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WEATHERING THE STORM

**CHARTING NEW COURSES
IN THE MEDITERRANEAN**

REPORT

SCIENTIFIC COORDINATION

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MED VISUAL IDENTITY AND COVER DESIGN

Four in the Morning

This report is published with the knowledge partnership of Leonardo on the occasion of the fifth edition of Rome MED – Mediterranean Dialogues, 5-7 December 2019, promoted by the Italian Ministry of Foreign Affairs and International Cooperation and ISPI.

PREFACE

This year marks the fifth edition of Rome MED – Mediterranean Dialogues, the annual conference promoted by the Italian Ministry of Foreign Affairs and International Cooperation and ISPI. Over the past four years, Rome MED has gathered hundreds of policy-makers and experts from all around the world with the aim of finding new paths out of the current geopolitical upheavals and drafting a positive agenda for the Mediterranean.

The 2019 edition of the Report provides insightful analyses, policy recommendations, new approaches to critical issues and data that can stimulate discussion during our conference and beyond. Structured along four thematic sections – shared security, shared prosperity, migration, culture and civil society – the Report focuses on a selection of topics, highlighting both challenges and developments stemming from a region that is undergoing profound transformations.

From North Africa to the Middle East, the region is in search of a new reordering. Conflicts, crises of legitimacy, struggling economies, socio-economic discontent, ethno-sectarian divides, demographic pressures, irregular migration flows, human trafficking, and climate change continue to upset the region. Growing competition among external and regional powers, who seek to strengthen their influence, adds further volatility to the area. However, the increasing centrality of the Mediterranean in the global system is not only due to the spillovers of these security and socio-economic dynamics beyond the region. It also relies on a strategic position at the intersection of different geopolitical areas and trans-regional networks. The main question yet to address is how to turn the Mediterranean potential into an opportunity for stability and shared growth.

I wish to thank all the scholars and experts for their insightful contributions to this Report. Their perspectives are crucial for a deeper understanding of the future prospects of the region.

Paolo Magri

ISPI Executive Vice President and Director

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1

SHARED SECURITY

1

Algeria: no return to business as usual

Haizam Amirah Fernández

Senior Analyst for the Mediterranean and Arab World,

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SHARED SECURITY

It is uncommon for countries to call off their presidential elections. When it happens, it is normally a sign of trouble in the political system.

It is even more unusual that a country postpones those elections twice in a row, and more so if it is done in a two-month span. This has been the case in Algeria in 2019. What makes the Algerian situation unique is that the third attempt by the regime to hold the postponed elections met with widespread popular disapproval. It is also quite exceptional that a popular mobilization asking for deep political reforms goes on for almost an entire year in a peaceful and remarkably civil manner (at least at the time of writing). There is little doubt that something profound has changed in the relationship between the Algerian state and its citizens, but many questions still remain unanswered about the future of the country and the way out of the current impasse between the military-backed regime and the mobilized society.

WHY IN 2019?

A deep sense of humiliation spread among Algerians in February 2019 when the official announcement was made that president Abdelaziz Bouteflika was planning to stand for a fifth mandate in the presidential elections scheduled for 18 April. The ailing Bouteflika, whose public appearances have become scarcer over time, was viewed by many Algerians as merely the façade of a power structure deemed corrupt and a hindrance to the fulfillment of their aspirations. Insult was added to injury when *le pouvoir* (the term used by Algerians to refer to the opaque power networks running

the country) tried to extend the fourth mandate and maintain the *status quo* that had benefitted them for decades.

The emotional impact of political decisions explains much of what has happened in Algeria in 2019 and it is also an indication of what is needed to break the current stalemate. The *de facto* powers were confident that they could contain the social malaise by replicating old tricks that had worked before. This attitude, that many viewed as arrogant, did not take into account the limits of the Algerian people's patience, nor the energy that could be unleashed if the population came to realize that the feeling of humiliation was in fact widely shared. The traumatic memory of the civil war of the 1990s was no longer an impediment to widespread and peaceful popular expressions of discontent against the political regime.

The country's massive and continued popular mobilization (called *hirak*) took almost everyone by surprise. One could argue that the traumatic recent history of Algeria, added to the learning process that followed the 2011 Arab uprisings, has resulted in the high level of political maturity shown by the Algerian population. The peaceful and civilized nature of the demonstrations – avoiding divisive ideological slogans, highlighting the pride of the national sentiment and acknowledging that diversity among Algerians is a source of strength – has generated a sense of unity and has even had a healing effect after much suffering in the recent past. Almost a year of sharing the public space to demonstrate without violence has helped many Algerians to rediscover their own country and fellow citizens.

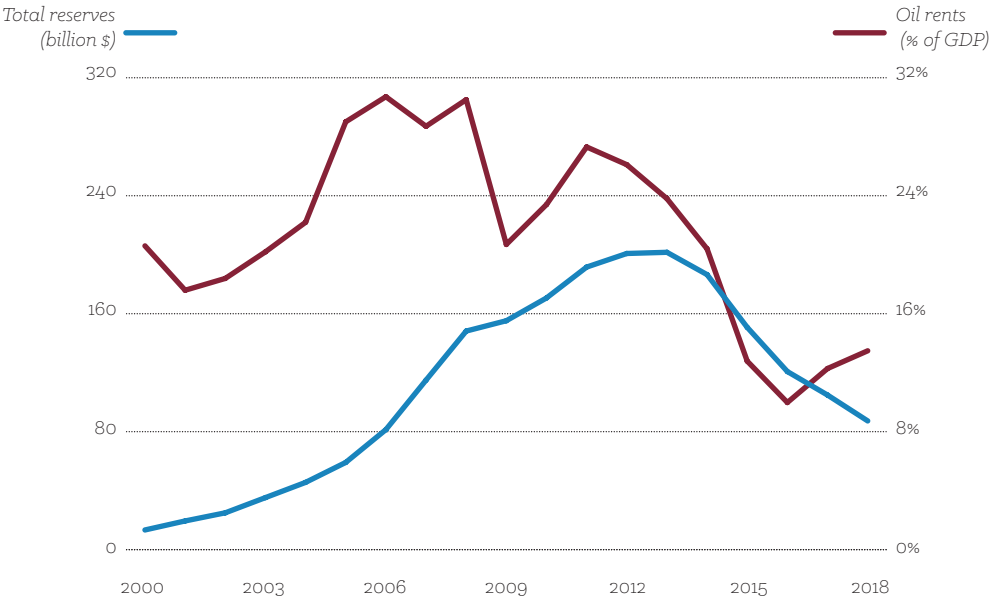


20

years Bouteflika has
been President of
Algeria

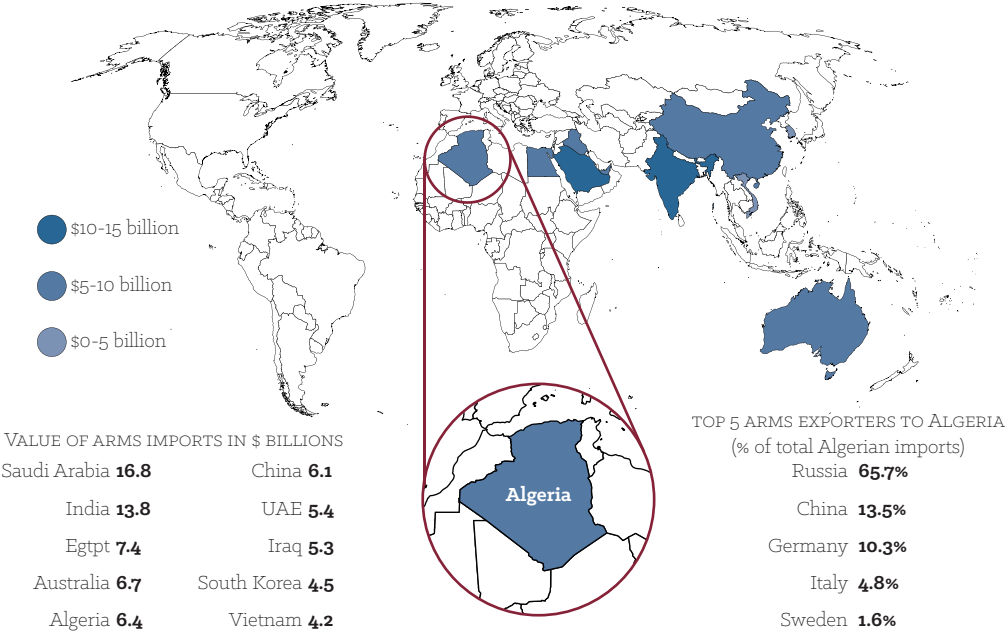
FALLING DOWN: THE ECONOMIC AND FINANCIAL CRISIS

Evolution of Algerian oil rents and total reserves



THE ARMY IS CRUCIAL

Top 10 countries in the world for imports of arms in 2014-18



Data: SIPRI; WB



\$10 billion

Algerian defence
budget in 2018

A CIVILIAN STATE OR A MILITARY STATE?

The Algerian People's National Army (PNA) has played a central role in the country's political life since its independence in 1962. That role has become much more evident following the outbreak of the *hirak* in February 2019. The military junta, headed by the army's chief of staff, General Ahmed Gaid Salah, forced Bouteflika to resign after twenty years of ruling the country as a result of the largest political mobilization since reaching independence. That move was followed by a wave of arrests among key figures of the political and business elites, mainly those associated with the Bouteflika "clan", starting with his influential brother Said, but also extending to members of the "opposition" parties and civil society activists.

The goal of the military since the beginning of the *hirak* was to force the holding of presidential elections as soon as possible in order to limit the chances of having to make concessions to the popular movement. Gaid Salah, who has been delivering one public speech after the other, has tried different tactics in order to weaken the *hirak* – like attacking the presence of Berber flags in the demonstrations – with little success. If anything, his threatening tone and lack of empathy have turned him into a highly unpopular political actor who does not seem fit to negotiate a transition or make credible offers to the population.

In the current Algerian political scenario, the military is sparing no effort to maintain its hold on power behind a façade of constitutionalism and far from credible electoral pluralism. For the military, preserving its material interests and ample prerogatives is crucial. This includes having exclusive control over the large defence budget (around \$10 billion in 2018, accounting for a quarter of total military spending in Africa, with Algeria being the fifth largest arms importer in the world).¹

It also means overseeing strategic affairs, playing a central role in politics and assuring legal immunity for past, present or future actions.

For many Algerians, the armed forces are the most trusted institution and the ultimate guarantor for safeguarding the national independence and sovereignty. However, as months of mas-

20 years of Bouteflika Timeline of the last Algerian presidential elections

1999
1st mandate



Elected with 73.7%

2004
2nd mandate



Elected with 85%

2009
3rd mandate



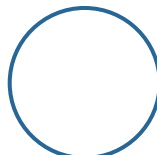
Elected with 90.2%

2014
4th mandate



Elected with 81.5%

2019?



expected on 12 December

Data: IPU



70%

dependence on
imports in Algeria

sive popular demonstrations have made clear, Algerians have expressed their desire to live in a “civilian state” (*dawla madaniya*) rather than in a state run by the military (*dawla askariya*), with independent institutions, credible electoral processes and legitimate rulers.

The political crisis is bound to continue in Algeria as long as the contradiction persists between the *de facto* military rule and the provisions of the 2016 Algerian Constitution. Articles 7 and 8 establish, among other things, that “The people are the source of all powers. National sovereignty belongs exclusively to the people. The constituent power belongs to the people. The people exercise their sovereignty through the institutions they establish. The people also exercise it through their elected representatives”. Algerians are no longer willing to accept the status quo and are saying they have had enough. Nothing captures that mood better than the banners used in demonstrations bearing the writing “The presidency is at the service of its excellency the people”.

AN UNSUSTAINABLE STALEMATE

After postponing the presidential elections that were scheduled first for 18 April and then for 4 July, the head of the military junta pushed to have them held before the end of the year. The chosen date was 12 December. Unless some unexpected event takes place before that date, there is very little chance that the elections alone – without a major overhaul of the political and electoral systems – will bring Algeria back to business as usual. The core of the ongoing deadlock between the military and the *hirak* is the manifest incompatibility between the replacement approach of the former and the transition approach of the latter. While the military junta prefers to select a new head of state without implementing any fundamental political changes, the heterogeneous

protest movement is calling for a democratic transition, with an effective separation of powers and leaders who are not associated with the old guard’s methods and abuses.

One problem that risks complicating the situation in Algeria even further is the looming economic crisis as a result of political paralysis. While the military is unable to reassure protesters about its willingness to reform the system and while the protesters are unable to appoint representatives and produce new leaders, Algeria’s economy is suffering the consequences of bad past policies, a lack of reforms and the volatility of oil revenues. Algeria’s foreign exchange reserves are shrinking (from close to \$200 billion in 2014 to \$65 billion in July 2019).

For a country that imports most of what it consumes (nearly 70%), this should be a major source of concern due to the social repercussions of a steady decline in reserves. Abundant subsidies and public projects also rely heavily on those reserves, which have been used to buy social peace. It is just a matter of time before political demands extend to the economy, which could lead to civil disobedience and repression if not addressed in a wise and timely manner.

It can be argued that the post-1962 system (the first Algerian republic) is showing signs of exhaustion and that the people want the establishment of a second republic with different rules of the game. The generational change is being felt in the streets of Algerian cities and in its cyberspace. However, it has yet to reach the upper echelons of the military establishment. It remains to be seen if a peaceful way out of the impasse that is threatening Algeria’s stability can come from younger generations of military officers who are willing to reduce the political exposure of the armed forces, while retaining their oversight of strategic issues.



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Algeria's economy is suffering the consequences of bad past policies, a lack of reforms and the volatility of oil revenues

2

Starting from resources: a model for conflict resolution in Libya

Arturo Varvelli

Senior Research Fellow, Co-head MENA Centre, ISPI

SHARED SECURITY

To this day, the ongoing armed conflict in Libya has claimed the life of more than one thousand Libyans and forced the displacement of 100,000 civilians. The two key stakeholders, Khalifa Haftar's Libyan National Army (LNA) and the Government of National Accord (GNA) led by Fayez al-Serraj, still believe that military victory is achievable. This hampers the possibility of a return to the negotiating table, which seems unlikely in the near future. Haftar's recent actions may be the sign of an imminent upsurge in violence and material damage, as demonstrated by the air strikes against civilian facilities and airports, as well as the growing involvement of external actors in both camps (in violation of the UN military embargo in force since 2011).

The United Nations cannot rely on a solid international community for its mediation effort: in the short-term it appears unlikely that the UN Special Envoy to Libya, Ghassan Salamé, will be able to broker a ceasefire that would bring the stakeholders to the negotiation table. At the same time, it seems just as unlikely that a military confrontation could provide a solution to Libya's problems. The initially relentless LNA military offensive against Tripoli did not achieve the desired result of a rapid conquest of the Libyan capital and will not bear fruit in the near future. In June, the militias registered some success at Gharyan and Tarhouna, previously controlled by Haftar's forces. The General's military defeat redefined the balance of power between the parties involved: while Serraj's GNA has

been re-vitalized by Haftar's attack, the latter has lost most of the consensus he had earned, including in Tripoli. Moreover, the South remains a tribal battleground, while relevant military and political forces like the militias from Misrata and Zintan (that contributed significantly to Haftar's defeat) are eager to expand the confrontation.

THE EXTERNAL FRONT: ONE CRISIS, MANY STAKEHOLDERS

The conflict currently appears to be playing out on both the regional and the international level. Recent evidence shows a growing involvement of regional actors, to the extent that the conflict is beginning to resemble a proxy war between the players who are brazenly supplying the two factions with sophisticated weaponry and mercenaries.¹ The motivations behind this support are manifold, ranging from a legitimate yearning for security to pursuing geopolitical ambitions, in addition to an ideological clash over the Muslim Brotherhood.²

Meanwhile, non-regional international actors appear to be reassessing their positions, particularly in light of Haftar's military adventurism. The appointment of Richard Norland as U.S. Ambassador to Libya and his support for a ceasefire point towards greater convergence between the U.S. position and the course set out by the United Nations. The Russians, who in the recent past supported Haftar politically and almost certainly militarily as well, also seem to be taking some distance themselves. The Russian Foreign Minister

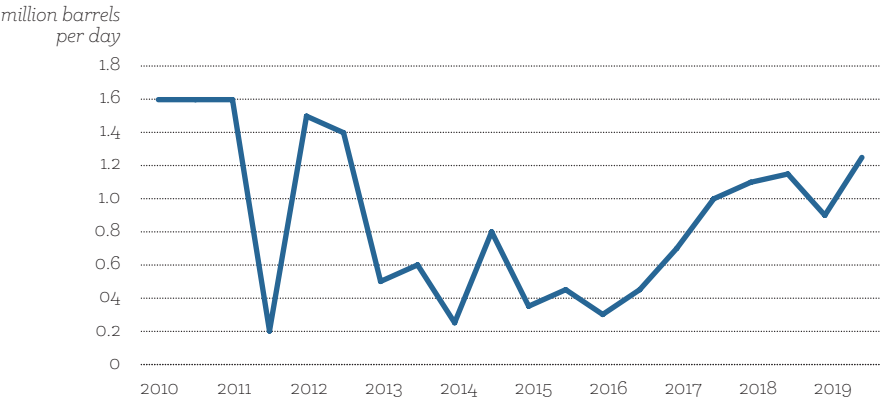


100,000

civilians forcibly
displaced in Libya

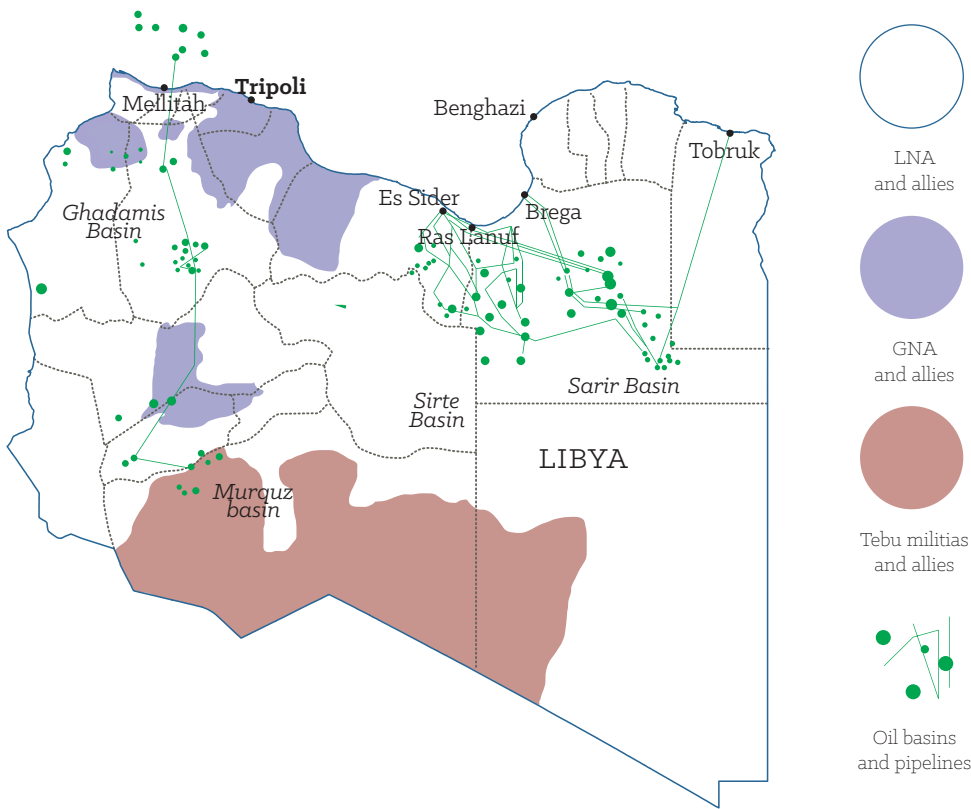
THE GREAT POTENTIAL

Oil production in Libya



WHO CONTROLS OIL?

Situation on the ground in Libya and major oil fields and infrastructures



Data: EIA; World Energy Atlas; Stratfor



30%

of Libyans live in
Cyrenaica

Sergey Lavrov recently declared that Russia is not supporting Haftar, but underlined that the Kremlin is talking to all parties in the conflict and will continue to do so.³ France too, after actively contributing to the recognition of Haftar's international political role, seems now to be backing away from its previous stance. Since the Palermo conference last November, Italy's support progressively shifted away from Serraj and closer to Haftar, but wavered during General's offensive in April and until his attempt to take Tripoli. Following these developments, Italy revived its ties to the GNA and Misrata while remaining equidistant from the two sides. When Serraj travelled to Rome in September to meet with the Italian Prime Minister Giuseppe Conte, it was precisely because he aimed to obtain clearer and more assertive support from Italy.⁴

LET LIBYANS TALK ABOUT RESOURCES: ONE STEP TOWARDS STABILITY?

If the international community wishes to revive hopes of negotiation, it will have to do so under different premises. In the medium and long term, the redistribution of revenues from energy sources (oil and gas) could facilitate a rapprochement between the conflicting parties at local level, while reducing tensions among the external (regional and international) powers that support them.

However, the deep split currently witnessed in Libya is not unique in the Middle East or among rentier state economies. In spite of notable differences, the Kurdish-Iraqi model may provide a viable option to overcome the Libyan crisis. After the 2005 Constitution officially sanctioned the autonomy of Iraqi Kurdistan (Article 140)⁵ and granted significant economic and political freedom from the federal government, one of the main issues concerned regulating power relations between the two sides with regard to the exploitation of natural resources, especially oil. There followed the "Oil and Gas Law of the Kurdistan Region" (2007), that provided for extraction activities to be overseen by the regional government in collaboration with the federal government and for all revenues obtained from petroleum extracted in Iraqi

Kurdistan to be deposited in a general petroleum revenue fund for Iraq (Article 18). Part of the revenue is then allocated to the regional government by a national joint commission,⁶ under the supervision of an international financial institution (Article 19).⁷ The agreement was later amended in light of mounting tension with the central government. Nevertheless, in spite of difficulties and disputes, this revenue-sharing agreement seems to have brought some degree of stability to the country.⁸

If the same framework were to be applied to Libya, a percentage of oil revenue would need to be allocated to Cyrenaica. In the Iraqi model, a share of the federal budget proportional to the percentage of the Kurdish population is earmarked each year for the Kurdish autonomous government. Starting in 2003, the Erbil quota remained – more or less continuously – around 17%, but starting in 2017 it dropped to 13%, reflecting the decrease in Iraq's Kurdish population. If Libya were to earmark a fixed share of oil revenue for the Benghazi branch of the Central Bank, for example around 30% based on the share of the Libyan population living in Cyrenaica, a long-lasting ceasefire could be agreed upon with eastern Libyan constituencies, along with a withdrawal of the LNA to within the borders of Cyrenaica or those prior to the military attack of 4 April, and perhaps even a future replacement of Haftar's leadership. As mentioned above, many tribes in Cyrenaica do not view favourably a continuation of a conflict that sees many of their youths fighting for the LNA for an increasingly unlikely conquest of the capital.

Such a system would allow the LNOC and the Central Bank in Tripoli to maintain their central role and their monopoly on resource exploitation by collecting revenue from fossil fuel exports and turning some of it over to Cyrenaica, which would then achieve a *de facto* autonomy in managing its accounts, maintain some of its own economic institutions, and potentially establish regional political ones. Should the agreement be violated by the LNA, the authorities in Tripoli could suspend the provision of funds to Benghazi.



48,400

million barrels: total
proven reserves of oil
in Libya (1st in Africa)

CONCLUSION

The adoption of an arrangement based on the Kurdish-Iraqi model in Libya would have positive repercussions on all three levels of conflict - local, regional, and international. It would uphold the interests of both Cyrenai-ca constituencies and regional actors, on the condition that the latter withdraw their military support to Haftar, especially if the most

influential international actors clearly express their opposition to his gambit for hegemony by explicitly condemning the military escalation he pursued. This solution would not lead to a division of the country, which for all intents and purposes already exists, but would instead be the best guarantee to preserve the unity of Libya and to provide a favourable outlook for its stabilization.



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*The adoption of
an arrangement based
on the Kurdish-Iraqi
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have positive
repercussions on all
three levels of conflict
- local, regional, and
international*

3

The quest for a regional security architecture in the Gulf

Annalisa Perteghella
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SHARED SECURITY

The debate surrounding the call for a security architecture in the Gulf is a recurrent one; and yet, it is extremely timely. As the frequent spikes of escalation in the Gulf region in 2019 have shown, security is a precarious asset, and as such it requires constant consideration and protection.

THE STRATEGIC RELEVANCE OF THE GULF: A FRAMEWORK

The Gulf is one of the more strategic regions in the world. First of all, its favourable location has made it a flourishing channel of trade and communication. The Strait of Hormuz, in particular, is considered a strategic chokepoint for the oil and non-oil seaborne trade of all the Gulf countries. It connects the Gulf with the Indian Ocean, i.e., the world's largest known site of oil reserves and exports to the world's highest consumption regions, (Asia, Western Europe, and the USA). Moreover, the string of ports lying across the coasts of Saudi Arabia (Dammam), the UAE (Jebel Ali), Oman (Duqm and Salalah), and Iran (Bushehr, Bandar Abbas, Chabahar), represent key logistic hubs with a global reach, and as such are relevant to the interests of global trade powers such as China.

This economic relevance, together with the complex political characteristics of the region, have made the Persian Gulf a hub for regional tensions, and its security and stability are constantly under threat – whether from external threats or challenges (e.g. terrorist groups) or from national (local?) crises, or latent conflicts between individual countries in the region (e.g. the Quartet vs Qatar, Iran vs Saudi Arabia). This

chronic vulnerability has direct and relevant consequences on local economic and social development.

The deterioration of the security environment we have been witnessing since the second half of 2019 is a direct result of the rise in confrontation between the United States and Iran following the US withdrawal from the JCPOA, of the subsequent European failure to abide by the deal and ensure its correct implementation, and of the resulting end of Iran's “strategic patience”. These dynamics strongly reverberate on security in the Gulf, as Tehran has (presumably) resorted to piracy and targeted attacks against oil tankers as well as key oil infrastructures in order to restore deterrence and gain political leverage vis-à-vis the United States. So, where do we go from here? What does the current crisis teach us, and how do we avoid future escalations?

BEYOND ESCALATION: THE FLAWS OF THE CURRENT SECURITY ARCHITECTURE

The answer lies in the concept of a regional security architecture. The 2019 crisis in the Gulf is not the cause but the consequence of at least two flaws: first, the current security system relies on objectives and guarantees of an external power (the USA) and it is designed to contain and exclude one of the region's most important states, i.e. Iran; its second and more important weakness is that it relies on a concept of security as a zero-sum calculation, leading all the states in the region to try to maximize their own security to the detriment of the others.

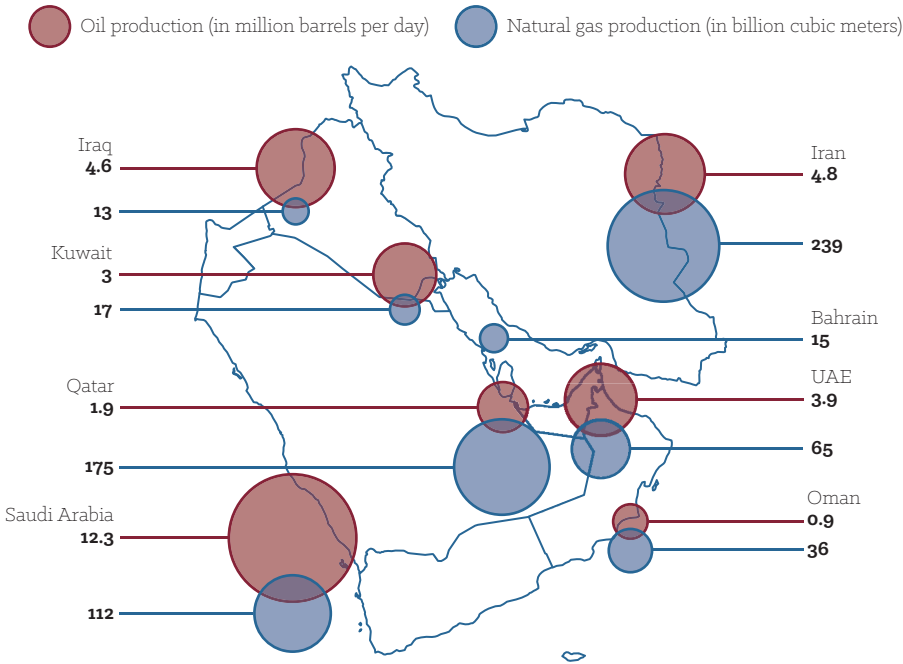
With regard to the first flaw, excluding Iran



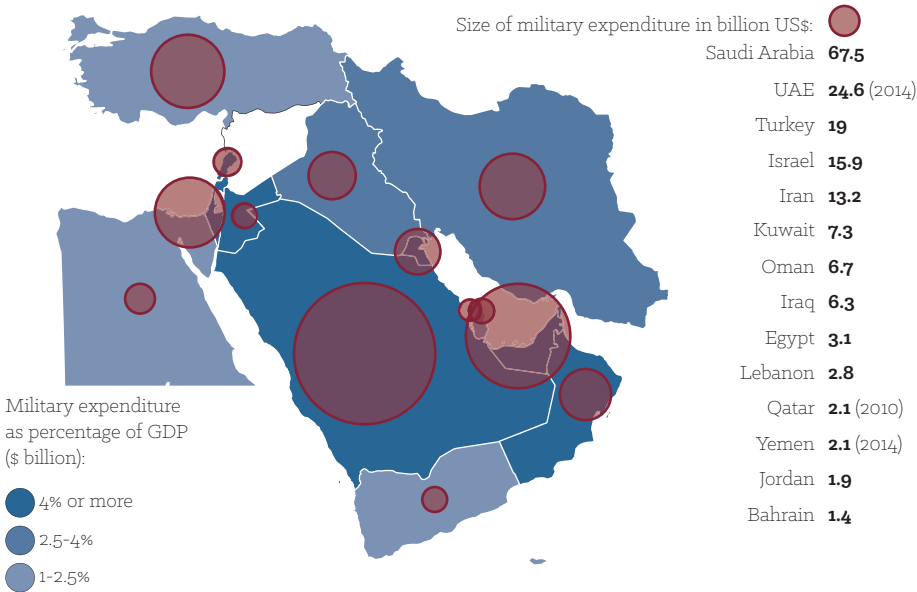
12%

of all arms imports in the world between 2014 and 2018 concern Saudi Arabia, the world's leading arms importer

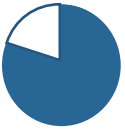
THE 'SOFT' COMPETITION: ENERGY
Oil and natural gas production of the Gulf countries (2018)



THE 'HARD' COMPETITION: MILITARY
Military expenditures in the Middle East (2018)



Data: BP; SIPRI



16.2%

of global natural gas
resources
are in Iran

from regional security arrangements (as the US withdrawal from the JCPOA and the “*maximum pressure*” policy aim to do) has only made Iran all the more determined to safeguard its security and economic interests in the region, and this stance resulted in a regional loss of security and a rise in instability. The US and its allies’ attempt at isolating Iran has been the policy since the aftermath of the Iranian revolution. Until 2003, Iraq was also on the US blacklist, and Saddam Hussein’s fate resonated as a powerful example in Tehran of what being on the “*axis of evil*” could mean. Iran’s rise in the region in the aftermath of Saddam Hussein’s being deposed in 2003 came as a result of the Iranian quest for maximizing its security in what was (is?) perceived as a hostile political environment. It comes as no surprise that the rise of Iranian ended up scaring its regional rivals, and thus triggering a quest for maximizing their own security against Iran, as the trends of the last 15 years in regional military spending show.

And here we come to the second flaw. After 2011 we witnessed a further deterioration of the security environment, resulting in today’s contrasting threat perceptions and in the lack of mutual confidence. The reconfiguration of political order experienced in many countries of the region, as a result of Arab Spring protests or lawful political succession, together with the rise of political Islam, with the spread of proxy wars in weak and fragile states, and in combination with the nuclear deal paving the way for Iran’s reintegration into the international community, all combined to ignite a massive securitization of the regional states’ foreign policy. Specifically, through the resultant attempt to maximize national security vis-à-vis the other regional actors, each country fuelled a steady drop in regional security. What we see today is indeed a reiteration of *zero-sum* calculations contributing in a feedback loop to the long-existing security dilemma, i.e. “the vicious cycle in which security-producing efforts by one state result in a sense of insecurity among another state, which then embarks on its own security-producing measures, in turn prompting the first actor to take additional steps to enhance its security”.¹

NEW ACTORS, SAME OLD STORY: THE DICEY ROLE OF RUSSIA AND CHINA

The picture grows even more complex if we take into consideration the expanding role of external powers such as Russia and China. These emerging actors are in fact becoming more and more interested in security and stability in the region, and are employing various strategies to try to maximize their own interests: increasing their political stature in the area (as in the case of Russia) and/or safeguarding and enhancing the trade routes (as in the case of China).

As their interest in the region grows, they continue to develop their own propositions for regional security. This is the case of the “*Russia’s security concept for the Gulf area*”, published by the Russian MoFA in July 2019² and subsequently endorsed by China.³ The proposal widely reflects the Russian worldview on international affairs: the core of the proposition lies in the notions of adherence to international law (the UN Charter and the UNSC resolutions), of multilateralism (i.e. having a voice, a clear rebuttal of US unilateralism) and of respect for sovereignty and territorial integrity within the constitutional framework and without external interference. Moscow’s long-term objective, as per the concept, is the creation of a *Security and Cooperation Organization in the Persian Gulf* (PGSCO), that would include all the countries in the region as well as external powers such as Russia, China, the USA, the EU, India, and other stakeholders. The main concern of this organization would be “*countering terrorism and extremism*” and “*ensuring sustainable political settlements in Yemen, Syria, and Iraq*”, then proceeding to wider-ranging efforts such as “*transforming the region into a zone free of weapons of mass destruction tackling transnational terrorism, illicit trafficking in arms and illegal migration, drug trafficking, and organized crime*”.

Many of these points can also be seen in the foundations of the Iranian idea of collective security in the Gulf, which periodically resurfaces in international fora – such as in the 2019’s call for the *Hormuz Peace Endeavour* launched by President Rouhani at the United Nations General Assembly in New York.⁴ The



\$8.1 billion

the amount of arm
sales to Saudi Arabia,
UAE and Jordan
approved by the US
in July 2019

Iranian view for the region can be reduced to a few principles: minimize the US role in the region; steer any organization away from too close of a Western alliance and minimize the possibility that it will be configured as an alliance against Iran; emphasize the littoral states as the “*natural*” interlocutors and members; and, finally, build up an effective leverage against Saudi Arabia.

Even though the Russian proposal can be met favourably by Iran and – to some extent – by other Gulf countries, its long-term sustainability is hard to prove. Moscow hopes to exploit the rising doubts in the Gulf about the reliability of the USA as the sole regional security guarantor, which would be a direct consequence of US energy independence. China, too, is interested in the region’s stability as it enters into significant partnerships with regional countries in order to secure oil imports and trade deals. For example, in July 2018 the UAE and Beijing elevated their relationship to a “*strategic partnership*”.⁵

However, this convergence of interests between Moscow and Beijing could soon turn into significant divergence as the fulfilment of one country’s objectives comes as a threat to the other’s interests. For example, if the Chinese role in the area should start being perceived by Moscow as a direct threat to its interests of self-determination and security along its peripheries, or if China (which is the world’s top oil importer) should decide not to

rely on Russia (the world’s leading oil supplier) for the arrangements to secure them.⁶

INCLUSIVE AND ENDOGENOUS: WHAT THE NEW SOLUTIONS FOR SECURITY SHOULD LOOK LIKE

So, in conclusion, a new regional security architecture is very much needed. Even though the reports of US withdrawal from the region are highly exaggerated, it is undeniable that the regional countries can no longer rely on Washington as their sole external security guarantor. At the same time, a new unconditional reliance on the Russian-Chinese embrace may prove unsustainable over the medium-long term. As a result, any new security system must originate in the region, must be inclusive (that is, not designed to isolate and contain individual countries in the region) and must aim at reducing tensions, managing crises, preventing conflict, and improving predictability. This potential new architecture can be initially devised as a platform for dialogue, translating only at a later stage into a more stable security regime involving ad hoc created institutions. The overall and main objective must be to defuse the security dilemma so as to eliminate the conditions enabling conflict. If we consider the chaos that emanated from the region over the last months, we might well find this proposal naïve. But after all, it is from chaos that opportunity springs, and solutions often hide in plain sight.



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any new security system must originate in the region, must be inclusive, and must aim at reducing tensions, managing crises, preventing conflict, and improving predictability

4

Breaking up critical infrastructure: cyber attacks in the MENA region

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SHARED SECURITY

**The ISPI Centre on Cybersecurity is promoted in cooperation with Leonardo*

Cyberspace has become one of the most dangerous and unstable domains in the world. According to the

World Economic Forum, cyber attacks are among the top 10 risks that our world is facing today (ranking fifth for likelihood and seventh for impact). In 2017, the average number of breached records by country was 24,089.² With the ongoing development in quantum computing and Artificial Intelligence, the risks that these attacks will increase both in terms of range and penetration capabilities are very high. While there has not been a “cyber Pearl Harbor” yet, the threats that these attacks pose to our societies and economies are real: “cyber attacks can be more dangerous to the stability of democracies and economies than guns and tanks” affirmed the EU Commission President Jean-Claude Juncker in 2017.³ One of the drivers of growing unrest in cyberspace is a surge of state-sponsored cyber attacks, which are often aimed at spying on an adversary or disrupting their capabilities. As underlined in ISPI’s latest Cybersecurity Centre Report,⁴ cyberspace is increasingly becoming an arena in which national interests collide, thus mirroring international confrontations. However, cyberspace is also the “domain of ambiguity” as it is almost impossible to establish actionable attribution for a cyber-attack. In order to understand the motivation and the scope of a cyber-incident, it is necessary to consider the multiple layers - strategic, political and operational - in which it occurs.⁵ Each cyber-campaign must therefore be contextualized in its

geopolitical setting to be properly analysed and evaluated.

THE RELEVANCE OF DIGITALIZATION IN THE MENA REGION

There are several reasons why countries in the Middle East and North Africa (MENA) should regard cybersecurity as a dangerous threat to their political and social stability. The MENA region has one of the fastest-growing internet penetration rates in the world: from 30% in 2014 to more than double (67%) in only five years. Some countries have already begun to implement plans for the digitalization of their economies and societies, thus becoming more and more dependent on ICT security. The penetration rate is expected to grow ever more, considering that the MENA region has a very young population - 60% of the population is under 30 - that is becoming more and more literate, and thus more technologically savvy than older generations. It is no surprise, therefore, that MENA countries are particularly concerned about the growing threats coming from cyberspace. Some have already suffered disruptive cyber attacks - like Israel, Iran, Qatar, and Bahrain - with relevant consequences in the real world. For these reasons cybersecurity and cyber-resilience have become major priorities for many governments in the region.

EXAMPLES OF CYBER ATTACKS ACROSS THE REGION: STUXNET AND SHAMOON

Two major malicious cyber campaigns, among the most disruptive attacks against



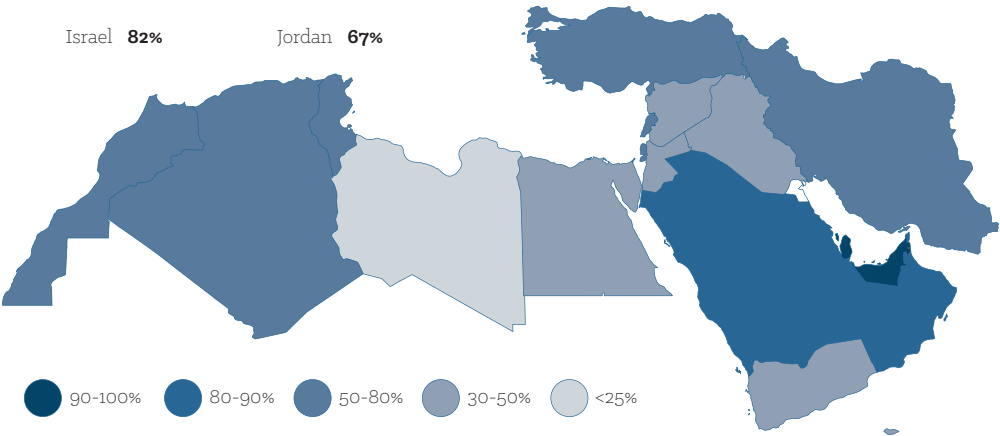
67%

internet penetration
in MENA countries

THE INTERNAL DIFFERENCES

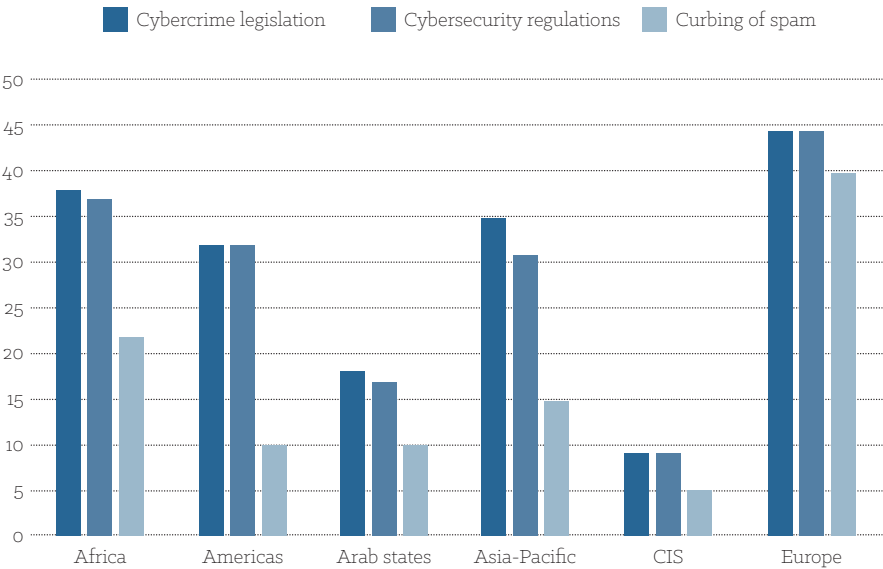
Internet users on total population (2018)

Qatar 100%	Oman 80%	Morocco 65%	Algeria 60%	Syria 34%
Bahrain 99%	Lebanon 78%	Tunisia 64%	Iraq 49%	Yemen 27%
UAE 98%	Turkey 72%	Palestine 64%	Egypt 47%	Libya 22%
Saudi Arabia 93%	Iran 70%			
Israel 82%	Jordan 67%			



LACK OF SECURITY IN THE MENA COUNTRIES?

Commitment to cybersecurity-related indicators per region



Data: World Bank; Global cybersecurity index

**+123%**

the rise of internet
penetration in
MENA countries in
2014-2019

critical infrastructure in the world to date, have hit the local industrial sector in the MENA region, whose implications can be analysed to reflect on the seriousness of regional and global repercussions.

The first is the so-called “Stuxnet attack”, a cyber-operation that came to light in June 2010 directed against an Iranian nuclear facility in Natanz. Stuxnet is the name of a cyber-worm crafted to penetrate the IT system of the targeted nuclear power plant and aimed at slowing down the enrichment process of the uranium. The nuclear facility was air-gapped, that is to say not connected to the public internet, thus the attack required the use of alternative devices – such as USB sticks – to be successful. Once inside the nuclear plant and activated, the worm spread into the system and changed “the output frequencies and thus the speed of the motors for short intervals over periods of months”.⁶ The nuclear technicians took some time to realize that the nuclear plant was being sabotaged through a cyber attack. Overall, it is reported that Iran decommissioned around 20% of its centrifuges in the Natanz plant during the attack.⁷ Moreover, the worm did not stop at Natanz; it continued to spread and it has apparently infected over 60,000 computers around the world (among the countries affected were India, Indonesia, China, Azerbaijan, South Korea, Malaysia, United States, United Kingdom, Australia, Finland, and Germany). However, the impact of a cyber attack goes beyond its “technical outreach”. Indeed, Stuxnet was a wake-up call in the cyber domain because, until that point, it was widely believed that industrial systems were immune to cyber attacks.⁸ As for the others offensive cyber campaigns, it is difficult, if not impossible, to determine the identity of the instigators and the actual perpetrators. Yet, thanks to a journalistic investigation conducted by New York Times reporter David Sanger, it would appear that it was the United States and Israel who initiated a major cyber attack program directed against the Iranian nuclear program.⁹ According to this analysis, the aim of the operation was twofold: on the one hand it aimed to weaken Iran’s nuclear capability

(as mere sanctions were not enough), while on the other, employing alternative solutions to a military airstrike prevented the escalation of violence in the region. Regardless of its actual consequences on the Iranian nuclear programme, the attack has bolstered Iran’s defensive and offensive cyber capabilities.¹⁰

Another interesting example of cyber attack in the region was directed against the Saudi Arabian Oil Company (Aramco) in the summer of 2012, two years after Stuxnet. Aramco is one of the largest oil companies in the world and one of the cornerstones of the global economy producing 10 million barrels a day.¹¹ On 15 August 2012, Aramco’s IT system was hit by a new type of destructive malware (dubbed Shamoon) that corrupted their files and spread across its network, infecting around 30,000 personal computers. It then extended to other firms’ networks, including Qatar Petroleum and ExxonMobil. Unlike the Stuxnet worm, Shamoon was not designed to target specific work stations in Aramco’s system and propagated randomly into the network¹² by first taking control of a computer connected to the internet and using it as a proxy to penetrate the system. The malware, that did not cause any physical damage to the infrastructure (even if it was intended to),¹³ resulted in the malfunctioning of the workstations and thus impacted production and business processes. It took Aramco around two weeks to return to business as usual. However, in December 2018 the malware re-emerged¹⁴ in a new wave of attacks against Saudi Arabia and the United Arab Emirates (UAE). Again, as in the Stuxnet case, it was impossible to ascertain responsibility for the attack. A group of hackers called “The Cutting Sword of Justice” claimed ownership of the operation, and yet doubts remain about the real motivations and the actual perpetrators,¹⁵ particularly because political experts appear more inclined to attribute the attack to Iran as retaliation for the Stuxnet attacks.¹⁶

WHAT CAN BE DONE?

As briefly outlined, cyberspace is a domain where it is possible to conduct operations aimed at disrupting and sabotaging the capa-

**60%**

of the population in
MENA is under 30
years

bilities of any adversary. As such, cyberspace provides the ideal environment to pursue strategic goals in light of two important considerations: first, it allows for a high level of anonymity and second, cyber attacks are still considered below the threshold of the “use of force” as defined by international law.¹⁷ These characteristics spark distrust among states when it comes to cyber affairs. The international community has been addressing the growing unrest in cyberspace with limited success. As a matter of fact, the views of international actors diverge significantly with reference to state behaviour and responsibilities in cyberspace. One possible way forward would be regional agreements among like-minded countries, which contribute to developing good practices and success stories that are key to build confidence and trust between states. In this sense, multilateral initia-

tives such as the Arab Convention on Combating Information Technology Offences¹⁸ or bilateral cooperation agreements like the Tunisian-French Agreement on Cybersecurity¹⁹ and the Memorandum of Understanding between India and the UAE are positive steps that must be supported and encouraged as a way to enhance mutual trust and transparency. Moreover, as a general policy recommendation, it could be important to seek greater involvement of MENA countries at UN level where two working groups (Group of Governmental Experts and the Open-Ended Working Group) are currently engaged in the definition of common approaches and responsible state behaviour in cyberspace. Nevertheless, until geopolitical tensions and conflicts are settled and peace reigns across the region, cyberspace will remain the perfect environment to harm and attack adversaries.



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One possible way forward would be regional agreements among like-minded countries, which would contribute to developing good practices and success stories

5

Winning hearts and minds in cyberspace

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SHARED SECURITY

The proliferation of information warfare in cyberspace has contributed over the years to increased instability.

Information warfare has a few distinct characteristics which make it a tool that many actors seek to use: even with limited resources, significant damage can be done, including changing public perceptions, damaging reputations or misleading audiences. Furthermore, information campaigns can reach a large amount of people through different online platforms, maximizing their effect. Identifying the perpetrator who is often complicated, and because of the lack of laws and tools to regulate behaviour in cyberspace, malicious actors can resort to a variety of tactics and subterfuges in this sphere.

INFORMATION WARFARE IN THE MIDDLE EAST: REGIONAL TRENDS

Conflicts and rivalries in the Middle East have extended also to the digital space, creating a new battlefield dominated by operations in cyberspace.¹ This has resulted in more and more states investing in developing cyber capabilities to support their ambitions. In the volatile security and political environment of the region, almost any political conflict plays out also through information warfare which is used to win hearts and minds and to shift public opinion in one's favour to gain a strategic advantage. Also in light of the fact that internet usage and social media penetration in the region are well above the global average, the Middle East has become an area very prone to information operations.

There are a few trends that dominate the information warfare picture in the Middle East:

- **Information warfare operations are used to escalate tensions as part of more encompassing strategies in regional conflicts and rivalries.** The predominant tools consist, on the one hand, in obtaining sensitive data with the aim of leaking or creating false information and, on the other, in social media campaigns that rely on fake accounts to support/counter different narratives, manipulate public opinion and spread false information.

The Gulf region has long been a playground for information operations especially with reference to conflicts and rivalries between Saudi Arabia, UAE and Qatar, Saudi Arabia and Iran etc. For example, in 2017, the Qatari news agency website was hacked to produce fake messages allegedly posted by Qatari leaders that criticized the US administration, showing support for Hamas and the Muslim Brotherhood and praising Iran.² This fuelled regional tensions between GCC countries and Qatar over Qatari foreign policy and led to the blockade and isolation of Qatar. Along the same lines, in September 2019 Twitter announced that it had suspended a handful of accounts based in the United Arab Emirates for being used in information operations against Qatar and Iran.³

Iran is another relevant cyber player. A complex, interlinked maze of news sites and social media accounts linked to Iran has given Teheran a vast outreach, with messages targeting audiences living in regional com-

THE ARAB WORLD AND SOCIAL MEDIA



In the Arab world
there are
164 million
active monthly users
on Facebook



Egypt is the biggest
national market
for Facebook
in the region, with
24 million daily users



Saudi Arabia
has the highest annual
growth of social media
users in the world: **32%**
between 2017 and 2018



There are
12 million
daily users
of Snapchat
in the GCC



2/3 of Arab youth
say they look first to Facebook
and Twitter for news



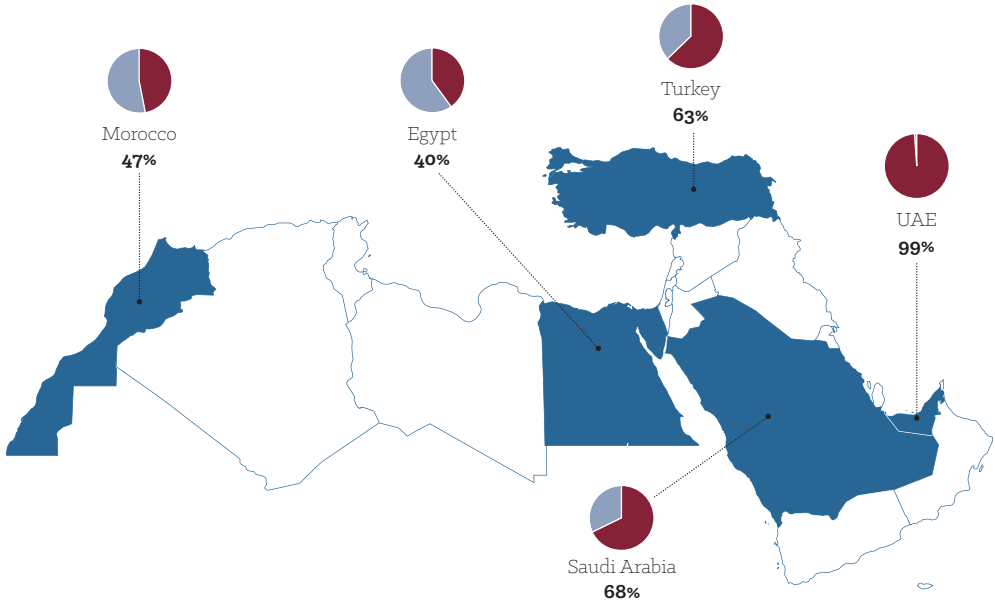
49% of young Arabs
say they get their news
on Facebook daily



The number of YouTube channels
in the MENA area has risen by
160% in the past three years

WHERE SOCIAL MEDIA ARE WIDESPREAD

First MENA countries for social media penetration (% of internet users)



Data: State of Social Media Middle East 2018, University of Oregon



66%

of Arab young
people get news from
Facebook
and Twitter

peting countries, but also in the US.⁴ Overall, this interlinked maze aims to exploit societal issues, coupled with narratives that offer support to Iran's actions and that condemn those of other countries.⁵ Technology and cybersecurity companies have identified networks of accounts originating from Iran on several occasions. The Atlantic Council's Digital Forensic Research Lab offers a comprehensive overview of these information operations connected to Iran in the past years.⁶ These accounts are used to promote messages that support Iran's foreign policy (for instance support for the Palestinian cause in the Arab-Israeli conflict, anti-Western propaganda targeted against Saudi Arabia) and aim to target audiences in other countries in the region but also in the US, with messages available in different languages.

External actors also use information warfare to pursue their goals in the Middle East. Russia, for instance, has been very active vis-à-vis the Syrian conflict, supporting a narrative that outlined two future scenarios (the current status quo with Assad in power or Jihadists taking over) and also aiming to reduce international support for Assad's departure. This is part of the complex strategy Russia has adopted in the Syrian crisis.

• **Operations that aim to steal data and then use the sensitive information obtained. These can be undertaken even by actors with known limited capabilities and reduced financial power.**

Operation Dark Caracal used malicious software to gain access to mobile electronic devices, steal data (contacts, documents etc.) and exert surveillance. Traced to a building belonging to Lebanese security services, the operation run from 2012 till 2018 and has targeted government officials, journalists, activists, military personnel etc. This shows that even actors with known limited cyber capabilities can design and implement operations of this kind. Technological innovations enable them to gather personal data that can be used for a number of purposes. A similar type of operation in place since 2014, undertaken by a group linked to Iran, aimed at stealing personal information of individuals based in the

Gulf Region, Turkey, Egypt and the US,⁷ with a main focus on telecommunications and the travel industry. The technology company Symantec has identified another group called Leafminer⁸ that has targeted government institutions and a wide range of private entities from different sectors across the Middle East since 2017. The group steals data – including emails, databases and files – and has been known to operate in Saudi Arabia, UAE, Qatar, Egypt, Israel etc. Although there are indications of where these types of operations are based, it is difficult to accurately determine who is behind them and whether or not they are state-sponsored.

Information warfare is also used to influence elections by hacking into the email accounts of high level politicians and then releasing damaging information to the public (as was the case with the 2016 US presidential election). In the Middle East, this has happened in Lebanon where groups linked to Iran targeted the Lebanese political leadership to erode popular support⁹ in view of the 2018 election.¹⁰

• **A significant use of information warfare by non-state actors and terrorist organizations that aim to gain more funding, recruits and to promote their operations.**

Non-state actors and especially terrorist organizations use information warfare to gain a tactical advantage in hybrid warfare campaigns. While possibly possessing low conventional capabilities, these groups resort to information warfare campaigns to create online narratives that promote the idea that they possess significant more military resources than they actually do. For example, ISIS has used this tactic extensively. As noted by Anne Slaughter, ISIS "has created a digital battle space in which an online narrative of victory can translate into success on the ground".¹¹ ISIS also used a wide range of platforms - online images, magazines, videos in several languages – to reach out to a broad audience to promote their manifesto, attract new recruits and radicalize them.¹² While ISIS did not possess any significant cyber capabilities, it used cyberspace and more specifically social media extensively to spread their messages. Given



24 million

daily Facebook
users
in Egypt

the low amount of investment required and their effectiveness, these tactics can be easily adopted and replicated by extremist groups all over the world.

RECOMMENDATIONS: TACKLING/ COUNTERING INFORMATION WARFARE

- Governments should invest more in protecting critical data resources. In many cases, Middle Eastern governments invest in cyber capabilities but leave gaps in cyber defence. Better protection systems can prevent the theft and leakage of sensitive information and can also function as early warning mechanisms. Governments should also invest more in the cyber defence of vulnerable public institutions, including universities, research centres, news agencies. At the same time, investing in R&D rather than buying off-the-shelf products increases in-house expertise and helps states develop their own systems/products.

- Greater investments should be made in educational programmes and awareness campaigns to increase the public's understanding of cyber threats. NGOs and civil society organizations could play an important role in this regard. Countering disinformation requires a combination of cyber/technological capabilities and educational outreach aimed at informing society. The goal is to educate people to be more critical and better informed to reduce the vulnerability gap and exposure to influence campaigns. At the same time, basic knowledge of digital protection re-

duces the risk of having private information stolen. Developing a comprehensive strategy and action plan in this regard is essential, followed by implementation on the medium to long term.

- Multinational tech companies play an important role in tackling information warfare; social media platforms should cooperate more with local stakeholders such as civil society and the media to better understand local and regional dynamics. A mechanism to share best practices and experiences could be put in place when addressing these issues. In the current regional scenario, it may indeed be difficult to establish this nexus of cooperation, but the effort could still yield important results.

- Identifying and exposing information warfare campaigns brings the issue to the public's attention. Furthermore, investing in research to analyse how disinformation spreads would contribute to better understanding the phenomenon and how different actors can fight against it.

The Middle East has been the stage of a variety of information warfare campaigns undertaken in cyberspace and these types of attacks will most likely further proliferate as the actors continue to enhance their cyber capabilities. Since these tactics and their implications are not confined to the region but extend worldwide, countering this threat requires long-term strategies and strong partnerships between states, government institutions, private sector companies and civil society.



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Greater investments should be made in educational programmes and awareness campaigns to increase the public's understanding of cyber threats

6

Yemen and the governance of hybrid security orders

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SHARED SECURITY

In the post-2011 Arab world, the presence of hybrid security actors in collapsing states has turned into the new normal,

also becoming a synonym for anarchy and chaos. Policy makers have usually adopted mainstream Disarmament, Demobilization and Reintegration (DDR) approaches to cope with the “militias problem”: as a matter of fact, these policy paradigms¹ have proven to be, much too often, ineffective and even counterproductive, since they started from the assumption that hybridity cannot be managed. But hybrid security orders can be governed too. In such peculiar settings, stabilization-oriented governance means supporting the local agency of these forces limiting the *entropic tendency* present not only in the Middle Eastern system,² but also within fractured Arab states. Therefore, supporting local agency implies breaking up or, more realistically, slackening dependency ties between local military groups and foreign patrons, in times of external penetration and transnational patronage. This localization process can succeed only if accompanied by the selective inclusion of hybrid forces – which is a step beyond formal institutionalization – into local mechanisms of revenue redistribution, development and security, as part of a federal state-(re)building process aimed to reconnect detached *power nodes* on the same territory. In this perspective, Yemen is an interesting case study since it combines a chronic lack of central sovereignty, a tribal social fabric, fluid political alliances, peripheral claims for autonomy, and foreign-interferences vis-à-vis local actors.

HYBRID SECURITY AND THE ARAB WORLD: MAKING SENSE OF A NUANCED LABEL

In the last fifteen years, most of the Arab states have been shattered by unsustainable social contracts, state legitimacy crisis, derailed political transitions, multi-layered civil wars and local conflicts for land, resources and revenues: some of them – Yemen, Libya, Syria and Iraq – experienced the unmanageable combination of these five dynamics. This resulted in the weakening and/or collapse of national institutional frameworks, replaced by the emergence of armed *feuds*. These are micro-orders arising from the ruins of war and built on the presence of militias and bottom-up hybrid security actors: while geographically adjacent, they are disconnected and often in competition one with the other.³ As a result of combats, hybrid players – mixed guerrilla and security governance entities – emerged as highly adaptable actors: basic goods providers (in Syria also through charities and local councils), political agents (the Hashd al-Shaabi in Iraq), warlords heading economic cartels (Libyan militias with interests in the oil sector) and smugglers in transit or border networks (the different forces controlling Yemen’s frontiers).

Surely, hybrid security actors are symptoms of ineffective security governance by the state, that co-opts or even exploits militias for the regime’s survival, hence shaping their hybrid nature. These orders reflect problematic sovereignties, far from the ideal of Westphalian-like states where the monopoly of force follows Weberian criteria, and closer instead to heterarchies in which statehood has turned into a

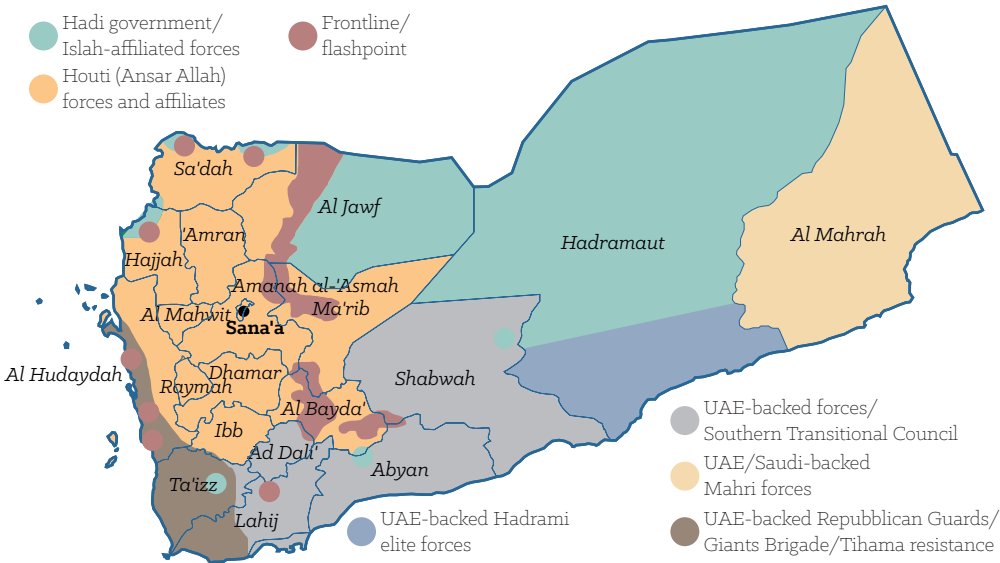


96,000

victims of the
Yemeni conflict so far

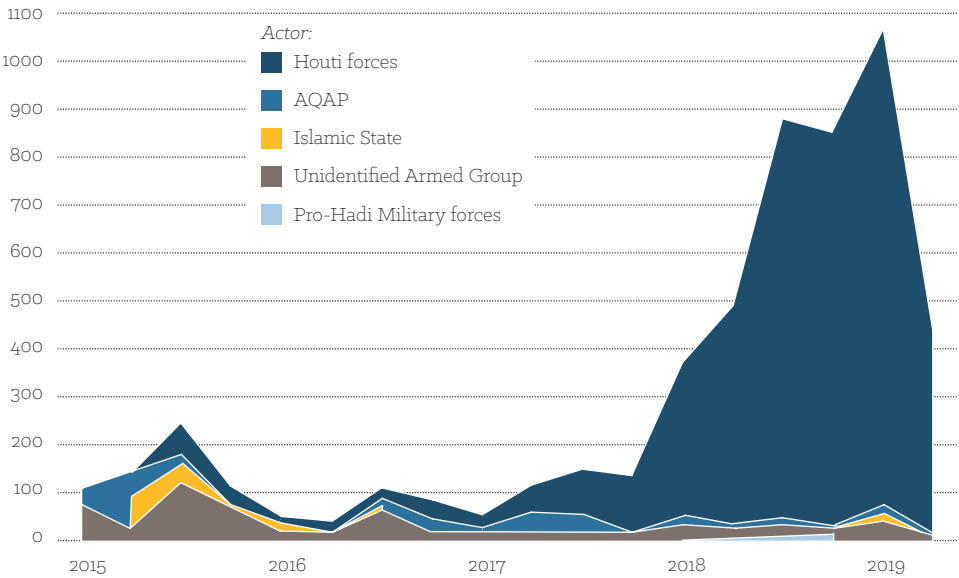
A FRAGMENTED CONTEXT

The distribution of the primary armed groups in Yemen (as of September 2019)



MILITIAS' ROLE IN YEMEN

Reported fatalities from remote explosives, landmines and IEDs in Yemen (January 2015 - June 2019)



Data: Chatham House; ACLED



267

civilian fatalities
as a consequence
of mines used
by Houthi

geographically-limited exercise. In hybrid political orders “diverse state and non-state security actors coexist, collaborate or compete”, since “the state and its monopoly of violence are contested”;⁴ this condition produces a variety of “co-governance arrangements between state and non-state authority”.⁵ Thus the label “hybrid security” becomes broad and multifaceted and comes to indicate highly unstable, fast-developing (in)security settings comprising a multitude of locally-rooted players: this category encompasses different nuances/typologies depending on the hybrid actors’ relationship with the government (direct/indirect connection or autonomy) and their goals (cooperation or competition with executive power).⁶

HYBRID YEMEN: FROM PATCHWORK SECURITY TO ARMED FEUDS

Yemen’s military structure presents a persistent penchant for double hybridization: hybridization due to the overlapping of tribal and military roles and loyalties (for instance, tribal chiefs who are also military commanders), and hybridization because of the vague boundaries between formal and informal security actors. The outcome of the 2011 uprising against Ali Abdullah Saleh’s regime, resulting in institutional crisis, civil war and the direct/indirect involvement of regional powers, has further enhanced this trend. The emergence of at least three competing centres of power in the country (the internationally-recognized government, the Houtis, the pro-secession Southern Transitional Council or STC) has resulted in a *patchwork security* scenario: locally-based security agreements prevail on deals agreed at a national level, since competing security providers have multiplied throughout the state and the instances of coexistence/cooperation between armies and armed non-state actors have increased, making room for hybrid security experiences of combat and, later, governance.⁷ Recent platforms for negotiation led by the United Nations have focused on Hodeida (ceasefire and military redeployment) and Taiz (humanitarian corridors) instead of pushing for an overall framework approach, thus following a patchwork

security pattern, as was the case with Syria’s four de-escalation zones brokered in Astana. Against this background, the *hybridization of military forces* becomes the norm. In fact, on the one hand remnants of the former regular armed forces confer legitimacy to non-state militias by turning them into regular security actors (as with the Emirates-backed Southern secessionist militias now technically under the ministry of interior or the army), while on the other, segments of the former official armed forces act as auxiliaries of the militias (like most of Saleh’s army loyalists coalescing with the Houti militia).⁸

This process triggers the erosion and then the re-composition of the military structure, with the rise of local armed feuds reflecting the balance of power on the ground. The feuds represent the ungoverned outcome of state crisis/collapse: in these power nodes, local intermediaries⁹ - who in Yemen are mostly military commanders and influent tribal chiefs at the same time - are able to cultivate hierarchical economic relations between local communities and government remnants, in the absence of shared and legitimized institutions. For instance, the Houti-held Sanaa’s network of governance and power relations differs from that of Mareb city, controlled by General Ali Mohsin Al Ahmar. But micro-feuds can also exist within the same city (consider the districts of Aden divided between pro-recognized government, STC forces, and Jihadists), or within a single governorate (as is the case in Hadhramawt, where the coastal areas are in the hand of STC militias and the Northern oil-fields of Wadi Hadhramawt are still controlled by pro-government groups, many of them affiliated with Islah).¹⁰

ONCE STATES, NOW ARCHIPELAGOS: STARTING ANEW FROM LOCAL AGENCY

In Yemen and in other fractured Arab states, the emergence of semi-autonomous and disconnected armed feuds forges, within unchanged national boundaries, new political geographies. States resemble now archipelago-like systems: these “islands of earth” are formally part of the same national archipelago but they rely, de facto, on local networks of



14 million

individuals at risk of
starvation and death
in Yemen

governance and power in order to survive.¹¹ In this context, conflict-related sub-economies contribute significantly to the consolidation of hybrid and localized forms of security governance: as pointed out in a recent research by Chatham House, the sub-economy type (capital city, oil-rich zone or transit/borderland area) determines local economic activities and violence spillover, thus encouraging armed actors to compete or cooperate in a specific territory. Therefore, a nationwide analysis is ill-suited to understand the security-economic nexus in wartimes, since “the conflict sub-economy of Baghdad has more in common with that of Tripoli than that of al-Qaim [an Iraqi border town]”, with the latter showing more similarities with Mahra (a Yemeni borderland) than Mahra with Yemen’s capital Sanaa”.¹²

There is therefore no doubt about the level of bottom-up decentralization achieved in conflict-torn Arab states, with a pivotal role played by hybrid security actors. As a result, restoring spatial, relational and security relations within Yemen, Syria, Libya and Iraq appears fundamental in order to rebuild fractured societies. This path can be pursued only by anchoring security players to local agendas and goals: this process, which also favours accountability vis-à-vis the territories of origin, needs to be supported by a comprehensive federal framework and governed by an agreed political centre able to reconnect polycentric territorial realities. In other words, decision-makers should insulate local military forces from external influences, thus breaking – or, more realistically, slackening the foreign connection that currently magnifies the entropic tendency.

Surely, economic incentives and revenue redistribution are inevitable to weaken the lucrative war economy cycle, emphasizing instead a community buy-in: local security must be linked to local decentralization and development. The hypothesis of a Yemeni National Guard (YNG),¹³ to be formed while restructuring the regular army, echoes this approach. Each governorate would partially contribute to its own security, co-financing its own Division of the YNG through the re-in-

vestment of a variable share of the regional budget (local taxes, fees and energy revenues): the largest share of the budget would be covered by external donors through central institutions, especially for less wealthy regions. This trade-off, *local budget for local security towards local development*, would partially keep local wealth within the territory, thus incentivizing members of militias or state-sponsored armed groups to engage part-time in the regular security sector, to be performed in a civilian capacity. In the current war economy context, soldiers of institutionalized militias receive higher salaries than army’s ones, and regularly so.

CONCLUSION: RETHINKING THE APPROACH TO HYBRID SECURITY ORDERS

If we look at the history of Yemen, and many other Arab states, hybrid security governance emerges as a permanent feature of their system: one that may be partially contained through inclusive, smart central processes based on effective decentralization, but whose dismantling would appear utopian, a goal that many Western decision-makers have toiled with unsuccessfully. Some of the militias and security players that have emerged “from below” should be reined in by national authorities and international stakeholders to facilitate federal state reconstruction in Yemen, Syria, Libya and Iraq. In Yemen, long-time marginalized Houthis are now much closer to Iran than in 2015 and have started to play the card of Tehran’s support as a political upper hand against Saudi Arabia; southern secessionists of the STC have exploited the Emirates’ backing to pressure the UN after being excluded from the negotiating table. Maximising the local agency of hybrid players means including selected members in the political process as well as in centrally-governed (and internationally-monitored) projects for local development and security provision. Although demanding, this community-based, locally-oriented approach would reduce the level of financial and political dependency vis-à-vis external sponsors. In this way, the governance of hybrid security orders would be a first step toward state rebuilding in fractured Arab states.



#med2019

this community-based, locally-oriented approach would reduce the level of financial and political dependency vis-à-vis external sponsors

7

Police reform in North Africa: a multilateral approach

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Geneva Center for Security Sector Governance (DCAF)

SHARED SECURITY

In the aftermath of the 2011 “Arab Spring,” reforming the security sector became a fundamental component of institutional capacity-building efforts to further democracy building. Police forces and security institutions were perceived as a central element of the oppressive political infrastructures that people were determined to topple, and thus became the focus of reform plans to reverse their role in state power abuses, corruption and violations of human rights. This was particularly the case in countries where political transition was driven by the uprisings (notably Egypt, Libya, Yemen and Tunisia), but also in countries the stability of which was relatively unaffected by those events, such as Lebanon, Morocco or Jordan. However, the contextual specificities of each affected country inevitably resulted in a curtailing of security sector reform (SSR)² efforts across the board. In fact, the Libyan and Yemeni transitions, suffering from external interventionism, led to failed states with collapsed institutions precipitating the countries into conflict. Meanwhile, Libya’s North African neighbours followed different paths. The cases of Egypt and Tunisia perfectly encapsulate two opposite reform paths: in both cases, there were initially serious opportunities to initiate SSR, which enjoyed public support.³ However, in Egypt, the counter-revolutionary restoration operated by Sisi and the armed forces all but halted any SSR efforts. In Tunisia, on the other hand, democratic legitimacy of elected institutions and strong civil society involvement favoured both a top-down and a bottom-up compromise on the country’s

approach to SSR. Such an approach was accompanied by genuine engagement with the security forces, and by a gradual strengthening of oversight mechanisms and institutions. The government also benefited from targeted technical support provided by international actors, as we will examine below. In the case of the region’s more resilient governments as mentioned above, SSR has generally remained an integral part of government efforts, albeit guided essentially by a top-down approach, institutionally designed, with limited or insufficient engagement at the broader political and civil society levels.⁴

POLICE REFORM IN TUNISIA

As a result of the 2011 “Jasmine Revolution” and the process leading to the Tunisian Constitution in 2014, SSR became a major focus – if not immediately on the part of all new national political forces, then at least of the international security and development cooperation directed at Tunisia. The former political system was built on a one-party structure which heavily relied on the internal security forces⁵ to maintain its exclusive grip on power. This legacy caused an atmosphere of suspicion and fear, and heavily damaged the relationship between citizens and the police.⁶ Therefore, fixing the relationship between the police and citizens has commonly been considered – with good reason – a potentially powerful tool for a stable transition towards democracy in Tunisia. The following short presentation of a possible approach to police reform in Tunisia lays out the rationale of SSR in a context of demo-

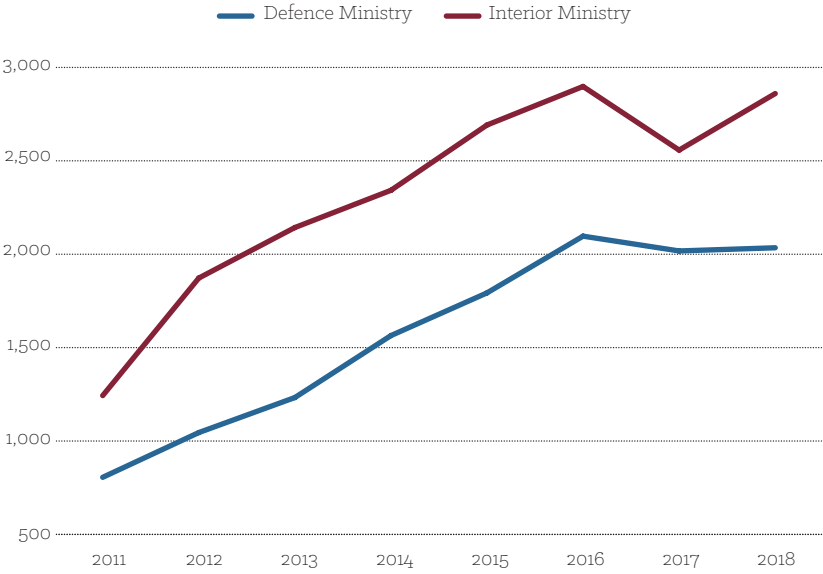


> 200

fatalities from
terrorism in Tunisia
since 2011

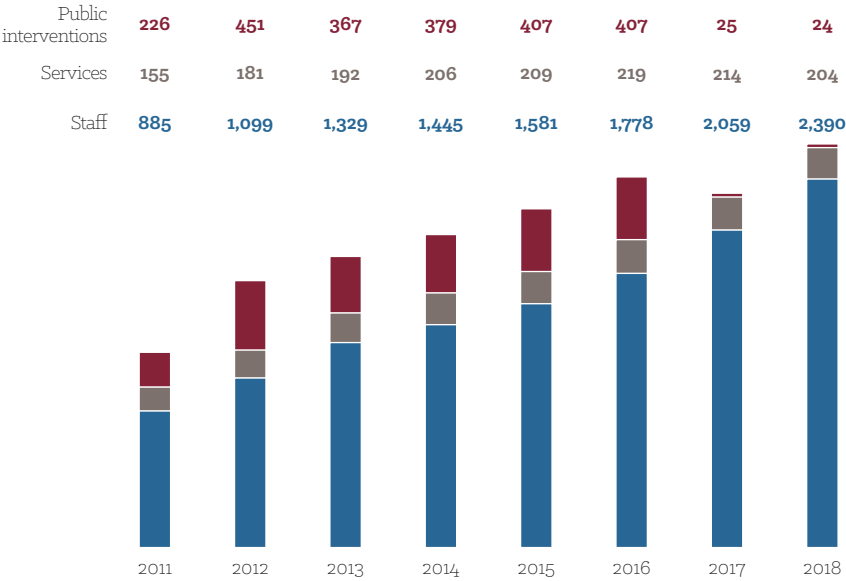
THE INVESTMENT IN SECURITY

Annual budget of Tunisian Defence and Interior Ministries (in millions of Tunisian dinars)

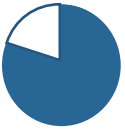


THE WEIGHT OF STAFF

Tunisian Ministry of Interior budget by expenses (in millions of Tunisian dinars)



Data: Marsad

**+130%**

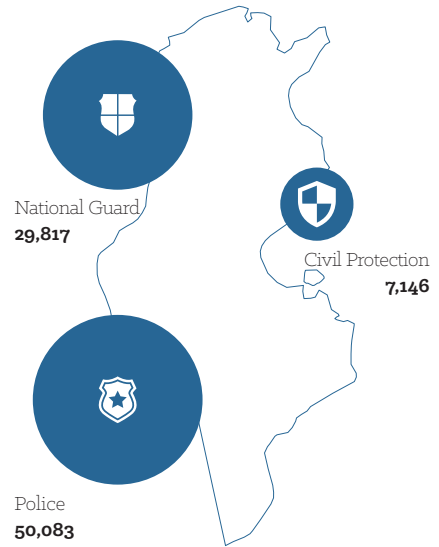
the increase of the
budget of Tunisian
Ministry of the
Interior between
2011 and 2018

**83%**

of MoI budget is for
staff expenses

cratic transition from an authoritarian state relying on a strong, oversized security sector that was subject to virtually no political control.⁷ In order to achieve progress under the given conditions, an SSR/G programme logic must address the political nature of the process, with careful consideration to the distribution of power within the institutional landscape. Given the disproportionate strength of the security sector itself, particularly the police in the case of Tunisia, the first goal of an approach intended to produce sustainable results should be to establish a more balanced institutional setup. Therefore, the inclusion of a wide range of political and social actors with potential influence on the main process (police reform) is a logical starting point for empowering the broader political environment. Once dynamics in the political environment to address power imbalances have been set in motion, the direct target of reform (police forces) may be confronted with internal dynamics favourable to and sometimes pressing for change. In this case, an international cooperation partner may become part of a political process, rather than an external actor with a pre-set reform agenda. While many multilateral and bilateral cooperation organizations and programmes have been directly engaged with the Tunisian Ministry of Interior (MoI) on police reform since 2011, this engagement yielded mixed results in its early years. In parallel, from the rationale of a comprehensive approach aimed at the political environment, a few organisations have entered into several other partnerships with Tunisian state bodies responsible for oversight and accountability mechanisms of security institutions, including the police.⁸ These partnerships have allowed them to address thematic areas of considerable relevance to the MoI and its security forces. Examples include building integrity, preventing and fighting corruption, access to information and professional communication development, as well as preventing the use of torture, particularly by police. The latter is of interest because the narrative surrounding torture prevention, including torture of particularly vulnerable groups such as minors, although discursively present within the MoI since 2011, only truly took shape with

The three branches of Tunisian internal forces Staffing of the Tunisian Ministry of Interior



— Data: Marsad —

the involvement of the independent National Anti-Torture Commission and with the creation of a working group composed of forensic doctors and judges/prosecutors.⁹ Following a request from the MoI, these efforts were subsequently expanded with the creation of professional peer groups, which also allowed criminal police officers to undergo training on the guide.

In the area of integrity building and reducing corruption, the gradual involvement of the parliament, of independent oversight bodies and of civil society on subjects including public financial management and institutional transparency has also opened opportunities for further engagement with the MoI. Once technical discussions with clear bearing on the security forces yielded promising results, the MoI expressed willingness to engage directly on several of the same areas of intervention, recognising their relevance to the Ministry and the police. Gradually, this engagement has been developing into a comprehensive approach to security and police reform approach with a focus on good governance and a multi-year partnership and support program concept currently being developed.¹⁰

In these two examples, a comprehensive approach may have triggered a change in the MoI's approach to reforms. Another similar example is the MoI's increasing openness towards the introduction of an oversight mechanism, through the creation of a commission on police ethics, which will be the objective of a project implemented by DCAF for the European Union.

Progress made up to now seems to indicate that a cooperative and multi-level approach to police reform in Tunisia – through indirect interaction with the MoI, and parallel engagement with a wider range of stakeholders at the political, institutional and societal level— has so far been successful. This does not come as a surprise when we consider two elements that shape the political environment of police reform in Tunisia: first, the MoI and its security apparatus played an important role in keeping the previous political regime in power; consequently, security forces were not considered as a neutral, citizen-oriented corps. Second, it was unrealistic to expect a Ministry that had held a predominant position in politics and society for decades to cede power immediately in a situation of political change. Yet, it is with this almost naïve assumption, widely shared in parts of the international community, that many SSR initiatives in Tunisia started, expecting results from direct cooperation with the MoI.

In contrast to this direct approach, developing a range of cooperation partnerships with both political-institutional and civil society actors allowed the setup of primary accountability and oversight structures for the security sector in the broader political environment. Thus, the MoI and the police have been given the opportunity to develop and transform in their own socio-political operational context, with a comprehensive institutional support package.¹¹

There are two main takeaways from this engagement in police reform in Tunisia: firstly, the understanding that in order to achieve broader political objectives through SSR, the reform approach must include a wide range of political and social actors with a potential influence on the main process targeted – SSR, and more particularly in Tunisia, police reform.

The second is the realization that an indirect approach to cooperation, involving multiple actors, both institutional and societal, leads over time to significant results. This of course occurred within a legal and political framework favouring reform, an environment which, if not in place already, may in some instances be difficult to replicate elsewhere.

POLICE REFORM IN THE MAGHREB: A WAY FORWARD?

The approach to police reform in Tunisia described above gives rise to interesting reflections and lessons learned that should be actively considered by organisations willing to engage on this thematic area in the region. Firstly, the adaptability of Tunisia-focused programmes to other North African countries is tricky, but feasible; in fact, this approach is now being adapted for different countries with a certain degree of success, most notably in Morocco.¹²

In other North African countries, the path to reform may take longer. While demand for reform in Algeria has considerably risen over the past year, possibilities for engagement remain limited so long as authorities are unable to commit to longer-term reform initiatives. In Egypt, police brutality is not uncommon, and in many respects reflects a reality of abusive military rule across the region: police forces can only be as accountable as the regimes they serve. Additionally, in a fragile context with a high potential of regional spill-over such as Libya, in which police forces are basically non-existent, potential for reform is extremely limited given the unstable institutional structures the country is plagued with.

Contextual differences must not be set aside in project design; however, at a time when socio-economic and security challenges intersect and span national boundaries in the MENA region, it is difficult to cast aside the regional lens when thinking about reform. Institutional structures have, for decades, influenced one another at their core – the hope now being that the same influences can pave the way for a mutually-inspired North African wave of democratization.



#med2019

an indirect approach to cooperation, involving multiple actors, both institutional and societal, leads over time to significant results

2

SHARED
PROSPERITY

8

The reconstruction of Syria: what role for external players?

Julien Barnes-Dacey

Director of the Middle East & North Africa programme
European Council on Foreign Relations (ECFR)

SHARED PROSPERITY

As Bashar al-Assad slowly re-establishes central control over Syria, the wider confrontation that has sustained nearly a decade of civil war is shifting to a new battleground, the economy. Whether Assad can rebuild Syria has become the central issue around which the opposing sides are now re-positioning themselves. Assad and his backers view reconstruction as a means of consolidating the regime's victory. Assad's opponents in the West, on the other hand, see it as the arena where they can renew efforts to extract concessions from the regime. In this backdrop, Syria will remain a cockpit of intense competition for some time to come. The result is likely to be the continued hollowing out of the Syrian state, for which the long-suffering Syrian people will continue to pay the highest price.

STARK SITUATION ON THE GROUND

Syria's needs, after more than eight years of devastating conflict, are almost unimaginable. Some 500,000 Syrians have been killed, twelve million internally or externally displaced, and the previously middle-income country has been economically devastated. According to the World Bank, at least \$226 billion of gross domestic product (GDP) has been lost, four years' worth at the 2010 figure.¹ The Syrian government says it will cost around \$400 billion to rebuild the country.²

While the government talks of a "post-conflict phase", it has taken few steps to initiate this process. The 2019 budget only allocated \$2.5 billion to reconstruction funding, a drop in the ocean compared with what is needed.³ While

some local projects are under way, the main government effort appears to revolve around a number of public-private partnerships centred on the one resource readily at its disposal: real estate. A series of property laws, including Law 10 which allows the government to designate redevelopment zones and compel owners to relinquish ownership in exchange for compensation, is designed to open up lucrative real estate opportunities. This process appears focused on stimulating otherwise unaffordable reconstruction with private finance, but doing so in a way which prioritises the channelling of economic rewards to regime-affiliated businessmen. Critics argue that this process effectively amounts to forced eviction, as it prevents many local residents (some of them now refugees) from asserting their legitimate ownership rights, and compensation is unlikely to match the true value of the expropriations.⁴

This approach, effectively side-lining equitable and needs-driven reconstruction efforts, is partly driven by the regime's financial imperatives; but it also likely reflects a desire to ensure that the general population can never again become an active popular force capable of challenging central authority.

THE ROLE OF THE REGIME'S ALLIES AND OTHER REGIONAL ACTORS

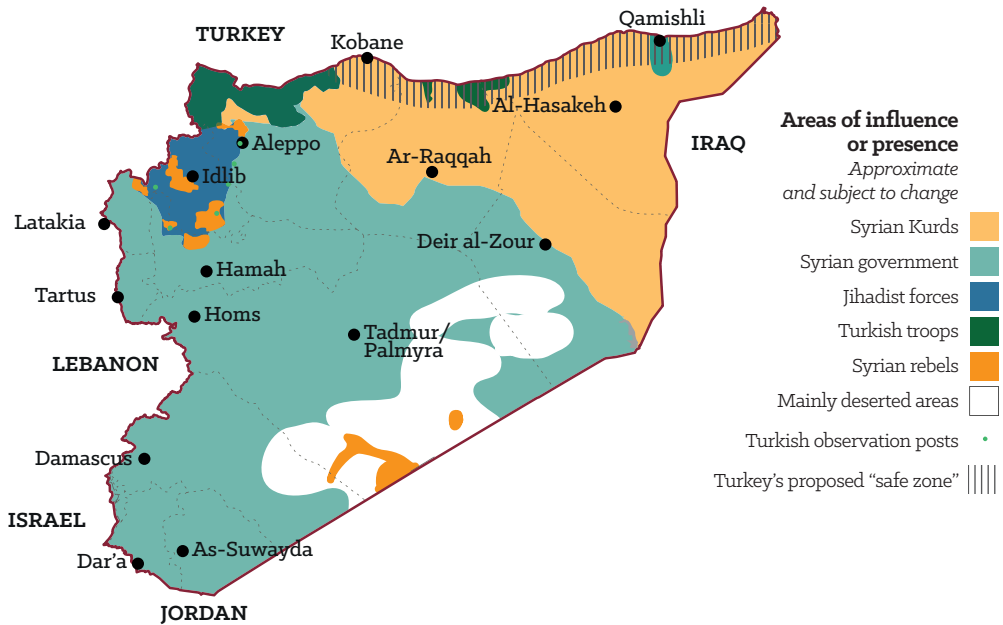
Assad also wants to use reconstruction to lock in wider international reintegration. Here, though, Damascus has made clear that it has no interest in Western support in view of its role backing the opposition and the perception that its help will be tied to unacceptable political demands.⁵



\$226 billion
of GDP lost in Syria
since 2011

THE SITUATION ON THE GROUND

Areas of control in Syria (as of 15 October 2019)



8 YEARS OF CONFLICT

Since 2011 in Syria...



more than
500,000
people killed



5.6
million
refugees



6.6 million
Internally Displaced
Persons (IDPs)



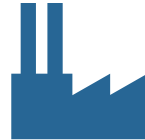
\$ 226 billion
of GDP
lost



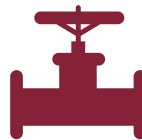
\$ 400 billion
needed
for reconstruction



\$16 billion
lost
in agricultural sector

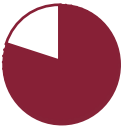


76%
of industries
ceased production



-94%
oil and mining
extraction

Data: HIS Conflict Monitor; UNHCR; World Bank

**40%**

of schools have
been damaged or
destroyed

The immediate focus is on Russia and Iran given their strong backing of the regime. But the attitudes of these two states highlight the complex dynamics of the post-conflict environment: Moscow, for its part, is now an active cheerleader for Western-backed reconstruction efforts, which effectively puts it at odds with the regime, highlighting a fundamental difference between the two. The regime's priorities are keeping control on the ground and channelling development through its own friends, whereas Moscow wants to use the prospect of reconstruction to secure Western acquiescence in its victory.

Damascus's position seems to be mirrored by the regime's other key backer, Iran, which also appears to prioritise the consolidation of Assad's military position. Moscow and Tehran do not differ fundamentally in their strategic ambition of seeing Assad victorious; but there does seem to be a divergence between them over the importance of Western acquiescence, as well as an emerging sense of competition for post-conflict influence in Syria.

On the one hand each sees control of economic resources as a way of establishing its longer-term influence in the country; but there is more direct financial competition, too. Having invested significant economic resources in ensuring Assad's survival, Russia and Iran are now both looking for payback.

Significant recent deals by both countries include securing leases on Mediterranean port facilities, Russia in Tartus and Iran in Latakia.⁶ Other agreements include a 50-year deal for the Russian company Sroytransgaz to develop phosphate mines near Palmyra, a contract which had previously gone to Iran. The change highlighted the emerging economic rivalry between the two, and indeed the Iranian media have expressed some concern that Russia is trying to edge Iran out of its post-conflict reward in Syria.⁷ Tehran also had a previously agreed mobile phone licence cancelled, though it has secured a range of other licences in the industrial, housing and agricultural sectors.

The financial dynamic driving Russian and Iranian interests in Syria highlights the commercial opportunity which some onlookers now see in Syria's destruction. Damascus is making significant efforts to woo the BRIC countries,

and particularly China, all of which still have diplomatic relations with Syria and will not tie support to any political demands. Assad also appears open to receiving financial support from the Gulf states; and although all these countries, like the West, long supported the opposition, an emerging acceptance of the regime's military victory and a desire to increase Arab influence to counterbalance Iran and Turkey have resulted in warmer relations, symbolised by the reopening of the UAE embassy in Damascus in late 2018.⁸

A WESTERN PRESSURE CAMPAIGN

If this is one side of the reconstruction coin then the West is the other. The US and many European governments regard the twin cards of reconstruction support and sanctions relief, both of them closely connected with a third – Western legitimisation – as a means of maintaining pressure on Damascus. This may also – always subject to President Trump's changeable impulses – be combined with continuing US sponsorship of SDF-controlled north-eastern Syria, home to important energy and agricultural resources.

This Western approach means a complete unwillingness to engage in any steps which could help the regime to cement its position. That rules out any support for reconstruction unless Assad makes political compromises. But there is also a more active dimension to this strategy, designed to raise domestic pressure on Assad so that he cannot win the peace. While most Western officials accept that Assad does not want Western money, the bloc believes it can force the Syrian regime to change its behaviour by increasing levels of domestic pain. Sanctions on dealings with Syrian financial institutions or the country's business elite are key features of this policy.

Syria's ongoing fuel crisis is a further example of this approach. While the shortages reflect longstanding Syrian regime corruption and economic incompetence, the recent crisis was directly provoked by US measures stopping the flow of oil from Iran.⁹ The shortage has provoked increased public discontent within Syria as fuel and food prices have risen.¹⁰

Western policy also has implications for

**\$7.5 billion**

estimated infra-
structural damage in
the city of Aleppo

humanitarian assistance.¹¹ On the one hand “smart” sanctions inevitably have a restrictive impact on imports more generally, including food and medical supplies, due to a “chilling effect” which makes the international private sector very wary of dealing with Syria even under humanitarian exemptions.¹² At the same time, Western states are now also interpreting humanitarian support more restrictively than ever to ensure that they do not provide support to the regime for wider reconstruction efforts.¹³ This is further motivated by a firm conviction that Western aid will inevitably be exploited by the regime to consolidate its own position rather than serving the needs of the wider population.

A key question hanging over the Western position is the degree to which this firm position can be maintained, especially given that it is unlikely to succeed in forcing significant political concessions out of the regime. A number of EU states have at times pushed to reopen the

conversation about Europe's policy towards Syria and the possibility of some re-engagement.

A DISMAL FUTURE FOR SYRIA

Ultimately, this ongoing geopolitical struggle will have immense real-world implications for Syrians on the ground who will continue to see their needs neglected. Any post-conflict activity will largely be shaped by the regime's positioning and the commercial and strategic ambitions of external players: no-one – not Russia, Iran, China or Syria's regional neighbours – will be interested in the core concerns of the Syrian population. Meanwhile Western measures risk reinforcing the regime's worst impulses. This unfolding dynamic could drive the country even further towards internal breakdown. The continued hollowing out of Syria will almost certainly have dire long-term ramifications for all involved.



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When oil is still king: economic diversification in the Gulf monarchies

Karen E. Young

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George Washington University

SHARED PROSPERITY

The countries of the Gulf Cooperation Council (GCC) – the Kingdom of Saudi Arabia (KSA), the United Arab Emirates (UAE), Kuwait, Qatar, Oman, and Bahrain – have some of the same problems they had forty years ago. They are reliant on natural resources as a primary source of fiscal revenue. They have populations that expect a range of social services and patronage from the state and its ruling families. Further, they have little private sector dynamism and productivity;¹ as the state tends to dominate local economies. These problems are not new, but the pressures of population growth and expectations of intergenerational equity have put economic policy at the centre of state capacity.

VARIATION IN APPROACHES TO DIVERSIFICATION

There has been new momentum to resolve, or at least begin to shift public policy to address inefficiencies like subsidies, spur private sector and non-oil growth, and to create alternate sources of government revenue. The momentum accelerated with a sharp decline in global oil prices in late 2014.

Since 2015, the GCC countries have become more competitive with each other in altering their policy landscapes to streamline fiscal expenditure, to attract foreign investment and resident investors. We can see variety in the approaches to economic diversification in many policy choices, but labour market regulation and rights of foreign investors stand out to distinguish how the GCC states view their relationship with outsiders. There is pressure to

create new sources of revenue and to transform primary energy exports into more refined petrochemical products, in itself a diversification initiative. The pressure varies depending on the burden of population size and diminished energy endowments. In most cases, energy dependency remains a key feature of Gulf economic models, even when energy product diversification via petrochemical production is an element of reform.

Intergenerational equity is a major driver of reforms, and a point of variation between the GCC states.² GCC oil exporters have substantial oil resources, but some (Bahrain, Oman) may face a terminal decline in oil revenues as soon as the next 15 years. Oil revenues remain the main source of funding for government spending, which is the key driver of economic output and household income in the Gulf. However, there are vast differences in how governments can sustain current spending, given their different natural resource endowments and social spending commitments. For Kuwait and Qatar, they have small populations and large stores of hydrocarbon resources, which enable them to save more of their oil and gas income over a longer period, thereby increasing their spending power in a post-oil era. Kuwait, Qatar and the UAE have large reserve assets in their sovereign wealth funds (with legislatively mandated contributions from oil revenues in Kuwait) and hydrocarbon reserves that range from 68 to 100 years of production.

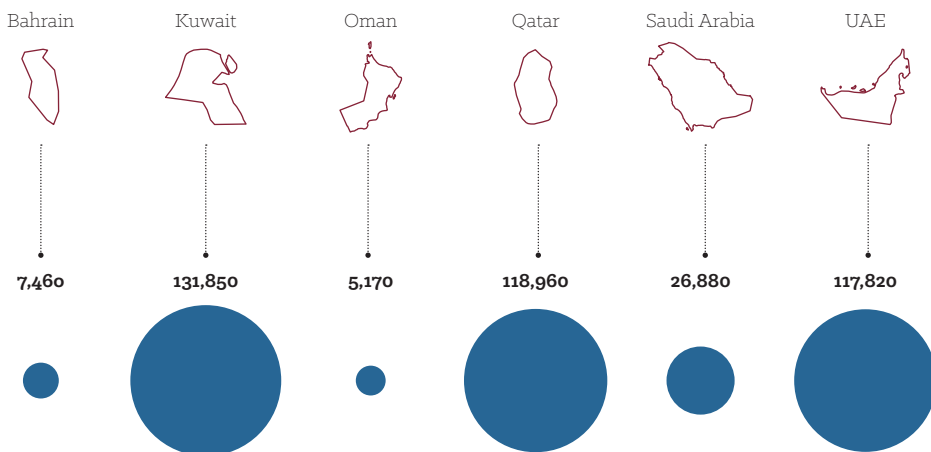
There is now some important variety across the GCC states in approaches to fiscal reform and foreign direct investment. Only the UAE,



-49%

decline in oil prices
between 2014
and 2018

The Gulf richness
Sovereign wealth per capita (thousands US\$, 2017)



Data: Brookings Institution

however, has shown a reluctance to rely on fiscal stimulus. UAE non-oil revenues are near 60% of total government revenue, the highest in the GCC. Kuwait spends more per capita citizen than any other GCC state, yet its non-oil income as a share of total income is lower. Research from CEIC and HSBC finds that Kuwait spends roughly \$13,000 per person (including non-citizens), while Bahrain spends about half, just over \$6,000 per capita, per year. Yet Bahrain's oil wealth is a fraction of Kuwait's.³ Qatar is similar to Kuwait in its spending and in its lack of non-oil revenue. These two economies are not diversified, just more endowed.

Saudi Arabia may have over 60 years of oil at current extraction rates, but its public finances are not likely to sustain the current spending levels without serious adjustment. Oman and Bahrain are in the weakest fiscal positions and hold the weakest resources. Bahrain has made a recent tight oil off-shore discovery and has announced it will allow 100% foreign ownership in some projects to help aid its extraction.⁴ This policy shift is novel in its welcoming approach to foreign ownership, as commercial agency restrictions and nationalization of oil resources have been hallmarks of GCC development policy for decades. The UAE has also announced special visas to allow long-term residency to

foreign investors and highly skilled professionals, along with the expansion of 100% ownership allowances outside of free zones, as part of the emirate of Abu Dhabi's Ghadan 21 initiative.⁵

**DOMESTIC PRESSURE TO DO MORE,
WITH LESS RESOURCES**

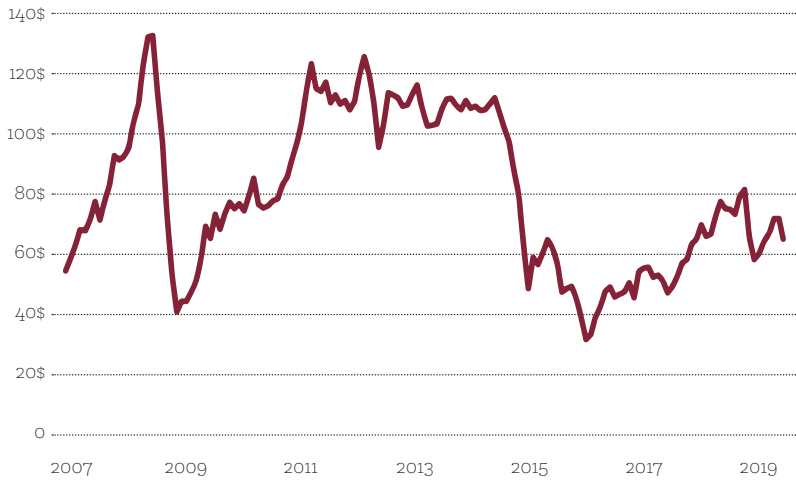
In each of these countries, governments face enormous strains on public finances and challenging economic outlooks, due to fluctuating oil prices, demographic pressures, high unemployment rates, and a lack of economic diversification. Debt has become a tool of choice, but the capacity to repay and grow is beginning to differentiate the GCC states.⁶ Wealth stored as reserve assets and the capacity to attract new private investment for job creation are not the same. Those states that borrow heavily now, without the capacity to generate new non-state, non-oil related wealth in the future will be at a disadvantage. Diversified economies will create growth that generates new revenue streams (arguably by taxes and fees) for the state, or they will rely on state-owned investment vehicles, including externally focused sovereign wealth funds, to generate it for them. Gulf states are now major issuers of emerging market sovereign debt globally, flooding the bond market with new issues since 2015.



60%

of total government revenue in UAE are non-oil revenues, the highest in the GCC

The fall of oil prices
Brent crude oil prices (2007-2019)



Data: US EIA

EMERGING MARKETS SOVEREIGN DEBT ISSUANCE

While debt repayment will constrict future fiscal policy space for Gulf states, there are also environmental and geopolitical challenges to confront. The rising impact of climate change further complicates socio-economic challenges. The Gulf will be a more difficult place to sustain, and the world will find new ways beyond hydrocarbons to meet its energy needs. The relevance of the Gulf to the global economy of the future will depend on its diversification efforts now. The region faces a future in which it will be more difficult to sustain a population both in comfort and in economic means, yet it is central in current global geopolitical and security concerns. Furthermore, there is a concerted “eastward turn” in the Gulf states’ orientation towards major energy consumers in Asia.⁷ The political and economic ties to China will have long-lasting effects on both the global economy and the security architecture of the Gulf and Red Sea corridor. The international order is undergoing a fundamental transition, with significant implications for the Middle East and the Gulf states. Inward and nationalist political shifts in the West, China’s increased engagement with the Middle East through its Belt and Road Initiative (BRI), the ongoing conflicts in

Syria and Yemen, and the potential breakdown of the Joint Comprehensive Plan of Action all necessitate a role for the Gulf states in international institutions and negotiated frameworks.

A CHALLENGING PROCESS

The breadth of policy demands, both domestic and external, are forcing GCC states to expand their state capacity and policy toolkits. Adjusting their labour markets to absorb and support women and youth is proving especially challenging. Labour market shifts pose distinct hurdles for those states more reliant on expatriate labour and consumption. Saudisation has strictly limited some retail and hospitality sectors to nationals;⁸ while Oman has enacted bans on hiring foreigners and set some sectors and job categories for nationals-only.⁹ These are all questions of the shifting social contract of the GCC states, with both domestic and foreign policy constraints. Gulf states will balance the demands of their citizens without losing power or going bankrupt, while also sustaining or amplifying their position in the global political economy. And some have more ambitious foreign policy goals than others.

Tracking shifts in fiscal policy since 2014, we can identify several trends.¹⁰ First is the implementation of taxes and fees and reduced



60

years of oil at current extraction rates in Saudi Arabia

subsidies. These efforts to increase sources of government revenue, and reduce costly expenditure on subsidies have been disproportionately borne by foreign populations in all of the GCC states, especially where foreigners outnumber citizens (Qatar, UAE), but also because citizens have had some policy respite. In effect, the second trend is a retrenchment and return to fiscal outlays to appease citizen concerns. In Oman, for example, citizens have been able to apply for needs-based support to purchase fuel products; 80% of Omanis reach the qualification threshold.¹¹ In Kuwait, increased electricity and water prices have exempted citizens and applied more to corporates and foreigners.¹² In Saudi Arabia, the Citizens Account program provides direct cash transfer support to lower income families (though without income tax, there is a broad swath of the population that can request direct support).¹³ Housing support is another area in which GCC states have continued to spend on generous provisions of grants or low-interest mortgage programs.¹⁴

The GCC, as a customs union, hoped to have a cohesive approach to the implementation of a value-added tax in 2018, but only the UAE and Saudi Arabia followed through as planned. Since 2018, only Bahrain has joined the five percent VAT group in early 2019.¹⁵ In 2017, the UAE announced excise taxes on tobacco, energy and

soft drinks. For the UAE, excise taxes and the value-added consumption tax weigh heavily on the expatriate population, which now serves as a convenient tax base. The implementation of fees for government services and visas have long been part of Dubai government revenue generation, as Dubai was the first in the Gulf region to implement a road toll system in 2007, which took advantage of its commuter, tourist and expatriate traffic along its main highway.¹⁷ In 2019, Abu Dhabi followed suit.¹⁸

We can see some learning transfer in the implementation of economic reforms and diversification effort both within and between GCC states. A competitive and nationalist landscape is emerging, in which foreigners and their investment will be more welcome in some states than others. Moreover, we should see long-term divergence in fiscal expenditure and intergenerational equity emerge as some states struggle with limited hydrocarbon resources. We can also expect citizens, and even residents, to take a growing interest in economic development policy and government performance. It is more difficult to predict how new foreign policy partnerships will shift economic opportunity and domestic politics in the coming years. What is certain is the continued dominance of hydrocarbons and their legacies in the political economy of the GCC.



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a competitive and nationalist landscape is emerging, in which foreigners and their investment will be more welcome in some states than others

10

China's economic rise

Maria Demertzis, Deputy Director
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Bruegel

SHARED PROSPERITY

China has grown about five-fold since it has joined the global trading system, the World Trade

Organisation. While such levels of growth are natural for a country that had been very closed until that time, there are rising concerns that it might follow the letter of the multilateral system, but not the spirit of the global rules of engagement. As a result, many argue that China has acquired an unfair competitive advantage and that the current multilateral system is not fit to cater for a country the size of China. Furthermore, while China has been a rule taker till now, at some point it may want to become a rule maker as well. Indeed, the United States is concerned that China's underlying motivation for global engagement is not just economic but may relate to security as well.

The US holds a much clearer view of how to deal with China. The current engagement in trade wars with China shows that the US does not believe that the spirit of the current global trading system is fit to accommodate a country that large or that different. Europe, on the other hand, is more reluctant to pass judgement. While broadly in agreement with the US when it comes to economic matters, Europe does not believe in trade wars as a way to impose discipline. But then how does one attempt to level the playing field? The EU, unlike the US, insists on preserving the multilateral system as a way of enforcing the law.

And what about security concerns? Should Europe welcome Chinese invest-

ments in critical infrastructure like communications but also ports? The problem lies in the fact that while these decisions are taken at country level, their ramifications extend across the continent. Pressure to coordinate such economic decisions is bound to increase, perhaps in direct conflict with a country's right to make sovereign decisions.

Europe is still the largest economic partner for the broader MENA region and the whole African continent, even though Chinese economic involvement is increasing. The next section provides a summary of the size of the economic interests at stake and their evolution in terms of trade and investment.

TRADE

In 2018, China ran a deficit in merchandise trade with the broader MENA region. China's exports amounted to \$126 billion and its imports from MENA countries were worth \$164 billion. A substantial proportion of Chinese imports from the region (90%) come from Middle Eastern countries, such as Saudi Arabia, Iran, Iraq, Oman, the United Arab Emirates, Kuwait and Qatar. These countries export large amounts of petroleum to China, and for most of these countries China is the first or second most important export destination (see table 1). Conversely, relations with North African countries are more limited, in some cases to few specific products.

China is the world's largest oil importer and 44% of its crude petroleum is imported from























\$ 126 billion

Chinese exports to
MENA countries
in 2018

CHINESE COMMERCIAL INVOLVEMENT IN THE MENA REGION

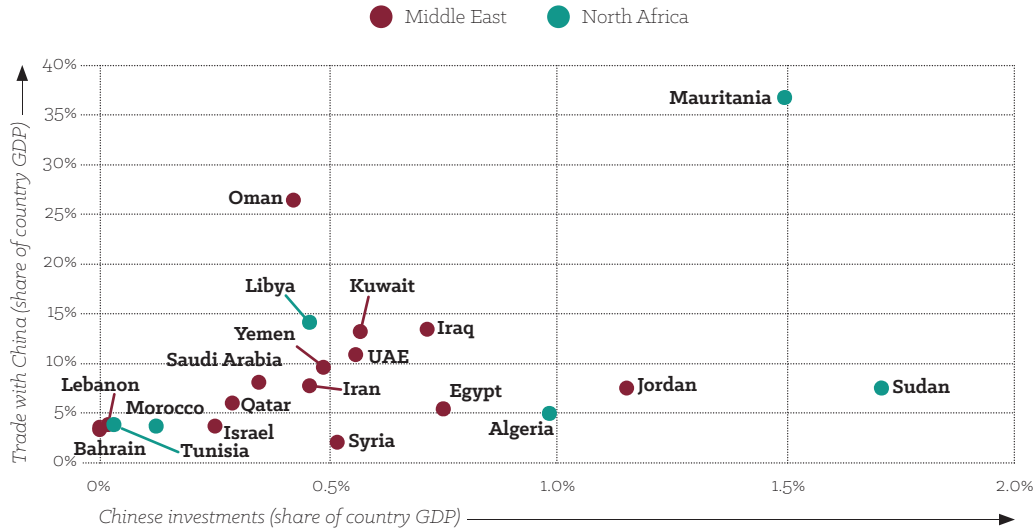
Value of Chinese imports and exports in the region by country (2018)

	Export to China (\$m)	Import from China (\$m)	Top export product	Rank of China as export destination		Export to China (\$m)	Import from China (\$m)	Top export product	Rank of China as export destination
Saudi Arabia	45,899	17,561		1	Algeria	1,179	7,923		15
Iraq	22,466	7,918		2	Mauritania	858	1,040		1
Iran	21,099	4,009		1	Yemen	718	1,877		2
Oman	18,821	2,876		1	Morocco	711	3,690		10
UAE	16,281	29,903		3	Sudan	670	1,885		2
Kuwait	15,359	3,321		2	Jordan	214	2,974		7
Qatar	9,091	2,489		4	Tunisia	195	1,416		16
Libya	4,742	1,433		6	Bahrain	150	1,139		16
Israel	4,631	9,316		2	Lebanon	49	1,983		32
Egypt	1,835	12,021		7	Syria	1	1,275		29



THE WEIGHT OF CHINESE ECONOMIC PRESENCE

Share of trade with China and Chinese investments on MENA countries' GDP

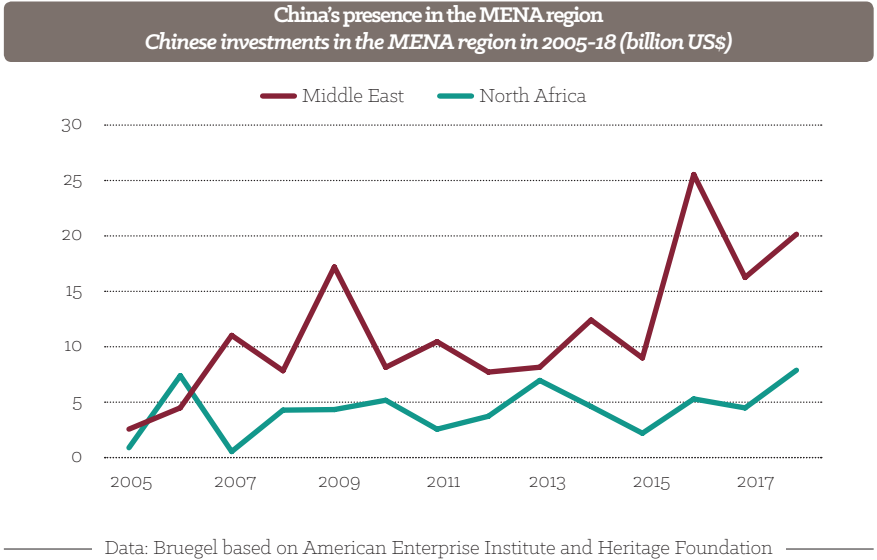


Data: Bruegel based on American Enterprise Institute and Heritage Foundation; International Trade Center; IMF



\$ 164 billion

Chinese imports
from MENA
countries in 2018



Middle Eastern countries. Apart from oil, China imports integrated circuits from Israel and Morocco and iron ore from Mauritania. In general, China's trade volume with non-oil producers is largely dominated by Chinese exports, which generate a trade balance surplus with these countries.

INVESTMENT

China's foreign direct investment (FDI) stock outside of Hong Kong was \$828 billion at the end of 2018 (Chinese Statistics Office, 2019). The China Global Investment Tracker (CGIT) collects public information to track the destinations of Chinese FDI flows. The figure above shows Chinese FDI flows into the broader MENA region since 2005. In all but one year, the majority of Chinese investments in the region went into Middle Eastern countries. According to the CGIT dataset, the largest recipient of Chinese FDI flows between 2005 and 2018 was Saudi Arabia with \$35 billion or 16% of total Chinese FDI flows into the MENA region. Over the same period, slightly more than half of total Chinese FDI into the MENA region went to Saudi Arabia, the United Arab Emirates, Iran and Egypt.

Chinese FDI in the broader MENA region focuses heavily on the energy sector (43% of total), secondly on real estate, and thirdly on the transport sector. Apart from a few hydropower

projects, most investments in the energy sector concentrate in the oil and gas sector in Middle Eastern countries. Chinese FDI into northern Africa flows largely into transport and energy (70% of total Chinese FDI into northern Africa).

Figure on page 51 puts the size of economic ties between the broader MENA countries and China into perspective. The chart plots the size of the bilateral trade volume and of Chinese investments as a proportion of the countries' annual GDP. Particularly for Mauritania, China is an important trade and investment partner.

LENDING

Important Chinese lending institutions such as the Chinese development banks do not report cross-border lending data. Therefore, it is very difficult to estimate Chinese lending to other countries.

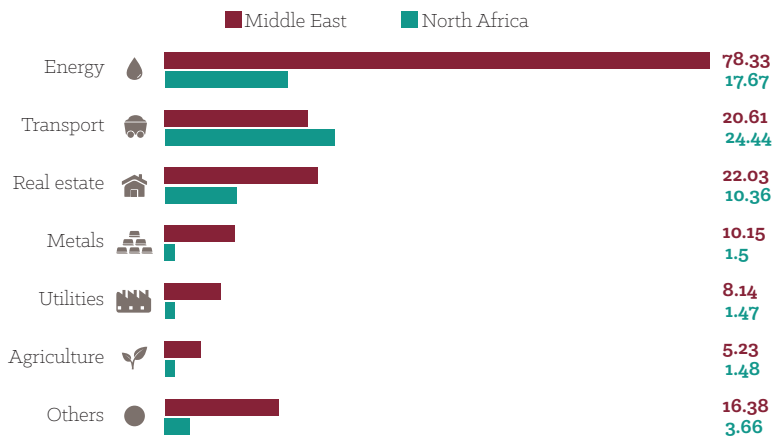
Lately, observers have feared that debtor countries might become unable to repay Chinese loans because these loans might be unsustainable. A working paper by Hurley et al (2018) analysed the impact of Chinese lending projects in the context of the Chinese Belt and Road Initiative (BRI) and identified eight countries which are under particular risk of debt distress due to Chinese lending. None of these eight countries is located in the MENA region. Furthermore, an analysis by Eom et al (2018) collected public information about Chinese loans



44%

of Chinese oil
imports are from
MENA countries

What is Beijing interested in?
Chinese investments in MENA by sector in 2005-18 (billion of US\$)



————— Data: Bruegel based on American Enterprise Institute and Heritage Foundation —————



#med2019

Europe remains the most important economic partner for the countries in this area but the broader MENA region is also becoming an increasingly more important destination for Chinese economic interests

to African countries and found that the only Northern African country that owes a substantial share of its debt to China is Sudan.

Europe remains the most important economic partner for most of the countries in this area but the broader MENA region as well as Africa are also becoming an increasingly more important destination for Chinese economic interests.

BEYOND ECONOMY: TOWARDS GREATER POLITICAL ENGAGEMENT?

While China's relationship with the region mainly focuses on the oil-producers Gulf states, the entire Middle East is a crucial crossroad for land and maritime routes link-

ing Asia to Europe and Africa in the framework of the BRI, launched for the first time in 2013, that is supposed to further increase Beijing's role in the MENA region. Over the past decade China has become an important economic player, however the economic dimension of the Chinese rise so far has not been followed or accompanied by a major engagement in political and security regional issues. While Beijing has been cautious vis-à-vis political and security challenges in the Middle East and North Africa, it will surely be called to deal with these issues in the medium- and long-term if it wants to secure its growing economic interests in the area.

The central role of Mediterranean infrastructures: a geopolitical tool

Eduard Soler i Lecha

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SHARED PROSPERITY

Geopolitics and infrastructures go hand by hand. 150 years ago, the opening of the Suez Canal connecting the Mediterranean with the Red Sea altered global geopolitics and reflected the penetration of European interests in the Middle East and North Africa (MENA). More recently, tension in the Strait of Hormuz, the attack against Saudi Arabia's Abqaiq oil refinery and the US suggestion to build a new military coalition to protect freedom of navigation indicate the extent to which infrastructures in this region are central to global geopolitics.

In this scenario, two considerations seem appropriate. First, infrastructure developments in the MENA region mirror global trends as well as global and regional power-shifts. Second, infrastructures tend to accentuate conflict but, under certain circumstances, they could foster cooperation dynamics instead.

GLOBAL TRENDS AND INFRASTRUCTURES

Global transformations are shaping the geopolitics of infrastructures, both in the MENA region and elsewhere. Specifically, five are the mega trends that can be observed, that means, changes with broad effects that are unlikely to be countered or turned around in the near future:

Connectivity. As a result of globalisation and technological innovation, individuals and production centres are increasingly connected through physical and virtual networks. Exerting control over the means of

transporting goods and information has become as important as territorial control, if not more so.

Digitalisation. This process, often referred to as a fourth industrial revolution, has also changed the way we look at infrastructures. Virtual ones are as critical as harbours, bridges or roads. This has altered the strategies of those whose task is to protect national security or global goods as well as the priorities of those who try to attack them.

Global power shifts. The rise of non-Western powers is one of the main transformations of the post-Cold War era. While in defence capacities the US is still very far ahead of any other competitor, in economic terms the situation is very different. Not only is China likely to overtake the US in 2020, but by 2030 it may be joined by India as well.

De-carbonisation. Environmental awareness and rapid technological progress in renewables suggest that the reliance of world economy on fossil fuels shall decrease significantly in the next decade. This will have major effects on the centrality of energy infrastructures, such as pipelines or refineries, and it will also alter maritime trade flows.

Climate change. The effects of de-carbonisation will not prevent global warming in the short and medium run. As far as infrastructures are concerned, one of the most visible effects of climate change is the opening of new maritime routes in the Arctic. While many of the other megatrends pointed at an increase US-China competition, this one puts Russia in a central position.

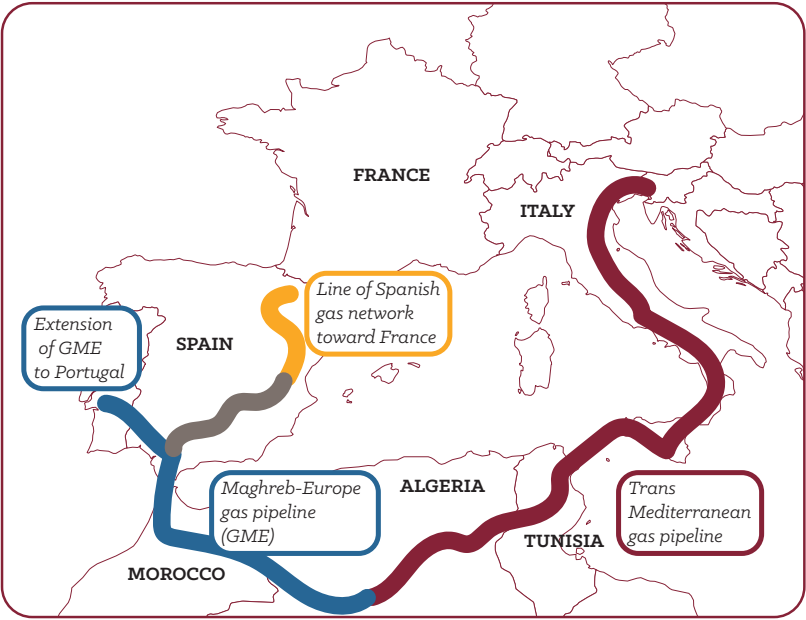


31.7 million

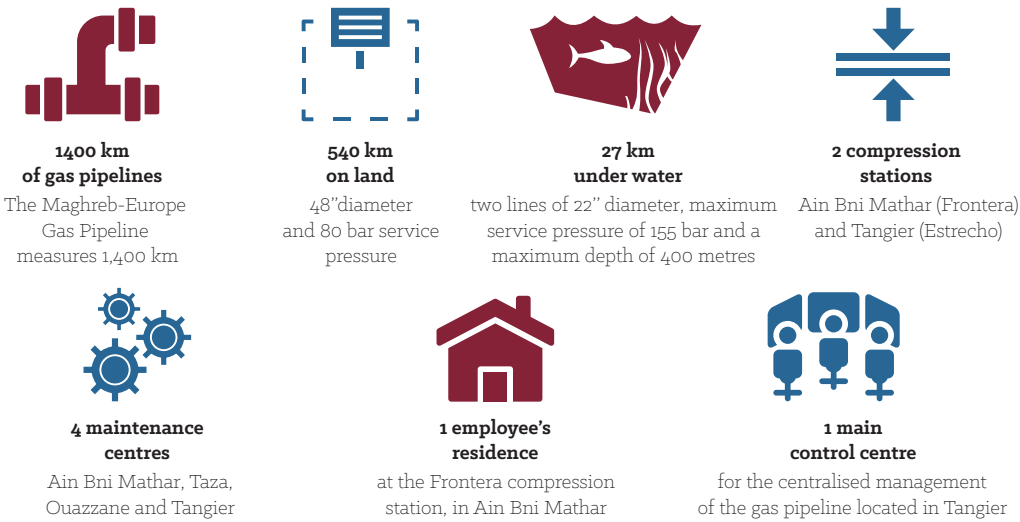
barrels of oil per day pass through the Mediterranean chokepoints

THE IMPORTANCE OF PIPELINES

Pipeline systems between North Africa and Europe



MAGHREB-EUROPE GAS PIPELINE IN NUMBERS



Data: GME



12 billion

cubic meters per
year: the capacity of
the Maghreb-Europe
gas pipeline

REGIONAL TRENDS

Next to these five global megatrends, other transformations are afoot in the MENA region that have a major impact in the geopolitics of infrastructures. These are:

Regional rivalries. The MENA region is a multipolar system due to the presence of at least five states that claim to be or tend to act as full-fledged regional powers: Saudi Arabia, Egypt, Israel, Iran and Turkey. Since 2011, Qatar and the UAE are also acting as regional powers, resorting to both hard and soft power tools. Old and new regional powers have resorted to infrastructural projects to project strength, increase their influence and/or build special relations with global powers. The competition among Gulf carriers, the Emirates' strategic investments in ports, Egypt's bet to enlarge the Suez Canal, al-Sisi and Erdogan's fascination with mega-projects are some examples of the increased competition among regional powers and its leaders in this particular field.

Blurred regional limits. The limits of the MENA region have always been diffused and contested. There is no commonly agreed definition of who is in and who is out. Neighbouring regions are increasingly embedded in regional rivalries in the Middle East. This is the case of the Sahel and the Horn of Africa and infrastructure development is one of the fields in which regional powers are taking positions.

Militarisation. This is a global trend but in the MENA region it is more accentuated, and the effects are more visible than elsewhere in the world. Everywhere we witness an increase in the purchase of weapons. In some countries, governments are devoting growing resources to the development of defence industries and military infrastructures. Occasionally, this also entails a growing role of military elites in civilian affairs. The participation of the Egyptian armed forces in infrastructural development or the synergies between civilian and military maritime infrastructures developed by the UAE are two concrete examples of the impact of militarisation in this field.

INFRASTRUCTURES AND CONFLICT

The attack against Abqaiq's state-owned Saudi Aramco oil processing facilities is one of the latest demonstrations that infrastructures and

conflict is a dangerous mix. In a region that is not short of conflicts there are plenty of examples of state and not-state actors trying to weaken their rivals by destroying or sabotaging critical infrastructures. One peculiarity in this region is that infrastructures can become a tool of domination and land annexation, as shown in the development of the road system in the West Bank.

After destruction comes reconstruction. Infrastructures also have a central role in the geopolitics of reconstruction. By investing in rebuilding roads and bridges or restoring electricity grids, water and sanitation infrastructures, international donors try to buy themselves influence in post-conflict scenarios. Again, one of the specificities of the MENA region is that those reconstruction efforts start well before the conflict has ended and, to a certain extent, correspond to conflict dynamics rather than post-conflict ones. Syria is the best example.

When it comes to frozen conflicts, infrastructure development may warm them up again, particularly if and when they have the capacity to alter the status quo or they have a great symbolic value. Tensions between Cyprus and Turkey in the Eastern Mediterranean around gas drillings or the recurrent tension between Egypt and Ethiopia regarding the construction of the Renaissance dam are two examples that also illustrate how infrastructures connect geopolitical dynamics in the MENA with neighbouring regions: South-Eastern Europe and the Horn of Africa.

Finally, conflict dynamics also reflect global transformations. On the one hand, China and Russia have become major players, particularly when it comes to reconstruction efforts. On the other, virtual infrastructures have become targets as attractive as physical ones and state and non-state actors are consistently upgrading their cyber capabilities.

INFRASTRUCTURES AND COOPERATION

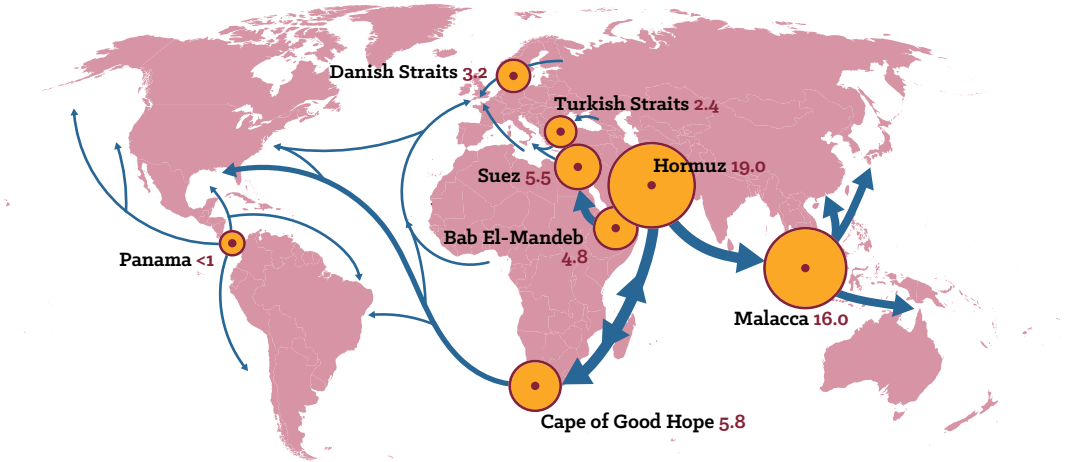
Although in the MENA region, infrastructures are generally associated to tension, rivalry and conflict, they could also be a catalyst for de-escalation, cooperation and peace. Region-wide infrastructure development can reduce energy costs, diversify clients and suppliers, and attract Foreign Direct Investment (FDI). Under certain conditions, infrastructures could even be ap-



5.7 million

barrels of oil a day:
the loss in production
for Saudi Arabia after
the attack in Abqaiq
on 14 September 2019

Oil trade: the centrality of the Mediterranean
Oil transport volume through the main chokepoints (million barrels per day)



Source: EIA

proached as a confidence-building measure. This is not the dominant trend in this region but there are some exceptions.

One example is the Maghreb-Europe Gas Pipeline, connecting Algeria to Spain via Morocco. Although the idea dates back to the early sixties, the agreement to build it came only in 1992 and it became operational four years later. This coincided with a phase of détente between Morocco and Algeria that started in 1988 and ended in 1994 with the closure of the border. Probably, the project would not have seen the light without this détente. It is also worth discussing whether the coming into operation of this infrastructure has buffered tensions between the two countries, particularly because a disruption would not only affect them but European countries as well.

This seems to be the rationale behind some of the flagship projects of the Union for the Mediterranean (UfM) such as Gaza's desalination plant or the Trans-Maghreb Motorway Axis (TMMA). It is only natural for the European Union to support this kind of projects in this and other frameworks. In fact, infrastructures have also been key in consolidating peace and regional integration in Europe itself.

BRIDGING THE DIVIDE?

Infrastructure will continue to play a central role in regional and global geopolitics, but a deter-

ministic approach should be avoided, suggesting that the region is doomed to conflict and war and that infrastructures will be one of the major catalysts. In fact, infrastructure tends to accentuate pre-existing conflict or cooperation dynamics. Thus, if rivalries among regional and global powers intensify even further, if they are perceived as existential threats, tension around infrastructure projects is likely to increase. In contrast, if there are peace opportunities or if key players realise that pushing the limits is a dangerous game, infrastructures could serve as confidence-building factors and create new interdependencies that would reduce the risk of an open conflict.

At a time when the global centre of gravity has shifted to Asia and the Pacific, infrastructures will remain one of the aspects embedding this region into global dynamics. This is mainly due to the weight of the five existing maritime chokepoints (Gibraltar, Bosphorus, Suez, Hormuz and Bab-el-Mandeb) but also to the leading role of state-owned or private companies from this region in strategic sectors (energy, ports, airlines, cybersecurity, etc...)

Finally, a more granular analysis of infrastructure geopolitics can help anticipate the ambitions and priorities of regional powers, point at certain areas where conflict may escalate, or situations in which infrastructures could help consolidate cooperative and peace-building efforts.

Infrastructures for growth: the way ahead

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Centre for Infrastructure*, ISPI

SHARED PROSPERITY

**The ISPI Centre on Infrastructure is promoted with the knowledge partnership of McKinsey&Company*

By 2030, the population in MENA is estimated to increase from 449 million to over 580 million: an impetuous growth that will challenge the countries in the region to provide workplaces, resources and infrastructure to guarantee and to improve the existing levels of income for their citizens. The task appears even more arduous when we consider that by 2030 almost 40% of their population will be still living in dispersed rural areas, making it more difficult to provide an efficient system of infrastructures and services.¹ A comprehensive plan to build new infrastructures and to modernize old ones is thus crucial to unleash the region's growth potential, reduce poverty and increase competitiveness, resiliency and stability.

INFRASTRUCTURAL NEEDS AND INVESTMENT TRENDS IN THE MENA REGION

Investments in infrastructure have recorded a steady increase in the MENA region in the last few years, especially after 2013. In particular, according to the G20 Global Infrastructure Outlook, Gulf countries record a relatively small infrastructure gap, with Saudi Arabia showing a difference between infrastructure spending and demand equal to 0.51% of its GDP. On the other hand, other MENA countries have more difficulties in financing their current needs, with a wider gap: 1.70% of the GDP in Egypt, 1.26% in Tunisia, 1.13% in Jordan. This trend is confirmed by the overall and sectoral quality of infrastructure in the region, with GCC countries that score far better than

their non-oil regional peers (see figure on p. 59). Investments, however, have been focused mostly on external regional and global connectivity, often at the expense of primary and essential infrastructure, such as water, energy, intra-national roads and railways.

Water infrastructures play a central role in regional development. The Middle East and North Africa region is the most water-scarce in the world, with over 60% of the population living in high water-stress areas. The region will be highly impacted by climate-related water scarcity, with an estimate of 6-14% of GDP losses by 2050. MENA has also the highest cost in the world for inadequate water supply and sanitation, with annual economic losses estimated at around 0.5% of regional GDP. Investment in this field is thus urgent, to counteract water scarcity and the depletion of existing groundwater. Desalinization plants are the main response to mitigate high demand, with a share of 46.7% of the world desalination capacity; however, the high consumption of electricity for water production questions the sustainability of this supply source. Reduction of public subsidies for civil and industrial use would probably foster innovation and private investments, increasing sector efficiency and productivity.²

Energy infrastructures lie at the core of the regional development. To reduce dependence from volatile oil and gas prices and in order to meet the rising demand, MENA countries are promoting a new wave of investments in energy projects. National authorities are seeking to preserve hydrocarbons for export by



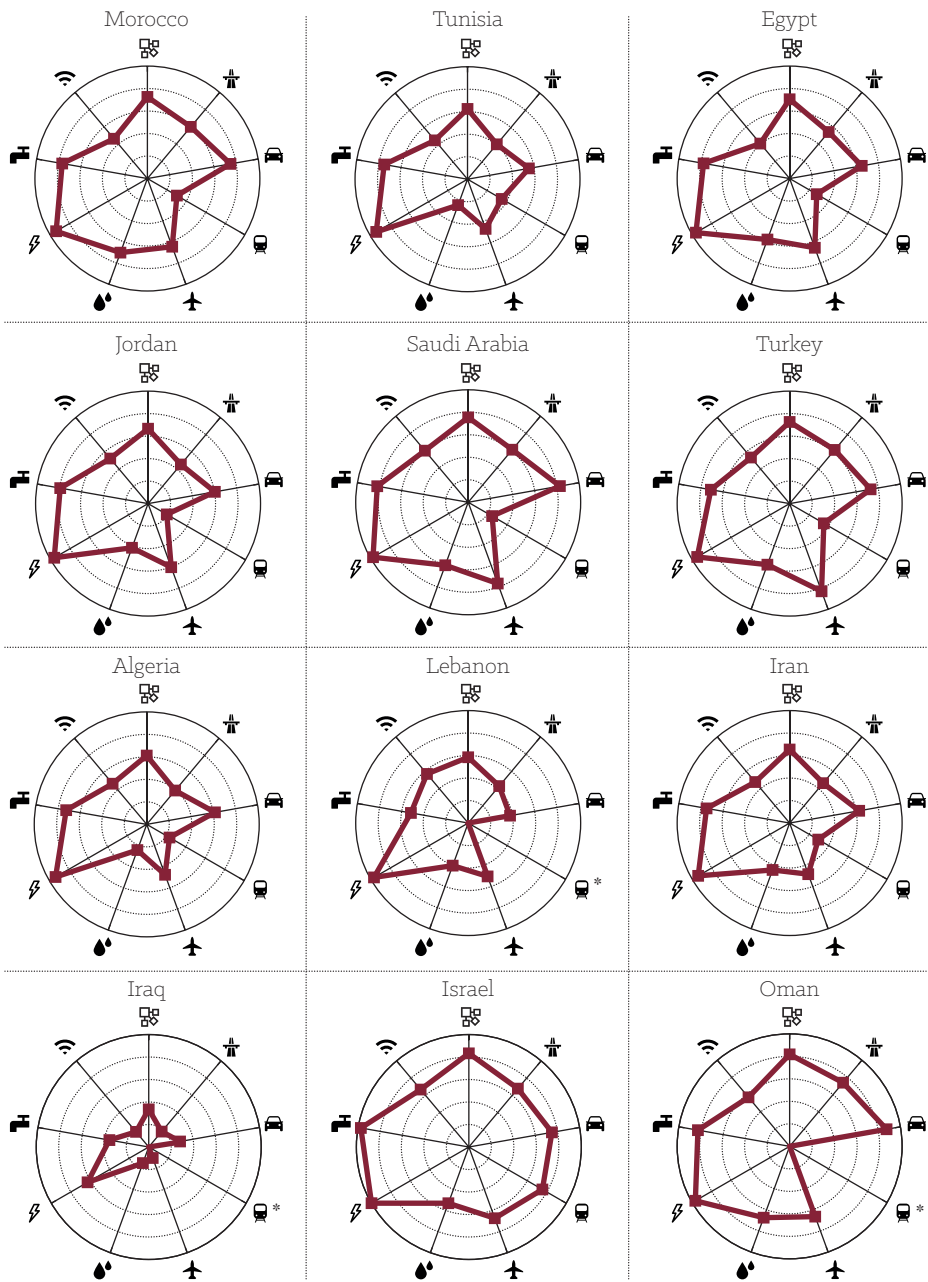
40%

of population in the MENA countries will live in dispersed rural areas by 2030

THE INFRASTRUCTURE SITUATION IN THE MENA COUNTRIES

Quality of infrastructures in the different sectors, by country

Infrastructure Transport infrastructure Roads Railways Air transport Water transport Electricity infrastructure Water infrastructure ICT



* No data available

Data: WEF Global Competitiveness Index 2018



8%

of businesses in
MENA have a digital
presence

slowing down unsustainable demand growth and diversifying energy sources, with new investment focused on nuclear plants (projects for \$164 billion planned or under construction), solar and wind farms.³ Since domestic generating capacity is often insufficient to cover demand needs, several projects to build cross-border electricity infrastructure facilities have been completed or are underway. They include the Maghreb regional energy interconnection (Egypt, Libya, Tunisia, Algeria, Morocco, and Spain), the Eight Countries regional energy interconnection (Egypt, Iraq, Jordan, Libya, Lebanon, Palestine, Syria, and Turkey) and the Gulf Cooperation Council (GCC) regional energy interconnection (Kuwait, Saudi Arabia, Bahrain and Qatar, UAE, Oman).⁴ Interconnected electrical grids enable energy imports, reduce costs, supply disruptions and allow the creation of an integrated market.

Digital services are a key enabler to enhance the regional economy's efficiency and boost productivity in other infrastructural asset classes. The quality of existing digital infrastructures is quite diverse across the region: while Gulf oil-producing countries score well in the global ranking, North African countries perform less effectively. Mobile internet and the introduction of 5G technology could in the medium term change the situation and provide a viable alternative to the more expensive cable and fibre broadband. The room for improvement is wide: only 8% of businesses in MENA have a digital presence, and only 1.5% of MENA's retail sales take place online. Bridging that gap would help streamline new business opportunities, tackle poverty and defuse social pressure affecting especially younger generations.⁵

Finally, **transportation** would require a sharp increase in order to bridge the gap and reduce the deficit in national networks and regional connections. According to the WEF Global Competitiveness Index, countries in the region score relatively well on maritime and air infrastructure. New seaports have been completed or are under construction in Morocco (Tanger Med),⁶ Algeria (El Hamdania),⁷ Egypt (Abu Qihir and the expansion of Port Said East),⁸ Israel (Haifa),⁹ often through

Chinese capital in the framework of the Belt and Road Initiative. Air infrastructures play a prominent role in the region's overall connectivity, particularly through international airline carriers and broad national strategies: Gulf hubs today are key nodes in the global air networks, capturing a growing share of traffic between Europe and East/South Asia, and weakening the direct links operated by European and Asian carriers.¹⁰ Investments have traditionally focused on ports and airports, to connect the region to the global value chains. What is missing is more investments in road and especially rail connectivity, a gap that hinders the development and finalization of an integrated regional market and the improvement of intra-national connectivity. In this regard, a milestone project is the envisaged GCC railways network that will connect all member countries of the Gulf Cooperation Council by 2023. The GCC network will run a length of 2200 km for an estimated cost of \$250 billion, fostering intra-regional trade and productivity in the area by providing new freight transport services.¹¹

WHAT IS STILL MISSING TO BRIDGE THE INVESTMENT GAP IN THE REGION?

To meet the increasing demand of infrastructure, many countries in the region are setting up different plans to overcome existing gaps and to enhance the competitiveness of national economies, with a focus on improving internal and regional connectivity. However, national public spending has proven insufficient to cover infrastructure gaps in many countries. If Gulf countries have created sovereign funds through oil revenues, non-GCC countries in the region show higher investment gaps, lower financial capacity and a greater need for external resources. The mobilization of private investment would be the most viable solution but many obstacles remain in place.

Several institutional and market weaknesses are holding back private sector investments. In the last few years private investments in regional infrastructure have decreased due to uncertain economic conditions, tightened prudential banking requirements and regional political instability. The lack of bankable proj-



60%

of MENA population
live in highly
water-stressed areas

ect pipelines is also a critical issue in many MENA countries, especially North African ones. The private sector is often not prepared to assess and develop infrastructure projects, given the costs, risks and obstacles in dealing with its public counterpart.¹²

MENA countries share institutional deficits in ensuring regulatory transparency and predictability, with high levels of corruption and foreign exchange risks, low levels of legal security and often a different treatment for national and foreign companies.

In low and middle-income countries in the region, multilateral and regional financial institutions have been playing a central role. According to official data, EIB, EBRD, AfDB and the World Bank have financed projects in Morocco, Tunisia, Egypt and Jordan for an overall value of \$64.6 billion dollars during the period 2014-2018. The involvement of institutional investors represents a crucial step to enhance internal competitiveness and projects quality and to attract further international investments by reducing the perceived risks borne by private investors.¹³

There is still a long way to go. In order to unleash the full potential of the region, two priorities are vitally important:

- to promote a dialogue platform in order to coordinate national infrastructure development projects in the framework of a comprehensive regional development plan; this would boost synergies, enhance efficiency and avoid costly and redundant overlaps among different projects;
- to create the conditions to attract investment by ensuring a clear legal and regulatory framework, through sovereign guarantees, political risk insurance, transparent procurement practices and equal conditions for foreign operators and state-owned enterprises.¹⁴

The investments on infrastructure Estimated investment plan on infrastructure in selected MENA countries and main projects

Algeria



5-year plan (2015-2019) to strengthen national infrastructure. \$17.5 billion allocated to build new water facilities, \$37 billion for the development of a 5000-km network, and \$5.3 billion for shipping. Sonatrach and Sonelgaz have planned \$50 billion in investments for energy projects.

Egypt



Planned investments include \$8 billion in road infrastructure by 2027, and \$12.4 billion in ports and water infrastructure, \$10 billion for high-speed rail and \$1.1 billion for air infrastructure by 2050.

Iraq



In the National Development Plan 2018-2022, has set up \$33.26 billion in transport investment and \$17 billion in water and electricity-related projects.

Jordan



According to the National Economic Growth Plan 2018-2022, has committed to invest \$3.47 billion in water facilities, \$4.3 billion in the energy sector and \$2.7 billion for transportation.

Morocco



By 2030, 2100 miles of expressways and 1300 miles of highways, with an overall cost of \$9.6 billion. \$37.5 billion will be allocated by 2040 in new railways and improvement projects. The government's 2030 port strategy is intended to dedicate nearly \$7.5 billion to upgrade and expand its ports.

Qatar



Infrastructure plan worth \$150 billion, within the Qatar Vision 2030 and for the FIFA World Cup 2022.

Saudi Arabia



Within its Vision 2030 Program, \$36 billion transport and social infrastructure plan to catalyze nearly \$429 billion in private investment. The plan includes 60 logistics initiatives, among them five airports and 200 kilometers of railroads.

UAE



\$1.6 billion of allocated funds of federal investments in infrastructure in 2019, \$4.4 billion allocated by 2021 in the framework of the Vision 2021.

— Data: National Budget and Infrastructure Plans; Oxford Business Group —

13

Middle East and energy: time to go green?

Christof van Agt

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SHARED PROSPERITY

Domestic energy demand growth, global economic and demographic shifts, as well as growing public awareness that the drivers of economic growth must adjust to respect human well-being and planetary thresholds impose new demands on energy security. A reassessment of the criteria for the rational and sustainable use of natural resources is underway not only in consumer but also producer countries.

The adoption of the UN Sustainable Development Goals and Paris Agreement in 2015 established a common direction of travel to work towards a more sustainable future for all and strengthened global consensus on the need to reduce greenhouse gas and other harmful emissions.¹ Investment in renewable energy, clean hydrocarbon technologies, energy efficiency gains, new technologies and innovation as well as infrastructure expansion play a central role on this journey to new world energy markets. First movers in North West Europe, North America, and North East Asia have brought about a dramatic drop in the cost of renewable energy sources and climbed the learning curve to successfully integrate solar and wind power. Meanwhile, new drilling techniques in North America have recast producer-consumer relations within a more competitive and diversely supplied energy market. These new dynamics unfolding simultaneously in the policy, technology, and market arena place energy market outlooks on more varied pathways and transform the traditional fixtures of global energy security.

A GREAT UNTAPPED POTENTIAL

The large renewable energy resource endowments that countries of the Middle East and North Africa region share hold great potential to help transform global energy markets. Governments in the region have stepped up efforts to modernise their economies including by diversifying energy sources through the rollout of renewable energy technologies. High solar irradiation levels and wind density have recently attracted world record bids for investment in the Middle East and are a “*first step on the road to energy diversification and renewable energy leadership*”.² Notwithstanding this potential, the share of renewable energy technologies in the energy mix widely varies among countries in the region. Hydropower, solar, wind, and geothermal already fulfil a substantial share of power generation in Turkey, Morocco and Egypt where renewables’ share in electricity production currently range from 50% to 35% and 8.5% respectively.³ But at less than 1% on average, the share of renewable energy supply is still very low in energy matrices in the Gulf region even when taking into account the lack of access to hydropower.⁴ This is in spite of the many mega projects currently underway in the region that the United Arab Emirates spearheaded with the launch of the Abu Dhabi Future Energy Company and Masdar City as early as 2006 and that made it the leader in renewable energy deployment in the Gulf today.⁵

In the past oil and gas producers have often viewed investment in renewables as a means to serve the strategic interest of energy con-

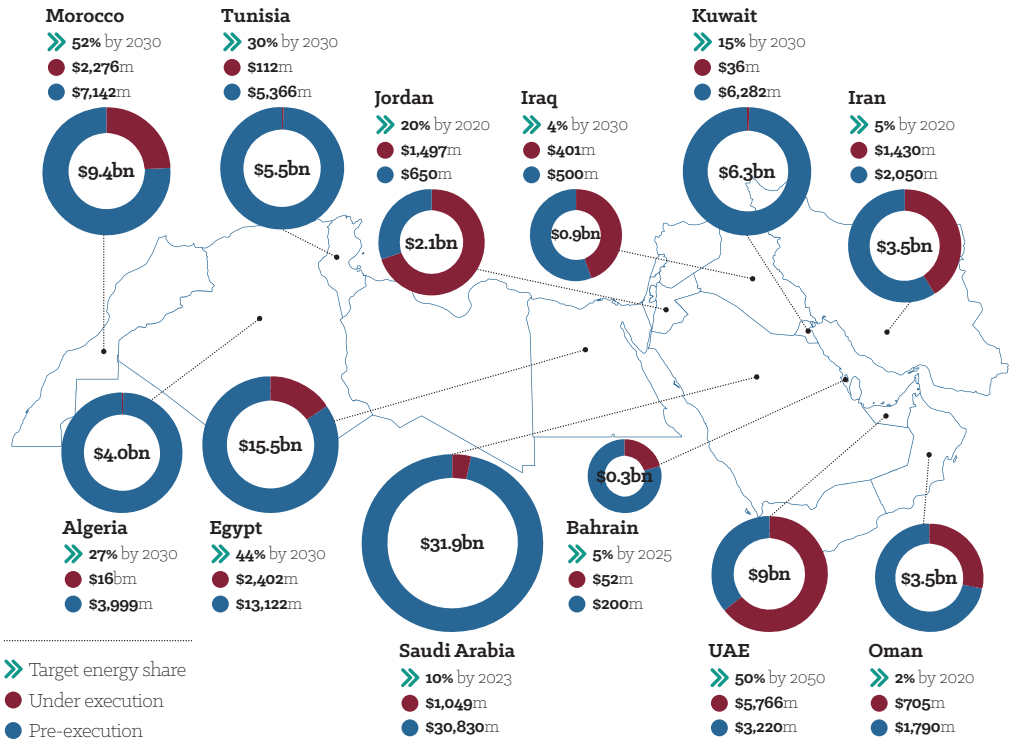


50%

share of renewables
in electricity production in Turkey

MENA COUNTRIES LOOKING AT RENEWABLE ENERGIES

Investments and targets in renewable energies



SUSTAINABILITY AT RISK?

CO2 emissions per capita and world ranking, 2016

Metric tons per capita			World Ranking		
Qatar	45.4	1°	Iraq	4.8	58°
Kuwait	25.2	3°	Turkey	4.5	64°
Bahrain	23.4	4°	Lebanon	4.3	71°
UAE	23.3	5°	Algeria	3.7	77°
Saudi Arabia	19.5	7°	Jordan	3	88°
Oman	15.4	10°	Tunisia	2.6	94°
Iran	8.3	29°	Egypt	2.2	99°
Israel	7.9	31°	Morocco	1.7	112°

Data: Source: World Bank; MEED; Irena



354 million

barrels of oil saved
in GCC countries if
current targets for
2030 are met

suming countries to reduce their reliance on the resources they provide. Such investment was therefore not considered a strategic priority in their own markets. Apart from the high costs associated with the deployment of renewables, structural market hurdles such as the prevalence of subsidised energy prices, infrastructure constraints to accommodate intermittency, and difficulties to connect often remote new supply sources with demand growth centres, have further locked out investment in renewable energy sources in major oil and gas producing countries. Renewed government resolve to reform markets have bolstered market confidence among new technology providers to place assertive bids. Hurdles will be lowered further, as new strategic considerations prevail over traditional considerations through policy assisted transitions.

The current low and more volatile oil and gas price environment and the expectation that global oil and gas demand growth will slow down while regional energy demand will grow, add further momentum to the sweeping reforms in oil and gas producing countries of the Middle East and North Africa. The existing opportunities that renewable energy technologies bring to alleviate pressures on the water, energy, and food nexus, cut across economic development questions in the region, create jobs and enhance economic productivity within industry and services sectors. As a consequence, wider macroeconomic goals rather than short-term business concerns will continue to push renewable technology deployment forward.⁶

GOVERNMENTS' PERSPECTIVES ON RENEWABLE ENERGY DEPLOYMENT

Over the next decade the Arab States of the Gulf Cooperation Council (GCC) alone could save 354 million barrels of oil (equivalent to reducing demand by 23%), create more than 220,500 jobs, and limit the power sector's carbon dioxide emissions and water withdrawal by 22% and 17% respectively, if already adopted targets to 2030 and other conditions are met.⁷ Recent ambitious announcements on the deployment of renewables, and other non-hydrocarbon technologies, such as nuclear, are generally motivated by the need to:

- **Enhance domestic energy security and system resiliency through the integration of renewable energy sources in energy matrices.**

The falling cost of renewable energy technologies and energy sector market reforms, including a reduction in government subsidies, enable exploitation of abundant renewable energy resource endowments and help improve energy matrices in a more competitive and demanding energy market environment. This includes the use of renewable energy for desalinated water supply. Hydrocarbon supply chains can also become more sustainable through the use of renewable energy, or in combination with related hydrogen technologies that help recycle carbon dioxide and enhance oil and gas recovery.

- **Make oil and gas production available on international markets to offset the rising cost of subsidised domestic oil and gas consumption.**

Freeing up oil and gas production for export through integration of renewables in the power generation and other sectors alleviates pressures on national budgets and can serve as a relative cost-neutral measure for the deployment of renewables. Export revenues can help to finance the deployment of renewable technologies, including the balance of system cost for their effective integration in energy matrices, and investment in manufacturing and education.

- **Create new local value chains to supply renewable energy technologies that in turn provide new export opportunities.**

The establishment of local value chains for renewable technologies build on the opportunities that the Middle East and North Africa offer beyond exploiting the large renewable resource endowment these countries share through global trade, energy, labour, and tax advantages. Local manufacturing capacity will help to accelerate deployment, stimulate research and development and also create new export opportunities for energy, products, and services to enhance economic performance.

- **Open up new employment opportunities for a growing population through the deployment of renewable energy technologies.**












Apart from diversifying energy sources to meet growing demand, investment in renewable energy technologies provides new direct



220,550

new jobs will be
created in GCC
within the 2030
target program

Egypt and Morocco lead the renewable market
Total renewable energy capacity in the
MENA region (MW)

Egypt		3700.0
Morocco		2907.5
Jordan		494.9
Algeria		481.9
Tunisia		348.4
UAE		140.0
Saudi Arabia		48.0
Qatar		44.0
Kuwait		40.5
Bahrain		5.9
Oman		0.7

Source: Irena

and indirect job opportunities. Solar technologies lead in manufacturing, procurement, installation, grid connection, operation and maintenance offering new chances for job creation. To ensure that the domestic work force is both willing and able to take on these new jobs that require varied skills, governments must invest in the rollout of corresponding education programs, engage with young professionals, and reduce reliance on expatriate labour.

• **Strengthen regional and global energy security by investing in cross-border energy trade infrastructure and renewable energy sources.**

Electricity demand is expected to surge in the region and will double over the next two decades in the Gulf region. Strong reliance on crude oil and oil products, alongside gas resources for power generation in oil and gas exporting countries, limits export to overseas import-dependent demand growth centres.

Cross-border energy trade and investment play a vital role to facilitate renewables integration and strengthen regional energy security. Regional cooperation can help the region to capitalise on comparative advantages and accelerate the deployment of renewable technologies at scale.

• **Reduce greenhouse gas, particle matter and other harmful emissions to raise environmental standards and contribute to achieving globally shared goals.**

Though all countries of the Middle East and North Africa region are members of the 2015 UN 2030 Agenda for Sustainable Development and Paris Agreement, focus on renewable energy deployment is primarily driven by the opportunity it offers to improve economic performance before addressing climate change concerns. This, however, includes an urgent need to improve environmental and productivity standards in the energy market including in relation with water and food sectors. Here renewable energy, alongside new circular models such as waste to energy, emissions to value, or carbon recycling play a key role.

THE NEED FOR GREATER COOPERATION

If not now then when, and if not here, then where other than in the Middle East and North Africa could deployment of renewable energy and clean innovative energy technologies have a higher impact on secure and sustainable energy market functioning? Greater dialogue and cooperation among countries in the Middle East and North Africa, as well as with international market stakeholders, on the platform that the International Energy Forum provides for the global producer-consumer dialogue will stimulate investment and help unlock the vast potential that the region holds. This will serve global energy security and accelerate orderly energy market transformations to fulfil long-term government visions, including globally shared goals.⁸



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wider macroeconomic goals rather than short-term business concerns will continue to push renewable technology deployment forward

14

The thirsty Middle East: the importance of water resources

Laura Silvia Battaglia
Journalist, Middle East Correspondent

SHARED PROSPERITY

The MENA region is one of the most water scarce areas in the world, with a regional annual average of 1,200 cubic meters per person (while world average is close to 7,000), according to the Food and Agriculture Organisation (FAO). Per capita annual water resources in water scarce countries such as Saudi Arabia and Jordan amount to less than 200 cubic meters. By 2025, due to population increase, the regional average water availability is projected to be just over 500 cubic meters per person per year. The region is characterized by high population growth rates, large and rapidly increasing food deficits, highly variable income levels both within and between countries, and limited natural resources, particularly arable land and water. Most of the region falls within the arid and semi-arid rainfall zones, where 60% of the total MENA population lives.

Not only is water scarce, but rivers are highly variable and difficult to manage. Many countries are mining groundwater, a temporary and risky expedient. The MENA region also accounts for about 60% of the world's desalination capacity but this option is restricted to the main oil-exporting countries. Major water resources in the region are shared between countries lying both within and outside the region. The most significant basins are those of the Jordan, the Nile, and the Euphrates/Tigris, all of which are subject to contentious riparian issues. Large aquifers underlie North Africa and the Arabian Peninsula but are costly to develop and pose potential problems insofar as agreement on abstractions by several countries is difficult to achieve. Deteriorating water quality is also an increasingly

serious issue in many areas due to a combination of low river flows, inadequate treatment, agricultural runoffs, and uncontrolled effluent from industrial activities. Seawater intrusion into coastal aquifers is a critical issue in most locations, and water logging and secondary salinity affect several of the major irrigated areas. The water scarcity situation is increasingly affecting the economic and social development of most countries of the region.

When combined with these factors, constrained access to water is set to lead to greater instability. This is likely to take the form of increased population movements within, across, and out of the region, as well as domestic social unrest and conflict between neighbouring countries.

A QUESTION OF GOVERNANCE AND POLITICS

In addition to geography and climate change, water management is now a question of governance and politics. Few governments in the region have put in place and implemented sound plans to mitigate the worsening impact of water scarcity. Most actually continue to incentivise high levels of water usage through low water pricing. While some countries have taken positive steps towards addressing aspects of this problem, too many remain prone to adopting quick fixes.

Most of MENA countries should draw up contingency plans, taking into account geographical, economic, and demographic differences when formulating water policies. The key solving factor – especially for water-scarce regions – is non-conventional water supply



60%

of the world's
desalination capacity
is in the MENA
countries

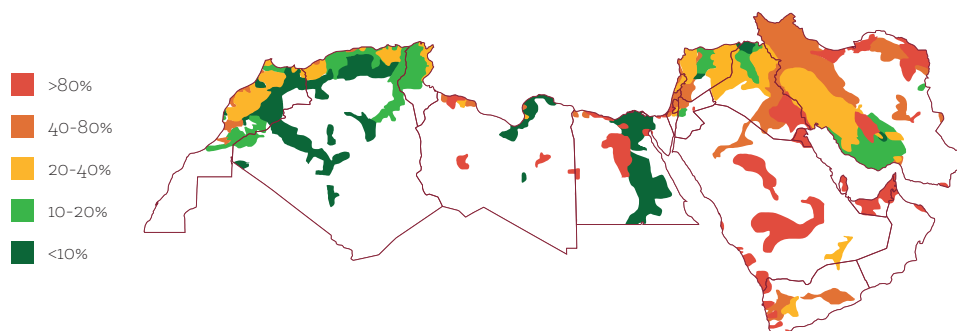
WATER IS CRUCIAL FOR THE ECONOMY

Use of fresh water and GDP composition in the MENA countries

	<i>Fresh water withdrawals 2015</i>			<i>Percentage of GDP 2017 (%)</i>			
	% for agriculture	% for industry	% of domestic	Agriculture	Industry	Manufacturing	Services
Algeria	59	5	36	12	36	5	44.1
Bahrain	-	-	-	0	41	19	57
Egypt	86	3	12	11	34	16	-
Iran	-	-	-	10	21	12	65.4
Iraq	-	-	-	5	42	2	-
Israel	-	-	-	1	19	12	69.8
Jordan	52	3	44	4	25	16	58.8
Kuwait	-	-	-	1	52	7	61.4
Lebanon	-	-	-	4	12	5	76
Libya	83	5	12	-	-	-	-
Morocco	88	2	10	13	26	16	49.5
Oman	-	-	-	2	47	8	43.7
Palestine	-	-	-	3	20	11	63.4
Qatar	-	-	-	0	52	9	47.9
Saudi Arabia	8	3	9	3	45	13	52.5
Syria	-	-	-	-	-	-	-
Tunisia	80	5	15	9	24	15	-
Turkey	81	-	-	6	29	18	53.3
UAE	-	-	-	1	44	9	46.9
Yemen	-	-	-	16	91	18	9.5
<i>World</i>	65	21	14	4	25	16	65.1
<i>MENA area</i>	52	3	44	6	35	11	54.2

Data: World Bank

Water stress in the MENA region
Water withdrawals as a proportion of surface water availability



Source: World Bank



1,200 m³
per person
 the annual average
 water availability in
 the MENA region
 (world average: 7,000)

sources, such as desalination plants. These sources can mitigate the detrimental impact of scarcity, as can managing domestic levels of water consumption by ensuring that price reflects cost. Furthermore, best practices and good governance in securing water supplies are necessary when it comes to MENA region: considering how rapidly water scarcity and other forms of environmental stress are beginning to shape regional developments, failure to implement effective water policies exacerbates the risk of conflicts between neighbouring countries.

In this scenario, investing to secure non-renewable sources of supply is necessary because a place that is water-scarce can still be water-secure, while conversely a water-rich country that uses water haphazardly can be insecure. Consequently, being water-scarce, as many countries in the MENA region are, does not make water insecurity inevitable.

**HOW A GROWING POPULATION IMPACTS
 WATER POLICIES**

Last but not least, two-thirds of the population in the MENA region live nowadays in areas with insufficient renewable water resources to sustain current levels of consumption. One of the most crucial transformations is rapid population growth and greater concentration in urban areas. At around 2% a year, population growth in MENA countries is steep compared to other parts of the world. By 2050, close to 400 million people living in the MENA region will be city-dwellers.

Rising urban population density causes particular stress on water resources. Within cities, the demand on water infrastructure is likely to further erode quality of life, thereby adding to the list of grievances that people have towards ruling elites. In addition, urbanisation may exacerbate rural-urban divides if governments come to focus their services on cities with higher population density, where the political and economic elites reside.

CASE STUDIES IN THE MENA REGION

Regarding water resources, in the MENA region each country faces its own issues, but similarities draw the line between those that have more domestic water resources than their basic minimum water needs (like Iran, Syria, Lebanon), and others that face instead a severe water shortage as water availability fails to meet even half of their water demand (like Jordan, Saudi Arabia, Yemen, Tunisia, Algeria).

Among the latter, when considering water policies different case studies can be identified. Jordan needs to develop a large-scale project intended to transport water from the Red Sea to the Dead Sea, including the construction of large desalination plants as well as hydrological power generators that could significantly enhance Jordan's water security, reinforcing good relations among Israelis, Jordanians and Palestinians. Egypt has signed a diplomatic agreement with Ethiopia and Sudan (The Khartoum Declaration) regarding the construction and usage of the "Great Ethiopian Renaissance Dam" and has devised a National Water Resources Plan to reduce



500 m³
per person
 water availability in
 the region by 2025

domestic consumption and mitigate the impact of water scarcity due to many internal challenges caused by a rapidly growing population, subsidised water costs, heavy water losses from inefficient infrastructure, wasteful irrigation, and highly damaging polluting practices.

HOW WATER ISSUES IMPACT STATE (IN)STABILITY: THE CASE OF IRAQ

In terms of social implications and ongoing conflicts, however, the most significant case study in the MENA region is Iraq. Prior to the first Gulf war in 1990, Iraq's water sector was one of the most advanced in the region, in terms of both supply and distribution. Since then, however, the lack of investment in the water sector, as well as the general destruction wrought by conflict, have taken their toll. For example, irrigation canals and other major components of the water infrastructure have deteriorated and at no point over the last two decades have any of Iraq's dams been filled to capacity. In Baghdad in particular, water levels are becoming dangerously low.

Part of the responsibility clearly lies with Turkey, which has embarked on a major irrigation and electrical power project called the South-eastern Anatolia Project, involving the construction of the Ilisu Dam, one of several dams that will ultimately slow or reduce the flow of water into Iraq from the Euphrates and the Tigris. But river flows in Iraq have been dropping for years, due to climate change and persistently high levels of consumption upstream. This has dealt a significant blow to food production, electric power generation, sanitation and health care and industry. Recently, erratic weather patterns, particularly drought in northern Iraq and unpredictable periods of rainfall, have had a major impact on Iraq's freshwater supply. At this stage, international organisations such as the United Nations have noted that the quality of water for drinking or agriculture in Iraq fails to meet the standards of the World Health Organization or even Iraq's own national standards.

Iraq's case shows how many factors can combine to ruin a country that could be potentially independent regarding water resources. Political key factors and external powers fur-

ther complicate the matter: by holding power over Iraq's water security, Turkey has the ability to shape Iraq's domestic politics including in the areas of governance; Kurdish nationalism and bilateral relations with other powers such as Saudi Arabia and Iran makes things even more difficult.

Additionally, it is no surprise that not-state armed groups have targeted water resources in Iraq. Mosul, which was the stronghold of the Islamic State in Iraq, is the largest city in the Nineveh Plains, a crossroad where dams, water, electricity and agricultural activities were very advanced in the pre-Saddam era. Also not surprising is the use of water as a weapon in domestic policy: for example, Muqtada al-Sadr, the influential Iraqi Shia leader, publicly demanded that the Iraqi government address water scarcity by a set deadline. Similarly, competition arises between public bodies of the State, like the government of Iraq and the Kurdistan Regional Government, that often fight to protect their diverging interests and further undermine investment in water.

WHICH WAY AHEAD?

Iraq is a case in point demonstrating the challenges of pursuing development and growth within the context of ongoing conflict and instability in the MENA region. It is no wonder that the rising young urban population is calling for better governance and, as the ongoing protests in the country have shown, one of their priorities is water, that they demand in better quality and larger quantity.

The Iraqi landscape suggests that other countries where governance is better but environmental and social factors are similar (desertification, drying up of rivers, climate change, exponential population growth) may soon be exposed to violent internal and external conflicts. In this sense, a solution could be found in the integrated water management plans carried out by the Gulf countries (UAE, for example), which make considerable use of sea water desalination, which requires however costly investment plans and the guarantee of regional alliances. For this reason, the road to more lasting regional stability must necessarily run along the waterways.



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a solution could be found in the integrated water management plans carried out by the Gulf countries (UAE, for example), which make considerable use of sea water desalination

3

MIGRATION

Climate change and demography as push factors of migration pressure

Bouchra Rahmouni

Senior Fellow, Policy Centre for the New South

MIGRATION

Climate change is one of the world's widest challenges of the 21st century.

Indeed, the natural variations of the climate accentuated by the emission of greenhouse gases made by human mass-activities in a capitalistic world, engenders weather fluctuations that are becoming irreversible. The migratory flow caused by climate change is alarming and has become a major issue in two continents: Africa - the MENA region - and Europe, that is, the transit countries that are now rethinking their policies concerning migrants. According to UNICEF,¹ the MENA region accounts for approximately 6% of the world's population, 60% of the world's oil reserves, 45% of the world's natural gas reserves, and 8 out of 15 countries are members of the Organization of Petroleum Exporting Countries (OPEC).

POPULATION GROWTH

While in developed countries the growth rate is slowing down, Africa is witnessing major changes in its demography. Indeed, the MENA region's population has been evolving since the second half of the 20th century. In the 1950's, the region's population was estimated around 100 million inhabitants. With an annual growth rate ranging from 1% to 2%, the population had grown to 380 million in the 2000s, corresponding to a 280 million increase in 50 years. Despite an estimated slower pace of growth between 2025 and 2030 - that the UN attests at around 0.8%, lower than the world's annual growth of around 1.3% - the MENA region will still post an annual growth rate of 2% from 2030 to 2050. According to these forecasts, the global popula-

tion of the MENA region is estimated to reach around 724 million by 2050 in a world that will be home to 9.7 billion people. The region will account for 7.46% of the world population. One exception to this general trend is Lebanon, where the population is expected to decrease by 480,000 by 2030 and then increase again by 2040, while Egypt, Iraq and Sudan will witness staggering surges with estimated increases up to 50% higher than the global rate between 2030-2050.

DEMOGRAPHIC TRENDS: A DOUBLE-EDGED OPPORTUNITY

As the world's population grows older, the emerging continent's population gets younger. The pace of population growth in poor and instable countries is higher. Demographic pressure is here to stay and while it could become an asset for emerging powers, it is in fact also a threat to stability. A population that is 60% 25 years old and younger is an advantage only with a clear strategic vision in place. For the time being, it would appear to be mainly a challenge to stability, and in the short term it will require the creation of 6 million new jobs by 2020 to respond to actual needs. For the time being the MENA region is struggling with the highest youth unemployment rates in the world,² and those figures are bound to increase further by mid-century.³ By then, 38% of the population will be under age and poorly educated, mainly because most of them live in fragile and conflict-affected countries, where over 15 million children leave school at a very early age, increasing the unskilled labour force.

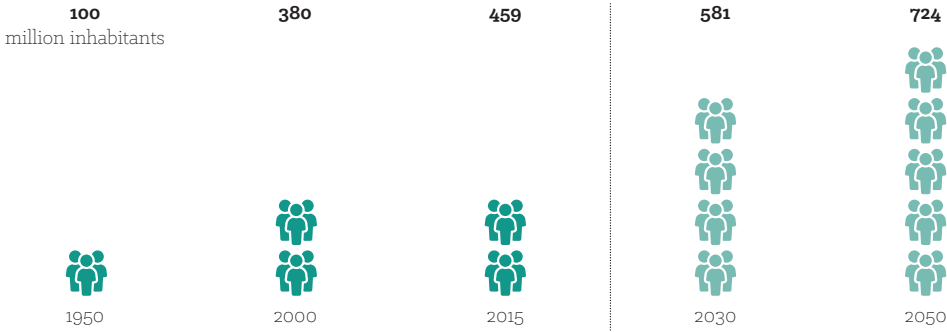


724 million

the population in the
MENA countries by
2050

A CONSTANT GROWTH

Evolutions of MENA's region population



CLIMATE CHANGE PRESSURES FROM THE SOUTH

Climate-related trends in Africa



Data: UN Population Prospects; IOM

Conflicts as push factors
People displaced in 2018 due to conflicts

	Number of displaced	Percentage of total
Sub-Saharan Africa	7,446,000	69.1%
Middle East and North Africa	2,137,000	19.8%
South Asia	544,000	5.0%
The Americas	404,000	3.7%
East Asia and Pacific	236,000	2.2%
Europe and Central Asia	12,000	0.1%

Data: Eurostat

POVERTY: A KEY ISSUE

The World Bank's goals for 2030 include ending extreme poverty and promoting shared prosperity by raising the incomes of the poorest 40% of the population across all countries.⁴ In the World Bank 2018 report on poverty and shared prosperity,⁵ the MENA region stands out for two reasons. First, the poverty rate has increased between 2011 and 2015 by 3% due to continuous political instability; second, the number of people living with less than \$1.90 a day has doubled in Syria and Yemen. And yet, population growth and demographics in the MENA region also represent a great opportunity to strengthen the economy and to improve the labour scenario. The lack of opportunities as well as the impact of instability and violence together with climate change have triggered, however, mass immigration to Europe - which is an aging region in need of a younger workforce. At the same time, the rise of European nationalism caused mostly by the emergence of terrorist threats has fuelled opposition against mass immigration.

ENVIRONMENTAL MIGRANTS: THE NEW CHALLENGE OF THE 21ST CENTURY

According to the United Nations, the number of international migrants⁶ in the world has steadily increased over the last 17 years, reaching an estimated population of 258 million in 2017, approximately 3.5% of the world's population (up from 173 million in 2000), that includes legal

and illegal migrants as well as refugees. Forced migration estimates indicate that around 65 million people have been displaced, including 21 million refugees (less than 10% of the international migrant population), 3 million asylum seekers, and 40 million internally displaced persons. Two thirds of international migrants live in Europe and Asia, followed by North America. Most migrants live in rich developed countries, including OECD countries; 29% (71 million) live in developing countries, with intermediate incomes; 9 million in low-income countries. In 2015, one-third of international migrants lived in 20 countries, most notably the US (47 million), Germany (12 million), Russia (12 million) and Saudi Arabia (10 million). Although there is no reliable estimation of climate change migration, it is widely agreed that this number is growing at a faster pace than the world population. According to the International Organization of Migration,⁷ by 2050 the number of migrants is predicted to be around 1 billion of which 200 million will be climate-forced migrants – a trend that is alarming to the governments that will be called to receive millions of largely undocumented migrants.

SECURITY AND BORDER CONTROL IN EUROPE AND TRANSIT COUNTRIES

The European Union's construction of the Schengen space has made it possible to legalize and control the mobility of migrants in order to prevent a potential rise in criminality rates. Following an agreement concerning the abolition of border control that was signed in 1985 and that has been in force since March 1995, the EU has been working to define a common policy to contrast illegal immigration in order to protect the common space. To this end, the EU has reached a readmission agreement with third party countries by setting up an external border protection agency (FRONTEX) that operates along the African coast. This policy has also provided for the creation of administrative detention centres where migrants await admission or expulsion while living in precarious, degrading conditions. The average duration of detention is 32 days in France and 30 in Morocco. The European migration control policy for illegal immigration is usually based on bi-

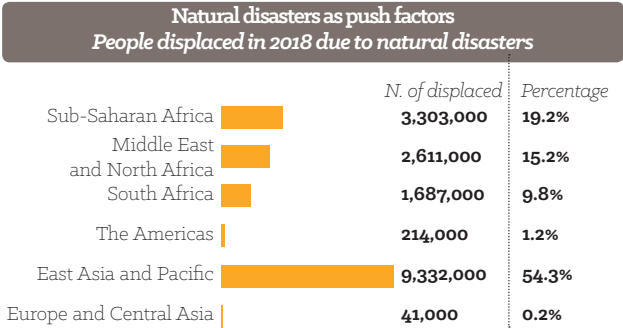


200 million
 climate-driven
 migrants worldwide
 by 2050

lateral agreements between the EU and transit countries of the MENA region such as Morocco (1996), Tunisia (1998), Algeria (2005) and Turkey (2016). The early agreements resulted from the Declaration of Barcelona of 1995 that aimed to intensify cooperation regarding illegal migration in the Euro-Mediterranean space. North African transit countries enter the agreements mainly to contrast the irregular migration of their nationals in exchange for the improvement of regular immigration conditions. The largest majority of migrants who transit through North Africa come from sub-Saharan Africa, especially from the Sahel region.⁸

THE LACK OF INFRASTRUCTURE

Mediterranean riparian countries⁹ seek above all to adopt a security plan concerning the MENA region countries. In 2005, on the 10th anniversary of the Barcelona Agreement the European neighbourhood policy was created, aimed to provide aid for development and the establishment of a common economic area, conditioned by participation in migration control. Morocco benefits from an advanced status that expands cooperation in the economic framework to evolve into a common economic space. A readmission agreement has been adopted by all the countries concerned that provides for the readmission of irregular migrants whose nationality is not the one of the country of readmission but the country of transit. It is an act by which the signatory states undertake to readmit nationals who have been arrested as illegal migrants, but also foreigners who have transited through their territory before being arrested in other countries. These agreements also call for the respect of the rights of migrants. Morocco has signed readmission agreements with several sub-Saharan states, among them Mali, Senegal, Nigeria, Liberia, Congo, a move that is widely regarded as a shift towards European migration policies. Since Maghreb countries are countries of origin, transit and destination at the same time, adequate public policies are urgently required to overcome the lack of proper infrastructure to host and improve the migrants' quality of life, also in light of the fact that no clear separation exists between climate migrants and poverty migrants.

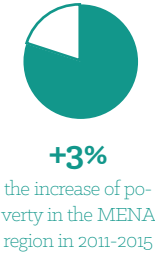


— Data: Internal Displacement Monitoring Centre (IDMC) —

REFUGEES VERSUS MIGRANTS

The definition of a refugee is “...owing to well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group or political opinion, is outside the country of his [or her] nationality and is unable or, owing to such fear, is unwilling to avail him [or her]self of the protection of that country; or who, not having a nationality and being outside the country of his [or her] former habitual residence as a result of such events, is unable or, owing to such fear, is unwilling to return to it” (Article 1A.2).¹⁰ However, this definition does not take into account the natural threats and climate change pressures that migrants may be trying to escape. Climate change has forced people to leave in order to escape floods, droughts or even rising sea levels in what are generally national migration flows. However, the status of climate migrants is often also threatened by a lack of provisions for the protection or defence of forced climate migrants/refugees. This is particularly evident in the MENA region, where droughts are the main reason of climate migration along with the lack of drinkable water, leading to disastrous consequences for human health in addition to high unemployment and the absence of opportunities.

By improving public policies, for example through strict worldwide regulations on greenhouse gas emissions, the integration of climate migration as a new form of forced migration, and investments in research and development concerning climate change and migration prevention, the climate migration flows could be better regulated.



16

The future of migration from Africa to the EU

Matteo Villa, Research Fellow
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MIGRATION

Over the last few years, in Europe the word “migration” has often gone hand in hand with the word “crisis”. The attention of public opinion and policy makers alike has dwelled on existing difficulties and immediate responses. But migration is surely not a new phenomenon and while the European “migration crisis” is now over, its conclusion will not mark the end of regular and irregular immigration to the EU.

On the contrary, the opinion that the future will see migration to the EU rise uncontrollably seems to be gaining traction. Recent UN projections showing that the African population is meant to double over the next 30 years have fuelled fears of a potential “multiplier effect” that demographic developments could have on migration from Africa to Europe.¹ But policy responses cannot be based on fears. To better understand the bigger picture and prepare accordingly, it is high time to develop a longer-term view on likely migration trends. This is no easy task, but in the face of difficulties efforts should be redoubled, not abandoned. Whilst, on the one hand, conflicts can spark sudden, high and unpredictable migration, flows are also linked to more predictable factors, some of which change slowly over time. These include GDP levels relative to other countries in the world, and population growth. A closer look at these factors can be revealing about the future of migration from the African continent to Europe, and can contribute to plan more effective policy responses.

PAST AFRICAN MIGRATION TO EUROPE

The stock of African migrants living in the EU between 1990 and 2020 (authors’ projections) has more than doubled, from 4.2 million to 9.4 million. This increase concerns both migrants from sub-Saharan Africa (SSA) and those from Northern Africa (NA). Given NA’s geographical proximity to EU countries, the share of migrants from this area living in the EU has constantly been higher than the share of SSA migrants. However, while in 1990 SSA migrants made up around 37% of all Africans living in the EU, this share has slowly increased over time and is expected to reach 45% in 2020.

Notwithstanding the latest 2014-2017 “migration crisis”, Africans living in the EU still comprise only 1.8% of the bloc’s overall population. A share that has indeed increased from 0.9% in 1990, but mostly between the late 1990s and early 2000s, not today. Also interesting to note is that, while several EU countries have tightened regular channels for African migrants, migration from the continent has not abated, but has mostly shifted toward irregular routes. This is evidence that underlying structural factors of migration tend to be stronger than policies aimed at restricting access, making flows hard to stop.

WHAT SHAPES MIGRATION

Migration models find a strong relationship between relative GDP per capita levels (compared to other countries) and migration flows. This leads many to believe that eco-

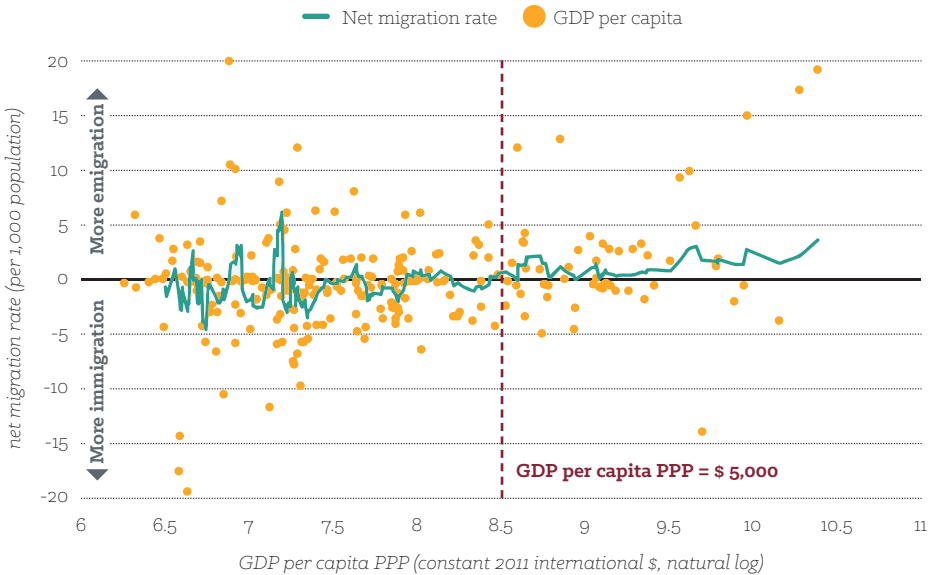


1.8%

of people living in
Europe are of African
origin

MIGRATION AND ECONOMIC DEVELOPMENT: AFRICA'S "MIGRATION PLATEAU"

Relation between migration and GDP per capita in Africa



PAST AND PRESENT

Stock of migrants in EU28 countries

	SSA	NA
1990	1,600,052	2,731,357
1995	1,902,685	2,922,888
2000	2,250,917	3,193,838
2005	2,961,606	4,295,531
2010	3,597,229	4,757,520
2015	3,815,557	5,001,425
2020 proj.	4,196,892	5,177,635

WHAT THE FUTURE HOLDS?

Annual migration flows
from African countries to the EU28

1995	98,833
2000	123,836
2005	362,476
2010	219,522
2015	92,447
2020 proj.	147,277
2025 proj.	174,353
2030 proj.	171,458
2035 proj.	172,986
2040 proj.	157,544

Sources: World Bank; Authors' calculation on World Bank data



< \$4,000

the average GDP per
capita in
sub-Saharan Africa

conomic development in one country should always lead to less emigration, as people find more opportunities at home. Instead, as GDP per capita increases from low levels, so does people's ability to imagine a future in another country and to act upon it. Therefore, emigration rates tend to increase as well. Today, this trend persists until approximately 5,000 international dollars at purchasing power parity (PPP). After that, as average incomes rise, the number of people emigrating starts to fall, as people are indeed more capable to migrate but also less willing to do so. Experts refer to this general trend as the "migration hump".² Given that the average GDP per capita of sub-Saharan African countries today is less than 4,000 PPP international dollars, well under the peak of the migration hump, we should expect emigration to increase as countries develop.

However, when one only looks at historical data from the subsample of African countries, the migration hump does not seem to hold true. Rather, the trend is much more similar to that of a "migration plateau": in African countries, the net migration rate remains very flat, also after having exceeded the 5,000 PPP international dollars threshold. This means that as GDP per capita varies, net migration rates stay constant.

A second key determinant of migration is population growth. As population rises, a constant emigration rate transforms into a larger absolute number of emigrants. Africa is set to double its population over the next 30 years, from 1.2 billion inhabitants today to 2.5 billion in 2050. As Africa's population doubles, the number of its inhabitants aged 15-35, the age cohorts that are most likely to migrate, is expected to double as well.³ At the same time, recent surveys of migration intentions indicate that over a quarter of the African population aged 15+ wishes to migrate to another country permanently or for an extended period of time.⁴ All signs point toward an impending "invasion" of young African migrants. But is it actually so? Are expectations of an exponential rise of future migration flows from Africa to Europe based more on facts or fear?

WHAT THE FUTURE HOLDS

In a forthcoming publication, we attempt to forecast migration flows from Africa to the EU over the next two decades. Here we summarize some of the preliminary findings. To forecast future migration stocks of Africans in the EU, on a country by country basis, we combine the "migration plateau" (i.e. the knowledge that migration rates from African countries do not vary significantly as they develop) and demographic trends with the evolution of migration stocks in Europe in the recent past.

Indeed, while Africa's population is meant to double between now and 2050, it has already done so in the previous three decades (since 1990), from 630 million people to 1.3 billion. Yet, the migration rate of Africans to Europe has remained quite steady. We can therefore safely assume that, even at times of tumultuous demographic changes, the recent past can be a good indication of the future.

Interestingly, results from our forecasts do not match popular expectations. Migration flows from Africa to the EU are expected to increase somewhat, but also to remain well within the range of past fluctuations. Moreover, migration flows to the EU are expected to stabilize and even decrease moderately towards 2040. Cumulatively, this means that the number of African citizens living in the EU (and who have not acquired EU citizenship) is expected to increase only marginally, from 1.8% today to 2.5% by 2040.

Migration forecasts for single African countries are also surprising. According to UN projections, in 2040 Nigeria will be the most populous African country by far: its population (329 million inhabitants) could be more than twice that of the second most populated country, Ethiopia (175 million). And yet, in terms of migration to the EU Nigeria is expected to be only the fourth country; more specifically, Nigerians are expected to reach Europe at less than half the rate of Moroccans, and at lower rates than Algerians and Somalis. The reason for this is, simply put, that the citizens of some countries have a higher likelihood to migrate than others, and Nigerians and Ethiopians have a markedly lower



2.5 billion

population
of Africa in 2050

tendency to leave their countries than, say, Algerians or Gambians.

Finally, geographical proximity to the EU is still expected to make a difference. The migration rate to Europe from Northern African countries will continue to be higher than that of the rest of African countries. But, in absolute terms, a shift is occurring, as more and more people are expected to reach Europe from SSA (110,000 migrants per year between 2020 and 2040) rather than NA countries (50,000 per year). This is a significant evolution if compared to the past three decades, when NA migrants comprised approximately half of total migration from Africa to the EU.

FROM CRISIS NARRATIVES TO MIGRATION GOVERNANCE

Recent attempts at bringing down irregular migration to Europe from countries facing the Mediterranean have proved very effective. However, these reductions have been achieved through disputable bilateral deals that “externalized” migration control to transit countries, and their sustainability over the longer term is questionable. Research has shown that past attempts to reduce migration flows have mostly incentivized aspiring migrants to take irregular routes, rather than not move.⁵

However, the belief that migration cannot be governed is highly exaggerated. We show that it is unlikely that migration flows from Africa to Europe will become so high for so long as to become unmanageable. This holds true even as the continent’s population continues to boom.

Better modelling of migration flows from specific countries allows EU policy makers to

choose the correct countries to target in terms of development assistance and diplomatic engagement. In some ways, there is a need to acknowledge that the policy toolbox might be more limited than is currently believed: the “migration plateau” shows that emigration from Africa tends to remain stable, irrespective of whether a country follows a sustainable development path or experiences a sharp economic recession. Also, as African economies continue to grow, the extent to which the EU can effectively rely on carrot-and-stick policies will be increasingly limited.

But many other policy tools are available to better manage future migration flows. Tailoring legal migration channels (especially for labour migrants) to expected migration flows from specific countries can help the EU avoid the human and economic losses caused by forcing migrants to take irregular channels instead. As others have proposed, this could be combined more strongly with programmes to educate and train potential migrants who are still in origin countries, bringing down costs while increasing the chances to integrate once here. Finally, investing in integration policies that are fit for those who are expected to reach Europe in the near future can also help to cut costs and focus on those policies that work (such as language courses or vocational training in specific sectors).

Forecasting future migration flows is crucial to fostering an approach to migration governance that is led by pragmatism, rather than baseless fears and false myths. Some Africans will migrate to Europe no matter what. Whether everyone can make the most out of it will depend on how governments choose to face this inevitable phenomenon.



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forecasting future migration flows is crucial to fostering an approach to migration governance that is led by pragmatism, rather than baseless fears and false myths

Safe and legal pathways towards Europe

Daniele Albanese
Caritas Italiana

MIGRATION

The global population of forcibly displaced persons increased by 2.3 million in 2018 reaching 70.8 million worldwide as a result of persecution, conflict, violence, or human rights violations.

The geography of the refugee crisis shows that, contrary to European media narratives, the large majority of refugees (85%) are hosted in low- and middle-income countries¹ and in Europe refugees comprise only about 0.4% of the overall population while non-EU migrants make up a narrow 4%.²

Protracted refugee situations across the globe now last an estimated 26 years on average³ due to the lack of durable solutions.⁴ A growing number of individuals embark on dangerous journeys, albeit irregularly, often at the hands of human smugglers and traffickers, paying exorbitant amounts and facing detention and treacherous conditions in transit countries,⁵ especially in Libya.⁶ While safe, orderly and regular migration is regarded as valuable by all the parties involved, in Europe external migration management and border control⁷ measures as well as restrictions on search and rescue operations and visa policies, have resulted in fewer arrivals but higher death tolls.⁸

Not surprisingly, several commentators agree that this shift from regular to irregular migration may be the result of more restrictive visa and external border control policies.⁹ Europe could certainly learn from studies concerning the last sixty years in the USA that show how the rigorous application of border restrictions has led to a reduction

in irregular migration flows only when it is accompanied by a significant, durable and credible increase in visa opportunities and regular journeys.¹⁰

In an attempt to address this sensitive issue at global level, the New York Declaration for Refugees and Migrants endorsed the development and expansion of Resettlement and Complementary pathways.¹¹ Building on this commitment, the Global Compact on Refugees (GCR)¹² recognized that creating adequate instruments for the admission of refugees can facilitate access to protection and also serves to express solidarity towards host countries and communities where immigrant numbers are higher. The signatory States agreed to develop a Three-Year (2019-2021) Strategy¹³ to make opportunities available to refugees on a more systematic, organized and sustainable basis, and to adopt appropriate protection safeguards.

In Europe the matter of safe and legal channels to obtain protection has gained momentum. This renewed interest has been influenced by various factors including the need to protect Syrians, a growing willingness to share responsibility, the determination to address the dangers of the Central Mediterranean route, as well as mounting pressure from large portions of European society.

It should be noted that the EU has drawn up a list of visa-liberalised countries (VLC)¹⁴ and in 2018 115,000 applications were submitted (almost 20% of all asylum applications), a number that marks a 30% increase over 2017¹⁵ and by far the highest in recent years.



85%

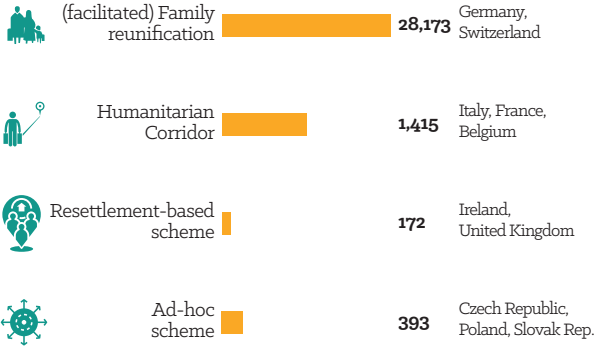
of all refugees
in the world are
hosted by low- to
middle-income
countries

ONGOING COMMUNITY SPONSORSHIP APPROACHES IN EUROPE (SINCE 2013)

Programme	Approach	Year/s	Who Sponsors?	Who is Sponsored?	Commitments of Sponsor	Complementarity
German Regional Admission Programmes		2013 - present	Family members	Syrian family members of German residents and citizens	Full financial support for 5 years, excluding healthcare	Additional to resettlement
Irish Syrian Humanitarian Admission Programme (SHAP)	Family Reunification-Based Programmes	2014	Family members	Syrian family members of Irish residents and citizens	Full financial support (indefinite)	Additional to resettlement
French Humanitarian Visas		2014 - present	Family members and faith-based organisations	Syrians and Iraqis in Iraq, Jordan, Lebanon and Turkey	Full financial support until granted refugee status (approx. 6 months)	Additional to resettlement
Humanitarian Corridor Italy	Humanitarian Corridors Programmes	2015 - present	Faith-based organisations and churches	Vulnerable persons in Lebanon, Turkey, Jordan, Niger and Ethiopia	Travel, housing, integration support for undefined period (usually 1-2 years)	Additional to resettlement
Humanitarian Corridor France		2017 - present	Faith-based organisations and churches	Vulnerable Syrians and Iraqis in Lebanon	Travel, housing, integration support for undefined period (usually 1 year)	Additional to resettlement
Humanitarian Corridor Belgium		2017 - 2018	Faith-based organisations and churches	Vulnerable Syrians in Turkey and Lebanon	Housing and integration support for 1 year	Additional to resettlement
UK Full Community Sponsorship Programme	Resettlement-Based Programmes	2016 - 2020	Registered charities	Refugees referred by UNHCR	Housing and integration support for 2 years	Within resettlement (Additional as of 2020).
German Community Sponsorship Pilot		2019	Groups of at least five German citizens or residents	Refugees referred by UNHCR	Housing and integration support for 2 years	Additional to resettlement (resettlement and sponsorship pledges announced at the same time)
Irish Community Sponsorship Pilot		2019	Groups of Irish citizens or residents, supported by Regional Support Organisations	Refugees referred by UNHCR	Housing and integration support for 2 years	Within resettlement (not additional)

Sources: "Fostering Community Sponsorship across Europe" (2019), ICMC Europe and Caritas Europa

The private initiatives
Private sponsorship in Europe (2013-2018)



Data: European Commission

RESETTLEMENT

Resettlement¹⁶ “involves the selection and transfer of refugees from a State in which they have sought protection to a third State which has agreed to admit them – as refugees – and grant them permanent residence status” and it is the primary solution adopted worldwide. According to UNHCR estimates, in 2019 the need for resettlement will concern around 1.4 million people (about 8% of the refugee population) globally. This figure is almost unchanged compared to 2017, but has increased by 50% compared to 2012.

In the face of growing needs, the response of the international community has been decidedly insufficient, even if resettlement has proved to be a tool with remarkable potential for integration.¹⁷ Until 2016, the quotas available globally increased steadily reaching a record 126,000 departures, while 2017 marked a sharp slowdown, allowing only 65,000 people to resettle.¹⁸ In the EU, the first comprehensive Resettlement Programme was launched in 2015 granting EU funding to States¹⁹ and, according to the EU Commission, 27,800 people resettled to Europe up to 2017.²⁰ More recently, EU Member States²¹ have pledged to resettle 50,000 refugees by October 2019²² and by the end of June 2019, 32,071 refugees have been resettled under the new scheme. Furthermore, in 2016 the European Commission proposed a Union Resettlement Framework, which is currently the subject of negotiations

among EU Institutions. Both of these schemes mark a significant increase in numbers over previous years.²³

However, despite these initiatives, statistics show that Europe’s contribution to global resettlement has been modest and represents less than 6% of the total need. Moreover several governments are using it as a strategic migration management tool by focusing on those countries that cooperate with the EU to reduce irregular arrivals (most notably the EU-Turkey agreement) and even infringing on the right to apply for asylum for those who come to Europe spontaneously.

COMPLEMENTARY PATHWAYS

As a result of wide-ranging consultations, according to the Three-Year Strategy (2019-2021) UN Member States affirm that a multi-stakeholder and partnership approach with States, national and international NGOs, civil society, private sector, academia, faith-based actors, refugees and other UN agencies is the best way to expand the availability of safe and legal channels. This might become a sustainable policy approach that would not require new measures to be designed from scratch for each crisis. It would function instead as an ongoing programme that will, over time, strengthen the international refugee protection regime. Admission programmes offering a mechanism for protection have become known as “complementary pathways”.²⁴

Complementary pathways include non-humanitarian means, such as procedures for family reunification, education (student visas) and labour mobility, which can serve to enhance refugee self-reliance by helping them to attain a durable solution, or humanitarian admission programmes, such as community sponsorship programmes, in addition to resettlement.

Family reunification²⁵ is an essential tool to create socio-cultural stability and represents one of the main avenues for legal migration to the EU. 359,724 people in 2018 obtained a residence permit for family reasons, a number that accounts for approximately one third of all arrivals.²⁶ However the procedure presents several complexities that make access diffi-



1.4 million
worldwide refugees
are in need
of resettlement

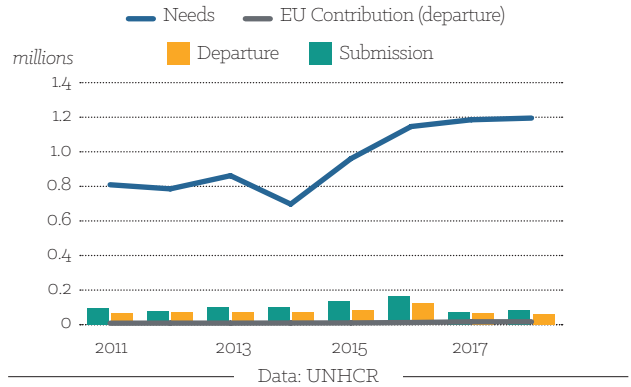
cult for applicants who are beneficiaries of international protection.²⁷

Access to student visas²⁸ and work permits for refugees, while encouraged by several recent research studies,²⁹ remains marginal not only in the EU but in all OECD countries (0.4% for student visas and 0.1% for work permits among main asylum nationalities).

Private or Community sponsorship programmes originated in Canada, where they have been available since 1978.³⁰ In Europe this is a flexible concept³¹ and three main approaches seem to have developed. The first is the *extended family reunification-based approach* in Germany, Ireland and France mainly for Syrian and Iraqi families; the second is the *Humanitarian Corridors approach* in Italy,³² France, and Belgium, which relies on agreements with receiving States to issue a specific number of humanitarian visas; and the third is the *Resettlement-based approach*, consisting of welcoming refugees who are identified and referred by UNHCR to the UK, and more recently Germany and Ireland.³³

The feasibility study commissioned by the European Commission³⁴ analyses the legal and operational feasibility and added value of EU support to sponsorship programmes. The study explores four scenarios, ranging from capacity building and financial support to new EU legislation and puts forward recommendations for the European Commission to support private sponsorship schemes by increasing funding opportunities for States and

EU and resettlements: still too little Resettlements submissions, departures and needs in the world and EU contribution



Civil Society Organizations and by developing capacity building tools.

The time is thus ripe to adopt resettlement and complementary pathways that have demonstrated in practice to be effective refugee protection tools, that European States can further develop and expand. In this regard, well-designed community sponsorship schemes and a resettlement framework can contribute to a considerable increase in the regular admission of refugees, to ensure better integration outcomes and more tolerant and welcoming societies. For that to happen, EU and national policy makers must seize this opportunity and tap into their citizens' growing desire to proactively contribute to refugee protection and integration.



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Well-designed
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increase in the regular
admission of refugees

Beyond the conflict: what future for Syrian refugees?

Kholoud Mansour

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MIGRATION

Eight years after the Syrian uprising and the subsequent conflict, the narratives about Syrian refugees are only getting more tangled and hostile.

The tightening of measures and coercive actions undertaken against Syrian refugees in neighbouring countries over the last few months are alarming. There has been colossal regional and international pressure calling for the return of Syrian refugees in the last few years, especially from Syria's neighbouring countries and Egypt. Those countries host now more than 5.6 million registered Syrian refugees and the number is even higher when considering the unregistered ones. The target for the U.K. was to receive 20,000 Syrian refugees for resettlement between 2015 and May 2020, but one single province in Turkey or Lebanon is home to double this number. The protracted displacement of the Syrian refugees has undoubtedly placed exceptional socioeconomic, political and security strain on these countries, overstretching their infrastructures and services while heightening fatigue in the face of soaring needs, which is not at all surprising. According to UNHCR estimates, 186,604 refugees have spontaneously returned home from neighbouring countries and from Egypt from 2016 to July 2019.

inception in July 2018, this "initiative" has incited Syria's neighbouring countries to take extremely tight measures and adopt policies that crassly disregard human rights, international protection standards, accountability or justice. Several push factors have forced many refugees to return or to consider returning despite the danger and threats that such a decision entails. These include, for example, their legal status and lack of documentation, the lack of employment opportunities, economic strain and the drying-up of savings, a hostile socio-cultural environment, and mounting racism and xenophobia against Syrian refugees. In addition to the various push factors that have left the refugees between a rock and hard place, such intense pressure to return deprives Syrian refugees of the right to choose, to make informed decisions and to assess their actual priorities and needs.

Studies and surveys have shown that 85% of Syrian refugees do not intend to return to Syria in the near future and that those who intend to go back would only return to their homes and areas of origin. This may not be possible under the series of laws enacted by the Syrian authorities since 2012, including Decrees 63/2012, 66/2012 and Law No 10/ 2018 that aimed to confiscate assets and prevent Syrians from ever accessing their properties again. The enforcement of the UN Pinheiro Principles is thus all the more essential to protect refugees and internally displaced persons against discriminatory laws on housing, land tenure and restitution and to enable them to demand restitution when they are unlawfully or arbitrarily denied access to their property. Studies have shown that many Syrian



186,604

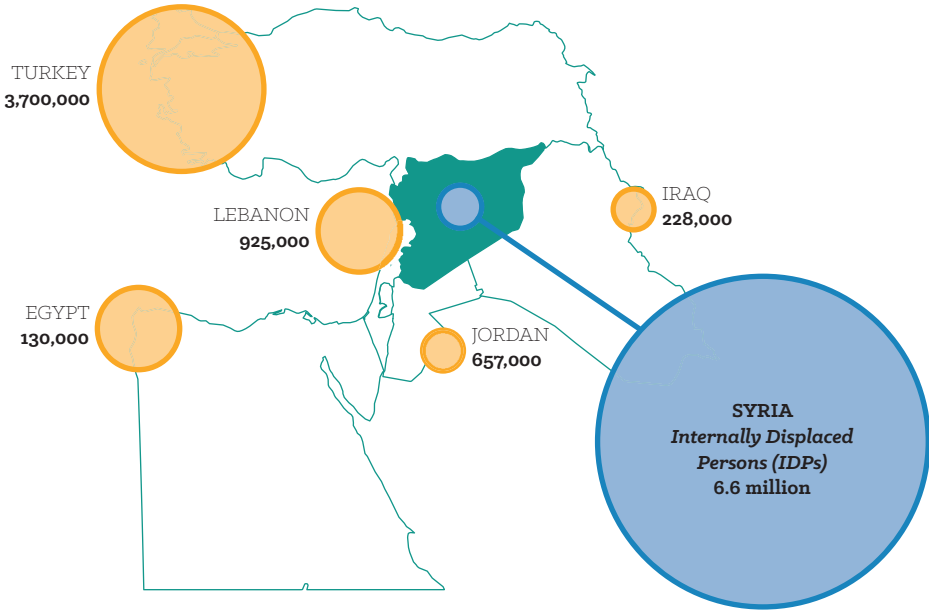
refugees returned home from neighbouring countries from 2016 to July 2019

"SAFE, VOLUNTARILY AND DIGNIFIED" RETURN?

The pressure on Syrian refugees to return has further exacerbated since the so-called Russian "initiative" to facilitate the return of 1.7 million refugees from there and from Europe. Since its

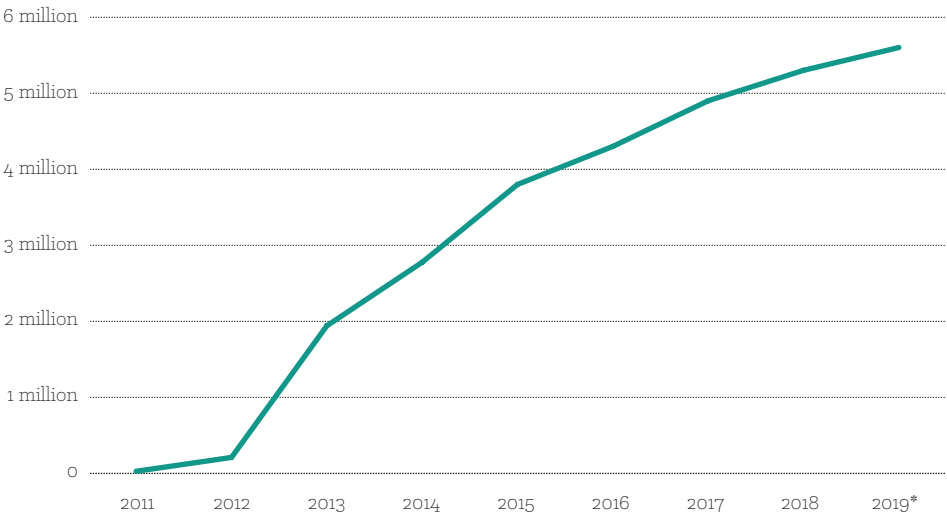
THE GREAT ESCAPE

Number of Syrian refugees by host country



THE CRISIS RUNS FAST

Number of registered Syrian refugees abroad since the beginning of the conflict



*as of September 2019

Sources: UNHCR



576,000

displacements
between May and
August 2019

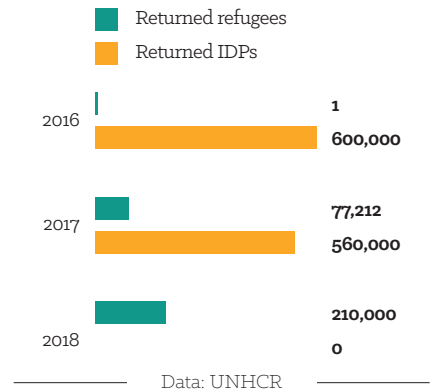
refugees do not believe in what is known as “voluntary, safe and dignified return” without a political transition in Syria and many could not even return to Syria as long as the current repressive regime is in place.

International observers and actors have been warning against the disastrous repercussions of forcing Syrian refugees to return under the veneer of “safe, voluntary and dignified” and how this is going to jeopardize their safety and security and lead to further displacements and destabilization. Pushing for return or maximizing the number of returned refugees at any cost has been widely criticised as “very premature” and a “poor policy target” considering that the situation in Syria is still highly volatile and the violence has not ended. The conditions are simply not ripe or conducive for return.

The military attacks and airstrikes by the Syrian regime and its allies on Idlib since last April have targeted primarily civilians, hospitals, schools and other civilian facilities. More than 1,000 civilians have been killed, among them 304 children. There are currently 3 million people in northwest Syria of whom 76% are estimated to be women and children (25% and 51% respectively). 576,000 displacements took place between May and August, including secondary displacements. In July the UN condemned what is happenings in Idlib as the worst humanitarian catastrophe of the century.

In public narratives and policy debates calling for return, Syrian refugees are perceived as a single entity, a mass of people that can simply be moved from one camp outside Syria to another inside the country. This rationale appears in line with Moscow’s request to the UNHCR to build camps inside Syria to ensure the return of Syrian refugees from the neighbouring countries. However, numerous reports indicate that Syrian refugees who have returned from neighbouring countries and internally displaced Syrians who have entered areas of “reconciliation agreements” have been systematically subject to disappearance, detention, forced conscription, recruitment, and harassment in the regime-controlled areas, while the UNHCR has warned that it

**Still a long way to go
Returned refugees and returned IDPs
in Syria over the last three years**



does not have access to some sectors in the regime-controlled areas.

Amidst the still raging war, the Russian “initiative” has been ambiguous at best. It has not provided - and most likely never will - any timeframe, mechanism or guarantee for the suggested large-scale returns. This “initiative” has failed due to its blatant impracticality and irrationality, in addition to the complexities of the Syrian situation. Russia’s direct and consistent involvement in military attacks and air strikes and its veto on the UN Security Council draft that condemns the attacks on civilians, hospitals and schools in Idlib in the last few months make this initiative not only illegitimate and surreal, but also immoral. Furthermore, it is precisely this initiative, hailed by Syria’s neighbouring countries, that has legitimated and intensified xenophobic language and repressive measures against Syrian refugees. Human rights organizations have documented many cases of arrests, detention, persecution and forced deportation. The Lebanese authorities have forced Syrian refugees to demolish their own semi-permanent structures and adopted stricter regulations on work and housing, including cracking down on companies and organizations that hire Syrians without work permits. Turkey has detained undocumented Syrians who, in some cases, were sent back to opposition-held areas in Syria after forcing them to sign “voluntary return” statements. Egypt has



1.7 million

refugees to return
to Syria under the
so-called Russian
initiative

closed down businesses run by Syrian refugees and tightened its policy and regulations on Syrians even further. At the same time, those same governments have continued to deny that they are engaging in forced return or deportation.

GROWING ANTI-SYRIAN SENTIMENTS

What is even more horrifying, however, is the rising xenophobic sentiment and the anti-Syrian campaigns that have become more systematic on an unprecedented scale. Regional politicians use incendiary language and anti-Syrian rhetoric to inflame nationalism and antagonism against Syrians simply to assuage their constituencies and to attract a wider audience. Observers and commentators have cautioned against the drastic consequences of dehumanization and anti-Syrian campaigns in neighbouring countries and in Egypt, drawing parallels to the escalation that led to the genocide perpetrated against the Bosnian Muslims in Srebrenica. Others have likened these practices to the white supremacist campaigns against African Americans and people of colour in the United States. Some European politicians have also repeatedly resorted to the same xenophobic discourse filled with hatred. In one recent example, the Estonian right-wing MEP called for a “final solution” for Syrian refugees who break the law in Europe, a reference that many regarded as a direct reference to the language used by the Nazi regime during the Holocaust.

A NEVER-ENDING CONFLICT?

There is a myth that the war in Syria has come to an end and that the conditions are now safe and stable enough for displaced Syrians to return. Despite its fallacy, this myth suits the national interests and the agendas of several regional and international actors aiming to close the chapter on the Syrian conflict for good. The myth helps to normalize narratives on return, to rehabilitate the Syrian regime and to dismiss accusations of war crimes and human rights violations. It is pertinent to the national interests of the neighbouring countries to accelerate the forcible eviction of Syrian refugees, who are thus sent back at any

cost and by any means. Moreover, according to some political agendas the Syrian crisis has been dragging on for much too long and the international community seems weary and eager to bring to an end its humanitarian and development programmes in Syria. Most importantly though, the myth serves to draw attention away from the countless fiascos encountered by the international community in its attempts to come up with a political solution in the earlier stages of the conflict that would have saved lives and prevented displacements, criminal acts, and widespread destruction. The myth that the war has ended has gained momentum and the pressure on refugees to return has been increasing in spite of conflict escalation on the battlefield in north-west Syria regardless of one simple fact: the war in Syria is far from over.

GOING BEYOND WISHFUL THINKING

Political sensitivity makes it apparently impossible to hold governments and politicians accountable for their policies that go against international human rights and the Geneva convention, for their dehumanisation campaigns, for their populist and racist statements. It is even harder to hold the international community accountable for its impotence in Syria. However, the onus is on the international community to force official authorities to abide by international protection standards and refugees and human rights laws and to find mechanisms and disciplinary measures that would deter such violent practices and discourage the dehumanizing sentiment and xenophobic political rhetoric. Serious - rather than wishful - thinking should be devoted to finding guarantees that would ensure that the return of Syrian refugees is indeed safe, voluntary, dignified and sustainable. Their return must be tied to a political settlement of this crisis that will provide just and sustainable peace for the Syrian population. The international community, and particularly the European Union and the United Nations must face their political responsibility and remain consistent in their position toward the return of Syrian refugees, that must be inescapably tied to a political settlement in Syria.



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*serious thought should
be devoted to finding
guarantees to ensure
that the return of
Syrian refugees is safe,
voluntary,
dignified and
sustainable*

4

CIVIL SOCIETY AND CULTURE

The interreligious dialogue between Al-Azhar and the Vatican

Georges Fahmi

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CIVIL SOCIETY AND CULTURE

In February 2019, Pope Francis and the Grand Imam of Al-Azhar, Sheikh Ahmed al-Tayyeb signed the **Document on Human Fraternity for World Peace and Living Together in Abu Dhabi, UAE.**

The documents start by stating, “Al-Azhar Al-Sharif and the Muslims of the East and the West, together with the Catholic Church and the Catholics of the East and the West, declare the adoption of a culture of dialogue as a path, of cooperation as a way, and of reciprocal understanding as a method and approach.” The declaration also insists that “dialogue, understanding and dissemination of a culture of tolerance, acceptance of others and peaceful coexistence would contribute significantly to containing many economic, social, political and environmental problems that bear down on a large part of humanity”.¹ This document is not only the outcome of the process of interreligious dialogue between the two religious institutions, but a mirror of the political choices of both Ahmed al-Tayyeb and Pope Francis in recent years.

THE POLITICAL DRIVERS OF BOTH AL-AZHAR AND THE VATICAN

Since Pope Francis assumed the papacy in 2013, he has made dialogue with the Muslim world one of the main pillars of his vision. The relation between the Vatican and Muslim societies faced a deep crisis in 2006 after now retired Pope Benedict XVI gave a speech that was perceived by many Muslims as making the link between Islam and violence. Pope Francis has been working to overcome this

crisis by insisting in his teachings on the need to build bridges, not walls, and to work with other religious communities for the good of human beings. The political developments in the Muslim world since 2011, particularly after the establishment of the Islamic Caliphate by ISIS in summer 2014, have made Pope Francis's approach to establishing dialogue with Islam both urgent and challenging.

Pope Francis believes that he is following St Francis of Assisi's footsteps by pursuing dialogue with the Islamic world at a time of violence and upheaval, as St Francis did when he came to Egypt in 1219 to meet with Sultan al-Kamil during the crusades. However, unlike the context encountered by St Francis, the extreme fluid Islamic religious sphere has rendered finding a Sunni partner that enjoys a minimum level of legitimacy for such a dialogue a difficult mission. Pope Francis has made several trips to different Muslim countries such as Palestine, Turkey and Egypt, and it appeared that Al-Azhar is the only Sunni institution that enjoys such legitimacy and could at least claim to be respected by Sunni Muslims all over the world.

Hence, from the Vatican side the dialogue with Al-Azhar satisfies two main interests. First, it offers the Pope the partner he has been looking for to join his dialogue project in this dangerously fluid era of ISIS. Second, by engaging in a dialogue with a moderate voice such as Ahmed al-Tayyeb, the Vatican is supporting moderate religious actors in their struggle against radical voices. A Catholic representative who has played an active role

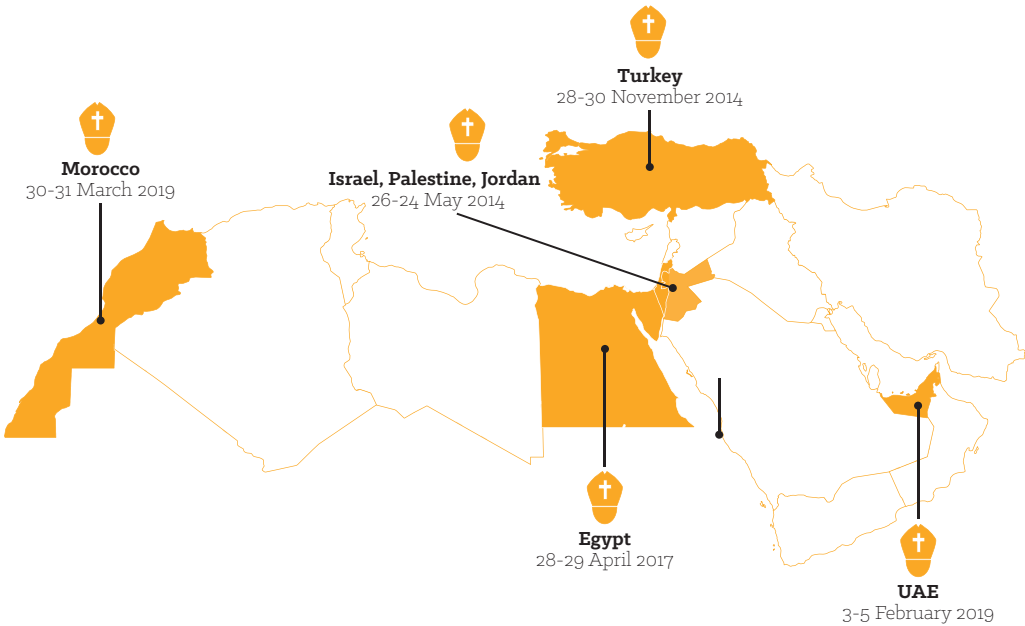


about 5%

of the population
in the Middle East
is Christian

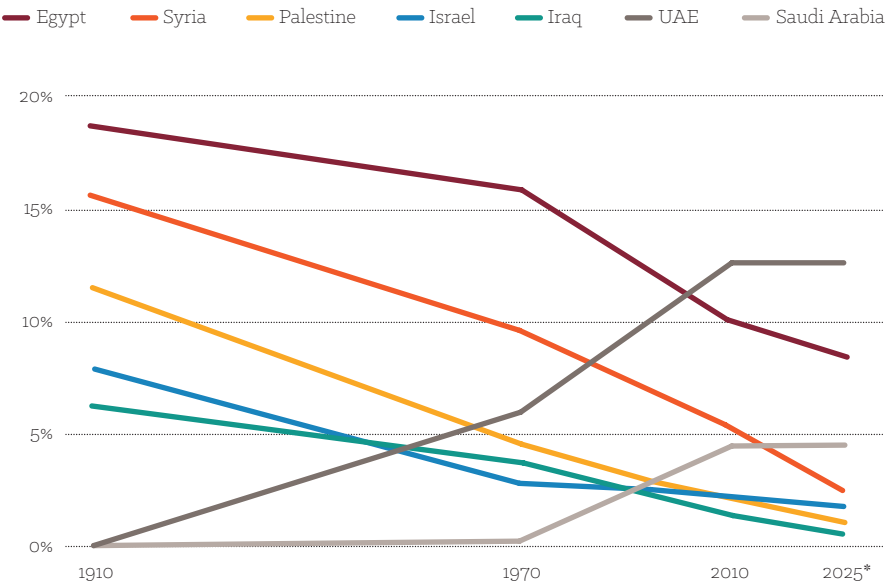
THE INTERRELIGIOUS DIALOGUE

Pastoral visits of Pope Francis to the MENA region



A DIFFICULT REGION FOR CHRISTIANS

Number of Christians as % of the population



Source: The Economist



6

Muslim majority
countries visited by
Pope Francis in the
MENA region

in interreligious dialogue between the two religious institutions, framed this issue clearly when he said “if Al-Azhar is down, whom shall we talk to, ISIS?”²

As for Al-Azhar, Ahmed al-Tayyeb too is pursuing his own political interests by engaging in dialogue with the Vatican. Since the overthrow of the Muslim Brotherhood rule in July 2013, Al-Azhar and its Grand Imam have been under increasing pressure from the new political regime to give up on the relative independence it enjoyed during the transitional period after the 25 January 2011 uprising. The political struggle between the Egyptian regime and Al-Azhar has often been framed by the Egyptian media as a struggle over the issue of religious reforms, accusing Al-Azhar of failing to lead the task of reforming the Islamic jurisprudence. However, this discourse masks another political divide over how to draw the lines of engagement between Egypt’s highest religious institution and the new political regime.

Through this dialogue process with the Vatican, Al-Azhar has also been able to counter this political pressure as it has reinforced its legitimacy internally. The dialogue process with the Vatican allows Al-Azhar to claim to represent all “Muslims in the East and the West” as mentioned in the Abu Dhabi Declaration in February 2019. By engaging in dialogue with the Vatican Al-Azhar is able to come across not as a mere state employee, but as a legitimate interlocutor on the international religious stage. Such a status makes it much more difficult for the regime to eliminate al-Tayyeb or to marginalize its institution. Second, this process also consolidates Al-Azhar’s image as a moderate religious actor open to dialogue with other religious traditions. Hence, it answers the accusation that Al-Azhar is a conservative institution that is blocking the process of religious reformation in Islam.

CHALLENGES AHEAD

However, this historical moment of rapprochement between Al-Azhar and the Vatican is facing a number of challenges that should be addressed in order not to let it fade

away. The first is that this dialogue process seems to be more like a dialogue between Pope Francis and al-Tayyeb, and less a dialogue between Al-Azhar and the Vatican. The rapprochement between the two religious institutions over the last few years was mainly due to the interests of Pope Francis and al-Tayyeb and their personal agendas as explained in the previous section. In fact, both men are facing resistance against their rapprochement from conservative voices from within both Al-Azhar and the Vatican, that are unhappy with the speed and direction of the dialogue between the two institutions.

The second challenge is the asymmetry between Al-Azhar and the Vatican, on both the political and the religious level. On the political level, while the Vatican is a state and the Pope is treated as a head of state, Al-Azhar is a religious institution operating within the Egyptian state, and Sheikh Al-Azhar is a state employee. On the religious level, while Pope Francis could claim to represent all Catholics in the world, it is much more difficult for Ahmed Al-Tayyeb to claim such authority over all Sunnis in Egypt, not to mention in the world. These asymmetries between the two institutions become a challenge in terms of protocol arrangements. One member of the Vatican dialogue team stated in an interview that “you might think that the main challenges we are facing are theological, but sometimes dealing with protocol is more complicated than our theological discussions.”³ For example, in preparing al-Tayyeb’s visit to the Vatican, Al-Azhar objected to the fact that Sheikh Al-Azhar should first meet with Cardinal Tauran (now deceased) who would then accompany him to the office of Pope Francis. They argued that that would not happen when Pope Francis would come to Al-Azhar, and the two men should be treated equally.

The third challenge is the lack of an action plan that would translate the joint declarations by both actors into concrete projects. For now, it seems that the whole process is only about rhetoric and pictures, but not actions. According to one of the participants from the Catholic side: “The aim is only to



13%

of people living in the
UAE are Christians
(mainly migrants
from Asia)

offer a suitable environment for actions, but it won't be up to the Vatican and Al-Azhar to act. It's the role of civil society actors on both sides to take advantage of this, to get things moving and start to act".⁴

WHAT NEXT?

After the dialogue between Pope Francis and Sheikh al-Tayyeb reached its peak with the Abu Dhabi Declaration in February 2019, the question is now: what next? The UAE has already taken a step by establishing a high committee in August 2019 tasked with developing a framework to ensure that the objectives of the declaration are realized. In order to succeed in its mission, this committee will have to address the above-mentioned challenges. This could be done on two levels:

- Vertically, by linking this high-level dialogue process to religious civil society organizations, Christian and Muslim alike, working on the ground with local populations. By

establishing dialogue between these religious organizations, the shared values of human rights, peace and coexistence could easily find their way to a larger Muslim and Christian audience, instead of being shared solely among the religious elite.

- Horizontally, by seeking to establish a sustained platform that brings together religious and political leaders in order to have an impact on national and international politics. Political leaders should treat religious actors as partners in building peace inside their societies.

Through these two mechanisms, a third measure that seeks to turn words into actions should emerge on the national and international levels in the form of both societal initiatives that bring together Muslim and Christian local actors to face the problems of their societies, and political ones to transform the values of this dialogue into laws and policies.



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*political leaders
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actors as partners in
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Living in displacement: the uncertain future of the Middle East lost generation

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CIVIL SOCIETY AND CULTURE

The generation of young Arabs born after 2011 is often referred to as “the lost generation”, “the children of war”, or even the “invisible children”. This is a generation that suffers the ills of protracted conflict and struggles to imagine a future beyond. Since the start of conflicts in Syria and Libya in 2011, Iraq before that, and Yemen after, stories of trauma, heartbreak, and unimaginable human suffering have become commonplace. Conflicts in Iraq, Libya, Syria, and Yemen have killed thousands and displaced millions, producing levels of destruction reminiscent of the cratered European cities in World War II. Entire cities like Aleppo, Raqqa, Mosul, Sirte, have been almost completely razed to the ground following the carnage of fierce fighting and bombing. What makes these conflicts even more pressing is that the majority of the populations facing conflict are often under 15 years of age. While many had previously been living in hardship under authoritarian regimes or in regions plagued by political instability, the current fighting has brought the concept of war and destruction to a younger generation that had grown distant from the conflict-ridden history of the region. For many others, instead, war is everything they know. This demographic group now faces the additional hardship of displacement either in their own countries, in neighbouring countries or in faraway countries across the globe.

whose lives were disrupted and overturned. Often forced to flee their cities and homes to escape the horrors of war, these children and youth are among the millions of refugees, asylum seekers and Internally Displaced Persons (IDPs) in the MENA region. Most of them find themselves obliged to live in temporary housing solutions, where however they often remain much longer than expected. In terms of number of refugees, the Syrian case is the most alarming. Since the start of the student protests against the government of Bashar al Assad in 2011, the victims of the conflict are over half a million. Among them are more than 55,000 children, while almost half of the Syrian population, which prior to the beginning of the war was about 22 million, no longer has a house to live in. In comparison, the crisis in Yemen presents an extremely lower overall percentage of refugees and IDPs than Syria, although the UN Office for the Coordination of Humanitarian Affairs estimates that approximately 12 million children, more than half of the total Yemeni population considered at risk, are in need of humanitarian assistance. In Iraq, the improved security and the increasing number of returnees are still not enough to ensure that the lives of more than 3 million Iraqi children will be free of risk, due to the danger posed by the remnants of war, as well as the lack of basic services and essential infrastructures.¹ Finally, the consequences of the stalled conflict in Libya are affecting more than one fifth of the total Libyan population, with 248,000 children involved. This fragmented and unstable country in North Afri-



5.8 million

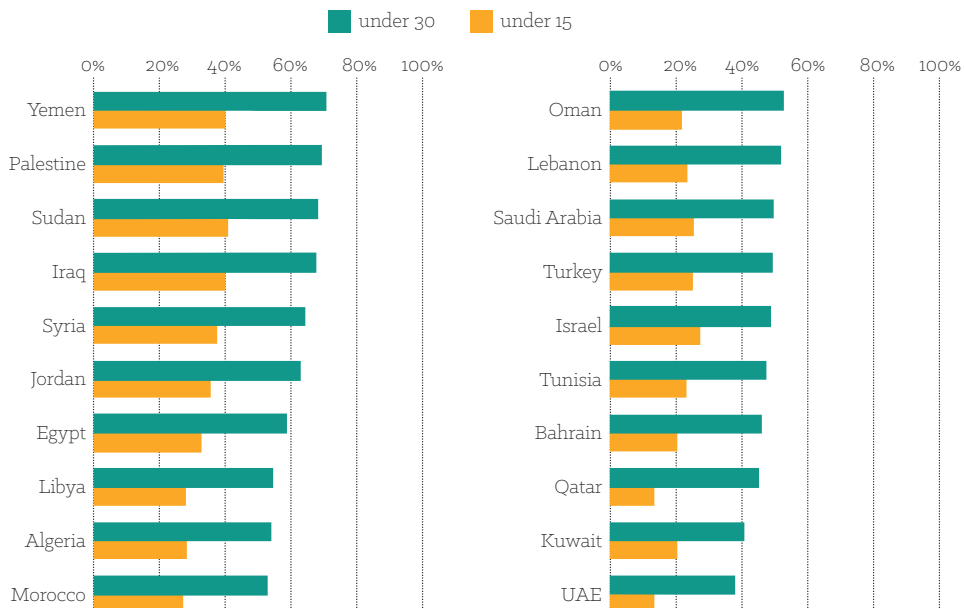
Syrian children aged
5 to 17 are in need
of schooling

A DISPLACED GENERATION

Among those who managed to leave the areas of conflict is a large number of young people

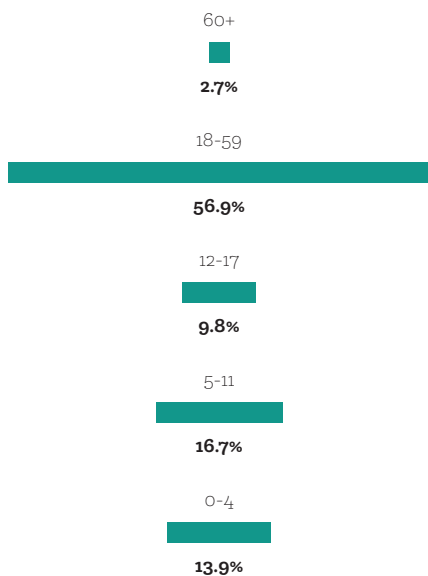
THE YOUNG GENERATION

Population under 30 and under 15 in the MENA countries (% of total population)



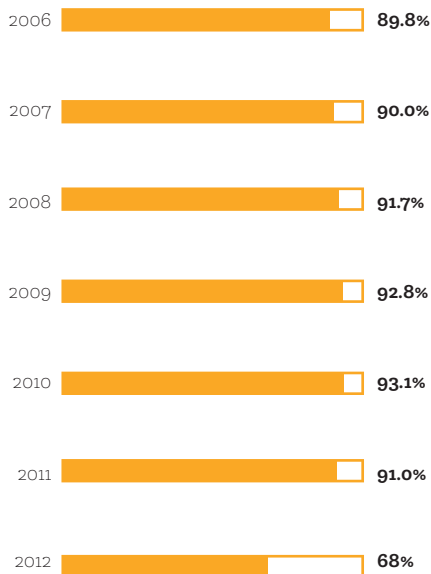
ALMOST HALF OF SYRIAN REFUGEES ARE MINORS

Age distribution of Syrian refugees



THE EFFECTS OF WAR ON EDUCATION

Primary school enrollment in Syria



Data: UNHCR, World Bank



150,000

education personnel
have left their post
in Syria

ca continues to be the stage of violations and abuses pursued with total impunity by all the parties involved in the conflict.

THE TRAUMA OF LIVING IN DISPLACEMENT

War, conflict and precarious conditions leave indelible marks on the lives of the younger populations. In conflict-affected countries, children have been violently uprooted from their ancestral homeland and forced to leave their life, companions and schools. In addition to the physical and emotional toll taken by the trauma of war, displacement further deepens these wounds. Many among the younger generations have literally known no other reality but war. With the abrupt rip caused by displacement, young refugees have lost their childhood overnight and inherited new responsibilities and duties usually pertaining to adults, like working to support their families. Often, they are underpaid and have to perform activities in unsafe and demanding contexts. According to UNICEF data, in Syria 1 in 10 refugee children is working, whether in farms, cafes, car repair shops or simply as vendors on the streets.²

THE IMPACT OF DISPLACEMENT ON ACCESS TO HEALTHCARE

Most Syrian refugees camps in Jordan, like Za'atari, Rukban or Hadalat, offer poor housing and unsafe living conditions, they lack toilets, running water and proper infrastructures, and are unsuitable to withstand the winter. These circumstances are not exclusive to camps in the Middle East. The Greek government is also struggling to accommodate refugees in camps filled well beyond capacity. Most refugees live in flimsy tents, unfit for extreme conditions, like winter temperatures dropping below freezing, or summer heat when up to 50 degrees Celsius are registered inside a tent and 45 outside. In these contexts, children are exposed to disease, malnutrition, poor sanitary conditions and lack of vaccinations. In Libya, 4,148 refugees live in the security danger zone in Tripoli or in the north-west.³ UNHCR has called for all refugees (more than a quarter of which are children or infants) to be evacuated from the detention centres, as food and water

are in short supply, unhealthy living conditions are rife and many are dying. With almost 80% of its population in need of humanitarian assistance, Yemen is unanimously considered "the largest humanitarian crisis in the world."⁴ Concerning health assistance, the most frightening threat to Yemeni children is malnutrition, in addition to poor sanitation, lack of safe water and very limited access to medical care.

THE IMPACT OF DISPLACEMENT ON EDUCATION

Education is another casualty of war. In Syria, once a hub of excellent primary school enrolment, with a greater percentage of public spending on education than countries like Germany or France (5.13% in Syria in 2009, compared to 4.88% in Germany the same year),⁵ the education system collapsed with the start of the conflict. Today, it is estimated that 5.8 million Syrian children aged between 5 and 17 are in need of schooling, as conflict impedes children access to learning. Field research by the International Rescue Committee in Syria has shown that 59% of sixth graders could not even read a simple 10 sentences fairy-tale, the equivalent of 2nd grade reading skills, and 64% of sixth graders could not solve a subtraction problem.

The most immediate physical damage concerns schools and universities. The University of Mosul, for instance, one of the oldest in the Middle East, fell under ISIS control and its library, which contained historical texts that were several centuries old, was torched.⁶ Its facilities were looted and tunnels were dug underneath its buildings. The campus was the scene of intense fighting, as Iraqi security forces fought their way through the city and coalition aircraft bombed buildings occupied by Jihadists. Moreover, teachers and faculty have been driven out, wounded and killed by years of fighting. Recent estimates on Syria, for instance, indicate that 52,500 teachers have been lost to conflict, more than two million children are currently out of school, around 150,000 education personnel have left the formal system, and one third of existing schools has been destroyed or severely damaged (2017 Humanitarian Needs Overview)⁷. The result



10%

of Syrian refugee
children are working

has been a reduction in public spending on education, combined with severe losses in terms of education infrastructure and personnel, reflecting heavily on school enrolment rates in these countries.

CONCLUSION

As a consequence of widespread violence and permanent uncertainty for the future, the civil societies in Syria, Yemen, Libya, and Iraq have suffered severely. As this analysis has revealed, one of the consequences has been the creation of a “lost generation” of children and young adults in the Middle East and North Africa region who have paid a tremendous price and are still bearing severe trauma. To make matters worse, it is evident that any solution would need to take into account the long term, while the region still lacks those factors that would allow for the start of a reconstruction process: physical means, funding and, above all, stability. Among the countries examined

here, only Iraq could be considered safe from the effects of ongoing war, but it is struggling with the aftermath of the conflict against IS and the recovery does not appear free of obstacles. Furthermore, displacement still constitutes a daunting challenge that will require time and effort to be addressed, not only economically but also socially.

The issue of the lost generations must be addressed not only on a regional scale but globally, because its consequences would resonate across the world for decades. One possible solution would require a comprehensive long-term investment to re-establish essential social infrastructures. Regional stakeholders like Turkey or the relatively stable oil-rich monarchies of the Gulf could play a leading role in this process, devoting their efforts and resources to the reconstruction of conflict-affected countries across the region. But nothing will be accomplished unless the violence comes to an end.



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Regional stakeholders
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Pathway to postwar recovery through safe schools in Iraq

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CIVIL SOCIETY AND CULTURE

Millions of children look forward to rejoining and attending school after the guns go silent and the bombing stops. This hope comes against a backdrop of 12,700 attacks on education in targeted and indiscriminate aggressions, harming more than 21,000 students and educators in at least 70 countries between 2013 and 2017.¹ Military use of schools in particular impedes the safe access to and use of schools for children.

THE CASE OF IRAQ

Almost two years after the Iraqi forces declared victory over ISIS, Iraq continues to struggle with the aftermath of the conflict. At the height of the recent escalation between 2013 and 2017, there were more than 100 targeted and indiscriminate attacks on schools in Iraq, harming more than 300 students and education personnel.² The schools were typically attacked with explosives, mortar shells and air strikes. In 2017, the UN verified 21 reports of the military use of schools, by various security actors, in different locations in Iraq. The schools were used to store weapons and explosives, as barracks, execution sites, screening centers, as positions for fighters and snipers, as military bases and more. As an example, in Hawija alone, 54 schools were used by ISIS for various purposes: as military bases, storage of weapons/ammunition, teaching and training of children, prison and interrogation centres, housing for ISIS members or to collect money.³ Further, armed groups, in particular ISIS, required schools children to join the groups or attend their training sessions, and asked teachers to

push their students to join.⁴ One media report indicated that ISIS kidnapped more than 100 children from their places of study to give them military training and use them in combat.⁵

Now, even after conflict, children's safety in school continues to be compromised and this has an impact not only on their access to education but also on their well-being. In a 2018 study,⁶ Save the Children showed that nearly one-third of children surveyed in Mosul reported never feeling safe at school, and only one-quarter considered school a safe space.⁷ This feeling of lack of safety can be explained by the fact that children are constantly reminded of the past horrors they experienced when in school during the conflict and still face constant danger from mines and unexploded ordnances, which continue to kill, maim and terrorise on a regular basis.⁸ The state of education in Iraq remains heavily impacted by the conflict, with many children struggling to return to school. One of the barriers to education for children affected by conflict in Iraq – and in particular in areas retaken from ISIS – is the lack of safety. An assessment from the Education Cluster showed that 69 schools had been damaged, the majority in west Mosul, and UNICEF reported that by June 2017, half of all schools in Iraq were in need of urgent repairs.⁹

To avoid a generation lost to conflict in Iraq, it is therefore crucial to prioritize the protection of schools from attack. The government in Iraq took a positive step in this direction by signing the Safe Schools Declaration, but more efforts are needed from the international community to ensure it is implemented.

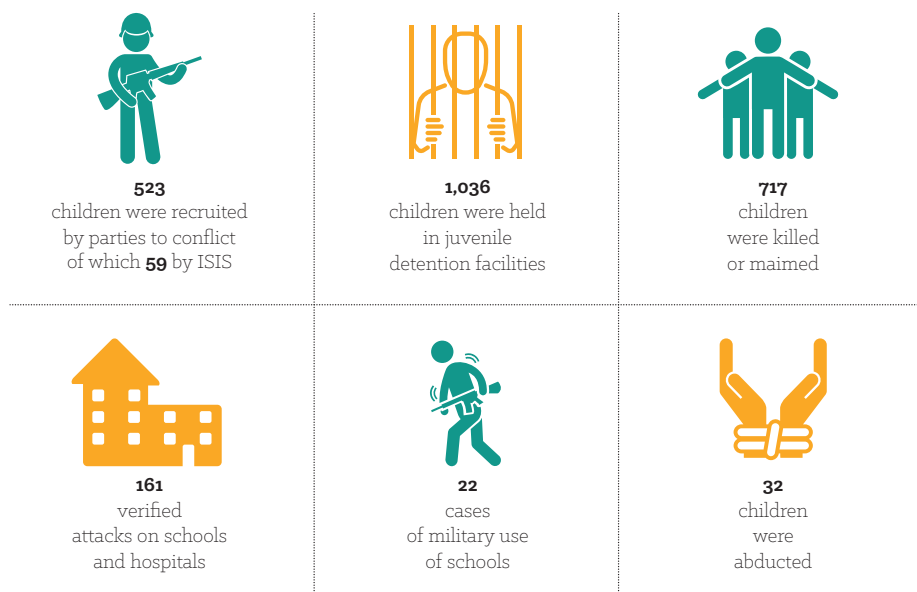


>100

children recruited
by ISIS from schools
in Iraq

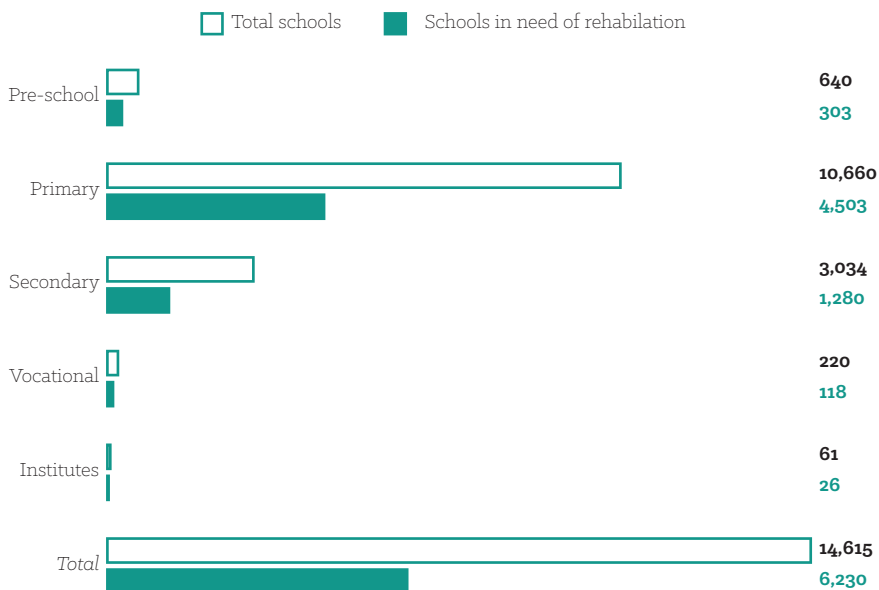
WHEN WAR AFFECTS CHILDREN AND EDUCATION

Attacks on schools and children in Iraq in 2017



THE INFRASTRUCTURAL NEEDS

Number of schools in Iraq in need of rehabilitation



Sources: UN; UNICEF



12,700

attacks on schools
reported worldwide
in 2013-2017

**THE SAFE SCHOOLS DECLARATION:
A POWERFUL TOOL TO PROTECT EDUCATION
FROM ATTACK**

Attacks on education and the occupation of schools and universities for military purposes are urgent humanitarian issues that affect the life, hopes and ambitions of a whole generation of children. Often, educational facilities are transformed into battlefields, detention centres, barracks, training facilities, bases, storage depots for military equipment and fighting positions (despite the number of international laws and treaties requiring parties in armed conflicts to protect civilians and civilian's objects from the consequences of war). This military use of otherwise protected civilian objects, like schools, universities and hospitals, converts them into military objectives under International Humanitarian Law (IHL). The mere presence of opposing forces in the proximity of schools places students, schools and personnel at serious risk of collateral damage. Such actions deny students their right to education and expose children and education personnel to harm.

Attacks on education violate internationally protected human rights, particularly the right to education that is enshrined in numerous international human rights treaties such as the Convention on the Rights of the Child¹⁰ and the International Covenant of Economic, Social and Cultural Rights.¹¹ Further, attacks on education delay the fulfilment of Sustainable Development Goal 4 (SDG4) on education,¹² and in the past five years alone have left children in 34 countries around the world without safe access to education.¹³ Attacks on education during armed conflict may also violate international humanitarian and criminal law and constitute war crimes as defined in the 1907 Hague Regulations, the 1949 Geneva Conventions and Additional Protocols, and the Rome Statute of the International Criminal Court.¹⁴

In addition to the physical safety aspect, conflict also has a huge impact on the psychosocial and emotional safety of children. If attention to the psychosocial impact of conflict is not integrated into education policy and programming, there is a risk that tensions

could increase. Conflict Sensitive Education¹⁵ ensures that children are protected, can alleviate the psychological impact of armed conflict and can contribute to peace, which in turn increases routine, stability and continuity of other vital services.¹⁶

The Safe Schools Declaration, developed through consultations with international legal and military experts, NGOs and governments, was opened for signature in 2015 in a process co-led by Norway and Argentina. The endorsement of the Declaration is an inter-governmental political commitment to protect students, teachers, schools, and universities from the worst effects of armed conflict.¹⁷ By endorsing the Declaration, governments express their support to fulfil seven commitments to protect education from attack. The first commitment is to implement the *Guidelines for Protecting Schools and Universities from Military Use during Armed Conflict*.¹⁸ These guidelines provide guidance to parties in armed conflict to help limit the use of educational facilities and reduce negative impacts if military use does take place. Endorsing governments should take steps to incorporate the guidelines into their military manuals, rules of engagement, operational-level planning and strategic guidance.¹⁹

Civil society organizations can facilitate the inclusion of the Guidelines in the operational framework of military, police and other relevant groups in conflict-affected countries and in international missions.²⁰ When working with military and armed actors, it is essential that the humanitarian principles of humanity, neutrality, impartiality and independence be maintained. For this reason, the political context has to be continuously evaluated to ensure the humanitarian principles are not compromised.²¹

In summary, the lessons that the government and the international community have learnt from past reconstruction efforts are integral towards informing the ongoing post-war reconstruction in Iraq. Constituting over 52% of the country's population, children have a central role to play in Iraq's recovery and reconstruction. The stability of the country depends heavily on the development of its chil-



33%

children in Mosul
reported that they do
not feel safe at school

dren. An educated, productive and engaged young population is central towards achieving a society that can enjoy long-term peace and stability. The time for all actors to come together to implement the Safe Schools Declaration - to reduce attacks on education and the military use of schools - is now.

RECOMMENDATIONS

Protecting children and their schools in conflict and in post-conflict contexts is fundamental. The following recommendations are made to reduce attacks on education and the military use of schools:

To the Government of Iraq:

- In military training activities and manuals, include practical scenarios illustrating the government's policy on military use of schools, and measures that armed forces can take to mitigate potential risks for students and teachers arising from past use of educational facilities for military purposes.
- Allocate enough budget resources towards education to ensure that the Department of Education is able to work on school rehabilitation and reconstruction especially in areas where large numbers of schools and classrooms have been ravaged by the armed conflict, to ensure that all children have equitable access to quality education in safe learning spaces, and that teachers are supported with adequate remuneration and capacity building on key education topics, including Conflict Sensitive Education.

- Collect reliable, relevant data on attacks on educational facilities, on the victims of attacks, and on the military use of schools and universities, including through existing monitoring and reporting mechanisms. Relying on this data, take swift action to keep schools safe.

- For the Ministry of Education to integrate sections on socio-emotional well-being and psychosocial support for school children in teachers' pre-service and in-service trainings to enable them to support their students during a siege or when the children have returned to schools after incidences of attacks.

To the International community:

- Increase funding on monitoring and reporting of attacks on education, including by supporting the collection of data that shows the impact on boys and girls.
- Commit to multi-year, flexible funding to support education in emergencies and the protection of schools and universities from military use.²²
- Train national, peacekeeping, stabilization military forces to respect and uphold the rights of children in armed conflict. This includes ensuring that children are protected from abuse and exploitation in wartime, post-war and in the transition to post-conflict frameworks of military, police and other relevant groups. It is noteworthy that the capacities that the military need (to abide by the Safe Schools Declaration) can also be useful when responding to a natural disaster.



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Constituting over 52% of the country's population, children have a central role to play in Iraq's recovery and reconstruction. The stability of the country depends heavily on the development of its children

Archaeology and cultural heritage: the challenge of recovering Mesopotamia's past

Federico Zaina

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CIVIL SOCIETY AND CULTURE

In the last decades, Iraqi public and private institutions together with the media have widely manipulated the country's rich and multi-cultural past for political propaganda and entertainment purposes. However, among the assets to safeguard against deliberate or accidental destruction and violence, the heritage paradoxically ranked very low. Furthermore, Iraq's cultural symbols have been systematically exploited by the country's ruling powers - from Saddam Hussein to the Islamic State - to pursue different political, social, cultural and religious agendas, drawing arbitrary lines between relevant and irrelevant. As a result, thousands of archaeological sites and heritage monuments - from Nineveh to the Imam Ali Mosque in Najaf - as well as cultural, ethnic and religious minorities - from the Kurds to the Yazidis - have been threatened by what has been widely defined a "process of cultural cleansing".

CULTURAL CLEANSING AND THE FALL OF MESOPOTAMIA

Cultural cleansing ultimately aims to eradicate cultural diversity and replace it with a single homogeneous perspective and set of behaviours. According to the UN, one of the consequences of this practice is the emergence of mistrust between different communities and towards the state as well as a weaker feeling of belonging to a shared culture and history. The country's political instability and cultural cleansing are also the consequence of a drop in the quality of education, widespread poverty and greater gender inequality especially during the Second Gulf War

and in its immediate aftermath and, most recently, under ISIS rule. The severe blows to the education system and the decrease in teaching quality have caused major disruption at all levels of society, but youths and rural communities have been particularly affected. This state of affairs has led to a return to more traditional values among Iraqi families especially in marginal communities, a gradual loss of awareness of the country's past among the population and the subsequent crumbling of social cohesion. The main effects of socio-political developments in Iraq on the country's cultural heritage may be summarised as follows: 1. Continuous conflict and instability and the resulting increase in poverty have contributed to the destruction and plundering of archaeological sites, heritage buildings and museums as physical symbols of the past; 2. The drop of investment in education has led to a collapse in the quality of education and the impossibility to train a new generation of archaeologists and cultural heritage experts; 3. The collapse of the country's institutions has left the symbols of Iraq's past vulnerable and exposed.

NEW COMMITMENTS FOR ARCHAEOLOGISTS IN IRAQ

The harsh consequences of Iraq's turbulent years have given rise to a series of initiatives by international research groups to safeguard the cultural heritage of Mesopotamia. Numerous consortia now bring together universities, private and public institutions that are working side by side to protect archaeological sites and monuments, contributing to the wider battle

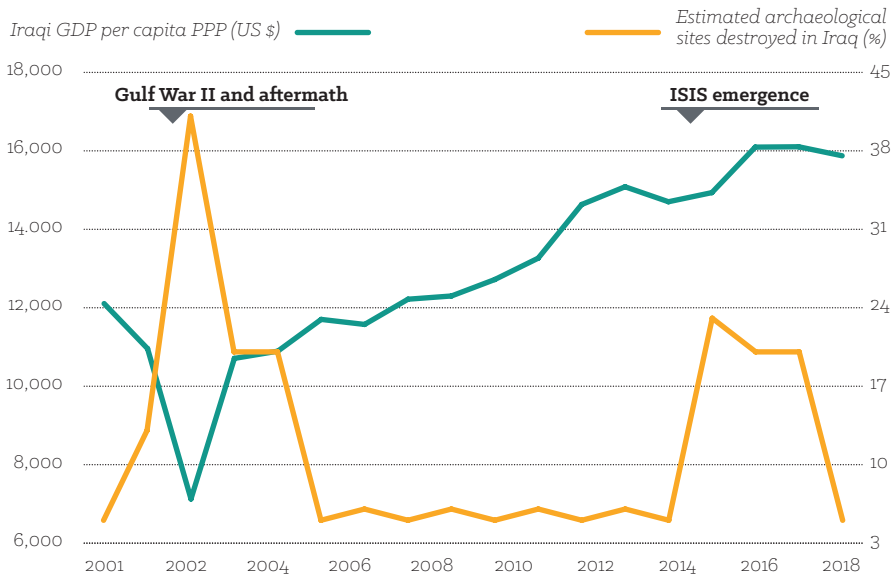


6

UNESCO
World Heritage sites
in Iraq

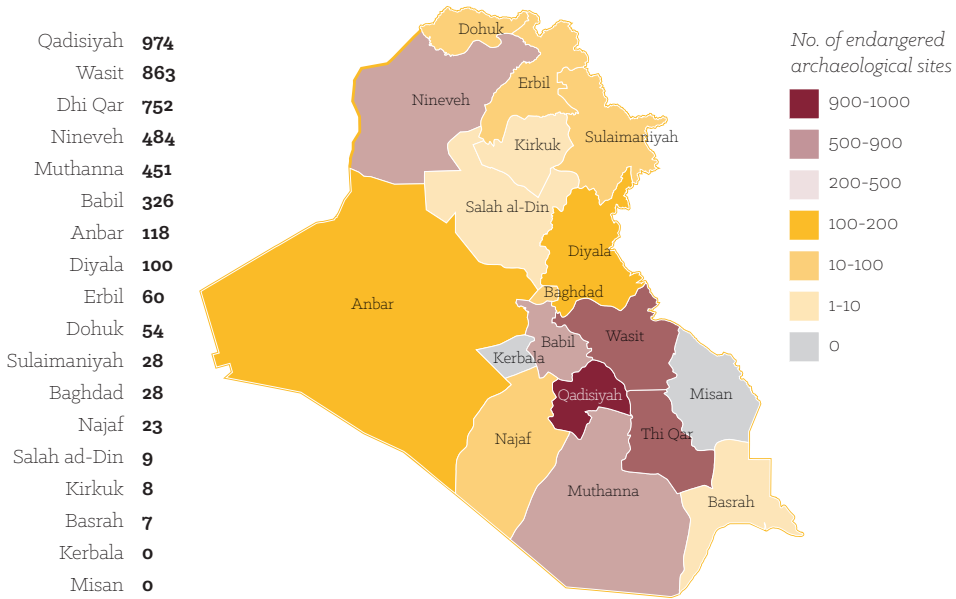
WAR AFFECTS ECONOMY AND CULTURE

Relation between GDP and looting of archaeological sites



THE ENDANGERED IRAQ

Number of endangered archaeological sites by region



Sources: Stone 2008; 2015; Al-Hamadani 2008; WB; EAMENA



3

World
Heritage
sites at risk

against the collapse of the country's social fabric. This may represent a new approach to the study of Iraq's past. These initiatives are also possible thanks to medium- and long-term funding schemes promoted by national and international institutions mostly in Europe and the United States. Today archaeologists are called to embrace a more holistic approach to face the new challenges originated by the long years of political and social instability in Iraq, while also acknowledging the need to engage new target groups, like local communities, local and national institutions. In order to promote the cultural heritage with this multi-faceted audience, in 2016 a multi-disciplinary European-Iraqi partnership developed two projects, WALADU and EDUU, that aimed to address these issues through a wide range of activities:

- Documentation: creating detailed documentation of endangered archaeological sites and heritage monuments;
- Conservation: preserving the ancient remains according to modern restoration techniques in order to make them accessible to the public;
- Legislation: working together with experts to improve existing legislation on the cultural heritage;
- Education 1: training a new generation of archaeology and heritage professionals through capacity building activities to guarantee the sustainability of documentation, conservation and communication of the national heritage;
- Education 2: Promoting the national heritage among local communities by organizing events and creating ad-hoc educational materials;
- Communication: Promoting Iraqi archaeology to a wider audience through public events as well as exhibitions or documentaries.

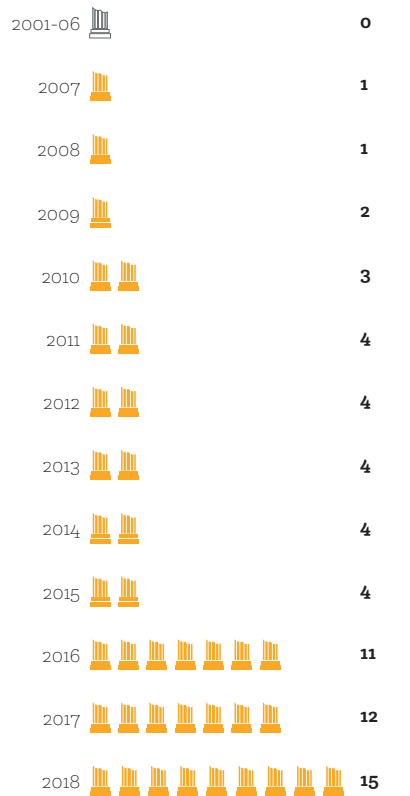
**ADDRESSING SOCIAL COHESION
THROUGH THE CULTURAL HERITAGE:
THE EXPERIENCE OF WALADU AND EDUU**

Different research institutions, mostly from EU and US, committed to developing projects focused on one of the points listed above. Among these, education and capacity building represent good middle and long-term solutions



4,285
threatened
archaeological
sites in Iraq

**An increasing commitment
Number of international projects conducted
by cultural research centres**



— Data: UNESCO; WALADU; EDUU —

to deal with the challenges of protecting and enhancing the cultural heritage of the country as confirmed by the UK initiatives carried out in the framework of the UCL Nahrein network and the British Museum Heritage Management Training Scheme, the German-based Deutsches Archäologisches Institut's Iraq Programme, or the UNESCO/UNITWIN Chairs Programme. Other international projects focused on the improvement of documentation and conservation strategies to protect the Iraqi heritage, such as the American Schools of Oriental Research Cultural Heritage Initiatives, the UK Endangered Archaeology of the Middle East and North Africa project, or the Emergency Red List of Iraqi Cultural Objects at Risk issued by ICOMOS amongst many others. In Italy, an integrated approach to the documentation, pro-

tection and communication of the Iraqi cultural heritage was adopted in 2016 through two international projects, WALADU and EDUU (2016-2020), led by the University of Bologna. The two projects are part of a comprehensive strategy to create an EU-Iraqi partnership in the field of education and cultural heritage. WALADU aims to train a new generation of archaeology professionals through collaboration with Iraqi universities. EDUU targets local communities and aims to contribute to a more widespread understanding and awareness of the cultural heritage in the country. The international consortium includes universities, national and private institutions from Italy, Turkey, Germany, as well as Iraqi and international organizations like UNESCO Youth and the Association of Arab Universities.

In order to achieve their goals, the two projects implemented the following activities in various stages. The first phase aimed to take stock of the current state of the heritage in the three regions involved by documenting and preserving archaeological sites and heritage buildings. Between 2017 and 2019, eleven archaeological research and conservation campaigns were carried out in the regions of Kufa, Qadisiyah and Wasit under the umbrella of the EDUU project. The results of these activities converged into an open-access “ArchIraq” WebGIS that provided access to information on the archaeological sites of the regions to a vast audience. The second phase consisted in educational activities aimed to provide local scholars and institutional officials with the necessary skills and tools to guarantee the sustainability of documentation and conservation activities at archaeological sites in the future. Intensive training of Iraqi scholars and other institutional officials was carried out in the framework of both projects in Italy, Germany and Turkey to improve their teaching and research skills and to provide them with higher quality teaching materials.

A major target for educational activities within the EDUU project are local communities. Interviews aiming to understand their perception of the heritage indicated a scarce familiarity with the history of the region and a rather irrelevant role of archaeological sites in community

life, but also revealed an interest in knowing and understanding them. To this end, specific activities have been designed mostly for schools thus targeting future generations. These included the creation of comics on the history of Mesopotamia, as well as the organization of visits to museums and archaeological sites.

This range of activities requires specific communication programs targeting the national and international public. For this purpose, dedicated websites and ad-hoc social network profiles and accounts have been launched for both projects, particularly on Facebook and Instagram. Additionally, promotional and educational videos concerning the projects are now available on the YouTube educational channel OrientLab.

NEW PATHWAYS TO COMMUNICATE

THE HERITAGE OF ANCIENT MESOPOTAMIA

The protection and communication of the national heritage in countries like Iraq remains an intricate and long-term challenge. Nevertheless, the design of a working methodology, the identification of specific target groups, the collaboration and commitment of different public and private institutions as well as the support of specific funding schemes have shown that this objective can be achieved. The activities carried out by various national and international institutions are starting to bear fruit, as demonstrated by the reduction in the destruction of archaeological sites by the local population, by increasing awareness among the new generations of their common past as well as by the renewed teaching capacity of many Iraqi scholars which will allow the training of a new generation of archaeologists. In a country like Iraq, torn by ethnic, confessional and socio-political divisions, better knowledge of the common historical heritage could help overcome some of those rifts. While the cultural heritage will probably neither resolve disputes and conflicts nor drive the spectre of terrorism away, it can certainly help to foster awareness of the nation's common history and develop a stronger sense of belonging. Archaeology can therefore contribute to the rebirth of a country like Iraq, long plagued by wars, and consequently to the reconstruction of its long-neglected social cohesion.



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In a country like Iraq, torn by ethnic, confessional and socio-political divisions, better knowledge of the common historical heritage could help overcome some of those rifts

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Starting from resources: a model for conflict resolution in Libya

1. Both factions have received significant military aid from their main supporters. On the one hand, unofficial images show that Serraj's forces received light weaponry, armoured vehicles, and even drones from Turkey. Haftar's forces, in turn, have been bolstered by Jordanian-made APCs, anti-aircraft artillery systems and heavy weapons from the United Arab Emirates, and substantial financial aid from Saudi Arabia. See also: "Libya's GNA says US missiles found at captured Haftar base", *Al Jazeera*, 29 June 2019; "American Missiles Found in Libyan Rebel Compound", *The New York Times*, 28 June 2019; S. Al-Atrush, "Libya's Haftar Orders 'Harsh Response' After Surprise Loss of City", *Bloomberg*, 29 June 2019.
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Police reform in North Africa: a multilateral approach

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8. Most notable in this regard is DCAF's cooperation with parliament as well as with independent state institutions and national authorities mandated to fight against torture, corruption and to uphold the right of access to information. Conscious of their potential to provide informal oversight, DCAF further engaged in programmes to strengthen civil society and empower the media by improving their competencies and relationship with the security sector.

9. Formed under the authority of the Ministries of Justice and Health, and supported by DCAF, this working group contributed to the national dialogue on torture prevention and prosecution through the development of a legal-medical guide to investigate torture allegations with standard protocols for prosecutors and judges.
10. DCAF has been cooperating with parliament, independent oversight bodies and civil society on subjects including public financial management and institutional transparency for several years. Within the scope of such engagement, a cooperation agreement with the National Agency for the Fight Against Corruption (INLUCC) was signed. Once technical discussions with clear bearing on the security forces yielded promising results, the MoI engaged directly with DCAF on several of the same areas of intervention, recognising their relevance to the Ministry and the police.
11. Both cooperation partnerships with political-institutional and civil society actors were at the centre of DCAF approach in Tunisia. The comprehensive package offered by DCAF has given the MoI and the police the opportunity to develop and transform in their own socio-political operational context.
12. In Morocco, for instance, DCAF adopted a similar multilateral approach and partnered with both institutional actors and civil society to promote SSG. DCAF's contributions to strengthen integrity, prevent torture and mistreatments have been well-received by Moroccan partners, with increased engagement in 2020 expected.

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Middle East and energy: time to go green?

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by 2019 and Saudi Arabia plans to install 27.3 Gigawatt (GW) over the next five years and 58.7 GW renewable energy by 2030. See also: “Dumat Al Jandal wind project beats record low price for onshore wind power”, The Renewable Energy Project Development Office (REPDO), 8 August 2019.

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MIGRATION

Climate change and demography as push factors of migration pressure

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Archaeology and cultural heritage: the challenge of recovering Mesopotamia's past

1. These two projects have been carried out under the coordination of N. Marchetti.

The image features abstract, layered blue shapes in the bottom right corner, resembling stylized architectural elements or a modern logo. The shapes are in various shades of blue, from a deep navy to a lighter sky blue, and are separated by white space, creating a sense of depth and movement.

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