonged neglect with deficient infrastructure and community services. Unemployment among the Shi'i sector was over 30 percent (twice the rate among the general population), which extended the Shi'i sense of deprivation, alienation, and estrangement opposite the Sunni regime. When compared with other countries in the Persian Gulf, this archipelago state was flooded with greater political, economic, and social tensions between the Sunna and Shi'a. During the 20th century, and until 1979, the tensions between the Shi'i majority and the Sunni minority were prominently expressed in Shi'i protests in which the Shi'a demanded full equality on the basis of Arab-Bahraini

nationalism. Sometimes the new middle class, including Sunnis and Shi'a, supported the protests, which demanded modernization in the country as an alternative to the existing, traditional, tribal system.

After independence from Britain in 1971, the Bahraini government faced significant pressure to establish a national assembly. Most of the middle-class supported Shi'i and Sunni representatives, who included in their platform the aim of limiting the powers of government, changing the traditional society and bringing about social integration of all elements of society regardless of religious identity.[10] A national assembly was indeed established, but it was disbanded in June 1975, less than two years after its formation, as the Al Khalifa family was afraid of losing control and influence. The dissolution of the National Assembly was designed to prevent Sunni–Shi'i cooperation.

The early 1980s marked the beginning of a period of radicalization among the revolutionary Shi'i groups in Bahrain, who rejected the Al Khalifa family's legitimacy to rule. Iranian propaganda likened the Arab monarchs to the former Shah of Iran and urged members of Shi'i groups in the Gulf Arab states to overthrow the existing regimes in their respective states and erect in their stead new governments modeled after the Islamic Republic of Iran.

In December 1981, Bahrain detained Shi'i revolutionaries who tried to sneak into the country to overthrow the government. They belonged to the Islamic Front for the Liberation of Bahrain (*Jabhat al-Tahrir al-Islamiyya lil-Bahrayn*), a group that investigations subsequently revealed bore the fingerprints of Iranian involvement. The organization sought to overthrow the tribal Bahraini regime and establish an Islamic Republic modeled on Iran. It also sought to expel the American presence from the Gulf in general and from Bahrain in particular. Bahrain's prime minister, Shaykh Khalifa bin Sultan Al Khalifa, accused Iran of plotting to destabilize the country and threatening the stability of the entire Gulf.[11] Leaders of Gulf Arab regimes issued angry comments after the failed coup attempt. An editorial in one of the Gulf newspapers stated,

> Once again the rulers of Tehran have proved that they are a group of conspirators who are plotting against the [. . .] Arab nations and Islamic countries; they have not managed to escape their own hatred and stupidity, but rather, since their ascent to power, they have tried to shake the [stability] of the region. But the peoples of this region are fully aware of everything, fully understand the extent of the danger, and are able to face this new challenge and deal with the danger hidden behind the masks and ignorance of the ayatollahs.[12]

The Al Khalifa family (like the Al Sa'ud family in Saudi Arabia) learned from past experience, and did not rest easy as they became well aware of the growing challenges to their rule. Beginning in 1980, they tried to placate

their opposition by channeling funds to the Shi'i sector to improve education, housing, and health care. This measured response actually reduced the incidence of protest and somewhat calmed the tensions between the Al Khalifa regime and the Shi'i middle class. But in Bahrain, societal divisions along Sunni–Shi'i lines erupted again. In November 1992, the Shi'a filed a petition calling for a constitution and a restoration of the parliament (which had been suspended in 1975). They also called for the release of political prisoners and the return of exiles. In line with their usual response, the Al Khalifa tried to drive a wedge between Sunnis and Shi'is and prevent cooperation between the two, and in November 1994 ordered the arrest and deportation of Shi'i members of the constitutional movement. The fact that Shaykh 'Ali Salman, one of the Shi'i leaders of the movement, had studied in Qom, Iran, from 1987 to 1992, provided the Bahraini government with grounds on which to declare that the constitutional movement did not represent the citizens of Bahrain, but merely represented some Shi'i individuals who were actually Iranian loyalists.[13] In December 1994, detentions and deportations led to widespread protesting which turned into an uprising that lasted intermittently until 1999.[14]

The Bahraini government also tried to alter the demographic balance in favor of the Sunnis, by granting citizenship to about 10,000 Sunni families from Jordan, Syria, Pakistan, and Yemen, whose sons had served in the security forces and were loyal to the Al Khalifa family.[15] Citizenship, housing, and special education were also awarded to 20,000 members of the Dawasir tribe, the Shamar, and other tribes. In spite of Hamad bin 'Isa's assumption of the title of Emir in 1999, a reshuffle in the government and a resumption of dialogue with the opposition, cleavages between Sunni and Shi'i communities still persisted. In November 2000, Emir Hamad ordered the establishment of a supreme committee in order to formulate a national charter to expand equality and social justice. Still this was just words rather than deeds because any legislative material adopted by the elected Council of Representatives would require approval from the Consultative Council, whose members were appointed by the Al Khalifa family. Even the delineation of electoral districts based on religious identity rather than size of population was designed to ensure Sunni dominance. In the 2006 elections, the largest Shi'i opposition movement, the "Islamic National Association" (*al-Wifaq*) experienced a split: the majority, led by Shaykh 'Ali Salman, supported participation in the elections, while the minority formed a separate faction called al-Haq and claimed that participation in the elections would perpetuate injustice against members of the Shi'i community that was enshrined in the law and the government. Given this split, Bahrain's ruling elite were able to foster relative calm in the opening decade of the 21st century and retained the majority of political and economic privileges.[16] The attempt to hold a national dialogue was met with

little success. As a result, the basic imbalance remains: the Sunni elite have retained their privileges while the Shi'i majority continue to be marginalized. Any attempt to alter the existing balance was perceived by the Sunni elite as a threat to the entire socio-political order.

THE US INVASION OF IRAQ—THE SHI'IS COME TO POWER

The US invasion of Iraq in April 2003 and the toppling of Saddam Hussein put an end to the rule of the Sunni minority in the country and created a meaningful precedent: this was the first time that an Arab state was headed by Shi'i leadership. For Iran, the upheaval in Iraq was a golden opportunity to expand its economic, military, and political leverage providing bridgehead to strengthen its position in the region. Iraq became the basis from which to build an arc of influence from the Iranian heartland to the Mediterranean Sea, feeding the Islamic Republic's aspirations for regional hegemony. Iran's regional expansion was based on the utiliziation of irregular forces and Shi'i proxies. The *Pasdaran* (Iranian Revolutionary Guard Corps, IRGC) entrenched itself in Iraq via the porous boundary between the two countries. Iranian activity focused on souther Iraq, in particular in the Shi'i holy cities of Najaf and Karbala, where they gained significant leverage. Thus, Iran's influence, which had long been felt in Damascus and Beirut, was now apparent in Baghdad as well. Sunni Arab states were anxious as these developments unfolded and the fraught relationship between Iran and the Arab states became a major issue on the region's agenda.

Arab rulers' worries about the rising Iranian threat were prominently expressed in Arab political and media discourse with Arab rulers raising doubts about the loyalty of Shi'i communities in Arab states. Egyptian President Hosni Mubarak argued emphatically that Shi'i communities in Arab countries are more loyal to Iran than to their respective states. In December 2004, Jordan's King 'Abdallah II warned that a "Shi'i crescent" (*al-hilal al-Shi'i*) threatened to tear the Arab and Islamic world apart. The central core of the "Shi'i crescent" was to stretch from Iran through the northern tip of the Persian Gulf (Iraq, a state in which the Shi'is constitute about 65 percent of the population), Bahrain (65 percent), and perhaps Kuwait (30 percent) and Saudi Arabia (13 percent), through Syria, an Iranian client state, and Lebanon, where the Shi'a make up a plurality of the population.[17] The Arab press held a lively and incisive debate about King 'Abdallah's remarks. Thus, the Shi'i–Sunni conflict has become a central issue in Arab public discourse exemplified by the frequent casting of Shi'is as 'Ajam, or foreign, but also as *rafida* or rejecters, symbolizing Shi'i Islam's rejection of Sunni doctrine.[18]

The initial American euphoria of ousting Saddam Hussein proved to be profoundly premature, exemplified by the infamous "Mission Accomplished" sign which greeted President George W. Bush on the USS *Abraham Lincoln* as he announced the victory of American forces. In fact, the United States soon became consumed in a bloody insurgency, concentrated primarily in the Sunni tribal areas north and west of Baghdad. The Iraqi insurgency, an alliance between remnants of the Ba'thist security state and hardened Salafi-jihadis, engaged in a series of suicide bombings against Iraqi civilians and attacks against American troops, provoking a rise in American disapproval of the war. The evolving changes in the Middle East were further underscored by the events outside Iraq, but had the active hand of Iran. With rising Iranian influence throughout the region, the 2006 Second Lebanon War between Israel and Hizballah provoked a significant change in Arab discourse, diverging from previous conflicts of outright opposition to Israel. It was, in fact, the opening salvo to a new war that now pits Iran and its Shi'i allies against Israel and the moderate Sunni Arab bloc.

What made the Second Lebanon War unique as a pivot point in the recent history of the Middle East was the fact that for the first time, Arab states were more worried about the rising Shi'i threat than they were in portraying their adherence to a pro-Palestinian and anti-Israeli position, and as a result significantly sought to downplay their antagonism against Israel. Unlike the previous wars in the Arab–Israeli conflict, Arab states in the region did not manage to reach a consensus with each other, nor did they project an image of unity. Instead, the discordant noise of the Arab world showed the new evolution of Sunni–Shi'i clashes. For Sunni officials in the Arab world, this war was a sign of the formation of a Shi'i camp in the service of Iran, which fed fears of the regional activities of Shi'is and their proxies. The Second Lebanon War also had significant repercussions for the interactions between regional and great powers. It crystalized, both in the minds of states in the region, and in Western capitals, the threat that Iran posed to regional stability, with increased activity at the time in both Iraq and Lebanon. Additionally, the conflict was first time the newly formed regional alliances began to take shape, marking the beginning of the increasingly overt relations between Israel and the moderate Arab States, crystallizing the evolving alignments within the region.

The 2006 War also marked the beginning of the waning influence of the United States in the region, bogged down in Iraq and Afghanistan. This was coupled with the increasing American urge domestically for a regional withdrawal and a proclivity to engage in "nation building at home," instead of adventurist policies in the Middle East. The Second Lebanon War also underscored the preeminence of non-Arab powers, and decreased salience of Arabs and their institutions, particularly the Arab League as actors of consequence.

The resulting regional breakdown, which became evident after the cessation of the war, has underscored Arab weakness, particularly with the rising power of Iran and Israel, the region's two most powerful states, and the expanded influence of a more assertive and Islamic Turkey.[19]

Of significant note during the conflict was the changing discourse of Sunni clerics, and their growing outward hostility to the Iranians and their Shi'i allies. One of the most poignant expressions of this was when Saudi Wahhabi clerics, representing the puritanical wing of Sunni Islam, posted fatwas declaring that the Shi'is to be a heretical sect and that Hizballah leader Shaykh Hassan Nasrallah was the son of the devil, an enemy with whom there should be no cooperation. Among those prominent clerics was Shaykh 'Abdallah bin Jabbarin, a leading member of the Saudi *ulama*, who published a fatwa stating that support for Hizballah is equivalent to sin, because the movement is working in the service of Iran. In the months following the Second Lebanon War, the atmosphere heated up around the issue of the Shi'is and their proxies. In August 2006, during a speech he delivered in front of the Egyptian Journalists Union, Shaykh Yusuf al-Qaradawi, an Egyptian religious scholar residing in Qatar, triggered a public debate over the status of the Shi'i community in Egypt. Qaradawi warned that the Arab Sunni community should be aware of "the Shi'i infiltration into the Arab Sunni states. Such an infiltration might ignite a spark that could eliminate every good and pious lot. We could easily witness the recurrence of events in Iraq in other Arab Sunni countries."[20] Another statement by al-Qaradawi that was quoted in the Egyptian press warned that the Shi'is are trying to spread their beliefs in Egypt on the basis that Shi'i saints have been buried there (such as the tombs of Hussein and Zaynab) and that "the Shi'is use Sufism as a bridgehead to *tashayyu'* (preaching in praise of Shi'ism and persuading believers to adhere to it) through which they have managed to infiltrate Egypt in the last few years."[21]

There were also other voices. A shaykh at al-Azhar in Cairo, Muhammad Sayyid al-Tantawi, said that "the dispute between Sunnis and Shi'is focuses on individual clauses rather than the main tenants of religion." Besides his bellicose statements, al-Qaradawi himself issued moderate messages from time to time, and in February 2007 called for cooperation with 'Ali Akbar Hashemi Rafsanjani, the Iranian president, toward ending the state of war in Iraq and thawing the tensions between Sunnis and Shi'is. Of course, there were also those who continued to claim, such as the Arab-American intellectual Shibley Telhami that "the public of the Arab world is not looking at the important issues through the lens of the Sunni-Shi'i divide." He argues that "They see them rather through the lens of Israeli-Palestinian issues and anger with U.S. policy [in the region]. Most Sunni Arabs take the side of the Shi'is on the important issues." Such statements, however, were drowned out by the sea of articles and editorials about the "Shi'i threat."[22]

There had been previous examples of Sunni–Shi'i clashes, but one could not have predicted that such an intense series of clashes would take place in such a short time. The once dormant conflict between Sunnis and Shi'is broke out again and took over the streets of Baghdad and southern Iraq with rival militias slaughtering members of the opposite sect. The rhetoric reached an absurd level when it spread to the Palestinian Authority, where the two rival parties are both Sunnis. Fatah activists, hostile to Hamas, derided Hamas activists, depicting them as Shi'is.[23]

In January 2007, Saudi leaders came out openly against Iran, stressing the dangers that the Gulf region was being subjected to, owing to the intensification of Iranian activity there: "We advised the [Iranians] not to expose the Gulf region to dangers," said Saudi King, 'Abdallah bin 'Abd al-'Aziz. Furthermore, he reinforced the Saudi position in the strong statement he made to the Kuwaiti newspaper *al-Siyasa*, "Any country that carries out unwise actions will be held accountable for them by the countries of the region."[24] This statement was published in the midst of a loud battle of words between Iran and Arab media outlets and official spokespersons from the Arab countries. King 'Abdallah also said that all attempts to turn Sunni Muslims into Shi'is will not succeed as the Sunnis constitute the majority of the world's Islamic community. In response to an interviewer's reference to some rumors to the effect that Iran was attempting to spread Shi'i Islam to Sunni Arab states as a means of increasing Tehran's political power, the King replied: "We are following up on this matter and we are aware of the dimensions of spreading Shi'ism and where it has reached." "However," he went on, "we believe that this process will not achieve its goal because the majority of Sunni Muslims will never change their faith." He added, "Ultimately, the majority of Muslims seem immune to any attempts by other sects to penetrate it (Sunna) or diminish its historical power."[25] These words by the Saudi King who did not frequently give interviews to print and electronic media, not to mention interviews about sensitive issues such as this, indicated of the importance of Shi'i–Sunni friction in the Arab public discourse.

Although there was no concrete evidence to substantiate the rumors that Iran was attempting to convert Sunnis, Arab claims regarding the supposed "conversions" were derived from real fears among Arab publics that Iran was growing in strength. In the face of the growing friction between Iran and the international community over Iran's nuclear program, Iran was known to utilize Shi'i populations in Iraq and Lebanon as a political lever and to entrench their own interests. An Egyptian columnist aptly summed up the fears of the Arab publics, saying: "The Arab allies of the US, Egypt, Jordan, and Saudi Arabia, are very worried by the sweeping influence Iran has gained in Iraq, Lebanon, and the Palestinian Authority. With the help of the Hizballah and Hamas organizations—radical and uncompromising forces on the issue of

Israel—Iran is propelling the whole region toward a goal the opposite of that which the allies of America want to reach."[26] "Iran's intentions are patently obvious," wrote *Al-Ahram*'s editor, 'Usama al-Sayyid Saraya, adding that "Iran is working actively towards spreading Shi'i doctrine even in countries which do not have a Shi'i minority [. . .] to revive the dreams of the Safavids." Saraya was referring to the Safavid dynasty that ruled Iran from the end of the 15th century to 1720 and converted Iran's population to Shi'ism. "That some people defend the Iranian position and deny Iranian ambitions over the Arab region, I see only as naivety and stupidity, coated with hatred for the American presence in the region," explained Saraya.[27]

This was in fact the infrastructure erected in the Middle East at the end of the 20th century and the opening decade of the 21st century. Sunni Arabs and Shi'i Iranians were cultural and religious rivals facing off in a titanic struggle with geopolitical implications. "Nuclear Iran is reviving the dream of the Persian Empire" was the title of *al-Sharq al-Awsat*'s January 2006 editorial, which claimed that Iran's nuclear program was not intended for an attack on Israel, but was meant to provide Iran with an important tool for further expanding its regional influence. As a result, the renewed tensions between the two major religious traditions of Islam—the Sunna and the Shi'a—were more closely related to geopolitical developments than matters of faith.

The Arab Spring has sharpened the struggle between the two major religious traditions in Islam and have intensified the bloody conflict between Sunna and Shi'a, especially in states where there is constant friction between the two communities. This further exacerbated fears in the evolving regional clash between Iran and the Sunni-led bloc headed by Saudi Arabia. The open involvement of the Shi'i Hizballah, intervening on the side of Iran and the Syrian regime in the Syrian Civil War, assaulting the majority Sunni town of al-Qusayr in 2013, showcased the sectarian bloodshed in the Syrian Civil War.[28] But perhaps more than any other country that had been hit by the storm of the Arab Spring, Bahrain proved to be a microcosm of the clash between Sunna and Shi'a, in a state where Shi'is dominated the population, but the Sunnis dominated the ruling elite. The fear of increased Shi'i assertiveness was of course exacerbated by omnipresent influence of Iran, and the fears of the Gulf Cooperation Council (GCC), of Bahraini Shi'is allied with the Islamic Republic coming to power.

THE BAHRAINI CASE: THE ISLAND OF SUNNI–SHI'I TENSIONS

The uprising that broke out in February 2011 in Bahrain was, at first, perceived as a continuation of the events collectively known as the Arab Spring

but also had considerable repercussions in the regional struggle between Iran and its Sunni opponents. Tens of thousands of Bahrainis flocked into "Pearl Square" (*Maydan al-Lu'lu'*) in the capital, Manama, demanding constitutional, economic, and political reforms in the island state. Messages were circulated on social media, such as a site called "the Youth of the February 14th revolution," organized by a group of youth who denied any affiliation to a political movement, and denounced the dictatorship in Bahrain.[29]

The Bahraini government tried to negotiate with the opposition leaders, sacked several unpopular ministers, released hundreds of political prisoners and was ready to carry out more reforms, but the protesters refused any compromise which would leave the government in its current form. They demanded a new constitution and full civil liberties advocating that the archipelago would instead be comprised a single electoral district with independent executive and judicial bodies. The Al Khalifa regime and its Sunni supporters understood correctly that responding to the demands of the opposition would bring about Shi'i dominance in the country, since the Shi'is accounted for about 65 percent of the country's citizens. Thus, the tensions between the two great traditions of Islam rapidly found expression in the Bahraini arena and overshadowed the efforts of Bahrain's citizens to formulate an authentic national message.

A Sunni scholar, 'Abd al-Latif al-Mahmud, called for a demonstration near a Sunni mosque in Manama on March 2, 2011, which was attended by about 100,000 people who openly and publicly expressed their support for the regime, opposing the demands of the opposition. Al-Mahmud called on the Bahraini emir to act against threats to stability and order in the country and accused the Shi'i of being supported by Iran and of trying to take over the country while cynically exploiting of the protests in Bahrain. Sunni–Shi'i tensions developed into the first violent clash in Hamad Town, where a large population of Sunni immigrants had been settled as part of the government's attempt to change the demographic balance. National unity disintegrated into sectarianism. Young radicals took control of the protests which began to focus more and more on the overthrow of the regime rather than on legitimate demands for government reform.[30] Many were injured on both sides. Bahrain's official media accused the Shi'i community of violence against Sunnis and also blamed them for the destruction of private property. The Shi'i opposition, for its part, blamed the violence on the government and demanded the expulsion of the naturalized Sunni immigrants.

The fact that the majority Shi'i population in Bahrain played a major role in the protesting gave the uprising a religious-sectarian dimension. The Al Khalifa reacted as usual with a heavy hand and made it clear that they would not give up their grip on power. The evacuation of the "Pearl Square" added fuel to the fire and the protests spread all over the country. Demonstrators

held signs calling for the overthrow of the existing regime, like those that had been raised in the town squares of Tunisia and Egypt. Several demonstrators also chanted slogans such as "Death to the Al Khalifa" and favored the establishment of a republican regime. The ruling family announced the abolition of political reforms and relied upon their classic formula for survival which was based on the support of the Sunni minority and backed by the security forces. On March 14, Bahrain's government declared a state of emergency. The army arrested many of the protest's political leaders and others suspected of anti-government activity. The government also ordered the demolition of Pearl Square which had become a symbol of the protest. Low-intensity clashes between security forces and protesters continued until mid-April 2012.[31]

Bahrain's neighbors watched the developments in the archipelago with concern. Saudi Arabia and Kuwait in particular, home to sizeable Shi'i communities, had long feared the consequences of the processes of democratization and the increased political power of the Shi'a. It was this fear of Iran, and its patronage and close links with Shi'i populations throughout the Persian Gulf that worried the Sunni-dominated monarchies of the GCC. Saudi King 'Abdallah applied strong pressure to his Bahraini counterpart to freeze the reform measures and to prevent any political compromise for fear that it would set a dangerous precedent and would hasten the fall of the royal families in the Gulf region. The Saudis were also keenly aware that the Americans had changed their strategy in the Middle East. In light of how the Americans had reacted to similar uprisings in Tunisia and Egypt, the Saudis feared that the popular uprising in Bahrain might, in the end, also be given a blessing of Washington. Thus, the uprising in Bahrain became a test-case of the ability of a Sunni monarchy to weather this kind of crisis. The Saudi king ordered the Bahraini emir to declare martial law and declared that the military has the right to implement the provisions of the Gulf Cooperation Council (GCC) Defense Pact. At the end of a GCC ministerial council meeting held on March 10, 2011 in Riyadh, the bloc issued a statement warning that "it would not allow any foreign interference in their affairs." They pledged to stand firmly and resolutely against any attempts to ignite sectarianism or spread sectarianism among them and among their people, or anyone who dared to threaten their security and interests.[32]

One thousand soldiers serving in the Armed Forces of Saudi Arabia and hundreds of police officers from the United Arab Emirates made their way to Bahrain to guarantee the preservation of the AL Khalifa regime. The "Bahraini Spring" was also accompanied with a geopolitical storm. Iran and Shi'i Iraq condemned the involvement of Sunni Arab powers in the affairs of a neighboring country and re-raised the bitter rivalry between Iran and Saudi Arabia and its "brothers." Thus, it can be said that the web of events in the island state were submerged in the various dimensions of the Sunni–Shi'i

conflict from times immemorial and also the modern-day Arab-Iranian conflict for dominance in the Persian Gulf.

In an interview with the Saudi web site, www.lojainiat.com, Prince Khalid bin Talal expressed the mood of the streets: "all doubts were verified and emerged sure that people of the *rafida* [literally, the 'rejecters,' a derogatory Arabic term for Shi'is] and wearers of turbans are behind the *fitna* [civil war], are the inciters who wish to lead the country into an abyss as Hizballah did in Lebanon, as they did in Iraq [. . .] in the Houthis' war in Yemen, and what is happening in Bahrain, and even before that the [demonstrations] that occurred several times in Saudi Arabia [. . .] agitating against the Saudi people [. . .] through raising slogans and images that harm the religion, the state, the ruler and its people [. . .]. While the Sunnis were doing it in Iran, they were expelled from their homes, imams and clerics were deported from their mosques, Sunni intellectuals were executed, imprisoned or they disappeared [. . .].We will not agree [in Saudi Arabia]—neither the leaders not the people—to any intervention in the affairs of the Saudi kingdom in any way. As [Saudi Foreign Minister] Sa'ud al-Faisal said: If someone tries to put his finger in the kingdom—his finger will be cut off."[33] An editorial in the Saudi daily *Al-Watan* stressed that "a statesman who retreats to the eastern bank of the Arabian Gulf—not 'Persian [Gulf]'—would be very wrong to think that the region's countries remain indifferent to the intervention in Bahrain. When we say 'the Bahraini interest' it is incumbent upon Iran to understand the intention of this concept is the 'Gulf's interest' and Gulf Cooperation Council (GCC) in its political and military roles was established for the unity of the Gulf and [designed] to protect it against anyone who would threaten the security of its citizens and its stability [...]."[34] Gulf dailies tried to draw attention to the Iranian regime's repressive policies against its own minorities in Iran, and against the Sunni Arab minority living in the country, saying

> "the Arab, Kurdish and Baluchi minorities in Iran, which taken [together] constitute a majority of the Iranian population compared with the Persian minority . . . are denied [the right] to speak in their own languages; restricts the Sunni religious scholars, and raises the young [minorities] to the gallows. The Iranian channel *al-'Alam*, which broadcasts to the Arab world, covered the protests in Bahrain and fabricated demonstrations in the cities of Saudi Arabia that existed only in the sick dreams [of Iran] while ignoring what is happening in Ahwaz, in Iranian Kurdistan and in Baluchistan, and even in the streets of Tehran where reformists are constantly oppressed."[35]

Bahrain inadvertently became the center of the struggle between Saudi Arabia and Iran for hegemony in the Persian Gulf. Iranian leaders expressed their firm support for the rebels' demands in Bahrain, and Saudi leaders viewed the protesting as riots borne out of an Iranian plot to undermine the

Arab regimes in the Persian Gulf. Whether or not Iran was directly involved in the protests was beside the point. The Bahraini regime, in cooperation with its allies in the Gulf, openly accused Iran of being responsible for riots in the country. The intervention of GCC forces, specifically Saudi Arabia, effectively internationalized the conflict and emphasized the unique geopolitical threat that the Saudis, as the main power in the regional bloc, saw emanating from Bahrain. As the scholar Frederic Wehrey notes, the Saudis viewed Bahrain not just as any state, but a state where the Kingdom had long exercised considerable political and economic influence, "a neighbor often described as its Cuba or Puerto Rico." The resulting intervention was a "significant strategic imperative to restore the kingdom's prestige in the wake of region-wide setbacks to Iran in Lebanon and Iraq." But from a wider geopolitical perspective, the Saudis sought to alert the Obama administration, specifically in the wake of their support for revolutions in both Egypt and Tunisia, that no such act would be allowed in Riyadh's backyard. As a result, the Saudi-led GCC response was not only a symbol of monarchical solidarity but a warning shot to the Iranians and its Shi'i allies.[36]

The Bahraini King Hamad bin 'Isa declared that "What Bahrain has witnessed is a test from God. However, there is a foreign plot that has been in the making for at least 20 to 30 years so that the ground is ready for its execution."[37] He ordered the expulsion of the Iranian representatives, suspended flights to and from Iran, Iraq, and Lebanon, and initiated a deportation of Lebanese Shi'is from the Gulf State on the grounds that they were involved in the protests in Bahrain and Saudi Arabia. The Iranians, of course, denied involvement. The uprising in Bahrain and the involvement of the Arab forces angered many Iranians and Shi'is in Iraq and Lebanon. For example, Ali Akbar Salehi, the Iranian foreign minister, demanded the removal of the foreign forces from Bahrain protesting regime's refusal to carry out the reforms demanded by the people. During the main Friday prayers in February 2013, Ayatollah Mohammad Emami Kashani (a member of the Assembly of Experts) called the rulers of Bahrain "foreign agents" and "servants of Israel" and expressed the hope that God will help the protesters to depose them.[38] Iranian Ayatollah Javad-Amoli claimed that "every Muslim has a duty to protect the Bahraini people and that many of the youth in Iran are ready to carry out *shahada* (martyrdom) in Bahrain"[39] and that the "royal dynasties of Al Sa'ud and Al Khalifa are unbelievers."[40]

The "Bahraini Spring" was born mainly out of the ongoing conflict between the Shi'i majority and the Sunni ruling elite. The events of the Arab Spring protests were a continuation of the socio-political protests throughout the 20th century, none of which were the product of cooperation between the Sunni–Shi'i middle classes. In this respect, the earlier

"Bahraini Spring" protests were different in the sense that they were characterized by radicalism. The crisis of Bahraini national identity and the sectarian split turned the small Kingdom into an arena of confrontation between Iran and Saudi Arabia and deepened the tension and hostility between Sunnis and Shi'is on both sides of the Gulf. The potential to utilize cultural-religious animosity for geopolitical purposes in the Middle East became easier than ever.

YEMEN AND REGIONAL POLITICS

The domestic conflict in Yemen was also cloaked in the broader geopolitical struggle which saw the utilization of sectarian tensions as a mechanism for foreign powers to further entrench themselves within the state. While Saudi Arabia stood with the ousted regime in San'aa, Iran was the patron of the Houthi rebel camp. The Houthis continued to present their demands within the framework of a socio-economic manifesto, whereby the weak and oppressed should be taken care of by the fair and just distribution of state resources. They shunned the characterization of the conflict as an ethnic or religious struggle and denied receiving support from Iran. They demanded that the country should not be divided into federal districts, since this division excluded them from the oil-rich provinces and robbed them of their "natural rights." Perceptive analysts rushed to warn that this was not a war of religion, but a political war or struggle for rights and opportunities. Others tried to over-simplify the debate, by explaining it in strict terms of the Sunna and Shi'a, a reductionist viewpoint as the Zaydis are not considered to be mainstream Shi'i Muslims.[41] Indeed, the battle included aspects of tribal politics and maneuvering, with the Houthis taking advantage of deep divisions within the ruling party, while in parallel consolidating their own political movement called *Ansar Allah* (Supporters of Allah). They did this while simultaniously cooperating with the Yemeni government against the Sunni al-Qaida. In the eyes of the West (especially Americans), the Houthis were initially viewed as "the lesser evil," but in the eyes of the Saudis and other Gulf States they were viewed as representatives of Iran in Yemen, as it was feared that their success would inspire the Shi'i communities in the other Gulf Arab countries.

In September 2014, President 'Abd Rabbu Mansur Hadi was forced to leave San'aa after the Zaydi rebels took control of the capital and signaled Iran's ambition to gain control over yet another Arab capital, this time in Yemen. The Houthi rebel takeover of al-Hudayda (a port city located 200 km south-west of San'aa) and in April 2015 also Aden, situated on the route to the Bab-al-Mandab Straits, provided the formerly landlocked Houthis with supply lines by which they could receive direct military aid from Iran. This fueled the Saudis' fears that

Yemen was becoming another area for the extension of Iranian influence in the region. This was in spite of the arguments of the Houthis that they were not "clients" of Iran and despite statements by Iranian scholars, correct in themselves, that the Zaydi religion of the Houthis was indeed not part of Twelver Shi'i Islam (*ithna 'asha'iryya*), the interpretation common among the Shi'is of Iran, southern Iraq, and southern Lebanon. It became increasingly difficult to ignore the close relationship between Iranian officials and Hussein Badr al-Din al-Houthi, the founder of the Houthi movement.[42] Iran's provisional moral support and logistical aid, including arms and training, was the product of certain strategic and geopolitical considerations that went in line with Iran's pattern of behavior in the region. The rulers of Iran were described as "the new sultans of the Red Sea," by Iranian journalist Mohammad Sadeq al-Hosseini asserting that "we [Iran] are the new sultans of the Mediterranean and the Gulf. We are in Tehran, Damascus, Beirut, Baghdad and San'aa and will redesign the map of the region."[43]

Developments in Yemen disrupted the balance of power and led to increased fears in the Gulf States that a Houthi victory in Yemen would arouse the Shi'i communities in the Gulf to civil disobedience, particularly in Saudi Arabia and Bahrain. Moreover, Yemen's internationally recognized government led by President Hadi received considerable aid from Saudi Arabia and the United Arab Emirates against the Houthis, with Yemen becoming another area for the extension of Iranian influence in the Middle East.

In March 2015, Yemeni President 'Abd Rabbu Mansur Hadi called for the urgent involvement of international forces in Yemen to "stop the aggression of the Houthi militias who carried out a coup against the government." Calling upon the rebels to withdraw their forces from the government offices in San'aa and return their confiscated weapons, Hadi tried to instill hope in his supporters by saying that in the end "the Yemeni flag would be hoisted on Mount Maran in place of the Iranian flag."

Events in Yemen hastened the idea of establishing a "Joint Arab Force" for rapid intervention. The force, established in accordance with the Treaty of Joint Defense and Economic Co-operation of the League of Arab States (the Arab League) in 1950, was originally intended to "curb the expansionist ambitions" of Israel and liberate Palestine but was now being employed by the Arab countries to curb the expansionist ambitions of Iran. The priorities of the Arab states dictated that the "Palestinian problem," which was often a focus of the statements issued by Arab leaders, had actually been pushed into a corner. The Arab coalition consisted of ten countries—the five smaller Gulf emirates and monarchies, Saudi Arabia, Egypt, Jordan, Sudan, and Morocco. "Operation Decisive Storm (*'asifat al-hazm*)" carried out by the Arab coalition led by Saudi Arabia beginning in March 2015 was primarily an aerial attack against Houthi concentrations in Yemen. The Saudis warned that they were considering a ground invasion to preserve the rule of their protégé, President Hadi, and force the Houthis to

withdraw their forces. The Saudis wanted to halt the geopolitical drift of their sworn enemy, Iran, into the strategic Strait of Bab al-Mandab and into the southern part of the Arabian Peninsula. In a similar dynamic to the 1960s during the Yemen War (1962–1968), Yemen—in the periphery of the Middle East, and one of the poorest and most underdeveloped countries in the world—turned into the focus of a wider confrontation, between Nasserist Egypt and Saudi Arabia. The allied Sunni offensive against the emerging Houthi regime in Yemen demonstrated once again how easily religious and cultural hostilities could be utilized for wider political objectives in the region. The signing of the Iranian nuclear agreement in 2015 exacerbated Saudi fears that American actions in the region would lead to a more pro-Iranian line and a reduction in Washington's pushback against Iran's malignant behavior in the region. Owing to these developments, Sunni Arab states became suspicious that the United States was actually propping up Iran's regional expansion. The battle for Yemen, and to some extent the conduct of events in Bahrain, were intended to curb Iranian influence in a part of the region which Saudis viewed as their own exclusive domain, but it was also revealed disagreements between the United States and its regional allies.

The GCC intervention in Yemen, which began in March 2015, was the first post-Arab Spring Saudi-led offensive that aimed to stem Iranian influence, in what Riyadh perceived to be its near-abroad. Yet the evolving alliances in Yemen were shaped by the highly tribalized nature of Yemeni society, lack of centralized power structures and bureaucracy, coupled with the internationalization of Yemen's internal fractures, pulling in not only Iran and Saudi Arabia, but also the rest of the GCC into the intractable conflict. The Houthis became allied with the forces of 'Ali 'Abdallah Salih, the long serving president, who united North and South Yemen in 1990, and was only ousted from power during the Arab Spring. Salih, a member of the Sanhan, arguably Yemen's largest, and most powerful tribal force, threw his support behind the Houthis, with government military forces loyal to him aiding the Houthis in their conquest of San'aa, underscoring the view that Salih and his allies were widely seen as the guiding institutional and political force behind their onslaught. While Salih was also a Zaydi, making his alliance with the Houthi rebels more palatable, his primary interest was retaking power and destroying the GCC-backed forces. After taking San'aa, the Houthi forces drove southward, towards the country's second largest city, the strategic port, Aden. While the Houthi forces were driven back by forces loyal to President Hadi, and aided by the Saudis and Emiratis, the Iranians continued to expand and entrench their support for the Houthi regime based in San'aa, providing them with advanced weaponry including surface-to-surface missiles, and anti-ship missiles which have been used to attack shipping in the strategic Bab-al-Mandab Straits leading into the Red Sea. But perhaps the most important event in the Yemeni context was the killing of former President Salih,

arguably the most consequential figure in modern Yemeni politics. After considerable speculation, both Saudi and Emirati officials had reached out to the former president and convinced him to abandon the Houthis. However, the Saudi–Emirati grand plan failed, as Salih was killed in one of his San‘aa strongholds while trying to flee to his hometown Sanhan in December 2017. The loss of Salih, and the inability of the Saudis and Emiratis to capitalize on the split within the Houthi ranks, has led to the perpetuation of the conflict as Iran has further entrenched its interests.

THE SECTARIAN BALANCE SHEET

The aftermath of the Islamic Revolution and Iran's aggressive foreign policy, aided by the strategic blunder of the American invasion of Iraq and the instability caused by the Arab Spring, have turned Tehran's regional push into overdrive. Yet, regional actors have consistently looked at their own substantial Shi‘i minorities with distrust. The experience of the 1980s (the attempted coup in Bahrain together with the introduction of Hizballah in Lebanon as the vanguard for the export of the Islamic revolution across the region) has left an indelible impression on the regimes in Bahrain, Saudi Arabia, and the other Gulf Sunni Arab states, underscoring the changing times in the Middle East, and the rise of a proactive Iran. The conduct of the Islamic Republic of Iran gave them reason to fear that Shi‘is in their countries were indeed a "fifth column" in the service of Iran. Besides the bilateral aspects of the 1980–1988 Iran–Iraq War (which included border disputes and the Kurdish question), the war was also a cultural and national struggle between Iranians and Arabs. Arab nationalists and Ba‘thists sought to defend "the Arab fortress" from the ancient Persian-Zoroastrian enemy, a fear which was famously elucidated by one of Arab nationalism's leading intellectual lights, Sati‘ al-Husri, who refused to appoint a well-known Shi‘i Iranian poet as an Arabic teacher in a primary school in Baghdad during the 1920s, fearing the undermining and subversion of Arab culture.[44] The rise of Ayatollah Khomeini thus posed a sharp challenge to the Sunni Arab neighbors of Iran and reignited ancient rivalries between Arabs and Persians, and between Sunna and Shi‘a. The final decades of the 20th century gave the Sunni–Shi‘i rivalry renewed vitality that has come to fruition in the aftermath of the Arab Spring.

With the expansion of Iranian influence and power in Yemen, together with the long-standing Iranian stronghold in Lebanon and growing influence in Iraq, the so-called Shi‘i Crescent, coined by Jordan's King ‘Abdallah, had turned into a "full moon," with Iranian power entrenched not only in the Levant, but also aiming to control the important shipping lanes at the head of the Red Sea. The Iranians utilized this political instability and the prevalence

of "failed states" throughout the region to entrench themselves, particularly in mixed societies where there were substantial Shi'i minorities, preying on tribal and sectarian cleavages to expand their influence. The Iranian urge for regional expansion was also aided by the rise of the Islamic State, which provided an extremist counterweight allowing Iranian influence to entrench itself in Syria and Iraq under the guise of defending the countries' Shi'i minorities. According to the *Economist*, more than half of Syria's population of 22 million has been displaced, with 6 million abroad, and 6.5 internally displaced citizens, most of whom are Sunnis.[45] The alliances formed by the Asad regime, between minority groups, including, but not limited to Alawites, Druze, Christians, as well as substantial numbers of Sunnis tied to the regime, together with Iranian and Russian support have staved off the rebel assault against the Ba'thist regime. As a result, the Syrian regime together with its Iranian allies have sought to remake the demographic balance of the fractured country. This has included the mass confiscation of destroyed property under a diktat known as Law Number 10, which allows the Asad government to take over property that is designated for redevelopment. Syrians were given thirty days to register to provide the requisite documents proving their legal ownership. Yet, with millions of absentee landlords, the law is no more than a power grab, allowing for the regime to wantonly seize property and lands. Tehran and Shi'i militias have also had an active hand in instigating population transfers, shoring up government support in areas that were previously populated by Sunni Syrians. This has included transferring Shi'is from Lebanon and Iraq, and resettling them in Syria as well as increasing the Shi'i population between Damascus and Homs and the Lebanese border.[46] These actions by the Syrian regime and Iran underscore the inherent sectarian nature of the conflict in Syria, and the distrust that regimes have for the sectarian "other." The events of the Arab Spring did not invent these sectarian tensions, but the tenuous demographic balance in states such as Syria and Bahrain, and the tribal and sectarian fissures in Yemen have served to entrench sectarian and tribal governments who have tried to safeguard their own particular interests. The initial euphoria that the Arab Spring brought, with hopes for pluralistic and democratic change, in reality only further emphasized tribal and sectarian tensions that had never gone away but were bubbling below the surface ready to explode.

NOTES

1. For more on the intellectual background on the development on jihadi ideology see 'Abdallah Azzam, *Join the Caravan* (Azzam Publications, 2001); Sayyid Qutb, *Ma'alim fi al-Tariq (Milestones)* (Cairo, 1964).

2. Robert J. McCartney, "Iranians and Iraqis Clash North of Main Battlefield," *The Washington Post*, July 17, 1982, https://www.washingtonpost.com/archive/politics/1982/07/17/iranians-and-iraqis-clash-north-of-main-battlefield/0d3b6f80-ba75-4ecf-a314-3fd41b6e05ee/?noredirect=on&utm_term=.94520f9477da.

3. *Tehran* (Arabic), March 14 and 18, 1980. See also: Uzi Rabi, *Saudi Arabia: The Oil Kingdom in the Labyrinth of Religion and Politics (Hebrew)* (Tel Aviv: The Open University, 2007), pp. 125–123.

4. Michael Axworthy, *Revolutionary Iran: A History of the Islamic Republic* (London: Penguin, 2014), p. 60.

5. Axworthy, *Revolutionary Iran*, p. 66.

6. Toby Matthiesen, *The Other Saudis: Shiism, Dissent and Sectarianism* (New York: Cambridge University Press, 2015), pp. 58–60; "Denied Dignity: Systematic Discrimination and Hostility Toward Saudi Shia Citizens," *Human Rights Watch*, September 3, 2009, https://www.hrw.org/report/2009/09/03/denied-dignity/systematic-discrimination-and-hostility-toward-saudi-shia-citizens.

7. Matthiesen, *The Other Saudis*, pp. 357–359.

8. Martin Kramer, *Shi'ism, Resistance, and Revolution* (Westview Press, 1987), p.10.

9. Matthiesen, *The Other Saudis*, pp. 357 and 371–372.

10. The National Assembly operated from December 1973 until June 1974, and from October 1974 to June 1975. The Assembly was disbanded in August 1975 and the constitution was suspended by order of the Emir. See: Rosemarie Said Zahlan, *The Making of the Modern Gulf States: Kuwait, Bahrain, Qatar, the United Arab Emirates and Oman* (London: Unwin Hyman Ltd, 1989), pp. 60–62.

11. Out of seventy-three members of the group, thirteen were Saudis, one from Kuwait, one from Oman and the rest from Bahrain. See *'Ali Hashim*, *al-Nahar al-'Arabi wal-Duwali* (Paris), no. 243 (December 28, 1981), pp. 27–25.

12. *Arab Report*, December 17, 1981.

13. Since the constitutional movement, headed by a Sunni lawyer, Ahmed Shamlan, and Dr. Munira Fakhru, and 'Shi'a figurers such as Shaykh 'Abd al-Jamri, supported civil protest and shook off Iran, Bahraini policy was blatantly biased. See Mahdi 'Abdalla Al-Tajir, *Bahrain, 1920–1945, Britain, the Shaikh and the Administration* (London & New York: Croom Helm, 1987), pp. 1–5.

14. Louay Bahry, "The Socioeconomic Foundations of the Shiite Opposition in Bahrain," *Mediterranean Quarterly*, 11 (Summer 2000), p. 129.

15. Mansur al-Jamri, "State and Civil Society in Bahrain," Paper presented at the Annual Conference of the Middle East Studies Association, Chicago, December 9, 1998.

16. Steven Wright, "Generational Change and Elite-Driven Reforms in the Kingdom," Durham Middle East Papers, Sir William Luce Fellowship Paper, No. 7 (University of Durham, 2006).

17. Because of the highly sectarian nature of many of the societies cited, particularly Iraq and Lebanon, it is difficult to accurately measure the demographic breakdown of the state. As a result, the percentages that are generally reported are rough estimates accounting for population change and emigration. See Iraq, *CIA World Factbook*, https://www.cia.gov/library/publications/the-world-factbook/geos/iz.html.

18. Fanar Haddad, "The Language of Anti-Shiism," *Foreign Policy*, August 9, 2013, https://foreignpolicy.com/2013/08/09/the-language-of-anti-shiism/.

19. For more see: Richard N. Haass, "The New Middle East," *Foreign Affairs*, 85, no. 6 (November/December 2006), pp. 2–11.

20. *al-Masri al-Yawm*, September 2, 2006.

21. Walid Tughan, Mustaqbal al-Arab bayna al-Sunna wal-Shi'a ("The Future of the Arabs between Sunnis and Shi'is"), *Ruz al-Yusuf*, September 18, 2006.

22. Shibley Telhami, "The Ties That Bind: Americans, Arabs and Israelis after September 11," *Foreign Affairs* (March/April 2004), https://www.foreignaffairs.com/articles/middle-east/2004-03-01/ties-bind-americans-arabs-and-israelis-after-september-11.

23. "Fatah Demo Slogan: Hamas Are Shi'is," *Gulf 2000*, January 8, 2007.

24. An interview given by the Saudi King, 'Abdallah bin 'Abd al-'Aziz, to the Kuwaiti *al-Siyasa*, January 27, 2007.

25. Diana Elias, "Saudi King: Spreading Shiism Won't Work," *The Washington Post*, January 27, 2007, http://www.washingtonpost.com/wp-dyn/content/article/2007/01/27/AR2007012700440.html.

26. *Al-Sharq al-Awsat*, May 17, 2008.

27. *Al-Ahram*, January 26, 2007.

28. Anne Barnard, "Hezbollah Commits to an All-Out Fight to Save Assad," *New York Times*, May 25, 2013, https://www.nytimes.com/2013/05/26/world/middleeast/syrian-army-and-hezbollah-step-up-raids-on-rebels.html

29. Report of the Bahraini Independent Commission of Inquiry. Accessed October 04, 2015, www.bici.org.bh/BICIreportEN.pdf, p. 65.

30. "Bahrain Protests: Your Stories," *BBC News*, February 20, 2011, https://www.bbc.com/news/world-middle-east-12504658.

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32. Tarek El-Tablawy, "GCC Pledges $20 Billion in Aid for Oman, Bahrain," *The Washington Post*, March 10, 2011, http://www.washingtonpost.com/wp-dyn/content/article/2011/03/10/AR2011031003629.html.

33. MEMRI Inquiry & Analysis Series Report No. 678, "The Bahrain Situation: Media Clashes between the Iranian-Shi'ite Camp and the Saudi-Sunni Camp," March 18, 2011, http://www.memri.org/report/en/0/0/0/0/0/70/5104.htm.

34. MEMRI Inquiry & Analysis Series Report No. 678, "The Bahrain Situation: Media Clashes between the Iranian-Shi'ite Camp and the Saudi-Sunni Camp."

35. Ibid.

36. Frederic Wehrey, *Sectarian Politics in the Gulf: From the Iraq War to the Arab Uprisings* (New York: Columbia University Press, 2014), p. 82.

37. HabibToumi, "Foreign Plot Again Bahrain Foiled, King Says: Country Returns to Some Sense of Normalcy," *Gulf News*, March 20, 2011, https://gulfnews.com/news/gulf/bahrain/foreign-plot-against-bahrain-foiled-king-says-1.780115.

38. MEMRI Inquiry & Analysis Series Report No. 972, "Iran Calls on Shi'ites in Bahrain to Topple Their Country's Sunni Al Khalifa Regime," May 29, 2013, https://www.memri.org/reports/iran-calls-shiites-bahrain-topple-their-countrys-sunni-aal-khalifa-regime#_edn12.

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40. Deede Ban, April 22, 2011. Accessed December 5, 2015, http://deedeban313.wordpress.com/2011/04/22/we-are-ready-to-die-for-bahrain/.

41. "Woman from Yemen, It's Not a Sunni-Shi'a Conflict, Dummy!," womanfromyemenblogspot.com, January 28, 2015.

42. Hussein met his death in battle in 2004 and was succeeded by his brother, 'Abd al-Malik, as leader of the movement.

43. The remarks of the Commander of the "Quds Force" of the Revolutionary Guards, Qasem Soleimani, in February 2015, on the anniversary of the victory of the Islamic Revolution, left no doubt that Iran viewed Yemeni territory as an important strategic asset: "Today we see the signs of exporting the Islamic revolution throughout the region, from Iraq to Bahrain and Syria, Yemen and North Africa. American arrogance and international Zionism admit their helplessness and the growing power of the Islamic Republic in view of their defeat in the face of the resistance." See *Fars*, February 11, 2015.

44. Kanan Makiya, *Republic of Fear: The Politics of Modern Iraq*, Updated ed. (Berkeley: University of California Press, 1998), pp. 153–154.

45. "How a Victorious Bashar al-Assad Is Changing Syria," *The Economist*, June 18, 2018, https://www.economist.com/middle-east-and-africa/2018/06/28/how-a-victorious-bashar-al-assad-is-changing-syria

46. For more, see Martin Chulov, "Iran Repopulates Syria with Shia Muslims to Help Tighten Regime's Control," *The Guardian*, January 18, 2017, https://www.theguardian.com/world/2017/jan/13/irans-syria-project-pushing-population-shifts-to-increase-influence.

Chapter 4

The Islamic State

The Caliphate's Iraqi Roots

The pitched sectarian battle within Iraq after the American invasion in 2003 provided the avenue for the rise of the Islamic State. This was further enhanced by the instability and the erosion of state institutions that preceded, and then continued during the Arab Spring uprisings. As a result, the upheavals in Iraq and Syria's descent into civil war led to a power vacuum that Salafi-jihadi movements managed to exploit. The most prominent movement in this category was the Islamic State (*al-Dawla al-Islamiyya*), the former Islamic State of Iraq and the Levant (*al-Dawla al-Islamiyya fil-Iraq wal-Sham*, the Arabic acronym being *Daesh*).[1] This organization was founded in western Iraq in the Sunni-dominated tribal regions, and fought against the American forces under the banner of *Al-Qaida in Iraq*. The roots of the Islamic State can be traced back to the closing decades of the 20th century, when Abu Mus'ab al-Zarqawi, a sworn enemy of the Jordanian royal family, was released from prison in Jordan and moved to Kandahar in Afghanistan.[2] There, he was able to convince al-Qaida's leaders to support the establishment of a training base for jihadi activity consisting mainly of Jordanian and Palestinian fighters. This force, which he called the "Army of the Levant" (*Jund al-Sham*), was established in 1999 in the city of Herat, Afghanistan. Besides fighting alongside the Taliban and al-Qaida in Afghanistan, he also organized a number of terrorist attacks in Jordan.[3]

A significant milestone was the conversion of the "Army of the Levant" into a branch of al-Qaida in Iraq (*al-Qaida fil-Iraq*) in 2002, a year before the US invasion of Iraq. During the episodes of brutal violence in Iraq, the organization developed a twofold strategy: fighting against the American occupational forces in Iraq and at the same time destroying the growing Shi'i presence, which in Zarqawi's view posed an existential threat to the Sunnis in Iraq in particular and in the region in general.

In a video clip, Zarqawi announced in September 2005 that his organization had developed a plan for an all-out war against the Shi'is in all parts of Iraq. Zarqawi's speeches were drenched in anti-Shi'i rhetoric and relied heavily on the ideas of the great Hanbali scholar and theologian Ibn Taymiyya (1328–1263), who called the Shi'is and its offshoots (i.e., Isma'ilis, Alawites, and Druze) "*al-rafida*," namely those who collaborated with the enemies of Islam who aimed to bring about its destruction. Ibn Taymiyya also ruled that "waging jihad against these people and imposing the penalties stipulated by Islamic law is the highest way of obedience and fulfillment of religious obligations."[4]

The deadly bombing of the Imam 'Ali mosque in Najaf, the Shi'i holy city in Iraq, in August 2003, left a long trail of deaths and represented a new stage of the murderous, sectarian war in Iraq.[5] The *modus operandi* that Zarqawi and his men had used to execute this deadly attack would form the basis of the Islamic State's activity in the future.

The threat of extremist Salafi movements targeting Western "outposts" in the Middle East has become a regular item on the regional and international agenda. Kidnappings of Western hostages and beheadings of "traitors" and "enemies" also became one of the hallmarks of "Al-Qaida in Iraq," led by Zarqawi. This organization was an integral part of the mechanism of al-Qaida, though it was one of many al-Qaida branches developed in different territories in order to promote attacks against "the near enemy" (*al-'adu al-qarib*), that is, infidel Arab regimes. The focus of their enmity was the Iranian Shi'is and their messengers in Iraq, who were seen by al-Qaida leaders as a bitter enemy. Usama bin Laden declared in 2006 that the Iraqi Shi'is sought the destruction of all Sunnis in Iraq. He depicted them as "traitors" and "agents of imperialism," claiming that their religious rites were heretical and that they deserve a suitable punishment according to sharia law.[6] Al-Zarqawi, like the leaders of al-Qaida, has identified himself with the Salafi-jihadi movement within Sunni Islam, which seeks to restore the exemplary time period of the "righteous forefathers" (*al-khulafa al-rashidun*), meaning the time period in which the Muslim community was led by the Prophet and then by the succeeding caliphs.

But the modus operandi of Zarqawi in Iraq created a fierce debate between the leaders of al-Qaida in Pakistan and Afghanistan. These leaders who preferred to target infidel regimes argued that the extreme violence displayed by "al-Qaida in Iraq," especially the beheadings and the brutal attacks against the Shi'a, created a problematic image that had the potential of damaging the jihad. Zarqawi nurtured hostility toward other Muslims who did not belong to his camp, and with the same ease as he accused governments of *takfir*, he accused other Muslims of apostasy and massacred them.

Zarqawi and his followers gave a sweeping and strict interpretation of the concept of "apostasy" and labeled all kinds of "sins"—selling alcohol or drugs, wearing Western clothing, shaving facial hair, participating in elections—as

heresy. The Shi'is of course, the majority of the population in Iraq, were charged with committing *bid'a* or unlawful innovation, related to heresy. One of the things Zarqawi saw as *bid'a* was the common practice in Shi'i Islam of worshiping at the graves and shrines of Imams. He saw this as damaging to the uniqueness and unity of Allah. Zarqawi sought the establishment of an Islamic emirate and set out different stages of his plan: "First we will banish the enemy and establish the Islamic State, then we will conquer the Muslim countries to return them to the heart of Islam, and then we will fight the infidels."[7] Thus, Abu Mus'ab al-Zarqawi laid the foundations of the future Islamic State.

Zarqawi's death in June 2006, brought about by a US Air Force bombing in Iraq, occurred while he was trying to create an umbrella organization of different Salafi extremist movements, which was called "The Islamic State in Iraq" (*al-Dawla al-Islamiyya fil-Iraq*). At the head of this organization stood Abu Hamza al-Muhajir and Abu 'Umar al-Baghdadi. These two leaders announced the establishment of the Islamic State of Iraq in October 2006. Abu 'Umar al-Baghdadi became known as *Amir al-Mu'minin*, the "leader of the faithful," a title that was generally given to a caliph, the Prophet's successor on earth. At this point, although not officially, the two different factions of al-Qaida parted ways. However, despite calling itself a "state" and giving its leaders titles, the Islamic State in Iraq did not conquer territory or establish governmental institutions, but merely acted as a terrorist organization; first under US occupation and then under the newly formed Iraqi government. Only in May 2010, with a shift in the organization's leadership—Abu Bakr al-Baghdadi[8] in place of Abu 'Umar al-Baghdadi—a significant change occurred in the tactics of the organization. The charismatic personality of Abu Bakr al-Baghdadi and the changing geopolitical arena helped the organization to rise and take power in places in Syria where a vacuum had been created. American forces then reduced their activity and announced their intention to leave Iraq. Iraqi Prime Minister Nouri al-Maliki continued his policy of discrimination against Sunnis and cemented growing ties with Iran, which were viewed as an abomination by the Sunni community in Iraq. Political vacuums and instability worsened by the Arab Spring, as well as the bloody war in neighboring Syria—further eroded the status of al-Qaida and created the kind of infrastructure which allowed the Islamic State to present itself as a suitable alternative.

KASR AL-HUDUD (BREAKING THE BOUNDARIES)—THE ESTABLISHMENT OF THE CALIPHATE AND ITS INTELLECTUAL ROOTS

The Islamic State was born in the labyrinth of Iraqi politics, in the heat of the struggle between al-Qaida and the US forces, as well as in the bloody

clashes between Sunna and Shi‘a. The rise of the Islamic State was aided by the chronic weaknesses of the regimes in Baghdad and Damascus. The transformation of Iraq and Syria, countries that had been ruled by authoritarian strongmen, into swathes of land where the central government had no control over, created ample opportunity for the Islamic State and other jihadi groups to form. The rise of the Islamic State was rooted in the aftermath of the American invasion of Iraq in 2003. As previously mentioned, the wholesale destruction of the institutions of the Iraqi state, disbandment of the Iraqi Army, and the failed processes of de-Ba‘thification created a whole sector of society that held grievances against both the US governing authorities and the increasingly sectarian Iraqi government. The rise of the Iraqi insurgency provides a snapshot of the future organization of the Islamic State. The insurgency united two disparate groups, ex-Ba‘thists, frequently with substantial experience in Saddam Hussein’s military and state security organs with jihadi fighters. Yet, while at face value the “secular” Ba‘thists and the jihadi of Abu Mus‘ab al-Zarqawi’s al-Qaida in Iraq would make strange bedfellows, the reality was far more complex, which integrates identities such as tribe, sect, and social cohesion as the reasons for this cooperation. The sectarian nature of post-invasion Iraqi politics and the ascendance of Shi‘i Iraqis, backed by Iran and the United States, pushed Sunni Arabs out of the corridors of power. It was into this vacuum that Zarqawi and his allies began to affiliate with Sunni Iraqi insurgents, gradually expanding their control over the insurgency. The Sunni insurgency was a diverse one, incorporating Islamists, Ba‘thists, and religious nationalists, and was solidified and crystalized particularly after American forces dismantled the institutions of Saddam’s state, most prominently the Army and the security forces. With the Shi‘is slowly gather control of the institutions of state in Baghdad with American backing, Sunni Iraqis of all stripes saw the Americans as handing over the state to Iran. As a result, the Iraqi insurgency and its most charismatic leadership, most prominently from Zarqawi himself, sought to increase sectarian tensions, dragging Sunni Iraqis to his side particularly in the tribal regions of al-Anbar Province, which would become the epicenter of the Sunni insurgency, and during the Islamic State’s quick expansion, the epicenter of its Iraqi offensive. While American troops were able to quell the Iraqi insurgency, the institutional frameworks and alliances, particularly among Sunni Iraqis, remnants of the Ba‘thist security elite, Al-Qaida in Iraq provided the basis for the would-be Islamic State. As the Syrian Civil War began, the upheavals allowed the remnants of the Iraqi insurgency to reconstitute itself in the instability of the fraying and failed Syrian state.

Al-Qaida in Iraq was aided by the sectarian and political fractures in both Iraq and Syria. In Iraq, the Baghdad-based central government was unable to exercise total control over its territory, while in Syria, the Syrian regime

withdrew from the territories that the jihadi rebels operated in, since Asad's policy was mainly focused on his survival in the major cities. This left a vast empty space between the governments in Baghdad and Damascus, which created an operational and conceptual space for the Islamic State to thrive in. Syria, bordering Iraq to the north-west, offered the Islamic State strategic depth. The bloody riots in Syria and the struggle of the various opposition factions against Bashar al-Asad became cloaked in the colors of Islam. Jihadis flocked from all corners of the Arab and Muslim world with messianic expectations for the struggle in Syria. These foreign volunteers together with local activists founded "The Support Front for the People of al-Sham" (*Jabhat al-Nusra li-ahali al-Sham*) under the leadership of Abu Muhammad al-Jawlani. It soon became apparent that Jawlani's organization was overshadowed by the Islamic State. The Islamic State's black flag was based on simplistic religious formulas: it sought to wage jihad against the infidel authorities in Baghdad and Damascus and against their supporters (i.e., Kurds, Druze, and Christians), calling for the establishment of an Islamic entity which would cover all of the Arab East (*Mashriq*).[9] The capture of Mosul by the Islamic State in June 2014 extended its territory of control to an area the size of the United Kingdom, and paved the way for the declaration of the establishment of a "state." On July 4, 2014, Abu Bakr al-Baghdadi declared the creation of an Islamic caliphate, under the leadership of a caliph, an institution which had not existed since the fall of the Ottoman Empire. In his Friday sermon in Iraq's largest mosque in Mosul, Caliph Al-Baghdadi called on his audience to reinstate the days of the Islamic Caliphate, which is "an obligation that has been neglected for many years and now rests on the shoulders of the Muslims."[10] Al-Baghdadi introduced himself as a Qurayshi, meaning a member of the Prophet Muhammad's tribe (the Quraysh tribe), and stressed the expansion of religious education. Immediately, al-Baghdadi announced the full application of Islamic law in the territory in his possession, thus giving content and form to the caliphate. The pledging of an oath (*bay'a*) to the new caliph by local tribes, Salafi-jihadi organizations, and volunteers from around the world, showed the impressive seriousness of the intentions and power of the new caliphate.

The timing of the announcement, which coincided with the beginning of Ramadan, was carefully chosen. Ramadan, according to the Muslim faith, is the month in which the Muslim community achieved major victories such as the "Battle of Badr" (624 CE)—the triumphant battle of Muhammad and his young followers against the Meccans. This would be seen as a "prophetic example" of the future of the Islamic State and therefore, the ceremony was held at this appropriate timing. Al-Baghdadi made sure that the tone and timing of the declaration were firmly rooted in the tradition of the Prophet. The ceremony also showed no lack of traditional symbolism. The clothing worn by al-Baghdadi, for example, was black, symbolizing Islam in a state of war.

The spokesman of the Islamic State, Abu Muhammad al-'Adnani, described the establishment of the caliphate as the historical moment in which dignity was returned to the Muslim nation and as the realization of a dream rooted in the heart of every Muslim believer.[11] With the establishment of the Islamic caliphate, the border between Syria and Iraq vanished, al-'Adnani claimed. He also argued that the idea of nation-states, a concept that the West imposed on the land of Islam, had disappeared, thus ending a dark period in Islamic history. The last caliphate, which was abolished in 1924 by the founder of modern Turkey, Mustafa Kemal Ataturk, and thrown in the dust bin of history on the pretext that it was no longer a valid system of governance, had now become the model of a blissful future for all followers of the Islamic State. The caliphate, which had been crushed during the 20th century by secular ideologies such as Arab nationalism, now proudly hoisted black flags as of Syria and Iraq merely looked on. This was a boundary-breaking event (*kasr al-hudud*) for the Islamic State.[12]

Al-'Adnani emphasized that with the establishment of an Islamic caliphate, all Muslims are obliged to pledge allegiance to the caliphate and its leader, Abu Bakr al-Baghdadi. Shaykh Turki al-Bin'ali, a senior cleric who supported the Islamic State, spoke of al-Baghdadi's merits. He determined that, based on the holy sources and the determination of the clerics, al-Baghdadi met all ten conditions that make a person worthy of such a position: he must be male, a free person, mature, wise, Muslim, seeking justice, brave, a descendant of the Quraysh tribe, familiar with the Islamic holy sources, and able to look after the interests of the Muslim nation. As if pulling the rug out from under the feet of those who oppose al-Baghdadi, al-Bin'ali added that a caliph should be recognized by all Muslims, yet there is no obligation on the part of all individual Muslims to pledge allegiance to him. Only a few senior members of the community should do such, as was determined by Shaykh Ibn Taymiyya and by other clerics.[13]

In March 2014, one of the propagandists of the Islamic State published an article titled "Oath (*bay'a*): Its Meaning, Its Conditions, and Its Duty" to protest against the "ignorance" that came as a result of the dictatorial policy of "blurring" and "hiding" reality from the people implemented by the "collaborators with colonialism and Sykes-Picot."[14] He added that anyone seeking to find fault with Abu Bakr al-Baghdadi, inflicts disaster on himself and on his relatives, in the words of the hadith: "He who died without an oath of allegiance is [considered] as one who died a *jahili* death [jahiliyya, refers to the period of ignorance before the advent of Islam.]"[15]

Soon, it became clear that the Islamic State intended to establish a caliphate not only for ideological reasons but also for practical reasons. The governmental relations of the caliphate, the rights and obligations of its nationals and

its definition of the "other" were already outlined in the organization's basic teachings. Every Muslim was now committed to respecting the strict principle of *al-wala' wal-bara'*, derived from the Qur'anic verse: "do not take my enemies and your enemies as allies, extending to them affection" (Sura 60:1). In other words, the believer should only maintain contact with his own kind, Muslims provide them assistance in times of trouble, and immediately cut off all contact with unbelievers.[16] Since aid to infidel forces is not allowed in Islam, Muslims who help "infidels" like Jews and Christians are also considered infidels. Based on this principle, the Islamic State made it clear that Muslims must contribute to the fight against the Western coalition, either by physical migration into its territory (the scene of jihad), or by financial donations, or by spreading propaganda.[17]

With the establishment of the caliphate, the Islamic State denied any legitimacy to the idea of the nation-state. In May 2015, the Islamic State published a leaflet titled "Loyalty to Islam, not the homeland!" (*al-wala' lil-Islam wala lil-watan*). The leaflet opens with the statement that one of the most dangerous legacies of the "modern invasion of ideas" is the idea of the nation and nationalism (*al-wataniyya*). This idea, the bulletin continues, is a destructive concept that undermines the foundations of Islam and threatens the existence of the Muslim caliphate. Nationalism, it says, means pledging allegiance to a certain piece of land and a power that dominates it, instead of pledging allegiance to Islam. This loyalty is expressed by the commitment of the nation's residents to defend their homeland and act against anyone who threatens it. "This is the essence of nationalism, the idea that was brought from the Western crusaders to the lands of Islam and was forced upon these lands decades ago by the occupation of the land and the rape of its citizens; they were made to adopt the principals that would make Muslims faithful to their logic [of the Western Crusaders] and to their religion."[18] The creation of nation-states was therefore seen by the Islamic State as nothing but a Western conspiracy that sought to turn the rifts between Muslim society into a permanent state of being through the principle of "divide and conquer" in order to make it easier for the foreign invader to control the occupied territories. The idea of nationalism was systematically enforced on the minds of Muslims, it argued, to such an extent that Muslim societies have begun to see their existence in national terms, as indicated in expressions like "national resistance" (*al-muqawama al-wataniyya*), "unity of the homeland" (*wahdat turab al-watan*) "motherland first" (*al-watan awalan*). Another term which refers to nationalism, *qawmiyya*, unlike *wataniyya* stands for loyalty across regions, and is based on loyalty to one's own ethnic group, which is perceived by the Islamic State as one of the "pagan methodologies that invaded the territories of Islam after the fall of the caliphate."[19] This variety of nationalism, the bulletin claimed, was the first bulldozer that destroyed the basis of the Islamic

faith. Ethnographic identities that have been developed (i.e., Arab, *Khaliji* [meaning of the Persian Gulf], African, Turkish) have become a focus of loyalty and support. Thus, the Islamic State concludes, nationalism is a heresy "and anyone who adopts it, advocating for it or advancing it, is considered a *murtad*," that is, the who rebelled against Islam.[20]

The negation of nationalism became a central goal in Islamic State's information campaign, explaining at length why the idea is fundamentally unacceptable.

A: Nationalism is a form of *shirk* (polytheism). "Nationalism is the false idea that turns countries and godless dictators into idols. It requires people to serve one country only; to sacrifice and fight for it; to exclude and to deny anyone who crosses the border into the country, even if they are friends of Allah; to love and be loyal towards all people residing within its borders, even if they are heretics and the worst offenders of polytheism. Thus, a nation becomes an idol, striving to obtain the place that belongs to Allah, as the following verse explains: 'among the people are those who take other than Allah as equals [to Him]. They love them as they [should] love Allah.'" (Sura 2:165)

B. Nationalism blurs the principle of *al-wala' wal-bara'*, which is based on the separation between Muslims and non-Muslims. Therefore, nationalism takes away from religion and distorts the proper social order. For the Qur'an says: "Your ally is none but Allah and [therefore] His Messenger and those who have believed—those who establish prayer and give *zakat*, and they bow [in worship]" (Sura 5:55) and "take not those who have taken your religion in ridicule and amusement among the ones who were given the Scripture before you nor the disbelievers as allies" (Sura 5:57). The adherents of nationalism place great importance on the adherence to a specific territory, which is enclosed by the borders of the homeland. They preach interaction between different communities and people and do not take the God-given separation between disbelievers and believers into account. Here the values of nationalism are in clear conflict with the proper legal texts and divert believers from the proper path.

C. Nationalism cancels the Islamic laws of territory (*al-diyar*) and emigration (*hijra*) and forces laws on the believer that were made by man instead of Allah. In the lands of disbelief (*dar al-kufr*) in which nationalism rules, apply different rules than in the lands of Islam (*dar al-Islam*). This being the case, it is the obligation of every Muslim to immediately emigrate from the lands of heresy and move to the lands of Islam, because adherence to a homeland is a heresy.[21]

D. Nationalism eliminates the distinction between Muslims and infidels, and creates a situation in which belief and unbelief are intermingled. This is because the relationship to territory, which is the basis for interaction between people, blurs the structural differences between religions. Allah made religion as a means to distinguish between people of this world and the people of the world to come. Nationalism, however, turns all its citizens into one nation and does not differentiate between believer and heretic, righteous and sinner,

which completely distorts the teaching of religious text, for it says: "Then will We treat the Muslims like the criminals? What is [the matter] with you? How do you judge?" (Sura 68: 35–36) and "Or should we treat those who believe and do righteous deeds like corrupters in the land? Or should We treat those who fear Allah like the wicked?" (Sura 38: 28)

E. Nationalism neglects the basis of the offensive Jihad (*jihad al-talab*). Jihad for Allah is characterized by fighting infidels on their own soil in order to impose the rules of Allah. The stated goal of the proponents of this vision is to maintain national unity and bolster the security of the homeland. Crossing the border is considered an act of "aggression" and "transgression of the national security" of neighboring countries, or as "obstruction of the international peace," which would worsen "good neighborly relations" and "blatant intervention" of the internal relations of these states. Hence, it is evident that it forms "an obvious cancelation of the command of jihad"—the principle of preventive warfare against infidels in order to eradicate polytheism.

F. Nationalism sows division and controversy. Nationalism drives rifts between Muslims and marks people as part of competing national entities. Because it preaches blind and fanatical loyalty to territory, history, and secular heritage, it: "separates between the Arab Muslim and his non-Arab brother (*al-'Ajami*)." Moreover, it separates between Arabs themselves—that is, Iraqis, Syrians, and Egyptians and divides non-Arab Muslims, that is, Turks, Kurds, and Persians. This is in contradiction with Allah's order to find unity within the community of believers; in the words of the Qur'an: "And hold firmly to the rope of Allah all together and do not become divided" (Sura 3: 103). Surely, the friends of the Prophet (*sahaba*)—Hamza al-Qurayshi, Bilal al-Habashi, and Suhayb al-Rumi—were of different (ethnic) decent and demonstrated unity because "Islam united them and not nationality."

To conclude, nationalism was perceived by the Islamic State as a modern *jahiliyya*. In March 2014, Abu Nusayba al-Maqdisi, one of the advocates of the Islamic State, published a book called *Islamic State in Iraq and al-Sham: Plan of the Promised Caliphate*. The book dealt with the issue of the historic caliphate, spoke out against the nationalist idea and presented it as an antithesis to the truth of Islam. The term "nationalism" (*qawmiyya*) was according to al-Maqdisi a central value in Arab *jahili* society before the arrival of Islam. Fanaticism for the nation or tribe regularly led to civil wars. After Islam managed to eradicate this notion, "the infidel West introduced these toxic ideas once again." It was no coincidence, al-Maqdisi claimed, that the primary proponents of modern nationalism were all Christian heretics, such as Butrus al-Bustani, Nasif al-Yaziji, or Jewish, such as Khalida Adib. The Sykes-Picot agreement deepened the magnitude of the disaster, when it was decided to dismember the Ottoman Empire and split it into small countries with borders. The homeland became a new idol that preached identification with a slice of territory and caused armies to fight in order to protect the borders established by the infidels.[22]

Also on this subject, the propagandists of the Islamic State heavily relied on the words of the scholar Ibn Taymiyyah, who noted that Islam rejects "anyone who disagrees with Islam and the Qur'an" should be rejected and that he who adheres to a different theology is an infidel and "belongs to *jahiliyya*" and deserves to be denounced.[23] The claim that "patriotism is one of the main virtues of religion" (*hubb al-watan min al-iman*) was seen by thinkers of the Islamic State as a claim that contradicts the commandments of the sharia, because "the homeland is a heresy and it is inconceivable that a Muslim will approve of heresy!"[24] The same analogy is used concerning the claim that "dying for one's country is considered martyrdom." Thinkers of the Islamic State set clear criteria for determining what is considered a martyr's death, and death for the motherland was not one of them. However, the battle for the sovereign territory of the land of Islam (*dar al-Islam*) is a jihad, because the *mujahid* (Jihad fighter) fights for supremacy of the divine law and for the protection of this area so these lands will not become lands of heresy, as is the case in most countries today. Because every Muslim must be faithful first of all to Allah and Islam and not to the nation-state in which he lives; the creation of an Islamic caliphate in the territory of Iraq and Syria provided an opportunity for Muslims to migrate from the lands of heresy to the lands of the Islamic caliphate and contribute to the jihad against the enemies of Islam.[25] "Today, after Allah has enabled the declaration of an Islamic caliphate in Iraq and al-Sham and in other countries, the lands of the caliphate have become an area of migration and jihad. It is mandatory for all Muslims residing in countries of heresy (such as Arab states or countries that call themselves Islamic) to immigrate to the Islamic State and to part with their homelands." Moreover, Muslims who will leave the lands of the Islamic State and will find refuge in areas controlled by Shi'is, the secular or crusaders will be held accountable on the Day of Resurrection, for it is written: "Indeed, those whom the angels take [in death] while wronging themselves—[the angels] will say, 'In what [condition] were you?' They will say, 'We were oppressed in the land.' The angels will say, 'Was not the earth of Allah spacious [enough] for you to emigrate therein?' For those, their refuge is Hell—and evil it is as a destination" (Sura 4: 97). This verse serves as a serious warning to all people whom patriotism prevents them from immigrating.

Al-Maqdisi explained the difference between patriotism (*hubb al-watan*) and the cult of the homeland. It is true that a person feels a sense of love towards the land where he was born in, in which his family and his tribe have lived in for generations, nor is this prohibited by Islamic Law. This sentiment is built into a person from his early years onward, just as the Prophet Mohammad testified about his love for Mecca—where he was born and grew up: "I swear by Allah! You are the best of the lands of Allah and you are the most beloved land to Allah, and had it not been that I was forced to leave you, I

would have never left you." The Prophet loved Mecca with all his heart, but he chose to immigrate with His followers to a different area, where it would be possible to establish an Islamic State. Proponents of nationalism, al-Maqdisi claimed, use this prophetic hadith ("patriotism is an important part of religion") to instill incorrect views into the public. An in-depth examination of the factors that motivated the Prophet to emigrate from his beloved Mecca will show that the need to hold on to the law of Allah was more important to him and therefore he needed to move to a place that would allow him to do such. The Prophet Muhammad was therefore acting in accordance with the laws of Allah by emigrating to al-Madina and because it was the will of Allah, he asked to sign an agreement with the Jews of the city.[26] Unlike those who believe that the country in which they live should be a peaceful state for all religions to live under constitutional law, Muslims must emigrate from the land where they cannot keep their religion, even if that is the country in which they were born and raised.

Thus, the de-legitimization of nationalism strengthened two basic principles that make up the foundations of the caliphate: *bay'a*, the oath pledged to the caliph and the *hijra*, the immigration of Muslims from around the world to the caliphate. The Islamic State proclaimed that this particular phenomenon of migration was unique to the Islamic State and unprecedented in human history.

The fact that people who do not share any ethnic, linguistic, or "national" common background flocked to the Islamic State even overshadowed the story of Muhammad's first state in Medina. Most migrants in his state had been from the tribe of Quraysh and had a common background in terms of genealogy, language, and geography. The magazine published by the Islamic State, *Dabiq*, gave a concrete example of this phenomenon:

> But if you were to go to the frontlines of al-Raqqa, al-Barakah, al-Khayr, Halab, etc., you would find the soldiers and the commanders to be of different colors, languages, and lands: the Najdi, the Jordanian, the Tunisian, the Egyptian, the Somali, the Turk, the Albanian, the Chechen, the Indonesian, the Russian, the European, the American and so on. They left their families and their lands to renew the state of the *muwahhidin* in the Sham region, though they had never known each other until they arrived there! I have no doubt that this state, which has gathered the bulk of the muhajirin in Sham and has become the largest collection of muhajirin in the world, is a marvel of history that has only come about to pave the way for al-Malhama al-Kubra (the grand battle prior to the Hour).[27]

After the Islamic State had based the foundation of its existence on the idea of *hijra*, there was a major effort to recruit new fighters via the media. Thus, the activists of the Islamic State appealed to Muslims living in France, Britain, Germany, Russia, and Central Asia in their own languages and

urged them to leave the infidel societies in which they lived and immigrate to the territory of the Caliphate in order to participate in the jihad against the enemies of the Islamic State. Typically, these propagandists presented theories that "proved" that their enemies—the crusaders, Shi'is and Jews—were partners in a global conspiracy that sought to weaken the power of Sunni Islam. Recruitment messages were written with an apocalyptic tone and prophesied that humanity stands on the verge of the revival of the true Islam. The immigrants to the Islamic State were viewed similarly to the supporters of the Prophet who emigrated from Mecca to Medina (*muhajirun*). Then, just like now, devoted followers left behind their families and their property in order to spread the religion of Allah. The propagandists of the Islamic State have used the sayings of the legal scholar Ibn al-Qayyim al-Jawziyya, a student of Ibn Taymiyya, in order to strengthen the spirit of immigrants who had to sacrifice their homeland in order to come. Ibn al-Qayyim notes that during the time of Prophet Muhammad, his followers were in the same position: "When Islam first began to emerge it was something strange, and anyone who embraced it and responded to Allah and His Messenger became a stranger in his district, his tribe, his family, and his clan."[28] The words of al-Jawziyya were also meant to ease the concerns of immigrants, since their previous environment must have seen their emigration to the Islamic State as an act of madness or stupidity. Only Muslims who have gone astray will be seen as normal by outsiders. "For the real Islam is extremely strange, and its adherents are the strangest of strangers amongst the people."[29] Thus, "in the era of *ghutha' al-sayl* ("the feeble scum"), they are the most wondrous of the creation in terms of faith, and the strangest of them all."[30]

Dabiq, the magazine of the Islamic State, proclaimed the principal of *hijra* as one of its pillars. Muslims from around the world, and especially from the West, were called upon to migrate to the arena of jihad in Syria and Iraq to help the Islamic State fight against its enemies. A call to perform *hijra* in the traditional sense of the word is supported by various hadiths, and its vitality was reinforced by the words of Abu Mus'ab al-Zarqawi, one of the founders of the Islamic State, who said: "So I swear by the One to Whom I will return, that there is no real jihad in Iraq except with the presence of the *muhajirin*, the sons of the generous *umma*, those who have left their tribes, those who bring victory to Allah and His Messenger . . . So beware of losing them, for with their departure will be the departure of your strength, and the departure of the baraka and pleasure of jihad. You need them and they need you."[31]

The media outlet *al-Battar*—an important propaganda tool for the Islamic State—published an article in September 2014, titled "Immigration to the Land of Islam is Obligatory." The article emphasized the sheer duty of every believer to immigrate to a place where sharia law is implemented, as long as this is not a country that wages a war against the *mujahidin* or agrees to

American influence in the region, since this would be an act of heresy. The latter type of country is tarnished by disobedience to Allah and therefore the true Muslim shall leave it behind. Saudi Arabia, for example, is a clear example of a country tarnished by heresy, in light of Saudi cooperation with the United States and its encouragement of American values and interests. Even countries like Kuwait, the United Arab Emirates, Yemen, Egypt, Tunisia, and Morocco are considered to be countries tarnished by heresy and all Muslims living in these territories are called upon to emigrate immediately.

The jihad they wage is directed against various enemies. A special brochure titled "Message from forces of the caliphate to those abstaining from [fulfilling the commandments] of jihad" and was intended for "those who do not participate in the fight of the Islamic State in order to call on Muslims to wake up from their sleep," and

> join the jihad effort, and see with your eyes and hear with your ears how all the nations tarnished by apostasy—Arab and foreign countries—have gathered to fight against the Islamic caliphate, to destroy the true Islam and destroy the Muslims, the representatives of Allah. What is your attitude towards these wars and great events!? Are you satisfied sitting with hypocrites who refrain from Jihad, of whom Allah said: 'They were satisfied to be with those who stay behind, and their hearts were sealed over, so they do not understand' (Sura 9:87).

The brochure speaks in an accusatory way to any person refusing to participate in jihad: "What you give to your religion, and you do not see that it is fighting every day and everywhere? Do you feel comfortable with sitting by idly while your brothers the *mujahidin* are paying with their body and their blood, their money and their families for the sake of you sitting calmly and peacefully?" How can you sit calmly "when your sisters are being imprisoned in the jails of tyrants? After all, even according to the statistics of the Safavid interior ministry (a name in this case referring to the Shi'i government of Baghdad) 5,130 Muslim sisters are behind bars in Iraq, 333 of them were raped, 1,200 of them conceived and gave birth and 180 of them died from the effects of the rape." What excuse would you say if you are questioned about the prisoners in Baghdad and Damascus "who were screaming for your help hundreds of times to free them from their chains?"[32]

In light of this, the Islamic State demanded of those not physically partaking in jihad, to at least preach jihad in order to help the *mujahidin*:

> "Are you not Muslims? Is your holy book not the Qur'an? Is your prophet not Mohammad? Is your religion not Islam? Is it not Allah who said: 'You are commanded to fight? What kind of Jihad did Allah refer to? Did He refer to the kind of Jihad that allows you to sit in your houses with your wives, who sit on their chairs? Are you above mankind so that you are not willing to carry the burden together

> with the *mujahidin* to fight the enemy who is after your soul? Is the Islamic State which was established in Iraq and al-Sham and in other Islamic countries only the country of the *mujahidin*, who are only thousands in number and you are millions? Is this not also your country? Do not you like having the law of Allah implemented on this earth? Do you not think of the Islamic caliphate with pride?"[33]

The Islamic State made a special effort to channel volunteers to the cities of the *ribat*, the strongholds of the frontier, in order to train them to protect the borders of Muslim territory or to prepare them for attack. The importance of their being sent to the frontline was based on the statement of Shaykh Ibn Taymiyyah and a hadith which said that "keeping watch during the night-time on the beach is more important than a person's actions on behalf of his family for thousands of years." In response to the question of whether living in Mecca, Jerusalem, and al-Madina is not preferable for the sake of worship and fasting than living in the cities of the *ribat* such as Damietta, Alexandria, and Tripoli, Ibn Taymiyyah said that "being in the cities of the book of the Muslims, like being in Al-Sham and Egypt—is preferable than residing in the three mosques [of the holy cities] together." This is because being in the *ribat* is considered a kind of jihad, whereas residing in the holy mosques of Mecca, al-Madina and Jerusalem is considered a form of *hajj*, because the Koran says: "Have you made the providing of water for the pilgrim and the maintenance of al-Masjid al-Haram equal to [the deeds of] one who believes in Allah and the Last Day and strives in the cause of Allah? They are not equal in the sight of Allah" (Sura 9: 19). Another tradition was brought by Muslim (one of the authors of the canon of hadiths) in his book *Sahih Muslim* which authoritatively quoted the Prophet saying: "*Ribat* by day and by night for the sake of Allah is better than fasting for a month. The one who died while defending the *ribat* is considered a *mujahid*, will receive the reward of Paradise and be safe from trouble."[34]

THE ISLAMIC STATE AND THE OTHER: THE SHI'A AND HETERODOXY

Perhaps the most important pillar of the Islamic State's ideology was its rigid and unwavering approach towards the "other," in particular towards Shi'i Islam and heterodox sects which they saw as un-Islamic. As a result, it exploited the historical enmity between the Sunna and the Shi'a and brought it to cruel and unprecedented heights. In a speech in January 2015, Shaykh Abu Bakr al-Baghdadi, the leader of the Islamic State, called the Shi'is prime enemy of the Sunni Muslim community. The struggle against them, al-Baghdadi said, is a dogmatic war (*harb 'aqdiyya*) and he urged the Sunni citizens

of Iraq to use their arms against the Shi'is. He further noted that the activists of the Islamic State will spearhead the fight against the Shi'a and would curb the trend of conversion to Shiism (*tashayyu'*) of Iraq: "You must crowd into Baghdad and the south [of Iraq] to burn the *rafida* [a derogatory name for Shi'a] in their country."[35] In order to justify the use of violence against the Shi'a, al-Baghdadi used a quotation from the Qur'an: "Those who disbelieve wish that you would neglect your weapons and your baggage so they could come down upon you in one [single] attack" (Sura 4: 102). And be warned that "if you neglect your arms, or neglect it this time, you will be enslaved by infidels, and afterwards you will not experience resurrection."[36]

One propagandist of the Islamic State, Abu Nusayba al-Maqdisi, a Palestinian by birth, devoted one of the chapters of his book to the perception of the "other," especially Shi'i, "so that the Muslims would know why we fight them and so that the tongues of the preachers of unity and rapprochement with impure Shi'is would be made silent." Al-Maqdisi argued that in the Islamic world numerous congregations consider themselves to be a part of Islam, while in fact they are not Muslims. "They turn themselves in the direction of the *qibla* (direction of prayer to Mecca), yet the *qibla* denounces these Shi'i ethnic groups." He addressed the Alawite community (*al-Nusayriyya*) in particular, calling it inimical to Islam and to Muslims.[37]

The chapter dealing with the classification of heterodoxy clarified

> "what deception does to people! It is the interest of all destructive schools of thought to lower the status of people to that of animals. If we will pay attention, it will become clear to us that all destructive philosophies of this earth were the fruits of Jewish involvement; the Jews who resent humanity, and take revenge on her. Hence, I have no doubt that the school of *al-jabr* (which believes in fatalism) or the school of *al-qadr* (which believes that fate is determined by the person) or the school of *al-tashayyu'* (which believe in conversion to Shiism) and most other destructive schools of thinking, are all cooked up in the kitchens of the Jews and are served as poisonous dishes for Muslims to die from. People think that most residents living in Iran and who spread into Iraq, Bahrain, southern Lebanon, and other countries are Shi'is, but the truth is that they are *rafida* and not Shi'i. The Twelver Shi'a constitutes the largest sect of Shi'ism and the most common one. Its goal is to ruin Sunni Muslim civilization."[38]

The Islamic State especially warned those Sunnis who were willing to cooperate with the Shi'i regime or with groups affiliated with it. In January 2014, the al-Furqan channel published an audio clip titled, "The Pioneer Does Not Lie to His People: About Events in Iraq and al-Sham." In this tape, Muhammad Al-'Adnani, a spokesman for the Islamic State, warned the members of the Sunni community in Iraq, in Lebanon, and in other "mixed" countries of a Shi'i evil plan designed to constrain Sunni abilities and weaken

their power base. The Islamic State channeled its greatest propaganda against the Sunni community which had been tempted by its greed to serve in the army and in the security forces of the Shi'i government in Baghdad. According to the Islamic State, these Sunnis had fallen like simpletons for the trap of the scheming Shi'a, which sought to divide and rule the Sunni community. In light of this, al-'Adnani called on several of such Sunni activists belonging to various movements, to return to the right path and to renounce their role as a tool for the Shi'a, to lay down their weapons and in exchange no harm would befall them. He added that when the Islamic State would encounter converts that "their blood will be placed on top of our list. The soldiers of the Islamic State are to cut off their heads, expel them, disperse them, and destroy the houses they live or burn them."[39] He pointed out that the Qur'an explicitly states how to proceed in these cases, and the failure to act upon it would make one liable for punishment on Judgment Day.[40] Sitting passively while the military, the police, the Shi'i and, the Alawites commit crimes of murder, rape, and theft is like denying Allah's explicit orders.

Sunni tribal leaders were required to prevent the mobilization of the tribesmen into the security forces of the Iraqi Shi'a. They were requested to announce publicly that they dissociate themselves from any tribe who joins the Shi'a. Later al-'Adnani also turned to the Sunni citizens of Syria; he asked them not to support the establishment of a secular state in Syria and not to take action against members of the Islamic State. He stressed that the secular Syrian opposition movements ("National Council of the Syrian Revolution," "Free Syrian Army") are not legitimate and should be treated heretics. In light of this, al-'Adnani warned the heads of the tribes and the officials of cities and villages not to help the Syrian opposition or give them shelter. At the same time, he demanded that religious scholars weigh their words carefully and stop distorting the truth and serve the interests of other groups. Al-'Adnani stressed that the campaign that was being waged in the media against Islamic State was designed to incite Muslims against it and to sow division between the armed factions in Syria. Especially the "Free Syrian Army" had fallen for this campaign, according to al-'Adnani. It created the false impression that the Islamic State is weak and has little capacity to influence the situation. As a result, it caused Muslims to act against activists of the Islamic State and it reduced the number of people assisting the Islamic State. In light of all this, al-'Adnani stressed that one should not be fooled by the enemy's publications and that the Islamic State does not impose laws against anyone who does not agree with its way and its teachings.[41] Al-'Adnani included in his verbal assault accusations against the armies of Egypt, Libya, Tunisia, and Syria and claimed that they had been an obstacle to the popular revolutions in the Middle East, that they had protected their respective authoritarian regimes and, therefore, must be considered heretical. As a result, he exclaimed that

there is a personal obligation (*fard 'ayn*) for all Muslims to fight the armies of the unbelievers who seek to thwart the sharia. Sometimes (as in the case of the Egyptian army) these armies also protect the Jews, the Copts, and the Christians who fight against Allah and the Prophet Muhammad. Thus, the war in Egypt was not a war against the "Muslim Brotherhood," but a war against the Muslim troops of Allah. Al-'Adnani condemned the "Muslim Brotherhood" for integrating into the democratic political system of Egypt, calling it a secular organization in religious clothes. He called on all Muslims, especially those in Iraq and Egypt, to reject the ways of peaceful demonstration and instead turn on to the path of jihad. He commanded the soldiers of different armies to desert and to cling to the right belief. He also called on members of the "Muslim Brotherhood" and other parties to return to the right path and not to continue on the democratic one.[42]

The Islamic State also channeled some of its propaganda against members of other heterodox communities, the *Nusayriyya* (Alawites) in particular, but also the Druze, the Kurds, and the Yazidis. In August 2014, the Islamic State published a compilation of rulings by religious clerics, "who lived during the time period of the *Nusayriyya* and knew of their disdain for the Muslims—which is obvious to everyone today." Ibn Taymiyya stated that "the *Nusayriyya* are the enemies of Islam, infidels and those who hate Islam [. . .] and whenever there is an opportunity we should shed their blood." He added that "the *Nusayriyya* are the reason Al-Sham was conquered by the Christians and Tartars [. . .], they will always [be on the side of] the enemies of Islam [. . .] they are the reason for the fall of Jerusalem to the Crusaders, and the reason for the fall of the Abbasid Caliphate." The "betrayal" of the Islamic nation by these communities—the Shi'a and the *Nusayriyya*—became an important motif in the writings of Islamic State propagandists. They connected this "betrayal" to the invasion of the "New Crusaders," namely the leaders of the French mandate in Syria and accused the *Nusayriyya* from benefiting greatly from the aid of this foreign heretic power. According to Al-'Adnani, the French had strengthened this community because "it knew the extent of the hatred of *Nusayriyya* towards Islam and Muslims and their love towards the unbelievers. Therefore, the French could not have found a better community to attend to their interests."[43]

The *Nusayriyya* were perceived as heretics (*zanadiqa*), who deserve most stringent punishment that is given in Islam to those who divert from the path of the religion. The Islamic State asserted that for *Nusayriyya*, there is just one option, and arguing that it is one's duty to kill them and to cleanse the country of them: in the words of the Prophet: "kill those who have converted." The verdict for their children is different. When they reach maturity, they should have a choice to convert to Islam. If they agree to do so then "the sword on their necks has to be withdrawn. Yet if they abide by their parents'

heresy, the sword of truth should be put on their necks." Ibn Taymiyya also ruled that if *Nusayriyya* seek to return to Islam, the Muslims cannot accept this and should kill them. He emphasized that the Prophet Muhammad and his companions started the jihad against dissidents of the religion of Islam and against the People of the Book. All people who did not consider them heretics would be seen as a heretic as well. The conclusion is, therefore, that the jihad against the *Nusayriyya* is a noble task and a great obligation, because "this is a more excellent jihad than the jihad against the People of the Book."[44]

The Islamic State's views on the Yazidi community were explained in the October 2015 edition of *Dabiq* where a discussion can be found on whether the Yazidi community is "an originally polytheist group or one that originated as Muslims and then apostatized."[45] This was an issue, since the Yezidis could be turned into slaves if they had never accepted Islam, but if they had denied it, they should be killed according to the law of the Islamic State. The ruling given by Islamic State's clerics was that the women and children of the Yazidi community would be transferred to the fighters of the Islamic State, who took part in the fighting in Sinjar. The Islamic State defended this notion by stating that "enslaving the families of the *kuffar* and taking their women as concubines is a firmly established aspect of the sharia that if one were to deny or mock, he would be denying or mocking the verses of the Qur'an and the narrations of the Prophet (*salla llahu 'alayhi wa sallam*), and thereby apostatizing from Islam."[46]

On the occasion of the Ramadan, the Islamic State published a leaflet about the special qualities and virtues of jihadi activities during this month. In the introduction to the leaflet, Shaykh Abu Hamza al-Muhajir (also known as Abu Ayyub al-Masri) propagates jihad against the enemies of Allah. According to Muslim beliefs, Ramadan is the month in which the victories over enemies of the Muslims take place, and thus participation in jihad should increase and the soldiers should seek martyrdom. Abu Hamza named the Battle of Manzikert as an example of a battle won by the Muslims in the month of Ramadan (August 1071). This had been a struggle between the armies of Sultan Alp Arslan, the Seljuk Sultan, and the armies of the Byzantine Emperor Romanos IV Diogenes (1032–1072). Despite its numerical inferiority, the Muslim armies were able to overcome the forces of the Byzantine Emperor and take him prisoner.[47] Abu Hamza used the Battle of Manzikert as evidence of the promise that the power of the Christian West will be eroded if the Muslims will adhere to jihad, and in the month of Ramadan double assistance is expected from Allah to perform this holy task.[48]

Christian communities continued to exist in limited areas of the Islamic State, and members of the Christian community located in the sovereign area of the Islamic State have been granted *dimmi* rights. In February 2014, the Islamic State announced that it had signed an agreement with representatives

of the Christian community in the province of al-Raqqa in Syria. This agreement promised personal security and protection of their churches and their property (*'ahd aman*) in exchange for their acceptance of the status of "protected people" (*ahl al-dimma*) and the fulfillment of the accompanying obligations, such as the payment of a poll tax (*jizya*).[49] Before signing the agreement, the Christians were given three options: converting to Islam, becoming *dimmis*, or emerging as enemies of the Islamic State. As such, the Christians of the Islamic State were forced into an uneasy agreement with their radical overlords, accepting diminished status, which included prohibitions against the construction of monasteries, churches, or residences of monks. In addition, Christians were forbidden to outwardly display any religious symbols and had to fully comply with the dictates of the Islamic State in matters of trade, dress, and behavior in public spaces.[50]

THE ISLAMIC STATE AND AL-QAIDA—A CLASH OF DIFFERING VISIONS

While there were significant common denominators between the Islamic State and al-Qaida, there were fundamental differences in both intellectual and practical views between the two factions, which evolved into a rivalry. Although the founding fathers of al-Qaida, Usama bin Laden and Ayman al-Zawahiri, spoke in general terms, arguing for the establishment of a caliphate, they did not seek to implement it in practical terms. Instead, their militant enterprise was supposed to place the required infrastructure so that in the distant future the caliphate could be established.[51] The ideology and the state-building project of the Islamic State challenged the previous supremacy of jihadi organizations such as al-Qaida. The command to swear allegiance to the first caliph, al-Baghdadi, was like a declaration of war on all that preceded the creation of the caliphate. The founding of the caliphate attracted members of various jihadi groups, as many joined the Islamic State. The information bulletin of the Islamic State made sure to undermine the legitimacy of other jihadi organizations, including al-Qaida, Jabhat al-Nusra, and to a large extent the Taliban in Afghanistan, while making fun of their leaders, Ayman al-Zawahiri, Abu Muhammad al-Jawlani, and Mullah Omar. In March 2014, a recorded speech of Abu Muhammad al-'Adnani was published, in which he attacked the jihadi organizations operating in Syria. He singled out Jabhat Al-Nusra and called it "a front of treason and embezzlement." By advising Muslims in the West to remain where they were and to strike at Westerners and their institutions, the Islamic State hurled another insult at the leaders of other jihadi organizations, seeing as they were unwilling to or incapable of carrying out such strikes. The Islamic State, as mentioned before, had

demanded that Muslims from all over the world would immigrate to join their ranks, and that Muslim residents of the West were hypocrites who preferred the pleasures of this world and made do with surfing on jihadi websites instead of taking active part in maintaining and defending the Islamic State.[52] These dictations set the Islamic State on a collision course, which turned into a bloody struggle with their rival organizations and with the "infidel states." This was the reason why most of the Islamic State's propaganda was directed against Sunni Muslims while greater and broader struggles were postponed.

Whereas al-Qaida emphasized the need for global jihad before the long-awaited proclamation of the caliphate, the Islamic State gave priority to the establishment of the caliphate as an immediate and practical goal.[53] In its approach to prioritize the consolidation of an Islamic State and to leave the uncompromising fighting of Islam's enemies for afterwards, al-Baghdadi mimicked the behavior of the Prophet. From the dawn of Islam, the Prophet chose to postpone fights with enemies and integrated policies of tactical compromises and agreements to ensure he would have the power that would allow him to resume his activity and to achieve his objectives.[54] That is how the Islamic State ruled in Raqqa, its capitol in the Syrian territory. On the one hand the Islamic State enforced sharia, but on the other hand it maintained a "black market" by selling oil to Europe.[55]

In other words, the Islamic State saw the establishment of the caliphate as an existential matter, and in order to realize this establishment, it adopted a far-reaching compromise—it did not prioritize a confrontation with the West, "the far enemy" (*al-'adu al-ba'id*), and left it for later. Even if the heads of the other organizations pursued the vision of the caliphate as their final goal, it was only realized by Abu Bakr al-Baghdadi, an ambitious and charismatic man, who was able to realize this utopian vision and took advantage of it. In a strategic move, akin to the breakthrough of Islam in the 7th century, the Islamic State managed to take over a significant territory in Iraq and Syria and settled in predominantly Sunni areas. The Islamic State imagined itself as having worked on the model that the early Islamic period had offered it. The doctrine of *takfir* became applicable during the time in which the early Muslims were surrounded by non-Muslims and sought a purer world, which would be achieved through the massive killing of people. Two hundred million Shi'is were marked a bitter enemy and a target for execution, as well as leaders of Muslim countries who preferred implementing legislation based on human law instead of on divine decrees. In the territory of the Islamic State people were executed on a daily basis, sometimes individually and sometimes collectively.

Unlike the conventional jihadi discourse, which sees the jihad—not necessarily the caliphate—as the supreme and primary commandment,[56] the Islamic State placed its hope on its own state-building project. Contrary to

the statements made by al-Qaida, calls for attacks on the West by the Islamic State—whether planned by its leadership or planned by "lone wolf" individuals—have been infrequent in their publications and speeches of their leadership. The Islamic State, unlike al-Qaida, emphasized instead that Muslims from all over the world should move to the Islamic State, which needed skilled people who were experts in their field (such as doctors, engineers, military personnel, clergy, clerks, etc.).[57] The order of things was made clear by the Islamic State from the outset: *hijra* is the path of jihad. This meant that defense of the caliphate was seen as jihad. It was seen as a battle of the Muslims against the Crusaders and anyone moving to the Islamic State would take part in the struggle against the enemy.[58] *Dabiq* magazine directed its message to the Western reader and devoted its third issue to the subject of *hijra*. In the issue that was published before that, the foreword mentioned:

> Many readers may wonder what are their duties to the caliphate now, so asking staff writers of *Dabiq* clarify the Islamic State's leadership position in this important issue. The first priority is to perform *hijra* from wherever you are to the Islamic State, from *dar al-kufr* to *dar al-Islam*. Rush to perform it as Musa (*'alayhi al-salam*) rushed to his Lord, saying, (And I hastened to You, my Lord, that You be pleased) [Taha: 84]. Rush to the shade of the Islamic State with your parents, siblings, spouses, and children. There are homes here for you and your families. You can be a major contributor towards the liberation of Makkah, Madinah, and al-Quds. Would you not like to reach Judgment Day with these grand deeds in your scales. [. . .] Finally, if you cannot do any of the above for reasons extremely beyond your control, insha'allah your intention and belief that the Islamic State is the Khilafah for all Muslims will be sufficient to save you from the warning mentioned in the hadith, "Whoever dies without having bound himself by a *bay'a*, dies a death of jahiliyyah" [Sahih Muslim].[59]

In another part of the third issue, *Dabiq* states: "This life of jihad is not possible until you pack and move to the Khilah."[60] These statements illustrate that global jihad or inflicting carnage on the West is not a priority for the Islamic State, rather it is the establishment of the caliphate—an obligation that had been forgotten and abandoned by Muslims for many generations.

In order to clarify the reciprocal relationship between the Islamic State and al-Qaida, Islamic State spokesperson Abu Muhammad al-'Adnani recorded a speech, in which he used quotes from Usama bin Laden, Abu Yahya al-Libi, and Abu Mus'ab al-Zarqawi, who according to him faithfully reflected the true ideology of al-Qaida. Al-'Adnani explained that in its early stages, the Islamic State obeyed al-Qaida because of its respect for its leaders and prevented attacks on them in Iran, Saudi Arabia, and other countries in order not to harm the interests of al-Qaida. However, later in the speech, al-'Adnani's words turned into a personal attack against Ayman al-Zawahiri; the current

leader of al-Qaida leader said that the Islamic State had never been a subordinate branch to him and his organization, and if al-Qaida members would be found within the territories of the Islamic State, they would be forced to pledge allegiance to the caliphate.[61]

Other organizations have also not been spared criticism by the Islamic State. In the first half of 2015, pro-Palestinian activists of the Islamic State accused Hamas of collaborating with Shi'i Iran and the Syrian regime. In April 2015, the Islamic State occupied the greater part of the Yarmouk Palestinian refugee camp on the outskirts of Damascus after a struggle with the organization *Aknaf Bayt al-Maqdis*, an armed militia set up by Hamas after the Arab Spring to protect the camp's residents. The occupation of the camp was intended by the activists of the Islamic State to thwart the attempt on the part of Hamas to hand the camp over to the Syrian regime. Activists of the Islamic State opened a belligerent and venomous discourse against the Hamas movement under the title of "Yarmuk is a disgrace to Hamas" (*al-yarmuk yafdah Hamas*). One of the agents of the Islamic State claimed that "Hamas leaders died since the death of Shaykh Yassin and nothing is left of it, except for mercenaries who only look after their own interests." Other communication channels criticized Hamas for persecuting Salafi-jihadi activists in the Gaza Strip and for submitting to Israeli dictates.[62]

Global jihadi organizations and political Islamic movements had to recalculate and form clear ideas about what the caliphate meant for them, as it threatened to take away the very necessity for their existence. The declaration of the caliphate signaled the opening of a sharp debate within Islam between the Islamic State and its rivals. Institutions, organizations, and individual Islamic clerics from different denominations around the world, such as Al-Azhar University in Egypt, immediately condemned the proclamation of the caliphate, and others such as Shaykh Yusuf Al-Qaradawi described it as "unlawful and unrealistic."[63] Others also claimed that this announcement was premature, and that there had been no pan-Islamic consensus (*ijma'*) about it. The Islamic State even failed to consult the main religious establishments in the Arab countries about this matter. These organizations defined the Islamic State as a swarm of *khawarij* (a loaded political and religious term which relates to those who fell away from the mainstream and rebelled).

Shaykh al-Qahtani, member of Jabhat Al-Nusra's Shura Council, the al-Qaida branch in Syria, published an article in July 2014 in which he compares the chaotic situation in Syria to the situation in Algeria during the last decades of the 20th century. In order to prevent an unwanted drift from the various jihad organizations, al-Qahtani warned that the Islamic State is fighting jihadi activist groups and other organizations in Syria, just because they do not accept its particular worldview. Al-Qahtani suggested that the "brainwashing" of "Abu Bakr al-Baghdadi and a bunch of his subordinate murderers"[64]

was intended to sabotage the jihad waged against the enemies of Islam. In its official magazine, *al-Risala*, Jabhat al-Nusra attacked Caliph al-Baghdadi because of his non-religious qualifications and claims that he did not even have one meaningful publication in his name that deals with Islamic law. *Al-Risala* suggested that al-Baghdadi, by his behavior, has distorted the concept of jihad and has become a tool of destruction which has thrown the nation of Islam into an arena of brutal bloodshed.[65]

Although the doctrine of rejecting the confrontation with the West was well established in the Islamic State, the constraints of time and the reality of the Western assault on its strongholds made the Islamic State adopt a new policy. The leaders of the Islamic State likened the current difficulties to the path of people with a great vision, just like the Prophet Muhammad initially experienced resistance. The spokespersons for the Islamic State made sure to warn the Americans and threaten the West that because of their attacks, they would severely damage their allies in the region.[66] Beheadings of Western journalists in a flamboyant and cruel manner (after having been held hostage in the Islamic State for about two years) was introduced as a response to American bombings of Islamic State targets in an attempt to achieve deterrence.[67] But as the Western onslaught continued, the Islamic State sent out threatening messages against the "crusaders" and against US President, Barack Obama, whom a spokesman for the Islamic State described as the "mule of the Jews."[68] As a result, the Islamic State also praised the story of Michael Zehaf-Bibeau, a Canadian bomber who burst into the Canadian parliament with a rifle and killed a soldier in October 2014. In addition, it also celebrated the attacks carried out in France, Australia, and Belgium.[69]

With emphasis on the ideological dimension, the Islamic State functioned as a multi-arm government, which provided social, legal, and municipal services. For example, services for relief and charity were organized by the Ministry of Charity (*diwan al-Zakat wal-Sadaqat*). For example, it distributes fuel for the needy. The Ministry of Fatwa and Research (*Diwan al-Buhuth wal-Ifta'*) also served as an official branch of government, which deals with legal issues. It processed demands for compensation and served as a mediator between rival tribes. An important means of deepening the legitimacy of the Islamic State, especially in tribal societies, was a mediation mechanism for settling disputes between rival entities. The Islamic State marketed its capacity as a mediator in an attempt to penetrate tribal society, and acquired the loyalty of tribal leaders. Activists of the Islamic State often met with various tribal leaders to instill the meaning of the concept of the "oneness of Allah" and the importance of the struggle against the enemies of Islam. These activists urged the leaders to pledge allegiance to the first caliph, Abu Bakr al-Baghdadi.

The Ministry of Education (*diwan al-Ta'lim*) focused its efforts on indoctrination in educational institutions, and on the study of Arabic and religious

studies. The Ministry of Agriculture (*Diwan al-Zira'a*) dealt with the regulation of agricultural lands for production and the Ministry of Public Services (*Diwan al-Khidamat*) was in charge of maintenance of infrastructure, sidewalks, roads, water supply systems, garbage disposal, bridges, and so on. The establishment of ministries that regulated the living conditions in the Islamic State was intended to strengthen the power of governance and create affinity and favorable government relations with the population.

The Islamic State put a special emphasis on the issue of family, on the status of women, and on the education of the younger generation. Under the title of "Women of the Islamic State," the Islamic State published a manifesto appealing to Muslim women. Bringing up the issue of the obligations and rights of women of the Islamic State was done in order to challenge two parties: on the one hand it highlighted the shortcomings in Western culture and on the other hand it critiqued the hypocrisy of Arab Muslim regimes such as Saudi Arabia. It also served as a general guide to the rules and regulations on how to treat non-Muslim women and include religious rulings concerning women who were born Muslims and then changed their religion. Other issues such as permission to marry girls as young as nine or prohibition on visiting beauty salons and the imposition of religious education from the home were also highlighted. Discussions were held in social media on the question of women's contribution to jihad. In this context, the Islamic State quoted a comment by Muhammad Bilal al-Qahari, one of the leaders of the organization *Ajnad Misr*, an Egyptian Salafi-jihadi organization, who claimed that he had received many calls from women eager to support the cause of jihad. Under the title "How Can Women Participate in Jihad," al-Qahari suggested four different ways of action. The first was to increase prayer for the sake of jihad and the *mujahidin*, the second was to spread jihadi publications online and to spur Internet users to take active part in it, the third was to give birth to sons who will assist in the jihad, and the last was to collect cash donations to send to the *mujahidin* in order to improve the quality of the jihad. Besides this he suggested that women, being the educators at home, can invest in jihadi education and indoctrinate children and youth, whom the Islamic State is dependent upon. For example, in the province of Ninwa a video was posted, titled "The training camp of Tal 'Afar," which dealt with the training of children and teenagers studying martial arts and sharia. In the province of al-Raqqa, "al-Faruk Institute of Young Lions" published a video of a training camp depicting young men and boys being taught the "principles of jihad" and different methods for struggle against the infidels until "the liberation of al-Aqsa and the occupation of Rome."

The process of institutionalization of the Islamic State put the West in a serious dilemma. On the one hand, the lack of action against Islamic State caused a negative response by the societies and countries in the region, while

on the other hand an immediate all-out war against the Islamic State was likely to lead to counteractions that had not been included in the original plans. A solution that would bridge the dilemma was found in the West's recruitment of the countries of the region, in order not to have direct Western intervention, and yet still be able to counter the Islamic State.

However, these regional countries clung onto their own narrow interests, and the struggle for collaboration to fight a common enemy in the Middle East seemed more complicated than ever. Many countries had to fight the Islamic State on their own soil. The Egyptians focused on the organization *Ansar Bayt al-Maqdis*, an extension of the Islamic State, which settled in the Sinai Peninsula, trying to expand the Islamic State into Egyptian territory. Turkey—after the bloody attacks attributed to the Islamic State on the Turkish side of the Turkish–Syrian border—decided to inflict destruction upon Jarablus (a city in Syria), but did so mainly to cut a piece of territory off of Kurdish northern Syria. Because the leading superpower, the United States, aided and supported operations against the Islamic State, but did not send its troops to fight the organization, it became a difficult task to eliminate the presence of the Islamic State, since the particular interest of each individual Middle Eastern country prevents the formation of a united front. Some even hoped that Iran would join the war effort against the Islamic State especially since the nuclear agreement between Iran and other world powers has become a *fait accompli*. Needless to say, this was also one of the bargaining positions Iran laid on the table, which helped it to achieve a quick resolution to its disputes with the superpowers. It is worthwhile to mention the statements made by Iranian figures like ʻAli Akbar Hashemi Rafsanjani, head of the Expediency Council. Rafsanjani, at the beginning of September 2014 taunted the Sunni world due to its inability to confront the Islamic State, stating that he wished not to interfere in a fight between Sunnis.[70]

The Islamic State, therefore, became the center of a broader struggle—it caused a clash of civilizations on two fronts simultaneously. On the one hand, the Islamic world clashed with Western civilization. On the other hand, an internal struggle erupted in the Islamic world: the "real" Sunna versus the awakening Shiʻa led by Iran. It is therefore not surprising that the organization was founded in Iraq, the country destroyed by all these clashes after the overthrow of Saddam Hussein. Equally important is the internal struggle between the Sunni Islamic State and the "moderate" Sunni, pro-Western countries like Egypt, Jordan, and Saudi Arabia, but also the struggle between the various political Islamic and jihadi groups.

The execution of the Jordanian pilot by setting him on fire in February 2015 shocked Islamic jurists. Most condemned this way of punishment and called it an act contrary to sharia. In response to these criticisms, the Islamic State explained that the execution carried out was equivalent to the deadly air

attack of the coalition forces against the Muslim population of Syria and Iraq. At the same time, the Islamic State made it clear that the penalty carried out was grounded in tradition and justified by verses from the Qur'an: "So whoever has assaulted you, then assault him in the same way that he has assaulted you" (Sura 2: 194). In any case, the Islamic State concluded that the actions of the Jordanian pilot were such that he could be seen as someone who had renounced Islam, and therefore the Islamic State felt obligated to kill him.[71] Islamic State propagandists relied extensively on examples from Islamic history, and in this case they found justification in their act since the first caliph, Abu Bakr, had set the precedent for severe and cruel punishments. During period of the *ridda* wars (against those who accept Islam and consequently betrayed their new religion), Abu Bakr ordered the military commander Khalid Ibn al-Walid "to not spare anyone he is able to kill, to burn them alive with fire, to kill them in a severe manner using all means, to enslave their women and children, and to not accept from any one of them anything but Islam."[72] Indeed, Khalid Ibn al-Walid had used different methods to defeat his enemy. He had them executed by burning them alive, stoning them, or throwing them off mountains.

When the Islamic State rose to the forefront, a one-dimensional view of the phenomenon of jihad took its place and placed al-Qaida and the Islamic State on a similar plane. This is perhaps best exemplified by President Obama's reference to the Islamic State in its early days, diminishing its significance in interview with the *New Yorker Magazine*'s editor, David Remnick, commenting that it was the "jayvee squad" of terrorists."[73] While the United States and Western world writ large were occupied with the threat, the journalist Peter Bergen, who was one of the first Western journalists to interview bin Laden in 1997, described him in his book *Holy War, Inc*. as a product of the modern secular world. He used terror, but also demanded particular political concessions such as the evacuation of American forces from Saudi Arabia. Al-Qaida fighters were familiar with the workings of the modern world with Bergen, for example, describing how the terrorists who caused the attacks on September 11 used the Internet to shop and had bought their flight tickets online. The Western discourse chose to understand jihadis as modern people who at some point came to believe in a mediaeval religious ideology. This theory was also applied to the members of the Islamic State.[74]

While both groups were products of the modern world, in reality, the rise of the Islamic State was the culmination of a long-standing struggle between two divergent streams of Salafi-jihadi ideology. The Islamic State's extreme focus on its sectarian identity, as a Sunni group, and its state-building project differentiated it from its al-Qaida predecessors. As Michael Weiss and Hassan Hassan argued, an integral component of the Islamic State's strategy and ideology was that "the Islamic State presents itself to an embattled Sunni

minority in Iraq, and an even more persecuted and victimized Sunni majority in Syria, as the sect's last line of defense against a host of enemies—the 'infidel' United States, the 'apostate' Gulf Arab states, the 'Nusayri' Alawite dictatorship in Syria, the 'rafida' one in Iran, and the latter's satrapy in Baghdad."[75]

This difference in both strategy and ideology was further underscored during the apogee of al-Qaida in Iraq's killing during the Iraqi insurgency, as al-Qaida and its Iraq affiliate led by Abu Mus'ab al-Zarqawi had a substantial break over the group's treatment of Shi'is. American intelligence officials from the Office of the Director of National Intelligence

> published a letter Zawahiri wrote to Zarqawi in June 2005, in which he urged Zarqawi to limit attacks against Muslim civilians. Such attacks, Zawahiri wrote, "won't be acceptable to the Muslim populace however much you have tried to explain it." Zawahiri's criticism received the most media attention, but other pro-resistance Sunni leaders have also questioned Zarqawi's unusually brutal methods. This debate over Zarqawi's targeting and methodology suggests that divisions among pro-resistance Sunnis may be deeper, and alienation among the public more widespread, than Zawahiri's letter acknowledged.[76]

Al-Qaida's fixation with attacking the "far enemy" in the West, its more moderate position regarding Shi'i Muslims, and Usama bin Laden's belief that al-Qaida would serve as the opening salvo that would someday conclude with the establishment of an Islamic caliphate, served as a breaking point with the Islamic State, which sought not to wait, but instead build its own state itself. While al-Qaida was a largely decentralized and flexible organization operated by a loose network of autonomous cells, the Islamic State sought to establish legitimacy through its state-building project, constructing real autonomous institutions with a government-like management structure, comprised out of a military and a civil section in each district. Atrocities carried out by the Islamic State time and again have reinforced the impression that the organization is a particularly brutal version of al-Qaida, and nothing more, yet all of these brutal actions were part of its own warped and brutal process of state formation. The religious character of the state, which draws from "the prophetic model" and relies strictly on medieval Qur'anic interpretations was "repressed" in Western, as well as Muslim discourse. According to this logic, one would think that the organization would attack Western targets, presumably using foreign fighters with Western passports, who can return to Western countries and carry out terrorist attacks there. Some Middle Eastern rulers also tried to use this argument and advised the West to destroy the organization as soon as possible. Saudi King 'Abdallah encouraged this train of thought by saying that "those jihadis will come to Europe in a month and to America within two months."[77] As mentioned previously, the priorities of

the Islamic State did not match those expectations, as the emphasis has been on the establishment and the strengthening of the caliphate and not on attacking the far enemy in the West. However, the aerial attacks from all sides on the strongholds of the Islamic State transformed its strategy and it began to carry out attacks against the West, using the flow of refugees escaping from the Syrian Civil War.[78]

Attacks in Paris and Brussels in 2016 demonstrated the extent to which the Islamic State managed to penetrate Europe and how its ideology found fertile soil in young Muslim communities stricken by economic distress and searching for identity, which had been a result of ongoing socio-demographic processes in Western Europe. Paris, the capital of European liberalism, and Brussels, the seat of the European Union, were appropriate objectives for the Islamic State's digital attack designed to mimic their struggle on European territory. "Cultural enclaves" such as the Molenbeek district in Brussels, slowly developed into autonomous Muslim communities in which misguided youths searching for the way out of economic problems (unemployment saw rates higher than 30 percent of these communities)[79] have become a target for the ideological message of the Islamic State. These young people were eager to buy into its message.[80] It is therefore not surprising that Belgium (having a 6 percent Muslim population) has become as of October 2015 the largest European source of Islamic State recruits (516 civilians) who moved to the killing fields of Syria and Iraq.[81] The popularity and support for the Islamic State by large numbers of European youngsters of Muslim immigrant background coupled with the influx of Syrian refugees fleeing the civil war has called into question their ability to assimilate into wider European society, and frayed the European political project. Undoubtedly, Muslim immigrants face social exclusion and discrimination, even in European "liberal" society, but the clash between identities, and the inability for immigrant populations to see themselves as a cohesive part of their respective societies has played a role in the attraction to terror groups such as the Islamic State. Yet, the realities of Muslim communities are far more complex and diverse than their monolithic portrayal in the media. While there remains, especially in countries like France and Belgium, large numbers of Muslim youth who live in public housing projects, the so-called *Banlieues*, their integration into mainstream society is far more advanced than previously reported. According to a report by Institute Montaigne, around 46 percent of French Muslims are either secular, or in the process of integrating into the "French contemporary value system." Yet, according to the same report, around 28 percent of those surveyed are "Muslims who have adopted a value system that is clearly opposed to republican values." These Muslims are primarily "young, under-qualified, and with low integration in the work force, they live in dense suburban neighborhoods. They define themselves more by the use they make

of Islam to express revolt against the French republic than by their conservatism."[82] While the survey notes that significant progress has been made, the fact that nearly a third of the French Muslim community has a value system that is deemed in direct opposition to France's republican values shows the duality within the French political system, and the challenges that remain to integrate Europe's Muslim minority. The European dream that attracted many Muslim immigrants, the ability to make a decent wage and live in a neoliberal and multi-cultural society, with open borders, has been harder to achieve than European bureaucrats in Brussels had portrayed. The rise of nationalism has been spurred by the continued influx of Syrian refugees, not only in Germany, but especially in the formerly communist states of Eastern Europe. The rise of right-wing nationalist parties, including the Alternative for Germany (AFD), the National Front (FN) led by Marine Le Pen in France, and increasing nationalist rhetoric from states such as Poland and Hungary have underscored these trends, but also shown the continued prevalence of illiberal attitudes amongst Europeans. With the continued presence of substantial refugee communities, particularly in Germany and with states such as Poland and Hungary doubling down on their own ethnically based nationalism, the relationship between Europe's Muslim community and rise of the far-right deserves attention going forward.[83]

THE ISLAMIC STATE AND THE NEW MEDIA—21ST-CENTURY TERROR

The dizzying success of the Islamic State in recruiting support among young audiences in Muslim communities around the world was largely the result of a sophisticated communications system built not only on the flow of updated information about their activities, but also on the distribution of indoctrinating material. By ensuring the high standard of quality of their media product, equipped with special effects in the style of the Hollywood film industry, the Islamic State produced a media system that proved to be highly dynamic and effective in achieving its goal. It increased the Islamic State's image as a highly successful organization, able to overcome formidable foes and put its doctrines into practice.

Since the establishment of the caliphate in July 2014, the Islamic State turned up the volume of their media activities and disseminated more propaganda in the virtual space. A plethora of publications, articles, videos, and audio tapes spoke in praise of the establishment of the caliphate and presented it as the "crown" on the holy scriptures and Islamic tradition. In many respects, the growth of the Islamic State's online presence, and its use of social media, mirrored its uses by the protestors of the Arab Spring. While

the youth of Cairo and Tunis used their Twitter and Facebook accounts to share and upload videos and to organize demonstrations against the authoritarian regimes, the Islamic State also utilized social media and a wide digital footprint to expand its influence, particularly amongst young Muslims in the West. In this sense, unlike previous groups like al-Qaida, whose leadership of Usama bin Laden and Ayman al-Zawahiri frequently utilized tape recordings to spread their message publicly, the Islamic State adopted an altogether modern approach, using the digital tools of the 21st century to become the first real technological terror group.

The Islamic State had three official communication channels that produce messages from Islamic State officials and articles that propagate its ideology to the non-Arabic-speaking public by means of video productions in Western languages, especially in English. The advantage of the Islamic State was its ability to reach a wide audience. Because of their previous encouragement to Muslims to emigrate from all countries to the territory of the Islamic State, they managed to incorporate many different mother tongues, using their recruit's language skills for propaganda purposes.[84] The Islamic State also worked on establishing a local communications system. Each of the districts under its control had been officially responsible for producing material about events in the district.[85] These communication systems broadcasted different kinds of messages, carefully tailored to their target audiences. The messages were usually short, to the point, and therefore they were rather successful in achieving their goal. The messages were designed to strengthen the relationship between the leaders of the Islamic State and the civilian population, to create the impression that the Islamic State is capable of running an effective government and undermine rival claims that it lacks control over the occupied territories.

Various communication channels broadcasted a picture of regular life in the pastoral areas of the caliphate with the government monitoring and directing society and providing for its needs. Many videos showed how a civilian population can live under sharia law and how this would change methods of trade and the economic life in the major cities for the better. The district of Nineveh produced videos that inform the viewer about the district's economy. These videos included interviews with local residents about their degree of satisfaction with the new government. Other videos covered the distribution of sacks of flour in Diala province and showed Islamic State officials socializing with the locals and keeping a record of the families in need. Another video focused on the distribution of charity in the district of 'Atarin and zoomed in on blurred faces waiting with vouchers that have written on them "eligible for *zakat*." In the district of Kirkuk, some videos were shot featuring the penalties set by law for residents who drank alcohol, engaged in witchcraft, or violated religious injunctions. The last part of the video,

residents were interviewed, who expressed their satisfaction with the Islamic courts, which provide justice and equal treatment for all.[86]

Alongside the official media channels, also unofficial channels aided the spreading of the Islamic State's propaganda. In August 2014, an umbrella organization called "the Media Front to Support the Islamic State"[87] was set up; the Al-Furat station, for example, was established in July 2015 and was designed to distribute propaganda materials to Russian-speaking Muslims. These channels worked on "cultural transmission," meaning that they selected relevant information about the daily events happening in the target community, giving them a symbolic and sometimes even a transcendental meaning.[88] In addition, the communication system of the Islamic State used a "community booster," which glorifies the qualities of the community, raises the members' self-esteem, and reinforces the communal identity of the individual. At the same time, the communication channels of the Islamic State focused on identifying dangers lurking within the community and took on the role of a community guard. In such a way the Islamic State tried to create community awareness based on common characteristics and highly valued traits.

The main objective of the Islamic State media was to create a clear framework that would distinguish between members of the Islamic State and outsiders, the latter of which were presented as inferior and less valuable, but at the same time as threatening the existence of the Islamic Caliphate. Like all fundamentalist movements, the Islamic State held on to the concept of an absolute cosmic struggle between "us" and "them," between those who struggle for the true faith and those who preach falsehood. By defining a certain type of people as the "other," such as Shi'i and heterodox believers, the Islamic State defined the boundaries of its discourse (i.e., the Shi'is were traitors, collaborators with the crusaders, and deviants from the true Islam). Such ideology in practice justified deeds such as execution of the "other." The communication and information systems of the Islamic State visualized the classification of the "other" with verbal, visual, and other kinds of symbols that contributed to a clearer definition of "us" and a greater cohesion of society. The overstepping of these symbolic boundaries symbolized "pollution" that needs to be cleansed by physical rather than symbolic exclusion. The propagandists of the Islamic State formed an extreme interpretation of the words of Michel Foucault that in "every society the production of discourse is at once controlled, selected, organized and redistributed according to a certain number of procedures, whose role is to avert its powers and its dangers, to cope with chance events, to evade its ponderous, awesome materiality."[89] Thus, the Islamic State conferred a narrative that described the situation in an absolute way, based on the "truth." This "truth" is not based on evidence or arguments and does not require justification. Arbitrary decisions on who was authorized to speak on behalf of the Islamic State were also derived from this

notion. Who was on the side of the "true" camp and who on the "false" side? In this ideology, the "other" was to be physically and verbally excluded.[90]

Another practical aspect of these messages was that the Islamic State became a magnetic force, especially to the younger generation. Many videos were posted about its activities and its successful raids on enemy strongholds, mostly those of the Peshmerga forces, the fighters of the autonomous Kurdish entity in northern Iraq. Activists of the Islamic State recorded their impressions on social networks, in which they found a suitable platform and an effective tool of psychological warfare against opponents. Islamic State fighters, for instance, kept personal Twitter accounts in different languages, provided explanations of the organization's method of operations and praised its actions. The same messages were transplanted into other online channels with different audiences, and experiences were transferred from the battlefield to encourage young Muslims to join the Islamic State. In order to open up their comments to a larger audience, they used a unique and well-used feature of Twitter (as well as Facebook and Google Plus), namely a hash tag or pound sign (#) before the title of their subject. For example, in English, any Internet user could look up #Wilayat Sinai and find information, comments, photos, videos on the Islamic State in the "Sinai province." In August 2014, several jihadi channels started a campaign on Twitter in English under the hash tag: #StevensHeadInObamasHands. Threatening messages, including the threat that the kidnapped American Jewish journalist Steven Sotloff would be executed, were designed to influence public opinion in the United States and exert pressure on the US administration not to lead a future coalition against the Islamic State in Iraq and Syria. These measures were designed to provoke fear and psychological terror of the enemy and empower the Islamic State by showing horrific scenes such as the high-profile burning of a Jordanian pilot in a cage. In its sophisticated and ruthless media campaign (with scenes of beheadings and child soldiers executing "traitors"), the Islamic State sent messages of shock and horror into Western homes and soon became the most prominent jihadi organization in the world, leaving al-Qaida marginalized.

Figure 4.1 Twitter icon of the Islamic State—the flag of the Islamic State in the shape of a chirping bird. Photo Credit: ISIS Media. Created by ISIS.

Psychological terror in the cruelest dimensions become a tool to spread the message of the Islamic State and became an important element in its success. Because of the image the Islamic State had created of itself, many Iraqi soldiers and the city of Mosul were captured by the Islamic State without a fight.[91]

THE POST-ISLAMIC STATE MIDDLE EAST

The creation of Anti-Islamic State Coalition, led by the United States, its Western allies, and Arab countries, gradually pushed the 'State' out of Iraq and into Syria. Yet, the geopolitics of this conflict also created strange bedfellows as American forces and Iranian-backed militias joined forces against the Islamic State. While it had utilized sectarian hatred against the Shi'a, and particularly against the Tehran-allied Shi'i government in Baghdad to gain support in the Sunni-dominated tribal regions of western Iraq, Iranian forces used the sectarian strife to advance their own agenda in order to expand their land corridor across Iraq and into Syria. The utilization of failed states and the decaying political systems of Iraq and Syria, coupled with the ethno-religious hatred of the other allowed for the two extremists, Iran and the Islamic State to press their advantage and consolidate power. As the Middle East moved into the post-Islamic State era, sectarian tensions, particularly those exploited by Iran, have constituted a pervasive influence on the region's geopolitical reality. Yet, the military campaign against the Islamic State and the laborious manner in which it was degraded and pushed back from its strongholds in Raqqa and Mosul and then defeated,[92] forces the question to be asked: why did it take so long? The answer is of course rooted in old-fashioned geopolitics and the interests of the numerous foreign powers who sought to use the Syrian Civil War and the multitude of rebel and jihadi groups, including the Islamic State to expand their interests in Syria.[93]

An illustrative example of this is of course the 2015 intervention by the Russians, who explicitly said that they were intervening to save Damascus from the Islamic State onslaught. While this was the Russian strategy voiced in public, the vast concentration of Russian forces were focused on entrenching Moscow's interests in Syria by safeguarding the Asad Regime and its Iranian allies, and attacking the "moderate rebels."[94] The Russian and Iranian alliance in Syria, propping up the regime of President Bashar al-Asad, was based primarily on eliminating all credible opposition to the regime, which had been portrayed in certain media outlets as "jihadi terrorists." Asad and his allies asked incredulously to many in the West who supported his overthrow, how they could support "jihadi terrorists" who were seeking to topple his "secular" regime. This made the Islamic State the ultimate foil for Asad and his allies, and grounded his repressive policies in political terms, within

the framework of a "secular" Arab government fighting against the butchers of the Islamic state. For both Iran and Russia, the protracted weakness of the Syrian state, both in its struggle against the rebel opposition and against the Islamic State allowed both actors to acquire significant power and influence in Damascus, with Tehran entrenching and expanding its coterie of Shi'i militias while also using Syria as a front against Israel. Russian President Vladimir Putin used the American weakness to make himself the final arbiter of any final status agreement in Syria. Likewise, Turkey, Syria's northern neighbor, which in the early days of the Syrian Uprising called for President Asad to step down, invested significant resources into supporting numerous rebel groups against the regime and also to balance against independent Kurdish groups as Ankara saw the entrenchment of a Kurdish autonomous region in northeastern Syria as the pre-eminent national security threat to Turkey.

In short, the rise of the Islamic State, and its significant staying power was aided by the particular interests of each individual Middle Eastern country which prevented the formation of a united front. Yet, even with the Islamic State's significant territorial losses, the words of Abu Bakr al-Baghdadi in an August 2018 videotape underscore the continued attraction of the Islamic State's ideals even in the face of military defeat. Baghdadi, the Islamic State's caliph noted that, "for the believer *Mujahidin*, the scale of victory or defeat is not counting on a city or town being stolen or subject to those who have aerial superiority, or intercontinental missiles or smart bombs, and not how many followers they have. The scale depends on how much faith the worshipper has."[95] In short, the influence of the Islamic State's virulent ideas, its vicious brutality, will continue beyond the destruction of its territorial entity. The ability of strong and cohesive jihadi groups to prey on weak and fragmented states will continue to challenge the sovereignty of states. The phenomenon of these professional troublemakers will continue to have a concerted impact on the future course of Middle Eastern politics, utilizing and manipulating social media, and attracting disenfranchised Muslim youth from the Middle East and around the world. The continued attraction to the Islamic State's ideology, the breakdown of Syria, the battle between Russia, Iran, Turkey, and the Gulf States, coupled with American retrenchment have continued to plague the Middle East and re-order its politics.

NOTES

1. *Bilad Al-Sham* is a common term in Arabic referring to the Levant, more specifically to an area called "Greater Syria," namely Syria, Lebanon, Jordan and Palestine.

2. Opinions are divided on Zarqawi's background. Some argue that he has Palestinian origin and others believed that he descended from the al-Hassan dynasty of the Khalayla tribe, known for its loyalty to the Hashemite Royal Family. According to the latter sources, Abu Mus'ab al-Zarqawi was a respected tribal shaykh who served in the Arab Legion and fought against the Zionists in 1948.

3. One of the most murderous attacks in 2005 on a number of touristic hotels in Jordan was claimed by this organization (which later became known as *Jama'at al-tawhid wal-Jihad*). Particularly brutal was the attack on Radisson SAS Hotel which occurred during a wedding ceremony and claimed the lives of thirty-six men and women. On the home page of one of al-Qaida's websites the organization explained that its goal had been to destroy the American intelligence agents, Israelis and other Western diplomats who stayed there.

4. Ibn Taymiyya, *Majmu' al-Fatawa Vol. 1* (Beirut: Dar ibn Hazm, 2011), pp. 19, 77.

5. In total, ninety-five people died, including Ayatollah Muhammad Baqir al-Hakim, the spiritual leader of the "Supreme Council for Islamic Revolution in Iraq."

6. "Nass al-Tasjil al-Sawti li-Bin Laden bi-Ta'rikh 1/7/2006." *Al-Jazeera*. Accessed August 7, 2016, http: //www .alja zeera .net/ news/ arabi c/200 6/7/1/ نص-التسجيل-الصوتي-لبن-لادن-بتاريخ-1-7-2006.

7. See al-hesbah.org. December 7, 2006. Already in the first issue of *Dabiq*, the Internet magazine of the Islamic State in English, the editors honored al-Zarqawi by crediting him with laying the foundations of the future Islamic State.

8. He was born Ibrahim 'Awwad Ibrahim al-Badri al-Samarra'i. Abu Bakr al-Baghdadi succeeded his predecessors, Abu 'Umar al-Baghdadi and Abu Hamza al-Muhajir, who were killed by the Americans in April 2010.

9. By this is meant Iraq, al-Sham (Syria, Lebanon, Palestine and Jordan) and the Arabian Peninsula. The Internet magazine of Islamic State, *Dabiq*, expressed time and again the need for uprooting the oppressive and heretical rulers in the Arab World, but particularly emphasized in its articles the rise of a pure Islamic caliphate and the downfall of the inherently evil Western attempt to rule the Middle East as expressed in the Sykes-Picot Agreement. See: "The Clarion Project." Accessed June 5, 2015, http: //www.clarionproject.org/news/islamic-state-isis-isil-propoganda-magazine-dabiq.

10. Al Khalifa Ibrahim, "Tafrigh: Taghtiyya Hassa li-Hutba Salat al-Jum'a fil-Jami' al-Kabir fi Madinat Mosul," *Mu'asasat al-Bitar al-Islamiyya, Ramadan*, 6, no. 1435 (July 14, 2014).

11. Abu Muhammad al-'Adnani al-Shami, "This Is God's Promise," *Mu'asasat al-Furqan.Audio cassette*, June 30, 2014. See also: Abu Hamam Bakr 'Abd al-'Aziz al-Athari, "God's Promise," *mu'asasat al-Ghurba'*, June, 2014.

12. al-'Adnani al-Shami, "This Is God's Promise."

13. The words of al-Bin'ali were published in a bulletin and circulated among the people of the province of Nineveh in Iraq in the end of September 2014. Turki al-Bin'ali Abi Sufyan al-Salami, "Mada al-Ayadi," *Al-Hama*, September 2014.

14. Abu Sahib *al-Muhajir*, "al-bay'a: Ma'naha, Shurutaha wa-wajibatuha," *Shabab al-Tawhid*, March 2014.

15. Sahih Muslim, *Riyadh: Dar al-Tiba'a*, 2 (2006), p. 898.

16. Al-Dawla al-Islamiyya fil-Iraq wal-Sham, "Fa-i'lam ana la ilah ila Allah: al-Wala' wal-Bara,'" *Al-Hama*, August 2014.

17. Al-Dawla al-Islamiyya, "Nusra lil-Dawla al-Islamiyya: 'Ala Ahzab al-Kufr wal-ridda wal-nifaq min awthak al-Iman," *Al-Hama*, November 2014. Based on the verse: "Do not take the Jews and the Christians as allies. They are [in fact] allies of one another. And whoever is an ally to them among you then indeed, he is [one] of them. Indeed, Allah guides not the wrongdoing people" (Sura 5:51).

18. al-Islamiyya, "Nusra lil-Dawla al-Islamiyya: 'Ala Ahzab al-Kufr wal-ridda wal-nifaq min awthak al-Iman."

19. Ibid.

20. Ibid.

21. For further details regarding the indoctrination of the Islamic State concerning the illegitimacy of nationalism, see: Milo Cromerford, "How ISIS Educates Extremism," Tony Blair Faith Foundation, September 4, 2014. Accessed August 9, 2016, http://tonyblairfaithfoundation.org/religion-geopolitics/commentaries/glance/how-isis-educates-extremism.

22. Abu Nusayba al-Maqdisi, *al-Dawla al-Islamiyya fil-Iraq wal-Sham: Mashru' al-Khilafa al-Maw'ud* (Fursan Al-Balagh, March 2014), p. 82.

23. "Al-wala' lil-Islam wala lil-watan," *Al-Hama*, *Rabi' al-Thani 1426*. (January 2015).

24. Ibid.

25. Al-Dawla al-Islamiyya, "al-Wala' lil-Islam wala lil-Watan," *Al-Hama*, May 2015.

26. Abu Nusayba al-Maqdisi, pp. 82–84.

27. "The Islamic State before Al-Malhamah: The Immigrants to the Land Of Malahim." *Dabiq*, September 3, 2014, pp. 5–6.

28. "Those Who Break off from Their Tribes," *Dabiq*, September 3, 2014, p. 8.

29. Ibid.

30. Ibid.

31. "The Islamic State Before Al-Malhamah: The Immigrants to the Land of Malahim," *Dabiq*, September 3, 2014, p. 5.

32. "Risala min jundi al-Khilafa ila al-Qa'idin 'an al-jihad," *Al Hama*, September 2014.

33. Allah says: "Even if you had been inside your houses, those decreed to be killed would have come out to their death beds" (Sura 3:154).

34. Sahih Muslim, *Riyadh: Dar al-Tiba'a*. 2nd ed. (2006), p. 923.

35. January 19, 2014. Accessed July 14, 2015, https://alfidaa.info/vb/showthread.php?t=91225.

36. January 7, 2014. Accessed July 14, 2015,https://shamikh1.info/vb/showthread.php?t=218261

37. Until the end of the First World War Alawites were known as Nusayriyya, after the sect's founder Muhammad Ibn Nusayr or after the mountainous province in Syria in which they resided. This name means "little Christians" and is derived from the similarity of the customs of this community with the customs of the Christians. At a certain point, members of the community preferred to be called Alawites, which means "loyalists of 'Ali" and his descendants.

38. January 7, 2014. Accessed July 14, 2015, https://shamikh1.info/vb/showthread.php?t=218261, pp. 8–19.

39. Abu Muhammad al-'Adnani al-Shami, "wal-Ra'id la yakthib ahluhu: Hawla ahdath al-'Iraq wal-Sham," Mu'asasat al-Furqan lil-Intaj wal-I'lam Rabi' al-Awal 1435 (January 2014), audio clip (transliterated by Fursan al-Balagh).

40. Referring to Sura 9:29: "Fight those who do not believe in Allah or in the Last Day and who do not consider unlawful what Allah and His Messenger have made unlawful and who do not adopt the religion of truth from those who were given the Scripture."

41. Abu Muhammad al-'Adnani al-Shami, "Laka Allah Itiha al-Dawla al-Mathluma," Mu'asasat al-Furqan lil-Intaj wal-I'lami, Dhu al-Qadr 1434 (September 2013), audio clip (transliterated by Fursan al-Balagh). See also: Shaykh Abu Muhammad Al-'Adnani, Jihadology – A Clearinghouse for Jihadi Primary Source Material, Original Analysis and Translation Service, June 16, 2014. Accessed July 14, 2015, http://jihadology.net/category/individuals/leaders/shaykh-abu-muḥammad-al-adnani/page/3/.

42. Al-'Adnani, Jihadology – A Clearinghouse for Jihadi Primary Source Material, Original Analysis and Translation Service.

43. Abu Nusayba al-Maqdisi, *Al-Dawla al-Islamiyya fil-Iraq wal-Sham: Mashru'al-Khilafa al-Maw'ud* (Fursan al-Balagh, March 2014), pp. 8–19.

44. Translation of Abu Bakr Al-Baghdadi, "Nusayris and the Druze," *The Victorious Party in the Land of Ash-Sham*. Accessed October 15, 2014, http://thevictoriousparty.blogspot.co.il/2014/03/nusayris-and-druze.html; "Al-Nusayriyya Al-Batiniyya," *Al-Hama*, August 2014.

45. "The Revival of Slavery before the Hour," *Dabiq*, 4, p. 14.

46. "The Revival of Slavery before the Hour," p. 16; Graeme Wood, "What ISIS Really Wants," *The Atlantic*, March 2015, p. 9.

47. In the academic literature there is consensus that the Battle of Manzikert symbolizes the beginning of the decline of the Byzantine Empire. The battle was also one of the key factors that led to the decline of the crusades. The crusaders had seen the defeat as an indication that they were unable to defend Eastern Christianity.

48. "Ramadan: Shahr al-Ijtihad wal-ta'at wal-jihad wal-futuhat," *al-Dawla al-Islamiyya: Al Hama, Silsilat halaqat fi Idhn* mujahid, no. 5 (May 2015). "With the arrival of Ramadan, the gates of paradise are opened and the gates of hell are locked and the devils are in chains" [Sahih Muslim].

49. For more information on this topic, see: http://www.baretly.net/undex.php?topic=33284.0

50. "Wathikat al-Madina," The Islamic State in Iraq and Al-Sham, Ninwa province, no. 34, 14 Sha'ban 1435 (June 13, 2014).

51. Reza Pankhurst, *The Inevitable Caliphate?*(London: Hurst Pub., 2013), pp. 133–158.

52. *Dabiq*, 3, p. 6.

53. See for instance the declaration of jihad by Usama bin Laden against the Crusaders and the Jews on March 23, 1998.

54. For example, the "contract of the nation" (*'ahd al-umma*) in the year 622 allowed local Jews political rights. In 628 these rights were canceled when Muhammad was powerful enough to expel them from the city. Even the Treaty of *Hudaybiyya* between the Prophet and the people of Mecca in 628 was valid for eighteen months until Muhammad's forces were strengthened and were able to take control of Mecca and the *ka'ba*.

55. See: https://www.middleeastmonitor.com, September 3, 2014.

56. See for example the teachings of ‘Abd al-Salam al-Faraj, leader of Tanthim al-Jihad, a radical Islamist organization in Egypt, who was executed in 1982 on suspicion of involvement in the assassination of Sadat. In the 1980s he had published a brochure titled “A Missing Commandment.” In his writing, which influenced the development of radical Islamic ideas, Faraj asserted that jihad is a missing commandment, because it has been neglected by the Muslims.

57. “Halab Tribal Assemblies,” *Dabiq*, 1, p. 11; “The Fear of Hypocrisy,” *Dabiq*, 3, p. 26.

58. *Dabiq*, 3, p. 5.

59. “Foreword,” *Dabiq*, 2, pp. 3–4.

60. “There Is No Life without Jihad and There Is No Jihad without Hijrah,” *Dabiq*, 3, p. 31.

61. Abu Muhammad al-‘Adnani al-Shami, “Ma Kan Hadha Minhajina Walan Yakun,” Mu’asasat al-Furqan, Jumada al-Thani 1435 (April 2014).

‘Adnani’s death at the hands of an American airstrike was a crippling blow to the Islamic State, as he was widely seen as one of the group’s most charismatic figures, and potentially seen as a successor to the Caliph Abu Bakr al-Baghdadi. His replacement Abu Hasan al-Muhajir has continued the Islamic State’s propaganda campaign mocking the American campaign to destroy the terror group and calling for additional attacks against the west.

62. https://twitter.com/wracom2323232/status/585036810318807040, April 6, 2015. #البرموك_يفضح_حماس.

63. International Union of Muslim clerics (Yusuf al-Qaradawi), July 3, 2014.

64. https://alfidaa.info/vb/, July 21, 2014.

65. Abu Faruq al-Muhajir, “Khalifa One Year on,” *Al-Risala* (July 1, 2015), pp. 21–25.

66. See for instance: al-Baghdadi’s speech as published on the Twitter account of al-I‘tisam, the media outlet of Islamic State: Twitter.com/wa3tasimo 01/19/2014; al-Baghdadi’s speech in July 2012 in which he promised that the Islamic State will attack the United States “immediately”: Shamikh1.info, June 22, 2012.

67. There have also been exceptional cases in which activists identifying themselves with the Islamic State acted against the West on their own (not in response to Western actions against the organization) and without their being aware of the priorities of the organization. For example, Mehdi Nemmouche, who opened fire in the Jewish Museum in Brussels, had been in the ranks of the Islamic State in al-Raqqa in 2013 and has been identified as having been among the jailers and torturers of French journalists kidnapped by the “Islamic State.” However, the Islamic State did not claim responsibility for the attack.

68. *Dabiq*, 4 (October 2014), pp. 32–44.

69. “Yahya: Lessons from a Shahid,” *Dabiq* 5 (November 2014), pp. 3–9.

70. Irna, Iran, September 10, 2014.

71. “The Burning of the Murtadd Pilot,” *Dabiq*, 7(February 2015), pp. 5–8.

72. “The Burning of the Murtadd Pilot,” p. 7.

73. Michael Weiss and Hassan Hassan, *ISIS: Inside the Army of Terror*, Expanded ed. (New York: Reagan Arts, 2016), p. XII.

74. Peter L. Bergen, *Holy War, Inc.: Inside the Secret World of Osama bin Laden* (New York: Touchstone, 2002), p. 29.

75. Weiss and Hassan, *ISIS*, p. XVIII.

76. Emily Hunt, "Zarqawi's 'Total War' on Iraqi Shiites Exposes a Divide among Sunni Jihadis," *Washington Institute for Near East Policy*, Policy Brief 1049, November 15, 2005, https://www.washingtoninstitute.org/policy-analysis/view/zarqawis-total-war-on-iraqi-shiites-exposes-a-divide-among-sunni-jihadis.

77. Ahmad 'Alab. "Hadim al-Haramayn Muhdiran al-'Alam: al-Irhab Sayasil 'ala 'Uruba wa-Amrika in lam Tatim Muharabatuhu," *Al-Hayat*, August 31, 2014.

78. Alison Smale, "Terrorism Suspects are Posing as Refugees, Germany Says," *New York Times*, February 6, 2016, https://www.nytimes.com/2016/02/06/world/europe/germany-refugees-isis.html.

79. Steven Mufson, "The Belgian Neighborhood Indelibly Linked to Jihad," *Washington Post*, November 15, 2015, https://www.washingtonpost.com/world/the-belgian-neighborhood-indelibly-linked-to-jihad/2015/11/15/02bba49c-8b39-11e5-bd91-d385b244482f_story.html?utm_term=.592d0a62b8fd; David A. Graham, "What's the Matter with Belgium?" *The Atlantic*, November 17, 2015, https://www.theatlantic.com/international/archive/2015/11/belgium-radical-islam-jihad-molenbeek-isis/416235/.

80. Mush'ari al-Daydi, "Qissat Belgika Ma'a "Da'ish," *al-Sharq al-Awsat*, March 23, 2016.

81. Rukmini Callimachi, "In Photos, Islamic State Shows How Terror Attacks in Brussels Originated in Syria," *New York Times*, April 14, 2016, https://www.nytimes.com/2016/04/14/world/middleeast/in-online-magazine-isis-paints-a-portrait-of-brussels-attackers.html; "Europe's Urgent Security Challenge," *New York Times*, April 11, 2016, https://www.nytimes.com/2016/04/12/opinion/europes-urgent-security-challenge.html; Andrew Higgins and Kimiko De Freytas-Tamura, "Jihadi Mentor Mingled Crime with Religion," *New York Times*, April 12, 2016, https://www.nytimes.com/2016/04/12/world/europe/a-brussels-mentor-who-taught-gangster-islam-to-the-young-and-angry.html; Thomas Erdbrink, "Rattled by Attacks, Many Belgians Still Want Nation Split in Two," *New York Times*, April 9, 2016, https://www.nytimes.com/2016/04/08/world/europe/rattled-by-outside-threats-many-belgians-still-want-nation-split-in-two.html.

82. Benjamin Haddad, "Facts and Figures on French Muslims," *Hudson Institute*, October 6, 2016, https://www.hudson.org/research/12902-the-facts-and-figures-on-french-muslims; Hakim El Karoui, "Un Islam Francais est Posible," *Institute Montaigne*,September 2016, https://www.institutmontaigne.org/publications/un-islam-francais-est-possible.

83. For more on the rise of the European illiberalism and decaying democratic norms see Anne Applebaum, "A Warning from Europe: The Worst Is Yet to Come," *The Atlantic*, October 2018, https://www.theatlantic.com/magazine/archive/2018/10/poland-polarization/568324/.

84. The first and most enduring was al-Furqan which began operating in 2006 when Abu Mus'ab al-Zarqawi founded the organization *al-Qaida in Iraq*. Messages from the most senior levels in the organization circulated through this media outlet, such Abu Bakr al-Baghdadi and Muhammad al-'Adnani. The second communication

channel, ‘Azzam, which was launched in 2013 with the establishment of the Islamic State in Iraq and al-Sham was of similar nature. Third, *Al-Hayat*, focused on appealing to audiences who do not speak Arabic and had its goal to instill them with the messages of the Islamic State.

85. The territory of the caliphate (the areas of Iraq and Syria) was divided into nineteen districts of control. Another fifteen districts were counted outside of Syria and Iraq, including in Yemen, Algeria, Khorasan (Afghanistan-Pakistan), the Caucasus and Nigeria.

86. The Islamic State of Kirkuk province, “Inna al-Hukm ila Lilah: al-Mahakim al-Islamiyya fi wilayat Kirkuk” (excerpt), January 25, 2015. Accessed October 1, 2015, http://www.alfarough.com/?p=1820.

87. The umbrella organization included: al-Ghurba’, Markaz al ‘Aysha, Rabitat al-Ansar, al-Wada‘ al-Manhaj, Ghurfat Minbar al-Ansar, Dabiq, al-Wa‘ah, Fada’ih al-‘Ilamaniyya, Shabakat al-Raqqa al- Islamiyya wal-Ribat. Accessed August 18, 2014, https://twitter.com/aaljabha.

88. For further explanation of the use of “cultural transmission” see: Ines Gabel, “The National Religious and the Media: A Love-Hate Relationship (Hebrew),” Chaim Herzog Institute for Communication, Society and Politics, May 2006, p. 11.

89. Michel Foucault, “The Order of Discourse,” in *Unifying the Text: A Post-Structuralist Reader*, ed.Robert Young (London: Routledge, 1981), pp. 48–78.

90. The overruling idea or “overruling narrative” is one of the characteristics of movements characterized by an ultimate idea. See: Eliezer Weinrib,*History—Myth or Reality? Thoughts about the State of the Profession (Hebrew)* (Ra’anana: Open University, 2003), pp. 374–368.

91. For example, in September 2014, the Al-Hayat channel, acting on behalf of the Islamic State, published a propaganda video in the English language titled “Flames of War,” praising the victories of the Islamic State and laid the brutal struggle against its opponents bare. A number of captured Iraqi soldiers were shown digging pits, being shot and then falling into the graves they dug themselves. The video celebrates the heroism, courage and techniques that the fighters demonstrate against their opponents in Syria and Iraq. See: Ryan Mauro. “ISIS Releases ‘Flames of War’ Feature Film to Intimidate West,” ClarionProject.org, September 21, 2014. Accessed January 7, 2016, http://www.clarionproject.org/analysis/isis-releases-flames-war-feature-film-intimidate-west.

92. As of the time of writing, the Islamic State only holds around 10 percent of the land in Syria, primarily in its eastern, sparsely populated desert regions.

93. Uzi Rabi and Brandon Friedman, “Weaponizing Sectarianism in Iraq and Syria,” *Orbis*, 61, no. 3 (2017), pp. 423–438.

94. Helene Cooper, Michael R. Gordon, and Neil MacFarquhar, “Russians Strike Targets in Syria, But Not ISIS Areas,”*New York Times*, September 30, 2015, https://www.nytimes.com/2015/10/01/world/europe/russia-airstrikes-syria.html.

95. Mohammed Tawfeeq and Steve Almasy, “Abu Bakr al-Baghdadi Admits ISIS Is Losing in Apparent Audio Message,” *CNN*, August 23, 2018, https://edition.cnn.com/2018/08/22/middleeast/isis-leader-abu-bakr-al-baghdadi-recording/index.html.

Part III

THE MIDDLE EASTERN SYSTEM

THE CONFLUENCE OF REGIONAL AND GLOBAL ACTORS

The election of President Barack Obama in 2008 led to a more hesitant American policy in the Middle East. After nearly a decade of continuous conflict, Obama pledged to the American people to bring its troops back home to engage in "nation building at home." Changes in American strategic priorities can be explained in different ways—as the result of "the Iraq and Afghanistan syndrome," as a result of economic and societal problems at home deriving from the aftermath of the Great Recession, as a result of a reduction in the dependence of the American economy on oil and gas from the Middle East, or as the result of a pivot away from the Middle East and toward Southeast Asia—but whatever its explanation may be, it can be said with certainty that the change in American policy had a decisive impact on regional geopolitics. This was further underscored by the inability of President Obama to enforce his so-called "red line" in Syria, refusing to act against the Asad regime's use of chemical weapons against Syrian civilians, and the refusal of the United States to enforce no-fly zones and civilian safe zones within Syria as means to alleviate the suffering of the millions of Syrian refugees. Obama's policy of retreat was finally cemented by the nuclear deal with Iran.

The withdrawal and increased hesitancy of the United States to exercise its power and influence in the region also had a significant impact on the reordering of regional politics. American actions during the Arab Spring, particularly the Obama administration's decision not to stand by Egypt's Hosni Mubarak, and instead calling for his immediate ouster, raised fears among American allies in the Persian Gulf, particularly in Saudi Arabia and in the United Arab Emirates that they could be next. Instead of leading to the growth of democracy, the Arab Spring became an "Islamic Winter" that saw the rise of sectarian extremists such as the Islamic State, and the continued rise of Iran. The uprisings, especially in Syria, Yemen, and Libya,

led to reassertion of confessional, sectarian, and regional identities, but also the rise of international actors who sought to manipulate these local clashes for their own benefits. Most prominently, the uprisings crystalized the new power dynamics between the rise of non-Arab powers, namely Israel, Iran, and Turkey, and the weakness of Arab states. Within the Arab states, new divides began to appear, with Saudi Arabia and the United Arab Emirates proliferating a strong anti-Muslim Brotherhood policy, and their fellow Gulf Cooperation Council (GCC) member, Qatar together with Recep Tayyip Erdogan's Turkey serving as the primary supporters for the Muslim Brotherhood government of President Muhammad Morsi in Egypt. This continued following his overthrow in the summer in 2013, with Ankara continuing to provide members of the Brotherhood with safe haven.

The continued fracturing of the Middle East regional system, both among Arab states, the rise of the non-Arab periphery has also been overlaid by the most substantial rise in global geopolitical tensions within the region since the cessation of the cold war. The American drawdown and the rise of Russia's influence in the region, particularly in Syria, coupled with nuclear deal between the world powers and Iran, have all provided added impetus for the creation of new geopolitical alignments and alliances. These led to a greater influence of non-Arab powers and the evolving alliance between Israel and the Sunni Gulf States, whose shared threat of Iranian entrenchment in Syria and regional expansion (coupled with the lowered interest in the Palestinian cause by Arab governments as a lynchpin for foreign policy) has increased the prevalence of *realpolitik* and subsumed the rhetoric of Arab unity and grand ideological projects. From Israel's perspective, which will be dealt with at the end of this section, the evolving and fluid changes of the regional system have led to changing strategies within Israeli foreign policy. The flipping of David Ben-Gurion's "periphery doctrine," which during the early years of the state of Israel utilized Turkey and Iran as a bulwark against the reactionary Arab regimes, has now been utilized in reverse, to combat the rise of revisionist and expansionist Iran and a hostile Muslim Brotherhood-supporting Turkey. Yet, while this reversal of the periphery doctrine has enabled closer cooperation between Israel and the Gulf States, in particular Saudi Arabia and the United Arab Emirates, the growing geopolitical alignment between Israel and the Moderate Arab States exemplifies the evolving geopolitical map of the region.[1]

NOTE

1. For more on the genesis of Israel's periphery doctrine, particularly during the early years of the state see Yossi Alpher, *Periphery: Israel's Search for Middle Eastern Allies*, (London: Rowman and Littlefield, 2015).

Chapter 5

Arab Spring and Regional Politics

THE OUTSIDE IN: THE RISE OF THE NON-ARAB PLAYERS—TURKEY AND IRAN

The instability within the Arab fold illustrated the weakness of Arab states, which had for decades been the epicenter of the regions' geopolitics. With states like Egypt and Syria, longtime central players in Middle Eastern geopolitics, gripped by internal political struggles and civil war, Iran and Turkey have seen as stable, consolidated nation-states that filled the vacuum that had been created by the eclipse of Arab power and the declining of the American presence in the region. Iran's continued support for its Shi'i proxies particularly in weak and fractured states seeking to export the values and ideas of the Islamic Revolution, and Turkey's proactive foreign policy based on utilizing its past Ottoman links with the region, were important factors in understanding the relationships between these two pivotal states and the region.

These two large non-Arab states, which during the majority of the 20th century served as pro-Western strongholds in the Middle East have recently played just the exact opposite role. Each of them cultivated its own narrative of current events in the Arab World in an attempt to gain political and diplomatic capital. Turkey has supported the Muslim Brotherhood and its affiliates as part of its neo-Ottomanist foreign policy, while Iran broadened its support for Shi'i militias and minority groups in fractured and failing states such as Syria and Yemen. Each of them in their own way endeavored to portray events in the Arab world in a way that would "prove" the strength of their own illiberal internal systems in order to justify their own pursuit of regional dominance.

TURKEY'S RISE AND OVERREACH

Since 2002 (the year in which the "Justice and Development Party (AKP)" won an election victory), Turkey, led by Recep Tayyip Erdogan, has taken a particular interest in the changing regional system and implemented a foreign policy that proactively sought to create a regional order in line with its own interests. Under the leadership of Prime Minister (and President from August 2014) Erdogan, and given the cumulative fatigue and weakness of global powers in the eyes of the new leadership of Turkey, the Middle East appeared to be a field of opportunities. Since the founding of the Turkish Republic by Mustafa Kemal Ataturk, Turkish strategic planners had firmly rooted the country's geostrategic trajectory in Europe. However, *Strategic Depth* (*Stratejik Derinlik*, 2001), a book by Turkish politician Ahmet Davutoglu (later to become Erdogan's chief foreign affairs aide, foreign minister and finally prime minister) served as a guide for the development of a strategy that aimed to strengthen relations between Turkey and the Middle East, specifically the Arab states. Turkey's turn to the Middle East reflected a shift in Ankara's geostrategic priorities, a shift not surprising considering the AKP's Islamist orientation. Davutoglu presented a new narrative of the common history of the peoples of the region, particularly Turkey's Ottoman and Islamic heritage in order to restore the dominant position that Turkey had formerly enjoyed in the region's past.[1] Davutoglu sought to use Turkey's geostrategic position as the landmass between Europe and Asia to pivot at the same time between Europe and the Middle East. The start of Erdogan and the AKP's tenure in office was greeted positively by international actors, as Erdogan and his party portrayed themselves as reformist followers of political Islam who would support the building of liberal institutions within the Turkish state, while also reforming the state and implementing market reforms. The results were substantial as Turkey was able to post consistent GDP growth through the first decade of the 21st century.[2] On the one hand, this led to, at least initially, a consolidation of democratic institutions within Turkey, and the beginning of Erdogan's drawn-out process to marginalize and eventually emasculate the all-powerful Turkish military, which he did following the failed attempted coup of July 2016.[3] Erdogan utilized and co-opted a significant portion of Turkey's Kemalist business elite, who like the military had a shared goal in market reforms and liberalization with the final goal of Turkey's ascension into the European Union. While Erdogan was able to put Turkey on the path to EU ascension, Turkey also sought to take a more active role in Middle Eastern affairs, utilizing its soft power, to expand relations with its Arab neighbors through both economic and cultural links. This led to the rapid spread of Turkish cultural capital, including the nation's famous soap operas and television programming, as well the establishment of the

Yunus Emre Institute, Turkey's answer to long-established Western cultural institutions such as the British Council, or the Goethe Institute, which served to promote British and German culture and values respectively. Davutoglu's foreign policy strategy, which was coined "no-problems with neighbors," sought to maximize Turkey's soft power, both economic and cultural, while also drawing on its past Ottoman heritage. The engagement with the Middle East was of course central to the AKP's identification as an Islamic party, and while in public they implicitly adhered to Turkey's secular-Kemalist norms, on the other hand, they sought to proliferate and entrench a new brand of Turkish Islamism within the political system.

While Turkey's bid for EU ascension was put on hold, primarily due to German opposition, Turkish foreign policy began to take a more Middle Eastern turn. This eventually led to increased rhetoric focusing on Islam and Turkey's ties to the region. Erdogan's rule has further crystalized a phenomenon coined by the American political scientist Samuel Huntington, who defined Turkey as a classic "torn country." Huntington's definition was based on the inherent contradiction within Turkey's own identity, as a country that was founded and based on the rule of forced, top-down secularization, a policy instituted by Turkey's founding President Mustafa Kemal Ataturk. Ataturk and his cadre of allies forcibly sought to disconnect Turkey from its Ottoman and Islamic heritage. What has become evident is that President Erdogan and the AKP, while at least initially giving credence to a moderate Islamic viewpoint, building and consolidating Turkey's democratic institutions, and decreasing the power of its long-powerful military, have now sought to overturn Ataturk's secular project, pushing Turkey towards a more Islamic direction.[4]

The events of the Arab Spring came as a surprise even to Turkey, but it was quick to take advantage of the circumstances in accordance with its own needs. Therefore, Turkey presented itself as a model of a stable state with a solid foundation with a strong economy, an Islamic orientation, a stable democracy, and a proactive foreign policy. Even the Iranian-American nuclear talks were consistent with its "good neighbor" policy towards Arab and Muslim states in the region and its efforts to establish itself as mediator between the United States, Iran, and Syria, Turkey's rivals.[5] Ankara's reaction to the Arab Spring was to ramp up support for political players who adhered to political Islam, specifically groups affiliated with Muslim Brotherhood. Seeing themselves as the model for states in the region to follow, the muscular expansion of Turkish diplomatic power led to a cooling of relations between Ankara and the conservative Arab monarchies, particularly the Saudis and Emiratis. Turkey's centrality to the changing geopolitical landscape lasted as long as the ascendant powers were their allies, such as the Muslim Brotherhood. But Erdogan and Turkey gambled on the continued success of political Islam, and following the overthrow of Egyptian President Muhammad Morsi, Turkey lost one

of its most significant allies. Under these circumstances, Turkey reformulated its regional strategy. Erdogan's advisor Ibrahim Kalin articulated the new Turkish foreign policy and named it "precious solitude." The new doctrine privileged Islamic-moral considerations over national interests.[6] Even if it can be boiled down to slogans which have no serious policy implications behind them, this was still an indication of a frantic and frenetic Turkish policy that was obsessively seeking a more dominant position in the region.

The Syrian Civil War served as the turning point in Ankara's seemingly benign foreign policy, with Erdogan guilty of substantial overreach in his belief in Turkey's ability to redraw the geopolitical map of the region. What started in Syria, as a call for Syrian President Bashar al-Asad's ouster, led to Ankara's embroilment as one of the largest backers of Syrian jihadi rebels, and as the region's preeminent backer of the political Islamists together with Qatar, drawing the ire of Saudi Arabia and UAE. But the civil war in Syria completely disrupted Erdogan's plans. He looked with longing eyes as Iran and its proxies, Hizballah and its allied Shi'i militias, intervened in the civil war in Syria. At the same time, the Sunni-Salafi element within the Syrian opposition grew at an alarming rate. As a result, Turkey became one of the many states which succeeded in training and trafficking weapons to Syrian rebel groups. The degree of Turkish involvement with Syrian rebel groups, including those who were the precursors to the Islamic State was detailed by the Turkish journalist Can Dundar, who reported on convoys of Turkish trucks going over the border to deliver supplies.[7] As the Islamic State quickly gathered steam, the Turkish intelligence services' close links with Syrian groups, and Turkey's open-door policy, allowing foreign fighters to transit through on their way to Syria, came back to haunt them. A series of suicide bombings and terror attacks swept through Turkey, including the October 10, 2015 bombings outside of the central train station in Ankara, where a "Labour, Peace, and Democracy" rally was taking place, supporting the peace track between Turkey and the Kurdish Workers Party (PKK).[8] The attack killed 109 civilians, the deadliest in Turkey's history and was the most significant in a string of attacks that hit major Turkish cities that culminated with a bloody nightclub massacre during the New Year's festivities in Istanbul in 2017.

Turkey's conflict with Russia, the severing of diplomatic relations and afterwards, its subsequent rapprochement, underscored the lack of direction in Turkish foreign policy and its rapidly decreasing influence in its own near abroad due to Russian advances. The initial rupture in relations with the Russians was precipitated after a Turkish F-16 downed a Russian Sukhoi Su-24 ground attack aircraft that, according to Ankara, had strayed over the Turkish border in November 2015. The resulting rise in tensions led Russian President Vladimir Putin to define the event as a "stab in the back" on the part of Turkey, leading to yet another problem for Ankara's foreign policy.

Terror attacks carried out by the Islamic State in retaliation for Erdogan's subsequent crackdown (in March and June 2016) worsened the domestic situation in Turkey. With the continued retrenchment of Russian power within Syria, backed by Russian Special Forces and Iranian-backed Shi'i militias have instead forced Turkey to focus away from its grand designs of overthrowing Bashar al-Asad. Instead, Turkey focused on safeguarding its narrow interests by creating a buffer zone on its frontier, aiming to push back Kurdish separatists allied with the PKK and their Syrian Kurdish allies the YPG (People's Protection Units). The advance of Russian-backed troops towards the Turkish border and the fall of Aleppo coupled with the fallout following the attempted Turkish coup in July 2016 could not derail the eventual rapprochement between Moscow. The resulting Turkish military offensives, namely Operation Euphrates Shield, were a mechanism by Ankara to save face and stave off the rise of the American-backed YPG forces. Thereafter, Turkish forces focused their energies on abortive attempts to take the city of Manbij in an unsuccessful attempt to cut off the Kurdish supply lines. Yet, Ankara together with pro-Turkish rebel groups had the tacit approval of the Syrian government forces and have since managed to build up a sector of Turkish influence north of Aleppo. But Turkey's military policy in its near abroad, and its fight against the Syrian Kurds and the PKK underscored the failure of the grand designs of Turkish foreign policy. The dreams of Turkey as a model for democracy in the Middle East have fallen by the wayside, with the failed coup of July 2016 only exacerbating the authoritarian tendencies of Erdogan and the AKP. The failed coup has served as the mechanism for a large-scale purge of the regime's enemies from the Army, civil service, and university system, further enhanced by Erdogan's 2018 referendum on changing the country from a parliamentary to a presidential system. While the country faced substantial domestic change, Turkey's foreign policy served as a cautionary tale for the penchant for overreach in an increasingly chaotic and unstable Middle East.

IRAN AND THE ARAB SPRING

Iran's initial reaction to events in Tunisia and Egypt was quite enthusiastic. The official media was quick to label the waves of uprisings in the Middle East as an "Islamic awakening" inspired by Iran's Islamic Revolution which took place in 1979. The daily *Siyaset-e-Ruz*, which is affiliated with Iran's traditional, conservative faction, claimed that it was a natural process, and that other, additional Arab rulers, who have an improper relationship with the Zionists and the West, would have the same fate as Bin 'Ali of Tunisia, and sooner or later would also be overthrown.[9] Iranian media took advantage of

the circumstances to criticize the monarchical regimes in the Gulf and claim that similar processes would take place in Saudi Arabia, Kuwait, and the United Arab Emirates, which according to Iranian spokesmen were authoritarian, corrupt regimes without widespread popular support. According to the daily *Ettelaat*, the last few decades have shown that the only successful model of government for the peoples of the region is the Iranian model which combines Islam and republicanism, and only it has the power to stand firm against the challenges of tyranny and imperialism to ensure the security of the region.[10]

But the popular uprisings in Tunisia and Egypt placed the Iranian authorities in a dilemma. On the one hand, from Iran's perspective, the overthrow of the presidents of Tunisia and Egypt, Zine al-'Abidine Bin 'Ali and Hosni Mubarak, were a welcome development, since they were pro-Western secular rulers who for many years had suppressed members of the Islamist movements in their countries. On the other hand, it was hard to ignore the obvious analogy between the civil disobedience in Tunisia and Egypt and the events that led to the protest movement in Iran, the Green Movement, following the publication of the election results in June 2009. Contrary to the official Iranian media, which is mostly affiliated with the conservative faction in Iranian politics, some members of the reformist faction differentiated between the Tunisian protest movement and the protest movement in Iran. This discussion on the Tunisian coup took place mainly between Iranian bloggers and internet surfers, where many expressed their hope that the Iranian people would ultimately bring about political change in their own country. However, in light of the success of the popular protest movement in Tunisia at the end of a two-week struggle, there were many bloggers who expressed their frustration that Iran's reformist opposition had been fighting the regime since the elections of June 2009 without having achieved any meaningful results. Some have wondered why Tunisia succeeded where Iran failed. One blogger said, "Iranians are so preoccupied with existential problems and questions of economy and employment that they cannot go out to political protests."[11]

Unlike the regimes in Tunisia and Egypt, the Iranian regime identified the public protests in 2009 and their continuation in early 2011 as a response to the events surrounding the elections and the house arrest of the two reformist leaders, Mir Hossein Mousavi and Mehdi Karroubi. The discussions that were conducted on social networks revealed the challenges that the Green Movement faced. Among the obstacles in their path were a lack of unified purpose among the various opposition groups and doubts as to whether the Green Movement could lead a mass movement and continue the struggle even in light of the regime's determination to suppress it at all costs. The Iranian regime did not ignore the existence of a wider opposition discourse, but rather identified it as an existential threat. During February 2011, violent

clashes took place between protestors and the security forces in Iran's major cities, Tehran, Mashhad, Shiraz, Esfahan, and Tabriz. At the same time, the regime intensified the pressure on the civil society activists and forced them underground. Police also managed to prevent foreign and local media from covering the ongoing protests in Iran. Attempts by activists to challenge the regime through street protests did not gain momentum, because they were not able to create significant alliances with important social groups, such as the Bazar merchants or trade unions.[12] The regime had the upper hand and the protests died down, but the events of the Arab Spring served as a warning to Iran's leadership.

For this reason, Iranian officials were cautious in their official responses to the popular uprisings in Tunisia and Egypt. Spokesmen for the Islamic Republic praised the heroic struggle of the Egyptians and Tunisians for their rights, but warned other countries not to take advantage of the situation to serve their own interests. The daily *Kayhan*, considered to be a mouthpiece of the regime, actually tried to equate the Iranian opposition or "anti-revolutionaries," as they were defined, with the ousted Tunisian president, who also worked in the service of Western imperialism. The daily lamented that Bin 'Ali found refuge in Saudi Arabia, which supported the opposition leaders in Iran during the riots in Iran in 2009. Professor Kayhan Barzegar of Azad University in Tehran, claimed that unlike the Tunisian people, who came out against their president, the Iranian people expressed support for their government and their dislike of the opposition that was connected to the United States and the West.[13]

When viewing events in other regions of the Middle East, such as the People's Republic of Libya, the Iranian narrative was diverted from protest and popular uprising to criticism of the United States and its allies for their military intervention that was motivated by their own geopolitical interests. Iran overlooked the UN Security Council Resolution of 1973 and the Arab League's support for Western military intervention, and viewed events in Libya as another example of a "Western plot."[14] From Iran's standpoint, events in Syria were of a more threatening nature to their own national interests. The precedent in Libya has shown that tough and cruel dictators were not immune to the winds of history. The Arab Spring had now hit Bashar al-Asad, an important client in Iran's patronage network, which created a direct threat to Iran's strategic foothold in the region. The events in Syria were also part of the wider Sunni–Shi'i struggle. Iran drifted into the center of the conflict and was identified (by Sunnis) as the head of a Shi'i axis that must be cut off.

The American invasion of Iraq in 2003 and the creation of an Arab state under Shi'i leadership, backed by the United States, coupled with Hizballah's expanding influence in Lebanon, led to a heightening of tensions along

Sunni–Shi'i and Arab–Iranian lines. The Second Lebanon War in 2006 demonstrated the depth of suspicion and hostility among Sunni states towards Iran and the Shi'i camp. The events of the Arab Spring were supposed to mitigate the historic rivalry between the two great traditions of Islam and lead to a dawn of liberalism. However, the Arab Spring did not lead to the suppression of the Sunni–Shi'i rivalry, but rather deepened and sharpened it. This was given expression in the events that took place in the Kingdom of Bahrain which provoked the intervention of its larger neighbor Saudi Arabia, who acted to prevent the fall of a Sunni monarchical stronghold. By sending troops to the island archipelago, the Gulf states demonstrated a unified front that was designed to deny Iranian interference in the internal affairs of Arab countries. This Sunni pushback came as Iran and her proxies expanded their control in Iraq, Syria, and Lebanon, where the struggle against the Sunnis was waged under the leadership of General Qassem Soleimani, commander of the Quds Force of the Revolutionary Guards. Pictures of the re-conquest of Tikrit, Saddam Hussein's birthplace in Iraq, bore a picture of Soleimani in the company of the Shi'i militiamen. Before the Arab Spring, Iran had tried to play down the Shi'i theme and explained support for its protégés, especially Hizballah, as a commitment for leading the resistance (*mukawama*) against Israel and for the Palestinians. Iranian involvement in Yemen on the side of the Houthi rebels may have provided Iran with opportunity to expand its circle of influence, but at the same time accelerated Iran's drift into the core of the Sunni–Shi'i struggle and its commitment to the Shi'i cause (even if the Zaydi Houthis are not "Twelver Shi'a"), but this was an inevitable defensive measure against Sunni dominance. And this, even while the Islamic State had become a reality, exacerbated the Sunni–Shi'i struggle and presented the struggle against Iran and the Shi'is as a basic duty and necessity for the purification of the Muslim community.

But the Islamic Republic of Iran was able to read the changing rules of the game in the regional system and develop an appropriate strategy. President Hassan Rouhani, whose goal was to get Iran out of the economic slump left behind by the previous president, Mahmoud Ahmadinejad, was able to identify trends well and act accordingly. Iran saw an opportunity in the American hesitancy on the Syrian issue in September 2013 and the decision not to exercise the military option there, to launch a diplomatic process and seek an agreement that would lead it out of diplomatic, political, and economic isolation in a relatively short time. The advent of the Islamic State transformed Iran into the "lesser evil," returned it as a regional and international player, without requiring it to give any real promise to withdraw its nuclear ambitions.[15]

The nuclear agreement between Iran and the world powers, the Joint Comprehensive Plan of Action (JCPOA), allowed the Iranians to gain considerable

economic breathing space and allow foreign capital investment, which during the punitive sanctions had all but dried up. The details of the agreement can be debated, but it is important to remember that the real test of the agreement is, of course, its implementation rather than the exact meaning of its provisions. Needless to say, parts of the agreement were drafted with ambiguity to leave space for interpretation on both sides, which will be a source of conflict and disputes in the future and will make it more difficult for US President Barack Obama's statements to the effect that "the path toward nuclear weapons was closed" or that "the deal is not built on trust, but on inspection," to stand the test of time.[16]

The lifting of the sanctions in January 2016 paved the way for an economic breakthrough with Iran and for increased trade between the Iranians and Europeans. The unfreezing of Iranian assets (amounting to more than $100 billion) helped to gradually rescue the flailing Iranian economy that was left by the previous president, Mahmoud Ahmadinejad. Advocates of the agreement hoped that it would also produce the economic fruit needed to start, in the next decade or so, the erosion of the power of the Iranian leadership. In the immediate term, however, the agreement was an important and valuable "insurance policy" for the leadership in Iran. It politically strengthened the position of the ruling elite in Iran, who did in fact direct some of the resources to the public good and present themselves as people who "practice what they preach," while at the same time continuing to commit human rights violations. The claims of the West against the tyranny of the Islamic Republic have been reduced accordingly, as the agreement paved the way for Iran to become a full member of the community of nations. An "Iranian Spring," even if the odds were not in favor of a large outbreak, seems more remote than ever. The agreement guaranteed political survival for the clerics who control Iran and the Revolutionary Guards commanders. This has led to the conclusion that by becoming a nuclear-threshold state, Iran's regime secured its survival, while states like Libya and Syria, which gave up the nuclear infrastructure they had started to build, were crushed.

The agreement strengthened the position of Iran within the geopolitics of the region. With improved economic assets and broad legitimacy from the international community, Iran has continued to support its various clients in the Middle East—Syrian President Bashar al-Asad, Hizballah, the Houthis in Yemen and others—and to fan the flames of conflict in the Middle East. Following the agreement, hopes that Iran would become a stabilizing force in the region were dashed quickly when it became clear that Iran adheres more strongly to a policy of managed chaos, perpetuates conflicts, and increases the dependency of the forces under its command.[17] The renewed intervention of Russia coupled with the unprecedented arrival of thousands of Iranian fighters, members of the Revolutionary Guards, and affiliated militias commanded

by Iranian officers to Syria, created a new strategic reality. Although the Iranians arrived, so it seemed, to ensure the survival of the Asad regime, what they actually sought was to consolidate their presence in the eastern Mediterranean.

The Russian intervention, coupled with Iranian ground support, including Shi'i militias from Afghanistan, Iraq, and Pakistan, Lebanese Hizballah and Syrian Army forces, have made the Syrian Civil War's final result a question of not if, but when. However, the Iranian presence in Syria, and the jostling between Tehran and Moscow have had a substantial impact on both the future constellation of the state as well as the numerous reconstruction and development projects.[18] Iran's malign influence in the Middle East has underscored the failures of the 2015 nuclear accord. This reality was even more conspicuous given the nuclear deal with Iran, which purported to address the nuclear question but left open the question of Iranian intervention in the Middle East. The conquest of Syria has provided proof of the nature of the "new Iran."

The nuclear deal signaled the beginning of a process whereby Iran would be empowered in the region, and just as with Iran's penetration of Iraq, Iran's involvement in Syria was accepted as a *fait accompli*. Yet, Iran's regional expansion has not been total smooth sailing for the Islamic Republic at home. The withdrawal from the nuclear deal by President Donald Trump in May 2018 and the imposition of significant sanctions against countries and businesses with trade and investment in Iran have tightened the noose around the regime.[19] The significant economic shocks of rising prices and a stagnant economy which only a few years ago had been a cause for significant optimism has led to significant protests in the Iranian street. Iranians of all backgrounds have protested, although lacking the organizational framework of the 2009, Green Movement protests and the support of reformist elites in Tehran. These grassroots expressions of anger at the regime have crystallized an emerging conflict within Iran between the core and periphery, and internally between those in the regime who still desire to "export the revolution" allied with the Supreme Leader and the Revolutionary Guard, and those such as President Hassan Rouhani who would prefer to see a greater focus on economic development at home.

THE MONARCHIES ON THE DEFENSE

The traditional monarchical regimes were able to deal more successfully with the waves of protest than the regimes of the Arab republics. Various studies attributed a higher degree of resilience to the dynastic monarchies due to the legitimacy they derived from their noble descent (in Jordan and Morocco—the *ashraf*, descendants of the Prophet) or standing derived from a function

(the Saudi king as defender of the Holy Places), but also due to the support of the tribes, the support of the educational systems, and the economic opportunities that are available in states with large oil revenues.[20]

Samuel Huntington's early research identified the problem facing monarchical regimes in the Middle East. This problem was embodied in "the king's dilemma," namely the discrepancy between the rapid development of infrastructure and technology on the one hand and the unwillingness of the ruling family to allow more liberalization in the political system on the other hand.[21] The monarchies were seriously challenged by the emboldened civil society, the increasing participation in online social networks, and all of the dramatic changes that took place in the Middle East in general, forcing them to expand their range of activities at home and abroad to improve their struggle for survival.

The announcement of the death of Saudi King 'Abdallah bin 'Abd al-'Aziz, in January 2015, and the coronation of his half-brother, Salman bin 'Abd al-'Aziz, momentarily diverted regional and international attention to the politics of the Saudi royal family and to the arrangements for succession in the Kingdom. There were many unanswered questions regarding the nature and functioning of the Saudi Kingdom, which despite its growing importance in the Arab World and in the international community remained largely closed and enigmatic. The Saudi state was forged in the image of the royal family, and there is no coincidence that the official name of the kingdom—the Kingdom of Saudi Arabia—bears the family name. Unlike other royal houses in the Middle East, such as Bahrain, Jordan, Morocco, and the Sultanate of Oman, the Al Sa'ud family is very large (about 10,000 princes) and its presence is felt in all walks of life. Sometimes this creates the impression that Saudi Arabia is a family business, or in the words of one Western observer, "a family that has a state."[22] But this simplification can be misleading, since it does not take into account the strenuous and complex process, in which there are, alongside the traditional monarchy, a state of institutions which are run, employed, and subsidized by the government.

The aging Saudi elite gradually internalized the fact that the traditional tools of diplomacy were not sufficient to shape the strategic environment, and that the Kingdom must assume proactive stance to counteract the dangers at its doorstep and reduce the margin of risk that they posed. King 'Abdallah and other leaders in the Arab World had been surprised by the events of the Arab Spring and turned to some socio-economic initiatives that were designed to quell the frustration among the Saudi youth. The main elements of this policy were the increased effort to localize the workforce, the discussion of the status of women in society and their integration into the labor market and the discussion of political reform. This was relatively sufficient to express the beginning of a slow but gradual change in the political culture

of the puritanical Kingdom. Many of King ‘Abdallah’s promises, however, remain unfulfilled. But he was the first king who tried to create public legitimacy for his position in addition to the religious legitimacy that the Al Sa‘ud’s had benefitted from, understanding the need for the formulation of a new social contract with the Saudi people.

The Saudis were able to deter the significant challenge of the Arab Spring protests relatively quietly, but not only because of its wealth, as is usually assumed, but also because of its tribal-clan structure and the continued loyalty of religious establishment to the ruling family. The religious establishment turned against the events in Egypt, and the “tribal elders,” warned the young people lest the demonstrations would tear apart the fabric of family and tribe. However, barriers related to the freedom of expression were breached, although not against the foundations of the regime. Students, for example, demonstrated for improved learning conditions, and women for permission to drive.

King ‘Abdallah’s reign provoked a substantial activist shift in Saudi Arabia’s regional policy. The state which formerly kept a distance from the events that transpired at the heart of the Middle East turned into a key player during the reign of ‘Abdallah. The strategy developed by ‘Abdallah was a formula that relied closely on the preservation of relations with the United States despite the acute differences of opinion between the two, and despite the anomaly that stood at the foundation of the relationship. After all, the arrival to a level playing field with the Americans on questions of regional security and the maintenance of a purposeful and effective dialogue were planks of Saudi foreign policy that had been put in place in the days of King ‘Abd al ‘Aziz Ibn Al Sa‘ud, the kingdom’s founder. But after the reign of King ‘Abdallah and after the subsequent developments in the region, including the advent of a dialog between the United States and Iran and the signing of the nuclear agreement, the US–Saudi relationship evinced a tone of bitterness and distrust. The Obama administration’s regional policy ignored the regional priorities of the Saudis, who had famously urged the Americans to “cut off the head of the snake” and put an end to Iran’s nuclear program.[23]

The strengthening of the Shi‘i Houthi camp in Yemen, the Saudi’s neighbor to the south, and the fall of the capital, San‘aa, into its hands, added to the Saudis’ level of anxiety about and hostility towards the Islamic Republic of Iran. The takeover in Yemen by the Houthi rebels, who were supported by Iran, was an ominous development for the Saudis, and in their minds, it was part of an Iranian plot. In this context, Saudi Arabia took a dramatic decision regarding direct involvement in Yemen. “Operation Decisive Storm” began in March 2015 and was a turning point in the policies of Saudi Arabia and the Gulf countries. It expressed determination and a resolute attitude in contrast to the weak position shown by their patron, the United States. Moreover, the Saudis felt secure enough to act without having American support in advance.

This operation was the first test for Salman bin ʻAbd al-ʻAziz, who had been appointed King of Saudi Arabia just two months prior. Saudi Arabia was awarded the backing of other Sunni Arab countries such as Egypt. The Egyptian newspaper *Al-Ahram* stressed in an editorial on March 26, 2015, that the intervention in Yemen came only after many policy initiatives and calls for mediation and dialogue. However, Yemeni officials, the article said, believed they could change the situation by force and deluded themselves into thinking that Arabs could not act. "The decision was taken to prove to them that all their accounts were wrong and show the world that Arabs have a shield and a sword now."[24] A sense of shared destiny helped to forge a natural coalition of Sunni monarchies and at one point it was suggested, apparently by Saudi Arabia, that the Gulf Cooperation Council (GCC) should be expanded to include Jordan and Morocco.[25] The intention was to unite the monarchies in a joint effort to stem the tide of Iranian influence, and also to deal with the winds of the Arab Spring. The initiative was not successful but it did demonstrate a sense that the Arab monarchies shared a kind of "common ground" in light of the changing face of the region.

In January 2016, Saudi Arabia executed forty-seven prisoners, most of them Sunni extremists, members of al-Qaida. But among them was Shaykh Nimr Baqir al-Nimr, a leader of the Shiʻi opposition in Saudi Arabia's eastern province, who spent many years living in, and studying in Iran. Upon his return to Saudi Arabia, he had served as the leader of the Shiʻi opposition to the Saudi regime. His execution hastened the deterioration of the relationship between Saudi Arabia and Iran. As Iran's leaders issued harsh and threatening statements following the execution, masses of demonstrators took to the streets and stormed the Saudi diplomatic missions in Iran and set fire to the Saudi consulate.[26] As a result, Saudi Arabia announced the severance of diplomatic relations with Iran. Bahrain and Sudan also announced the severance of relations with Iran, while the UAE announced that it would downgrade its diplomatic relations with the Islamic Republic.

This chain of events set a new record for the deterioration of relations between Saudi Arabia and Iran, to countries which in any case, already had troubled relations owing to centuries old religious tensions (Sunna versus Shiʻi) and ethnic tensions (Arab versus Persian). This was in addition to other incidents that occurred directly between the two countries, primarily the Hajj tragedy in September 2015, which claimed the lives of 464 Iranian pilgrims. Saudi Arabia, which sees itself as the leader of the Sunni Arab World, adopted an active *modus operandi* because it feared the expansion of Iranian hegemony. Relations between Saudi Arabia and the United States became more complicated due to the fact that the West and the developing world were the main consumers of Saudi oil for decades, managed to lessen the dependence on Gulf oil owing to the discovery of new oil reserves and a massive development of the shale oil industry.

The oil issue illustrated how the Kingdom's internal and external affairs intertwined with each other. The steep decline in world oil prices (less than $27 a barrel at the beginning of 2016) greatly weakened the Saudi currency reserves, and this was expressed in the dramatic changes in the 2016 national budget. The leaders of the Saudi Kingdom understood correctly that if this trend were to continue, the day would not be far off when the Kingdom would not be able to provide the high standard of living that its citizens had enjoyed in recent decades. This in turn could have led to unrest which could undermine the rule of the royal family.

'Abdallah's successor, Salman bin 'Abd al-'Aziz, was assigned the task to further expand on the legacy that 'Abdallah had left, meaning that he should lend a sympathetic ear to constructive criticism; be more tolerant and sensible toward the public discourse on the economy and society, be more tolerant and sensible toward the question of the integration of women into societal values; implement a proactive foreign policy which would situate the Kingdom at the head of the regional camp that sought to reduce the impact of Iran in the Middle East; and demonstrate a commitment to the struggle against radical Islamic organizations. For forty-eight years, Salman had been the governor of Riyadh, the heart of the Kingdom and the seat of most of the princely family. He was appointed King as expected and without incident, but his appointment highlighted the advanced age of the sons of Ibn Saud. Appointed to the position of Crown Prince was Muhammad bin Nayif, the former interior minister, who had established a fearsome reputation as a figure implacably opposed to the spread of radical Islamic terror in the Kingdom. But perhaps the biggest surprise was the appointment of one of King Salman's sons Muhammad bin Salman as the Defense Minster. The young prince, then aged 30 was parachuted into one of the most powerful positions in the Kingdom. At the same time, for the first time in the history of the Kingdom, a foreign minister who was not a prince was appointed—'Adil al-Jubayr, who previously served as the longtime Saudi ambassador in Washington. All three have promised to change the foreign and domestic policy of Saudi Arabia. These figures were sworn enemies of the extremists, Sunni and Shi'i alike. They and the other grandchildren received the difficult task of preserving the Kingdom and navigating their way in a new world that was constantly striving to whittle away the legitimacy of the autocratic monarchy.

Saudi activism was reflected in the March 2016 visit of Saudi Arabia's Minister of Defense Prince Muhammad bin Salman (MBS) to Cairo and Ankara. This active approach, that sought to situate the Kingdom as the region's center of gravity and create a broad common denominator with those who saw eye to eye on the challenges of the time, had now become the basis of Saudi statecraft. An expression of this was the announcement issued by the Jordanian government that the Muslim Brotherhood offices in Amman would

be closed, hours after the visit by Muhammad bin Salman. The Saudi Kingdom during the 20th century, with its long borders and extensive oil deposits, rested on the Western defensive shield (the British and then the United States) and demonstrated a cautious diplomatic approach. Today however, under and new generation of leadership but now, in the second it has adopted a more vigorous, and adventurous foreign policy in dealing with the changing variables of regional geopolitics. The Saudis' involvement in Bahrain in March 2011 and its intervention in Yemen in March 2015 were intended to send a message that in the tough and problematic Middle East that the Kingdom has no plans to sit back and do nothing and certainly cannot be referred to as a "paper tiger."[27] Thus, the Kingdom of Saudi Arabia, which had for decades been a hesitant power, refraining from an activist foreign policy and reliant on Washington began to take a more activist role in the region, especially after the signing of the JCPOA between the world powers and Iran.

If there is one person who symbolized the changing face of Saudi Arabia, its foreign policy and its national goals, it is the young Crown Prince Muhammad bin Salman. Crown Prince Muhammad Bin Salman (MBS), dislodged his cousin the former interior minister Muhammad bin Nayif in June 2017 as the new Crown Prince, and rapidly consolidated his power, and pushing the kingdom to both initiate reforms domestically, while also retaining its aggressive foreign policy. MBS, was also responsible during his tenure as Defense Minister for the bloody Saudi intervention against the Houthis in Yemen, and together with the United Arab Emirates enforced a blockade against its neighbor Qatar, in response to the emirate's independent pro-Muslim Brotherhood foreign policy. On the domestic front, MBS has initiated a new modernization program known as "Vision 2030," an ambitious plan to modernize the Saudi economy and wean the kingdom off of its outsize dependence on oil revenues. "Vision 2030" has also been coupled with a social liberalization program, finally giving Saudi women the right to drive, and allowing for the opening of entertainment centers for the first time since the 1970s.[28] The strategy behind these ambitious domestic programs has been the continued advancement of the Kingdom's expanded ruling bargain with its subjects based on the alliance between the modernizing monarchy and the kingdom's youth, providing them with increased opportunities, cracking down on corruption, and allowing them greater social outlets. These reforms are part and parcel of a larger balancing act for MBS as he seeks to maintain the Al Sa'ud family's political legitimacy while enhancing his personal power and entrenching the power of a new generation of Saudi royals. These royals will derive their legitimacy from Saudi Arabia's youth, who are hungry to live in a more open and modern society. Conversely, the top-down liberalization program has also led to a crackdown on civil society activists, as well as the famous roundup of Saudi

business and political elite at the Ritz Carlton Hotel in Riyadh, underscoring the state, and, more importantly, the royal family and MBS himself as the primary arbiter of any significant social and societal change.[29] On the foreign stage, MBS's aggressive confrontation with Iran and Saudi Arabia's enemies has yielded few results. The Saudi intervention in Yemen has been a humanitarian disaster and its blockade against Qatar has also failed as the Qatari's vast cash reserves have limited if any significant economic damage. As a result, MBS's foreign policy has shown the substantial limits in Saudi Arabia's ability to both confront Iran and to alter the geopolitical balance in the region.

There is however a distinction that must be made between Arab monarchies with smaller economies such as Jordan and Morocco, forced them to develop a different mindset regarding their future than their wealthier gulf counterparts. Unlike their brethren in the Persian Gulf, both Jordan and Morocco are not blessed with overwhelming fossil fuel reserves, and as such have been forced to tread even more carefully than Arab monarchies flush with oil revenues and the substantial cash. Even before the events of the Arab Spring, the Kingdom of Jordan faced the increasing irritability of the Bedouin population concentrated mostly in the south due to their weak economic situation and ongoing neglect. Jordanian tribes, who had always enjoyed dominance in security organizations and decision-making positions in the Kingdom, now felt that the delicate balance of power between themselves and the Palestinian population had eroded and that they had the disadvantage due to their exclusion from the circles of economic reform in the Kingdom. Some even mocked King 'Abdallah II and especially his wife, Queen Rania, for their decision to transfer large properties in the city of Ma'an to the Queen's family members.[30] The waves of Arab Spring protests did not spare the Kingdom and alongside the elites of Transjordan, youth movements and Islamist movements demanded reforms that would improve governance in Jordan and set the Kingdom on the path towards a constitutional monarchy.[31]

However, the King made it clear from the outset, that the Arab Spring was not born from political motives, but from economic issues. "In Jordan," he said, "there is a clear majority that are interested mainly in economic reform and economic prosperity as opposed to political reform. But because of frustrations that gives them more political out voices and I think that goes not only in the Middle East but throughout Europe and other places."[32] Jordan is a monarchy without economic resources and economic power, and in contrast to the Gulf, where rulers can buy the support of the residents with ample economic benefits, Jordan needed a different approach. King 'Abdallah initiated reforms to appease the protesters. Among other things, to demonstrate the path of peaceful protest and to create channels of

dialog with the protest groups, the King worked to revise the constitution and dismissed prime ministers to create the impression that change was taking place. He frequently used the terms "government of technocrats," and spoke highly of reforms and transparency, but in fact applied cosmetic, slow changes.[33]

At the same time, pressure on Jordan's borders increased due to the flood of Syrian refugees who fled in terror into Jordanian territory. Jordan is a state whose history has been intertwined with the waves of refugees displaced by numerous wars in the region. Most notable were the waves of Palestinian refugees who arrived in the Kingdom in 1948 and 1967, and about 450,000 Iraqis who arrived following the US invasion of Iraq in April 2003 and who were absorbed mainly in the capital Amman. However, the wave that swept the Kingdom since 2012 was different in nature and intensity, and its continuation called into question the ability of the Kingdom of Jordan to deal with the long-term consequences of the humanitarian crisis in Syria. The influx strained the Jordanian economy, which saw a decrease in exports due to the damaged economies of neighboring countries such as Syria and Iraq. Beyond the financial aspects, the wave of Syrian refugees changed the demographic balance in the Kingdom. In addition to the Kingdom's majority Palestinian population, the addition of the refugees was, and continues to be, a source of political concern, whether in light of the lack of jobs, or anti-royalist ideology.

Territorial growth of the Islamic State in Iraq and Syria was a nightmare in the eyes of the Jordanian monarchy. A large demonstration that took place in the city square in June 2014, with the participation of local youths who eagerly internalized the messages of the "Islamic State," forced the Jordanian monarch to intensify his actions. The protestors' slogan, "Ma'an—the Fallujah of Jordan," was interpreted as an existential threat and led to the arrest of hundreds of supporters of the "Islamic State." They were arrested and quickly tried, procedures which were made possible by emergency legislation which expanded the concept of terrorism to include all ties or dangerous contacts with a foreign country.[34]

In a region that has experienced fragmentation, rift, and humanitarian disaster, and the entrenchment of the Islamic State at the center, Jordan has become more important in the eyes of the West as a strategic outpost. This fact was not lost on the King himself, for whom, like his predecessors, the survival of the Kingdom rested on "help from friends." The King declared in November 2013 that if Jordan did not receive significant assistance from the international community, it would "take steps" to protect its interests. In January 2014, the Jordanian monarchy readily accepted a non-permanent seat at the UN Security Council, vacated by the Saudis at the end of 2013. This status was to give the monarchy a sympathetic ear in international circles

and better ensure that essential aid would reach the Kingdom. It was not for nothing that the Kingdom introduced itself as a full and willing partner to the regional peace initiative but also as a partner in the fight against the "Islamic State," thereby raising its strategic value in the eyes of the United States and the European Union. As the Americans sent military assistance (1,700 soldiers were stationed in Jordan and $1 billion in aid was sent during 2014)[35] and deepened their intelligence cooperation with Jordan, the European Union laid the foundation for humanitarian aid efforts and allocated considerable amounts of money for development initiatives, including the creation of a free trade area between the EU and the Jordanian Kingdom.[36] In the eyes of the West, providing for the Kingdom's security was a way to reduce the negative impacts in the region. Yet, even with continued Western assistance, the Jordanian monarchy has sought to balance internal political realities with its international political obligations, most prominently, its promises for economic reform. This balance was severely dislodged after protests in the summer of 2018 which occurred after the Kingdom sought to implement substantial economic reforms after receiving a three-year line of credit from the International Monetary Fund (IMF) worth $723 million. This included a new tax law, which raised taxes on businesses from 20 to 40 percent and on workers by 5 percent, both of which sought to reduce Jordan's public debt and reform the country's economy. The tax raise was coupled with the wealthier Gulf states, including Saudi Arabia and the United Arab Emirates, withholding over a billion dollars in economic aid which Jordan has historically been over reliant. The protests that spread from Amman across the nation had the widespread support of the powerful labor unions and trade guilds and led the resignation of the Prime Minister Hani Mulki, and his replacement by 'Umar Razzaz, formerly the education minister who quickly met with labor union leaders who had staged a national strike and pledged to withdraw the tax bill.[37] The Jordanian case serves as a cautionary tale that Western dreams of economic reform without considering the political realities on the ground, which can lead to events quickly spiraling out of control.

The Moroccan monarchy also stood out as relatively stable. The authoritarian caption "God, Fatherland, King" (*Allah, al-Watan, al-Malik*) which was used in the days of the grandfather (Muhammad V), the father (Hassan II), and the son (Muhammad VI, the current king) became a motto for Morocco and it remained intact although changes with the times were evident. Morocco's monarchy is over a thousand years old. Its ruling dynasty, the Alawites,[38] descendants of the Prophet Muhammad, have ruled in Morocco for over 350 years. The events of the Arab Spring in Tunisia and Libya affected developments in Morocco. During each month of 2011 the youth movement, which called itself the "February 20th Movement," and which included educated leftists and members of the Islamic Movement, held demonstrations that

brought together people from all walks of life. The activists' claims focused on low wages in the public sector and the concentration of wealth in the hands of the royal elites and the *makhzan*, a cabal of powerful businessmen close to the royal family. "The King's wealth exceeds that of the Emir of Qatar," was a statement borne by the protesters and which reflected the mood among them. For them the diagnosis was sharp and clear: "The King is the problem, and the Republic is the solution." Therefore, the "February 20th" activists altered the course of the monarchy, giving the King the new task of paving the way toward becoming a constitutional monarchy.[39]

King Muhammad VI, as with other kings in the Middle East, did not make light of the challenge that was placed at the doorstep of his monarchy. He promised a constitution that would empower the parliament and the legislative body. Indeed, the new constitution emphasized human and civil rights and made the language of the Berbers (Amazigh) an official language, but this was not accompanied by structural change since all the members of the constitutional reform committee were chosen by the King. Muhammad VI held tightly to the reins of power, and his dominance in the government was clear. The economic power of the royal family, which controlled large chunks of the Moroccan economy, served as an additional lever of power in the hands of the King.[40] At the same time, the King used the government as "an axe to grind" and to avoid criticism, shifting the public protest toward the government. The King was often one of its toughest critics. Thus, for example, in his throne day speech of July 30, 2014 he asked, "Where is this wealth? Has it benefited all Moroccans or only some segments of society?"[41] Yet, even with rising criticism of the monarchy, during and following the events of the Arab Spring, the Moroccan monarchy has remained in power through a combination of deft political maneuvering and devolved power to the prime minster and the Moroccan parliament. The elections in both 2011 and 2016 saw the Islamic Party for Justice and Development (PJD) win considerable advantages. Yet, the party has remained in power due to its focus on domestic concerns such as poverty alleviation and economic development. Even with the constitutional changes, the Moroccan monarchy still retains overwhelming prerogatives over the elected civilian government. While extreme political change was averted and the monarchy was able to safeguard its position, an uneasy coexistence has remained with the Moroccan state. In spite of that the Kingdom has investing significant capital in economic development, many unanswered questions remain regarding the future relationship between the elected government and the monarchy.

Arab monarchies were thus able to use the crisis that emanated from the Arab Spring to offer token reforms while also safeguarding their own important positions at the apex of their respective countries. Arab monarchs sought to take control of the public discourse from the outset, introducing changes

to the constitution and implementing mostly cosmetic reforms, enabling them to "buy time" and examine the situation. They continued to put their trust in the mosaic of intertwined interests of blood ties and clan-tribal traditions, which proved remarkably resilient in the Middle East, where grand visions of Arab unity and solidarity have rang hollow. Although monarchies instituted change, they did it slowly and gradually, to create the impression that the monarchy was evolving or that a democratic process was underway. They have also benefited from the fact that the spilling of blood in Syria, Iraq, Libya, and Yemen aroused ambivalent feelings about "revolution" among their citizens.

ISRAEL AND THE MIDDLE EAST: A GEOPOLITICAL CHALLENGE

The 21st century brought to the fore a new geopolitical chessboard and provided Israel with new and complex challenges. Throughout the 20th century, Israel's defense doctrine had traditionally focused its energies against Arab states, particularly Egypt and Syria, whose ranks were united against Israel. Knowing that the "second round" of fighting was only a matter of time, and that the Arabs did not intend to accept its very existence, Israel crafted its security doctrine accordingly.[42]

Thus, amidst the ongoing struggle with the Palestinians, Israel worked diligently to create a fairly stable balance of deterrence versus the conventional armies of its Arab neighbors. This "stability" collapsed under pressure from the drama that hit the Arab World, as some countries in the region became failed states which turned into hotbeds for non-state organizations and radical ideologies. The American invasion of Iraq in 2003 eliminated a significant threat to Israel in Iraq, but also enhanced its main geopolitical foe, Iran. The rise of the American-backed "War on Terror," coupled with the Second Intifada crystallized the new threats that the state faced, namely from non-state actors as well as Iranian-sponsored terror.

The geopolitical instability created in the aftermath of the Arab Spring reinforced this line of thought. The artificial and colonial creations of Iraq and Syria, coupled with the rapid deterioration of the highly tribalized societies of Yemen and Libya, underscored the increased salience of tribal and local identities. In Iraq, Kurdish autonomy gained momentum after the fall of the Iraqi dictator in April 2003 and the Kurdish autonomous region began to function as a *de-facto* state. Libya has been a splintered country following the downfall of the Qaddafi regime; and in addition to the ongoing tribal rivalries, the ancient disagreement between Tripolitania and Cyrenaica

was revived. Finally, in Yemen, the division between north and south and between the Houthis and the Sunnis, and in Syria the impact of a minority regime led by Alawites, and allied with large sectors of Druze and Christians against the majority Sunni population, have led to protracted civil wars and unprecedented humanitarian crises.[43]

The struggle between nations, or what was left of them, has produced a generation of enemies that employ terrorism and guerrilla warfare on Israel's borders and the proper response to them was not the conventional military thinking of the 20th century. The Israel-Gaza War of 2014, "Operation Protective Edge," once again highlighted the complexity of asymmetric conflicts.[44] Hamas, like Hizballah—a hybrid organization that is neither a classic terrorist organization nor a state—employed urban guerrilla warfare in an impressive way and overcame Israel's military superiority. The cynical and cruel use of civilians as human shields and the use of international media outlets to transfer images of destruction and horror was a serious impediment for an army acting on behalf of a democracy and subject to international law.

In addition to the "Islamic State," the self-proclaimed caliphate in the land of Iraq and Syria, sub-state organizations have appeared throughout the Middle East, namely Jabhat al-Nusra in Syria, Ahrar al-Sham, the Free Syrian Army, Ansar Bayt al-Makdis in the Sinai Peninsula and other groups such as Hizballah and Hamas that sought to consolidate their power at the expense of crumbling states. Multiple actors with different orientations in a particularly violent landscape marked the opening of the chaotic era, which, even if they did not lead to an immediate escalation on one of Israel's borders, a threat which required constant adjustment.

The fact that the borders of Israel had weathered conventional threats from hostile armies in the face of the dissolution of Syria and Iraq led many to assume that the Arab Spring had generally created a situation more conducive to Israel.[45] However, the chaos that the Middle East has found itself in and the dramatic side effects of this chaos soon gave birth to new challenges. The blood-soaked Syrian expanse exemplified the complexity of the Middle East scene.

The initial image of the rebels battling the cruel dictator soon morphed into a struggle which drew in a variety of conflicts in the Arab-Muslim world. The all-out war in Syria between the various forces within it—the Asad regime, the Salafi-jihadi militias, and the "Free Syrian Army"—were all playthings in the hands of more powerful regional or international players. Patron–client systems deepened the divide between the different factions and ensured that the struggle would continue, as the patrons of the various factions tried to consolidate their own influence by force and arming their clients so that they would not be defeated.

Israel's response was best articulated in an interview Prime Minister Benjamin Netanyahu gave in October 2015 to CNN host and foreign policy commentator Fareed Zakaria. When asked whether the presence of the Islamic State is preferable to Bashar al-Asad, Israeli Prime Minister Benjamin Netanyahu said, "You know what you have there in Syria . . . you've got Asad, you've got Iran, you've got Hizballah, you've got Daesh, ISIS. You've got these rebels and those rebels. And now you've got Russia. Do you know what's better? I don't know. I know what I have to do to protect the security of Israel. And the thing that I do is I draw red lines and any time we have the intel [intelligence], we just keep them. We do not let those actions of aggression against Israel go unpunished." Identifying red lines addresses the needs on the tactical level, but it is certainly not enough.[46]

For Israel, a very different situation had taken shape in Syria, and the impact this had on its operational freedom of action was significant. The Russian presence in the Syrian coastal area certainly meant that the rules of the game had changed in this arena. A number of factors have made the formulation of new rules a necessity, including fear of possible friction between Israel and Russia, the spillover of advanced Russian weapons transferred to Hizballah, and above this, questions regarding the nature and future of the Iranian presence in Syria. The emerging reality demanded progress on a practical and tactical level. Therefore, Israel forged more channels of dialogue, which could be used to help prevent a situation in which southern Syria, which had felt the impact of external actors, would fall into the hands of Salafi-jihadi forces or alternatively, into the hands of Iran and its proxies. Iran stepped up its presence in the Syrian coastal area. The Iranian presence in Syria was not a new thing from Israel's vantage point. For years, members of Iran's Revolutionary Guards had been active there, through its proxy Hizballah, but it seems that the signing of the nuclear deal intensified this phenomenon and made Iran a favorite player, courted politically and diplomatically. A takeover of the Syrian Golan Heights by Iran continues to be its strategic goal, with the entrenchment of the Iranian Revolutionary Guards Corps and its Shi'i militia allies. This served as the background for Israel's continued offensive actions in Syria and was the reason behind the December 2015 assassination of Samir al-Kuntar together with Hizballah commanders. These Iranian forces and proxies sought to lay the groundwork for the introduction of Iran and to the Syrian Golan Heights in order to make it a front in the struggle against Israel.[47]

This reality pointed to a multi-variable security situation, including variables that were more complex and more difficult to predict than in the past. The known map of the Middle East is not out of use, but in many cases, it no longer reflects reality and may be misleading. The Middle East is in the midst of geopolitical change, which requires new ways of thinking. The new geopolitical chessboard has posed a real challenge to Israel, and forced it to

revisit and re-read some of the prevailing assumptions in order to formulate an appropriate strategy for the changing geopolitical environment. Indeed, the Arab Spring brought new challenges to Israel's doorstep, but in the composite picture some new opportunities were born out of a fresh reading of the new geopolitical environment. In the absence of a clear picture of the balance of power and given the multiplicity of orientations and shifting alliances, the conventional wisdom that "the enemy of my enemy is my friend," has come into effect.

The monarchies which were put on the defensive (and also Egypt), which viewed with concern the march of a nuclear Iran, despised the Islamic State and feared the negative ramifications of it, were natural partners for tactical alliances, which enabled them to reduce the margin of risk. The possibility for such cooperation grew in proportion to the dimensions of the chaotic situation. These collaborations suited Israel, since the conditions for their existence consisted of overlapping interests and an anti-Jihadi or anti-Iranian consensus. The outlook for these collaborations was, however, limited due to ideological, emotional, and ethical limitations and the need for the involvement of an international party. Obviously, the occasional call for collaboration set the stage for the advancement of existing cooperative relations. Israel, therefore, rose to the occasion and intensified its efforts to interact on a wider scale with countries that it shares common interests with.

Egypt was a true example of that. The economic and security challenges which were laid at its doorstep set priorities which clearly created a potential for collaboration with Israel. The focus on the internal agenda as a key component to building political and public legitimacy for the rule of al-Sisi dictated a policy that aimed to accelerate economic development and the creation of jobs. Under these circumstances, relations with Israel had added value. The devaluation of the importance of the Israeli–Palestinian conflict, along with a series of security threats from Hamas and Islamic Jihad in the Sinai Peninsula, created a common denominator which led to increased intelligence cooperation between Israel and Egypt.

Since November 2014, when Ansar Bayt al-Maqdis subordinated itself to the "Islamic State," a severe threat was posed to the al-Sisi's regime. After an attack on an Egyptian military post near Shaykh Zuwayd, a "state of emergency" was declared in the north of the Sinai Peninsula. The murderous jihadi attack on the Egyptian military outposts led to the establishment of a "security zone" along its border with the Gaza Strip. The Egyptian Army acted decisively and ruthlessly by uprooting local residents and establishing a checkpoint between Al-'Arish and the cities of Shaykh Zuwayd and Rafah. This was an indication that Egypt identified radical Islamic groups (including the Muslim brothers and Hamas) as an existential threat and waged a bitter struggle against them. The struggle worsened during 2015,

when citizens and tourists in Egypt became targets of the armed militias.[48] Beyond fighting in the Sinai Peninsula, Cairo's involvement in the civil war in Libya increased, as demonstrated by its support for the pseudo-secular government in eastern Libya. For Israel, Egypt was a recognized partner in the struggle against radical players and a partner for close security coordination. Israel also played a significant role in helping Cairo quell the influence of Islamic State's affiliate in Sinai, conducting airstrikes against jihadi positions, underscoring the depth of Israel's security cooperation with the Egyptian government.[49]

Already during Operation "Protective Edge" in Gaza during the summer of 2014, the priorities of the al-Sisi regime could be clearly seen. In fact, Egypt actually helped Israel by closing the Egyptian-Gaza border and calling for the removal of Hamas, an offshoot of the Muslim Brotherhood outlawed in Egypt. The Israeli agreement that Egypt would be allowed to move its forces to agreed areas in the Sinai Peninsula contrary to the limitations set in the Camp David Accords offered valuable insights into the conduct of states and societies in the Middle East in the 21st century. Egypt and Israel, despite that their fundamental disagreements remained unchanged, signaled to each other that during times of crisis, both would be able to benefit if they could meet in the field of common interests.

The ambivalent attitude of Egypt's al-Sisi to Israel was primarily demonstrated in the arena of diplomatic ceremony. More than 100 countries sent their representatives to a conference in Sharm al-Shaykh in March 2015, a conference convened to promote the Pharaonic project "the future of Egypt" to use the words of al-Sisi.[50] Only four countries did not officially attend and were defined as un-wanted: Turkey, Iran, Syria, and Israel. It is hard to say that the lack of invitation to Israel was surprising, since clear diplomatic considerations and economic needs guided al-Sisi in his decision. For a conference funded by Arab money, an Israeli presence would not have been politically correct. But that did not overshadow the peaceful and purposeful cooperation that developed between Israel and Egypt. The Palestinian issue also requires Israel to reach a decision. On the one hand, it seems that the pressure of current events in the Middle East pushed the Israeli–Palestinian conflict into a corner, and that it is no longer the key to solving all the region's problems, as has been claimed by many over the course of the 20th century. Nevertheless, the relative marginality of the conflict did nothing to help revive the floundering negotiations between Israelis and Palestinians. On the contrary, in the years after the Arab Spring, the negotiations between Israel and the Palestinians were caught up in a garbled path, and it was doubtful whether they will get out of it. In any case, the regional uncertainty made it difficult to take risks that accompany the diplomatic progress with the Palestinians. Israel was also intransigent on the demands it made concerning

security arrangements in any future agreement. Mahmud Abbas and the Palestinian Authority placed their hopes on the corridors of international politics in order to mount pressure on Israel with the backing of the Arab League and deepen its isolation until it would comply with the precepts of international law.[51] In the absence of a solution, even a partial one, the motifs of "the other Middle East" were strengthened, meaning the dwindling influence of elites in government, and the transfer of agency from the rulers to the wider publics armed with digital literacy. The extreme phenomena of the "knife intifada," and the use of religious and cultural motifs, the al-Aqsa mosque for example, brought the conflict to the brink of explosion. Events around the Temple Mount (al-Haram al-Sharif) demonstrated that in an unstable Middle East, religious symbols could handily be used to ignite the struggle.

In the absence of a clear picture of the balance of power and given the multiplicity of orientations and shifting alliances, the common wisdom that "the enemy of my enemy is my friend" has come into effect. These factors mean that Israel's options are necessarily limited. First, it will continue to enforce a policy of two absolute red lines—no Iranian or Hizballah presence on the Syrian Golan, and no introduction by Iran of weapons that will alter the current balance of power between Israel and Hizballah. At the same time, opportunities were created for Israel to make common cause with 'moderate' Sunni regimes sharing the same Iranian enemy. This has led to expanded Israeli covert diplomatic activity and expanding ties in the region which culminated with Prime Minister Netanyahu's visit to Oman in October 2018.

Israel's strategy vis-à-vis Iran and its proxy forces were as follows: On the one hand, Iran funds and supports Shi'i militias close to Israel's border, which can potentially lead to an escalation on Israel's northern frontier. Yet, on the other hand, Hizballah has turned inwards concentrating its efforts in Syria, without an immediate interest in confronting Israel. While Hizballah has suffered significant losses in its Syrian operations, it has gained much-needed combat capacity and experience. In conjunction, Hizballah and the Iranians were using their increased capacity to expand and create a broad front, both in southern Lebanon and in the Syrian Golan from which to potentially launch attacks against Israel in the future. But while Israel has acted aggressively in Syria, particularly against Iranian targets, the influence of Russia and Moscow's control of Syrian airspace remains a constraint on its freedom to maneuver.

From the Israeli perspective, the Trump administration has been a welcome change, as the Obama administration was seen as quiescent to increased Iranian power in the region, especially in the aftermath of the Iranian Nuclear deal known as the Joint Comprehensive Plan of Action (JCPOA). The influence of Secretary of Defense James Mattis at the Pentagon, former head of US Central Command and a noted Iran hawk, was comforting to Israeli intelligence and defense officials. This has been coupled with a more aggressive

line on Iran and a view toward a greater American pushback against Tehran's regional ambitions.[52] Israeli policy in the region thus remains dual tracked, focused on blocking and pushing back the Iranian threat, while concurrently expanding its relations with moderate Arab states.

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Chapter 6

The Middle East and Outside Powers

> "How beauteous mankind is! O brave new world,
> That has such people in't."
>
> William Shakespeare (The Tempest,
> Act V, Scene I, II. 205206)

For decades, the United States, the world's most dominant superpower served as the primary outside regional actor in the Middle East. While throughout the cold war, American foreign policy focused on Washington's implacable opposition to the spread of Soviet-backed communism, there has always been an inherent contradiction between American realpolitik and the desire for US foreign policy to take on an ideological and universalist "Wilsonian" component, seeking to spread liberal institutions and democracy throughout the world. These ideas were particularly emphasized during the Bush administration where the neo-conservative ideals of democracy promotion led to the invasion of Iraq and subsequent American occupation. Yet, the bright-eyed idealism of American foreign policy did not end during the Bush administration. The election of President Barack Obama in 2008, an implacable opponent of the Iraq War, had a significant influence on American foreign policy, as he embraced the notion that in order to restore its reputation in the world, the United States needed to reduce its involvement in the Middle East and focus on what became "nation building at home" particularly in the aftermath of the global financial crisis.[1]

Obama's electoral victory was accompanied by an atmosphere of euphoria among his supporters, and the new president saw himself as the leader of a transformation, not only in domestic policy but also in the international arena. In the global environment of the 21st century, in the UN General Assembly in September 2009 Obama declared, "in an era when our destiny is shared,

power is no longer a zero-sum game. No one nation can or should try to dominate another nation. No balance of power among nations will hold."[2]

Obama's vision for the Middle East was outlined in his famous "Cairo speech" at Cairo University where he emphasized the need for a "new day" and the termination of former tensions and preconceptions. Somewhat apologetically, Obama disavowed the past errors of the West and its negative attitude towards the Arab and Muslim world during the colonial era and during the cold war. He expressed respect and appreciation for the Islamic faith and for its contributions to civilization, and he praised the activities of the Muslim community in the United States and stressed that the United States was not in a confrontation with Islam, but rather only with extremist groups and violence. This part of the speech was ornamented with Quranic verses, in full congruence with the rules of "political correctness," and, by all accounts, conveyed a message of openness, and even perhaps, intimacy. The speech did not stand out for its contents, since it didn't introduce any meaningful changes, other than the style and the very fact that the American president delivered it in an Arab country as part of a diplomatic effort designed to appease the Arab-Muslim world.[3]

The president's statement received rave reviews, mostly because it did not focus on problematic policies of Arab states, and because nowhere did it offer—let alone require—any real steps on their part. Although the speech extolled the importance of values such as freedom of religion, women's rights, and economic development, it explicitly avoided calling upon the Arab and Muslim world to implement these values, either in principle or in practice. This is particularly noticeable when his speech was compared with the speech given by Secretary of State Condoleezza Rice in the same place four years prior. Not only did Rice address these issues more decisively but also she demanded that the regime in Cairo implement reforms as quickly as possible.[4] Obama's speech made it clear that this was not to be the way forward. Obama's "Cairo speech," therefore, was a watershed moment in the exercise of "soft power" and public diplomacy based on persuasion and communication filled with symbols. The agenda of Obama administration did not at first, if at all, focus on advancing democracy or the protection of human rights. President Obama expressed this line of thinking in his "Cairo speech," arguing that nations must not impose upon another state a political system, values, or characteristics. When protests broke out in Iran in June 2009 by members of the Green Movement, his policy of nonintervention was strictly followed, as the United States was careful not to directly support the demonstrators who sought freedom and a greater share in power. Many Iranians had pinned their hopes on this new president, but he responded feebly to their overtures. The rest of the Western powers—France, Britain, and Germany—were content to implement lukewarm and symbolic steps.

AMERICA MEETS THE ARAB SPRING: FLAWED ANALYSIS AND FAILED POWER POLITICS

The "Cairo speech" underscored the basic approach of the President and his administration towards the international arena. In his inaugural speech, as on other occasions—especially his speeches in Europe, Latin America, and Ankara, Turkey—he implicitly apologized for historic mistakes made by the United States, and his predecessors, and offered cooperation based on "respect and mutual interests." The "Cairo speech" indicated his desire to put the government in the position of an "honest broker." The message was that this would be a pragmatic administration, freed of emotional biases, and that in its strategic calculation, the Arab and Muslim states would not be less important than Israel, and perhaps be even more important.

When protestors in Tahrir Square began congregating, setting off the domino effects of the Arab Spring, President Obama hurried to tie the events of the Arab Spring to his "Cairo speech," by saying: "two years ago in Cairo, I began to broaden our engagement based upon mutual interests and mutual respect . . . we face a historic opportunity. We have the chance to show that America values the dignity of the street vendor in Tunisia more than the raw power of the dictator. There must be no doubt that the United States of America welcomes change that advances self-determination and opportunity. Yes, there will be perils that accompany this moment of promise. But after decades of accepting the world as it is in the region, we have a chance to pursue the world as it should be."[5] At first glance, the Western countries identified the events of the Arab Spring as a wave of democratic protest, a "crossing the Rubicon" that would put an end to dictatorship and mark out an evolutionary path toward liberal democracy. Indeed, the authoritarian regimes in the Arab World were perceived as corrupt, ineffective, and un-democratic, as outdated relics of a primitive world. The common slogan in the different countries "the people want the overthrow of the regime" expressed the intention to displace the autocratic elites who stood at the helm of power for many years in favor of a more transparent and free government. Many Western leaders welcomed these events and viewed them as a historical turning point, in which the public rejected despotic rulers, demanded free elections, and transparent political institutions. President Barack Obama praised the demonstrators who took the fate of their nations in their hands: "The story of this revolution, and the ones that followed, should not have come as a surprise. The nations of the Middle East and North Africa won their independence long ago, but in too many places their people did not. In too many countries, power has been concentrated in the hands of a few."[6] In a half apologetic tone, Obama explained his decision not to support Hosni Mubarak, who until then had been a cornerstone

of American strategy in the Middle East, saying that "history will end up recording that at every junction in Egypt, we were on the right side of history."[7] French Foreign Minister Alain Juppé also expressed regret about past errors, saying, "For too long we thought that the authoritarian regimes were the only bastions against extremism in the Arab world. Too long, we have brandished the Islamist threat as a pretext for justifying to an extent turning a blind eye on governments which were flouting freedom and curbing their country's development."[8]

Western analysts debated amongst themselves as to the level of "democratic-ness" each of the countries experienced after the events of the Arab Spring. The "Freedom in the World Index," published regularly since 1972 by the US-based NGO, Freedom House, measured this based on two main indicators: political rights and civil liberties. Questions were asked such as: "Is the head of the executive and the legislature elected in a free, competitive, and fair manner; are citizens given the right to organize within the framework of political parties; is there any significant opposition in the country that is not limited by the government?" Other indicators were derived from addressing questions such as: Is there freedom of expression in the country, including free media? Is there freedom of religion? Is education free of blatant political interference? Do citizens have the right to organize and demonstrate? Is the judiciary independent and impartial? The findings showed that in Yemen, for example, "there was a slight deterioration in the level of democracy, while at the same time, the democracy index showed improvement." The analysts' provisional conclusion was that it is possible to view the events of the Arab Spring as a positive democratic awakening, even if it will fail in the end due to structural reasons, such as the tribal social structure of the country, lack of tradition for the rule of law, or lack of a political party system.[9]

Indeed, the ruling autocrats in Egypt, Libya, and Yemen were far from being models of democratic governance. Elections held in those countries were largely misrepresented, empty procedures, primarily designed to preserve the rule of tyrants through the semblance of a democratic process. However, these criticisms aside, they were pragmatic regimes with secular characteristics that maintained effective "working relationships" with Western powers. The protesters, a significant proportion of which were educated, modern, and Western-oriented, managed to produce energy that led to the overthrow of rulers. Yet after free and competitive elections, power was taken by conservative Islamic forces who did not necessarily favor modern values and liberal democracy. Soon it became clear that countries that had applied a merely procedural dimension of the democratic process, showed no significant improvement in the dimension of liberal democracy. In Libya, the results of the free election were defined as a "promising start" and a "step in the right direction." In Egypt, the Muslim Brotherhood candidate, Muhammad Morsi,

was elected president of the Republic, with the support of conservative, radical, Islamist elements. But his overthrow by ʻAbd al-Fattah al-Sisi, an act perceived as more of a coup than a revolution, ate away at the foundations of Western theories of democratic progress.

Analysts and Western diplomats tended to interpret the events of the Arab Spring as a crushing blow to the radical Islamic movements. US President Barack Obama in May 2011 claimed that the waves of protest were proof of the annihilation of al-Qaida and evidence that the values this organization preached and proliferated did not find a sympathetic ear among the younger generations in the Arab countries. This was, in the eyes of the West, a natural continuation of al-Qaida's deterioration after the elimination of its leader, Usama bin Laden, in May 2011.[10] This event was presented as the end of the organization and its teachings. Writing in *Time* magazine, Rania Abouzeid explained that "these militant groups [referring to al-Qaida] no longer define the Middle East. . . . The paradigm has changed. In the old days, if an autocratic regime was pro-American and anti-Islamist, its opponents were anti-American and Islamist almost by default, and vice versa." Oliver Roy, an internationally renowned expert on Islamic movements, went on to say, "It's certainly coincidence that the two events are linked in time, but in fact it's logical because the death of bin Laden symbolized the marginalization of al-Qaida in the Middle East." Abuzeid concluded, "Today's young Arabs have rejected both autocrats and extremists." Then with an allusion to famous lines by Shakespeare, she ended her article with the words: "It's a brave new world in the Middle East."[11]

The reality was, unfortunately, the opposite. The capture of large swathes of territory by primitive organizations with messianic outlooks, and their claim to represent "true Islam," marginalized those who protested in the town squares and those who dreamt of an Arab Spring. The Islamic State began to "nest" in the ruins of Middle Eastern failed states, and the depth of confusion in the West was apparent. Indeed, many Muslims opposed the Islamic State and its aberrations, and were forced to argue that its modus operandi did not represent the nature of Islam. Muslim activists around the world also launched an online public relations campaign criticizing the Islamic State, stressing that it did not represent them, and that it was directly responsible for the increased Islamophobia in the West. Others uploaded a series of videos titled "Not in my name" which were a call against "all acts of barbarism perpetrated by bloodthirsty fanatics who consider themselves to be Muslims." But that was not enough to argue that this was not a messianic-religious group that had a significant theological dimension, or to make the case, as was made by Barack Obama, that the Islamic State was not Islamic at all, and was even "un-Islamic."[12] Leaders around the world were reluctant to use the term Islamic State, whether because they feared that it would be

interpreted as recognition of the phenomenon or for reasons of political correctness. Whatever the reason, their reluctance in this regard was fundamentally flawed.

The Islamic State was an Islamic organization, and the group's very title is a derivative of its essence and vision, rooted firmly in Islamic thought. It is true that these unusual and extreme activities constituted an attraction for mentally unstable, troubled souls and thrill seekers of all kinds who felt rejected by their communities in the Middle East and Europe. But its recruiters preached the message of the Islamic State while drawing upon scholarly and systematic interpretations of Islam. In fact, every major decision or law adopted by the Islamic State was based on the concept of "prophetic methodology" as it was known to the Islamic State's activists. This slogan which was also proclaimed on billboards and engraved on the back of coins refers to the manner in which a devout Muslim strives to follow the prophecy and example of Muhammad in fastidious detail.

Many years have passed since the religious wars in Europe, and many in the West have found it difficult to view the Islamic State as the product of a conflict that has theological dimensions. The fact that religion or religious ideology has long ceased to serve as a central pillar in the construction of societies or countries has led many in Washington and in European capitals to assume that this is also the case in the ruined cities of Syria and Iraq. Many were incredulous while hearing signs of apocalyptic thinking in the statements that poured forth from leaders and members of the Islamic State. Referring to the Islamic State as nothing more than a terrorist organization was an attempt to minimize the phenomenon and disregard the danger of some of its various dimensions. One statement by a senior American military figure in the region testified as to the West's difficulties in understanding the phenomenon: "We have not defeated the idea," he said. "We do not even understand the idea."[13] References to the phenomenon were accompanied by large doses of caution and political correctness lest a whole civilization would be tainted. Many preferred to view the phenomenon as the result of bad governance, corruption, and enclaves of poverty. While it is clear that these explanations cannot be completely ruled out, the concept and ideational aspect of the Islamic State cannot be taken off the table. It stands to reason that the vast majority of Muslims reject the "state" dimension due to a variety of conceptual and operational aspects, but, as Bernard Haykel has said, to argue that the group is "un-Islamic" would be flawed. Haykel argued that the "State" is saturated with religious fervor and that Muslims who repeat the worn-out expression that "Islam is a religion of peace," with the aim of distancing themselves from the consequences of the "State" implicitly acknowledge that there is not just one Islam, but instead recognize that the actions of the "state" are in

accordance with an interpretation of the sacred texts, albeit the most severe one. The Islamic State and its activists sought to return to the realities that were present at the dawn of Islam and to renew a fanatical adherence to the imperative of *jihad* and to the various practices associated with it, as implemented by the Prophet in the early days of Islam and during the war that was waged against the surrounding pagan communities.

Tens of thousands of Muslims flocked to the territory of the Islamic State from France, Britain, Belgium, Germany, the Netherlands, Australia, Indonesia, United States, Africa, and other parts of the world. Many recruits came to lend a hand to the effort of fighting for the Islamic State and were willing to endanger their lives for it. Answering the challenges posed by the Islamic State has become very complex and demanding. Soon it became clear that the air strikes on specific targets could inflict damage but could not defeat it.[14]

As often happened in the past two centuries, the West found itself at an impasse: it was important for Western governments to be seen as protector of freedom and democracy, but what was more important was the need to maintain strategic outposts and geo-economic advantages. This was born out of a hesitant policy which in the eyes of many in the region exposed the hypocrisy of the West's lofty rhetoric about freedom and opposition to repression.

The columnist Thomas Friedman, who was initially swept up in the Western euphoria upon seeing the outbreak of the events of the Arab Spring and even went so far as to compare the demonstrators in Tahrir Square to the "flower children" on American college campuses in the 1960s, wrote an article about a year after, addressing the sad loss of innocence of the Arab revolution, saying that it more closely resembled the disintegration of Yugoslavia than the "velvet revolutions" of Eastern Europe.[15]

The US government had no coherent policy in relation to the Arab Spring and in most cases it adopted a policy of reacting to circumstances which were rife with inconsistency. The sharp transition from a policy of non-intervention, which included statements that the United States would not intervene in wars that were not its own, shifted to the American policy of urging Egyptian President Hosni Mubarak and then Yemeni President 'Ali 'Abdallah Salih to resign immediately and respond to protesters' demands. This was a policy shift that surprised many of the allies of the United States in the Middle East. Events in Libya illustrated the frenetic state of mind of the American administration. With the outbreak of hostilities in Libya in February 2011, the Obama administration was initially hesitant join the emerging coalition against Qaddafi, probably due to the limited American interests in Libya. However, ultimately it was the American government that

backed rapid military action in Libya because of the need to prevent human rights violations. This pattern of action, called "leading from behind," was itself a product of hesitancy and indecision. On learning of the execution of Mu'ammar al-Qaddafi, President Obama declared that "our decision to protect the Libyan people and help him escape the dictator was the right thing to do." Regarding the bloody events in Syria, the only thing that stood out from the otherwise bland American policy was its condemnation of the massacres committed by Bashar al-Asad's regime. Despite that "red lines were crossed" and chemical weapons were used against defenseless civilians, the US government decided to carry out a "surgical strike" against the Syrian regime, but even this plan was eventually shelved. After the Syrian regime began receiving Russian support, conflicts in the region acquired the added dimension of patron–client relations.[16]

The declaration by US Secretary of Defense Chuck Hagel, in November 2013, "no more wars, no more Middle East," once again demonstrated the inherent contradiction in the conduct of American and Western policy in the Middle East.[17] The decision to withdraw US forces from Iraq was explained by the president when he asserted, "In Iraq, we've succeeded in our strategy to end the war," leading to "renewed American leadership in the world."[18]

A flexible foreign policy adapted to the changing circumstances has become the cornerstone of state behavior in modern times. Nevertheless, this was not the case with the United States. The frenetic behavior of the United States, as if it were one of the countries in the region, soon provoked questions about the extent of its commitment to its allies and instilled in them a lack of certainty that only intensified the sense of vulnerability and gave events in the region a critical dimension. The fear of having the same fate as the regimes in Egypt and Tunisia, despite their partnership of many years with the United States, planted among them uncertainty and the inability to anticipate the price they might have to pay for taking certain measures. On the flip side, they could not anticipate what future advantages they might gain if they were to make concessions to the superpower and align with it. In this situation, willingness to "align" with the superpower reduced its policy of reacting to circumstances which weakened the motivation of regional states to cooperate with it and this stunted the superpower's ability to protect its power and defend its interests in the region.

Even in regard to the Israeli–Palestinian conflict, the US administration continued to behave as if resolution to the conflict was the key that could solve all the region's problems. The deeper the Middle East imbroglio became, the more the American government relied on the marathon of talks led by Secretary of State John Kerry to bring a "breakthrough."[19] Failure of the talks brought about a renewal of fighting in 2014 between Israel and

Hamas, known as "Operation Protective Edge" during which the US government was caught in a rather awkward position when it was incapable of coordinating between Egypt, Israel, and Hamas in order to reach a ceasefire. Even in its efforts, it preferred to work via Turkey and Qatar, patrons of Hamas, and ignore actors such as Egypt and the Palestinian Authority. For the first time, the United States did not play the dominant role in an arrangement involving Israel.

But the United States' main problem, and the West's problem in general, was its inability to digest the new constellation of power that had been created in the Middle East. On May 13, 2015, President Barack Obama gave an interview to *Al-Sharq al-Awsat* in which he expressed his hope that unified Iraq will be governed in the right spirit and spoke in praise of the Iraqi army's counter-offensive against concentrations of the Islamic State. The attempt to define things in terms of the 20th century and the insistence on adhering to the state framework of Iraq and Syria as if they could be fixed is anachronistic thinking. Not only is this mindset not "up to date" but also it does not take into account the new powerbrokers in the region. The United States insists on continuing to define the Middle East in terms that it itself dictates.

More significant was the administration's reference to the question of Iran's nuclear program. On this issue, as with other issues, the Baker-Hamilton Report significantly influenced the President's policy. The report, published in December 2006, was the result of a bi-partisan panel appointed by the Congress (led by former Secretary of State James Baker, and former Congressman from Indiana, Lee Hamilton). In it, the panel outlined a new strategy pertaining to American policy regarding all the important issues in the Middle East. The report was built around the assumption that the American commitment to Israel limited its scope of activity and obscured benefits that might grow out of, for example, cooperation with Iran and Syria (which was then still a viable state). These were perceived in Washington as potential partners who could help achieve certain goals such as the stabilization of Iraq and the suppression of al-Qaida and other Sunni-jihadi groups.

The Baker-Hamilton Report served as the master plan for the Obama administration's foreign policy and was also the basis for the formulation of a policy of rapprochement towards Iran on the premise that Washington and Tehran are natural allies, and that Washington should be the one to change its attitude toward Iran. In one of the first speeches that Obama delivered, he appealed to Iran on the occasion of Nowruz (the Persian New Year celebration) to find potential ways to move forward and added, "If countries like Iran want to open their clenched fists, they will find in us an outstretched hand."[20] In June 2009, the Green Movement was born and the streets of Tehran were flooded with people protesting against the regime. Demonstrators responded

to the lukewarm American support so as not to arouse antagonism in the relationship being formed between Washington and Tehran.

Obama's second term was marked by an effort to substantiate this policy with action and utilize Iran as a tool to restrain Asad. A few weeks after Bashar al-Asad attacked his own people with sarin gas on the outskirts of Damascus killing about 1,500 civilians, Susan Rice, the President's national security adviser, made clear in a speech that she gave on September 9, 2013, "Russia and Iran repeatedly reinforced our warning to Asad."[21] The speech, which introduced the Islamic Republic of Iran as a potential partner, was clearly intended to influence Congress in its deliberation over the question of airstrikes in Syria—attacks that Obama had backed away from two weeks prior.

In June 2014, when Islamic State fighters occupied the city of Mosul in northern Iraq and announced the establishment of the caliphate, the disastrous consequences of US policy in the Middle East were exposed. To avoid the need to address the monstrous phenomenon, government officials clung to the notion that the fight against the Islamic State would be a long and drawn out one, and informed insiders that it's best to focus on the long term even in turbulent times.[22] The growth of the Islamic State rendered the American–Iranian dialogue the last card on which the US rested its arguments and justification for the inconsistent policy it conducted in the Middle East. In defiance of those who claimed that the connection with Iran was politically destructive and militarily dangerous, the government made it clear that what was so remarkable about the policy of rapprochement with Iran was that Iran could contribute to fighting against Islamic State. The simplistic assumption that Iran would fight the Islamic State serving American interests gave Iran a green light to operate freely in Syria and Iraq.

The Obama administration acted with the awareness that at the negotiating table, it was the one that set the agenda and the Iranian negotiators were under stress to sign an agreement. In August 2015, on the eve Congress's approval of the agreement, Secretary of State John Kerry said in an interview that negotiators from Iran, Foreign Minister Mohammad Javad Zarif and President Hassan Rouhani, will find themselves in "serious trouble" at home if an agreement is not signed.[23] In general, the administration argued that including Iran in the political system and international economy would, in effect, tone down its aggressive behavior, and that this was certainly more effective than increasing the pressure.[24] In an interview given in March 2014, the president claimed that his approach strengthened the reformist camp in Tehran: "If in fact, as a consequence of a deal on their nuclear program those voices and trends inside of Iran are strengthened, and their economy becomes

more integrated into the international community, and there's more travel and greater openness, even if that takes a decade or 15 years or 20 years, then that's very much an outcome we should desire."[25] Since the price was minimal and the discomfort was temporary, the Iranians benefitted economically and politically, as they received a massive cash infusion while also maintaining their advantageous geopolitical position within the region.

The events in Egypt and the unequivocal US support for the "right" of the masses to protest in the squares of Cairo reaped harsh criticism from Jordanians and Saudis. They complained about the shortsightedness and inconsistency of US foreign policy, which, on the one hand sought to enlist Arab support against Iran, and on the other, helped to topple regimes and weaken countries that had a role in the balance of power in the area. One critic said, "What began in Iraq was delivered in full to Iran for passed through Afghanistan and Pakistan, and now also Egypt is experiencing the birth pangs of a new regime, whose nature is not yet known."[26]

In an article in *Al-Sharq Al-Awsat*, the director-general of the Jordanian Broadcasting Authority, Salih al-Qallab, said that the American president's policy regarding the events in Egypt were tainted by electoral considerations and that politicians were trying to win over the American public in view of the upcoming elections. Obama tried to take credit for the events in Egypt and present himself as a leader with a vision in contrast to his predecessor George W. Bush. Al-Qallab added teasingly, "All that is left for Barack Obama to do . . . is to board the presidential plane, come swiftly to Cairo, join the rebels in Tahrir Square and raise Mohamed El-Baradei's fists high while saying to President Mubarak, through the biased [television] channels . . . 'Leave, leave, o spiller of blood. The era of oppression is already over.'"[27] Saudi columnist 'Abd Al-'Aziz Hamad al-'Awayshaq concluded that this conduct cost the United States a significant amount of influence and credibility in the region and that this was just another failure in the series of failures of the Obama administration. The United States was perceived by people in the region as a naive superpower lacking understanding in the affairs of the Middle East that foolishly handed Iraq on a silver platter to the Iranians. It was a superpower that failed to normalize relations between Israel and the Palestinians, and its indecision has brought on a tragic humanitarian disaster in Syria. The United States erred in its response towards Hosni Mubarak, refrained from supporting 'Abd al-Fattah al-Sisi and in the end, signed a problematic agreement with Iran.[28]

The anxiety of Sunni Arab states, especially Saudi Arabia, rose steadily. These countries looked on in despair as the United States signed an agreement with Iran, while Iran was becoming a nuclear threshold state. So as not to be left behind, they began to make statements about their determination

to develop their own nuclear capabilities which has the potential to create a nuclear arms race in the Middle East. One of the tests of this agreement was to see whether it could provide stabilization and quell explosive tensions. Washington's hope that following the agreement, Iran would become a balancing power in the Middle East and would help in the war against the Islamic State, actually provoked some of the primal fears that stand at the base of the Middle East's conflicts.

The continuing crisis in Yemen has clearly illustrated the changing circumstances and confusion between the regional and international players. The allied Sunni offensive led by the Saudis against the Houthi regime in Yemen once again proved how easy it was to stir up religious and cultural hostility to advance a given state's geopolitical interests in the region. The Saudi attack was accompanied by a note of defiance, but also a real concern for the future in light of US policy in the region. The battle for Yemen was intended to curb Iranian influence in the region, which the Saudis viewed as their exclusive area of influence, but also signaled the gap between rhetoric and deeds between the United States and some of the Arab states that had long been viewed as part of the "pro-American camp." The United States announced its support for "Operation Decisive Storm" (*'asifat al-hazm*) against the rebels, but the Saudis let the Americans in on the "secret" of the planned operation only a short time before their aerial attack on rebel bases. The rapid response of the allied Sunni states including Saudi Arabia, Egypt, Jordan, and the Gulf states and their offensive against the Shi'i Houthis in Yemen was also the product of these rising fears, particularly the emerging nuclear agreement with Iran, and the inability of the Americans to counter growing Iranian influence in the region.

THE BEAR RETURNS: PUTIN REASSERTS RUSSIA'S POWER

Russia's dramatic decision to send troops to the Middle East has most clearly shown how the rules in the region have changed. The Syrian conflict provided an opportunity for Russia, to maximize its geopolitical influence, to saving the regime of Syrian President Bashar al-Asad with Moscow's aid. Paradoxically, the very existence of the Islamic State provided the "pretext" for Russian involvement in Syria. Unlike with the case of previous interventions in Georgia and Ukraine, where Russia was seen as the "bad cop," in the Syrian case, Russia was presented as the "good cop" because the Islamic State was nearby. Soon it became clear that the Russian offensive was not focused on the eastern part of the country, where the Islamic State had grabbed territory, but rather in the western part of the country controlled by

moderate rebels who had already made significant achievements in the fight against Asad.

Russia, much like the United States, has always viewed itself as a nation with a sense of mission, as a providential power originating back to Moscow's centrality to Orthodox Christianity as the "Third Rome." The collapse of the Soviet Union, and total disintegration of centuries of empire building, first under the Russian Empire, and then under its successor state the Soviet Union, had a significant impact on Russian strategic thinking. The fall of communism and the end of the Soviet Union saw Moscow treated as a defeated power, and Russian elites, specifically the security elites who would come to power in 2000 with Vladimir Putin, felt humiliated. The result, buoyed by a rise in energy prices, saw Moscow under Putin move away from the doldrums of the 1990s, where the Russian state focused a considerable energy on quelling Chechen separatism in the north Caucasus, to expanding Russia's geopolitical reach.[29]

The Russian intervention in Syria was the perfect avenue to allow for Russia to regain its perceived rightful place as a major world power. Coming to the aid of the Asad Regime was also an instrument to expand Russia's influence in the Middle East, and insert Russia as the *sine-qua-non*, for any final status resolution in the Syrian conflict. With the American decision not to intervene in Syria to uphold the so-called Red Line and the use of chemical weapons, Russia has used this opening to expand their regional position with Tehran, at Washington's expense. Most of Russia's operations in Syria have not been to counter the Islamic State, but instead to deliver a crushing blow to the Syrian opposition, as and the Russians have, according to most sources, concentrated the majority of their airstrikes on opposition positions.[30] Additionally, Russia's foreign policy posture and particularly President Vladimir Putin's idea of Russia's grand strategy has been formulated on hindering and blocking American power and influence, while also increasing Russian prestige and entrenching their own position as Syria's final arbiter and power broker. This has been further cemented by Russia agreeing to extend the leases of its naval base in Tartus on the Mediterranean coast and the Khmeimim Airbase outside Latakia, for the next forty-nine years.[31] Russia's foreign policy interests in Syria also overlap with Iran's, and while Moscow and Tehran have seen a convergence of their own interests within the Syrian conflict, it would be a mistake to state that their interests are totally aligned. Yet, Russia's intervention pounced on a moment of weakness that Putin sensed, emanating from the United States. Washington refused to enforce their so-called red line in Syria, and following Russia's annexation of Crimea, Washington instituted sanctions against top Russian government officials, but balked at sending lethal aid to the Ukrainian government which soon after the Crimean annexation was forced to beat back Russian paramilitary

forces and special forces in the eastern Ukrainian Donbass Region.[32] Putin's foreign policy recognized the weakness of the West, particularly the way that the Obama administration used a policy of reconciliation that eschewed any type of conflict. Moscow viewed American hesitancy in Syria as a golden opportunity to turn the tide and give the advantage to Bashar al-Asad. The speed and decisiveness of the Russian operation made it clear that what Moscow had up its sleeve was a clear goal; there was no standoff with the Americans or eradication of the Islamic State, but rather a suppression of the rebels that were fighting Asad. The Iraqi government's green light to Russia to use Iraqi territory in the effort against the Syrian opposition indicated that, for better or for worse, the players in the Middle Eastern arena were internalizing the changing circumstances. Thus, while the Obama administration continued to send warnings to the Russians and as European countries were divided on the question of refugees, a new reality took shape in the Middle East. Russian involvement has unequivocally demonstrated the fact that the Western countries and the United States are notably devoid of an action plan, goal, or vision.

Although the return of stability to Syria was an immediate interest, the response of the international community to bloodshed in the country amounted to idleness. Despite the humanitarian crisis, and the way that the effects of the war have spilled over into neighboring states, and despite the real aims of the Russian military involvement in Syria, the international community still did not mount any effort to put an end to the bloodshed.[33] During the civil war, Syria was, in effect, divided into different areas of control whose main characteristics were their demographics. Refugees tended to move towards the territories where the ethnic-religious makeup gave them a greater feeling of safety. At the same time, cooperation tightened between Russia, Hizballah, and Iran. This provided the kind of ground forces needed to make progress and to fight not only the Islamic State but even more so the rebel groups throughout Syria, thereby providing Russia an advantage that the Americans and Europeans lacked in their aimless fight against the Islamic State.

THE EUROPEAN SPILLOVER

The effects of the Middle Eastern crisis began to spill over into Europe as Europe was flooded with an increasing flow of asylum seekers and refugees, crowding at its borders on a scale much larger than the continent has seen since the end of the Second World War. The West abandoned the Middle East in its time of need, and underestimated the ability of Middle Eastern problems

to become European problems. The complete surprise in European countries at the arrival of waves of people to the borders testified to the degree of distortion and imbalance that was present in the way that Europe had read the developments in the Middle East. Europe was neither ready to provide for the immediate needs of refugees and asylum seekers, nor did it have a long-term strategy to deal with the waves of immigration.

In November 1995, the European Union, which had convened many prior conferences in order to consult and create a framework that would prevent such an outcome, brought together ministers from France, Spain, and Italy to develop some fitting initiatives. The "Barcelona Process" and other initiatives such as the Euro-Mediterranean (Euro-Med) Ministerial Conference[34] were designed to help countries neighboring southern Europe undergo structural changes and reforms in the fields of economy, society, and government. The logic by which these programs were designed fed the adage, "If Europe does not visit the Middle East the Middle East will visit Europe." In other words, if a suitable employment infrastructure is not created in the economic periphery, that is, the countries of the *Maghrib* (North Africa) and the *Mashriq* (Arab countries in the Asian part of the Middle East), residents of the periphery will migrate to the big cities or wander across the Mediterranean to one of the EU countries in order to make a living. These programs, which were ambitious, original and creative, severely failed because of the Euro-centric approach inherent in them. They were not built on a relationship of equals: the role of Arab societies was that of a client rather than a partner, and they were from the start tainted with a hint of colonial flavor. Moreover, Europe had no clear policy or theory through which it could advance political change or promote good governance. Another obstacle was the fears of the Arab dictators that structural change would generate independent power centers that would bring about their downfall. Thus, the EU countries continued to have a "give and take" relationship with the Arab dictatorial regimes, thereby actually nourishing the socio-political lava that gave rise to the Arab Spring. In the test of history, cooperation and aid programs have failed miserably.

The reality that EU countries were met with during 2015 was clearly different from the one that they had tried to plan twenty years earlier. Millions of refugees flooded Europe's Mediterranean countries, and many of them drowned at sea on their way. The dramatic increase in the number of asylum seekers in the second half of 2015 was a direct result of the deteriorating situation in their home countries, namely Syria, Iraq, Afghanistan, Eritrea, Sudan, and Somalia. In Syria especially, the continuation of the bloodbath and destruction led to the displacement of more than ten million Syrians from their homes. The countries that they escaped to, namely Turkey, Lebanon, and Jordan, became weighed down by the burden. The call was frequently

voiced that to cope with waves of refugees coming from the Middle East and Africa "the roots of the problem" must be dealt with. Even while this assessment was correct, it was very difficult to implement. The EU made a mistake by focusing only on what was happening in neighboring countries and the countries of the Mediterranean basin and neglecting other states in the region. The conflicts in Yemen and Iraq, as well as the refugee crisis in Syria (which also affected Jordan and Turkey), presented the Europeans with a painful and problematic reality. The European Union avoided acting many times because there was no certainty as to its outcome, but the refugee crisis represented the painful price and destruction that resulted from inaction.

The torrent of refugees revealed that alongside tactical questions regarding the difficulties of absorption and how to overcome them, member states would be forced to deal with complex issues of integration. The waves of refugees and the question of absorption revealed many disagreements among member states. German Chancellor Angela Merkel, the so-called moral compass of Europe, announced Germany's readiness to receive refugees at its borders, but noted that Germany would also need to adjust itself to the changing circumstances in the coming years.[35] More far-reaching was a statement by the President of Germany, Joachim Gauck, in which he called for Germans to welcome the growing diversity and internalize the need for a new definition of the nation, a new definition which will include different shades, a definition in which shared values will be used as a foundation, a definition which is clearly different than the "homogeneous," one in which almost all of its members are Christian, fair-skinned, and speak German as a mother tongue.[36]

However, the trail of blood left by the Islamic State terrorists who carried out the terrorist attacks in Paris in November 2015 and in Brussels in March 2016 raised even more questions which had been suppressed by liberal Europe until now. These attacks (like the attacks in San Bernardino, California, in December 2015 and Orlando, Florida, in June 2016) raised questions of identity in Western societies, as well as profound questions about how to foster assimilation among immigrant communities, and a growing suspicion towards the "other." There were always those trying to whitewash the problem and treat it as a passing wave. Thus, for example, after the deadly terrorist attack in San Bernardino, Arab-American scholar Shibley Telhami explained, "we forget that religion and ethnicity are often only small parts—sometimes mere afterthoughts—of how people see themselves."[37] Telhami also asserted in 2004 that the Shi'i–Sunni conflict is but a passing episode and "the public of the Arab world is not looking at the important issues through the lens of the Sunni-Shiite divide." He argued that "They see them rather through the lens of Israeli-Palestinian issues and anger with U.S. policy [in the region]."[38]

Religious, sectarian, and ethnic identities have proved to be far more resilient in the Middle East than modern identities. The realization that citizens of

a state, who adhered to a certain religious community or other type of community, could act against the state and view it as a source of their troubles was a slap in the face of multiculturalism, one of the core Western-European values. The lack of solidarity and willingness to bear the brunt of the refugee crisis highlighted profound disagreements among EU member states, arising out of their cultural, political, economic, and historic differences. Apart from Germany, whose response to the refugee crisis emphasized the moral dimension, and several countries in which proto-fascist voices won out, most countries of the EU opted to respond in accordance with their own particularistic national interests. Such a mindset was expressed by the Prime Minister of Hungary Victor Orban when he blamed Germany, arguing that Germany's open-door policy was inviting more refugees to come to Europe and thereby threatening the preservation of Europe's Christian character and values. These statements laid the foundation for a stinging debate about the identity of the future of Europe, not to mention the issue of the refugees and their absorption.

After the events of September 11, Arab-American lawyer Anika Rahman, commented on the way in which circumstantial events can cause people to view each other differently:

> I am so used to thinking about myself as a New Yorker that it took me a few days to begin to see myself as a stranger might: a Muslim woman, an outsider, perhaps an enemy of the city. Before last week, I had thought of myself as a lawyer, a feminist, a wife, a sister, a friend, a woman on the street.[39]

Rahman's words were a painful reminder that identity is derived from the interaction between a person and his environment.

The relationship between the West and the Middle East has reached an important crossroads. The baseless pretentions inherent in seeking to build a Middle East based on liberal ideas, pretensions that accompanied the West's conduct toward the region in the past decades, have now been replaced with a more bitterly realistic and cautious attitude. During Barack Obama's second term as president, the United States showed a decreased commitment to Iraq and Afghanistan, maintained a lower profile in foreign affairs and mounted military responses only against direct threats to American national security. This was illustrated by its "no boots on the ground" policy, meaning that there would not be soldiers on foreign soil, with the possible exception of Special Forces. Instead, they sought to set up "strategic partnerships" with friendly countries and implement "corrective diplomacy" toward hostile countries.

Despite good intentions, the creation of a "new Middle East" is beyond the capabilities of an external power. Any attempt to introduce some stability in the conflict-ridden region will require thoroughly addressing the issue of the

interaction between religion and state in Arab society and the relationship of the state to the individual. This process will require long and complicated cross-cultural studies, and in fact, a real revolution in the educational systems of Arab societies. There is doubt as to whether Arab societies are strong enough to climb out of the despondency into which they have sunk, but even if it will take a generation and much suffering and hardship, there is still no substitute for the authentic process that leads to self-reliance. What is clear is that the solution cannot be imported from the outside, but instead should come from the people themselves.

NOTES

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Conclusion

The events of the Arab Spring and the political upheaval that followed have reordered and remade the politics of the Middle East. The hopes for a new "fourth wave of democracy" blooming in the Arab World were instead met with civil war, religious extremism, and state breakdown, topped with the rise of the Islamic State. The aftermath of the Arab uprisings crystalized the inherent contradictions within Middle Eastern politics, which included the prevalence of authoritarian states led by strong men that were structurally weak, and once overthrown, became failed states. The structures of Middle Eastern states, and particularly Arab states, Egypt excluded, had low degrees of national unity and were fraught by sectarian, regional, and local conflicts. The Arab Spring served to illustrate and bring these out into the open, not limited to, but including, splits and conflict between Sunna and Shi'a, Arab nationalists and Islamists, and between minorities and the majority. If the 20th-century analysis of Middle Eastern politics focused primarily on the state as the focal point of analysis, the tectonic shifts that the Arab uprisings caused have underscored the need for more wide-ranging analytical frameworks, including taking a more introspective look at the impact of political culture, ethnicity, regional and local identity, as well as transnational factors, namely, but not limited to Islam. It was this attraction to Islam, and not to the European concept of the nation-state, that gave rise of the Islamic State, attracting thousands of supporters from throughout the Middle East, and from the Muslim diaspora in the West. The state itself and the artificial creations of the colonial powers forced fixed borders and identities on people who for centuries had not seen themselves as Iraqis, Syrians, or Lebanese, but instead as Sunni or Shi'i Muslims, Alawites, or Maronites. The artificiality of these boundaries and the prevalence of political movements within the Middle

East based on romantic ideas seeking to absolve the fractious domestic and national political questions, whether they were pan-Arabism or seeking to recreate the caliphate, underscores the lack of cohesive and unifying national identities.

The political upheaval also had a significant impact on the regional and inter-state balance within the Middle East, returning in some respects to the era of the Arab Cold War, with regional powers, in this case the conservative Sunni Arab monarchies, seeking to dislodge the rise of a revisionist Iran. While the Arab Cold War of the 1960s pitted those same conservative Arab states against the then revisionist and Arab nationalist Egypt under the leadership of Gamal Abdel Nasser, 21st-century geopolitical alignments have added the region's historical outsider, Israel, to the side of the conservative Arab states. Reversing nearly a century of antagonistic relations, the looming threat of Iran, coupled with Israel's qualitative military and economic power have forced much of the Arab world to reassess its ties with the Jewish state. The long-standing focus on the intractable Israeli-Palestinian conflict long seen by policymakers in the West as the "master key" to "solving" the Middle East has been shown for what it was, a sideshow in the clash amongst Arab states, who sought to utilize the plight of the Palestinians for political gain.

But more than anything, the Arab Spring has underscored the lack of influence of foreign powers, who have sought to imprint their own ideologies and political culture on the region. These dreams of spreading universalist maxims of freedom, democracy, and liberal institutions, while admirable, have been shown to be foolhardy at best. The interactions of outside powers in the region were perhaps best expressed by the historian Elie Kedourie, who asserted, "when recent British and American policies in the Middle East are considered, together with doctrines and principles which justify them, then it is realized what a large part verbal traps and dubious dogmas have had in construction of doctrines and shaping of policies."[1] Kedourie's contention, articulated nearly half a century ago, and far before the Saidian craze that swept academia, should serve as a guiding principle for analyzing the Middle East, viewing it dispassionately as a place of enormous promise but also endemic instability, a region which has fought viscously against the penetration of Western ideas and conceptions of liberalism, preferring instead to hold fast to its own traditional values. In the end, the goal should be analyzing the Middle East, warts and all, as it is, not as it should be or what we wish it to be. That means appreciating the Middle East for its "otherness" and seeing the unique factors, particularly the impact of religion and tribal solidarity for what they are, not as essentialist caricatures, but as significant components of the socio-political map.

NOTE

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About the Author

Uzi Rabi, PhD (Tel Aviv University, 2000) is the director of the Moshe Dayan Center for Middle Eastern and African Studies, and a senior researcher at the Center for Iranian Studies, both at Tel Aviv University. Formerly, he was the head of the Department of Middle Eastern and African History at Tel Aviv University. From 2004 to 2005, he held a visiting professorship at the Lipinski Institute of San Diego State University.

Professor Rabi is the director of the TAU Workshop, an annual ten-day seminar for international scholars that focuses on the geopolitical situation of Israel and its neighbors, and the co-editor of *Bustan: The Middle East Book Review*. His research focuses on the modern history and evolution of states and societies in the Middle East, Iranian-Arab relations, oil and politics in the Middle East, and Sunni-Shi'i dynamics; within this framework, he has supervised the dissertations of numerous doctoral candidates in this field over the years.

PUBLICATIONS

Rabi has written a number of books in both English and Hebrew. In 2015, Professor Rabi published *Yemen: Revolution, Civil War, and Unification* (I.B. Tauris), which covers the modern history of Yemen. He published a related book in Hebrew, *Yemen: the Anatomy of a Failed State* (Kibbutz HaMeuchad) in 2014. In 2007, he published *Saudi Arabia: An Oil Kingdom in the Labyrinth of Religion and Politics* (The Open University, in Hebrew). In 2006, he published *The Emergence of States in a Tribal Society: Oman Under Sa'id bin Taymur.*

Rabi has edited a number of volumes, including *International Intervention in Local Conflicts: Crisis Management and Conflict Resolution Since the Cold War* (I.B. Tauris, 2010), *Tribes and States in a Changing Middle East* (Hurst, 2016), and *Lost in Translation: Forgotten Paradigms of the Arab Spring*, together with Abdelilah Bouasria (Sussex, 2017).

Additionally, he has published numerous articles in peer-reviewed journals, including *Middle Eastern Studies*, the *British Journal of Middle Eastern Studies*, the *Journal of South Asian and Middle Eastern Studies*, and *Otre-Terre—Revue Europeene de Geopolitique*.

LECTURES AND APPEARANCES

Professor Rabi is regularly invited to the Knesset and other governmental forums to deliver briefings and lectures on matters of national and regional importance. Additionally, he has presented many academic papers over the years. He has given annual lectures at the Middle East Studies Association conference; in 2015, the subject of his lecture was Israel and Iran following the P5+1 nuclear treaty. He has frequently given other lectures in both academic and non-academic forums; the latter includes a roundtable discussion at NATO Headquarters and the EU Headquarters in Brussels 2015–2016.

Professor Rabi frequently provides expert commentary and analysis on a number of international and Israeli news outlets, including Arabic language television channels.