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Mediterranean Advisory Group

MENA 2030: A Strategic Foresight Exercise

The prospects for regional cooperation on peace and security in the broader Middle East and North Africa (MENA) region are more than bleak. To take stock and to identify future trends, threats, and weak signals of change that might have an influence on the security architecture of the region, the Regional Program Political Dialogue South Mediterranean of Konrad-Adenauer-Stiftung (KAS) convened its Mediterranean Advisory Group for a strategic foresight exercise on 28 to 30 March 2019 to formulate future scenarios for the MENA region and discuss possible opportunities for multilateral security cooperation in the Mediterranean.

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I. What's Past is Prologue

Reminding and reassuring oneself of the historic pathways that led to where the world stands today is an exercise usually done by historians. Assessing key assumptions and patterns of historic interpretations is, however, also a good starting point for a strategic foresight exercise. Historic narratives are anything but objective descriptions of past events; they serve societies as tales to rally round the flag, to build a common identity, a legitimate cause, a trajectory for the future – in short: to build a nation. History is a social artefact that is being interpreted by various stakeholders differently – depending from which angle historic events are being looked upon and which (future) purpose an interpretation should serve. If one takes a differentiated historical perspective on the MENA region, it becomes an even more fragmented and heterogeneous place than it already appears at first glance. However, it is worthwhile to put oneself into different actors' shoes before starting a foresight exercise since it wipes away most of the stereotypes and commonly-held truisms that can be a hindrance in developing a fresh perspective on seemingly gridlocked situations.

Before the KAS Mediterranean Advisory Group (MAG) started its strategic foresight exercise by identifying key drivers of change, outlined the status quo of security cooperation in the MENA region and reconstructed different key state actors' national narratives by asking how (historic) developments influence today's decisions in the field of peace and security and which security parameters are considered the most vital by the states of the region. The MAG experts took on the perspectives of **external powers** (the United States and France) as well as **regional actors** (Iran, Israel, UAE) in this first exercise of the MAG workshop. During the discussions, three main patterns emerged: strategic hegemony, strategic loneliness, and strategic nostalgia.

The United States' strategic hegemony over the broader Middle East started as a product of the Cold War during which the global power competition with the Soviet Union and the need to secure energy resources and military bases dominated US priority setting and the MENA region was perceived through the prism of the fight against communism. After a transitional period from 1979 to 1991, US policy in the region followed a "democratization agenda" that became increasingly militarized after the attacks on September 11, 2001, and narrowed in on counter-terrorism. Since 2011, MENA has become "burden-some" in the eyes of the US and although the interest of America in the region remains more or less the same, the cost-benefit ratio has come more into the fore.

France's mingling in the region was seen by the experts as a mixture of nostalgia, political necessity, strategic over-ambition and European disunity. While it is yet unclear what the retrenchment of the United States from the MENA means for the overall power equilibrium in the region, France's future role will most likely be confined to North Africa and the Sahel according to the experts – not only because its power projection capabilities are limited, but more importantly because the EU does not appear to have clear priorities and a coherent European policy towards the MENA region.

The root causes for France's special role in the MENA and the European disunity are leading far back – from the Sykes-Picot Agreement and France's post-World-War-I mandate in Syria and Lebanon to, more importantly, the nation's trauma of the Algerian War ending France's ambitions as a global power and reducing the nation's territory by about 75 percent. Experts saw this trauma – and France's feeling of being left alone and misunderstood by other European – as a dominating part of Europe's MENA policy today. Additionally, discussions identified a fundamental shift in Paris' approach to the MENA: responding to the assassination of Lebanon's Prime Minister Rafik Hariri and Tehran's aggressive stance *vis-à-vis* Israel, Paris ended its even-handed policies regarding the Israeli-Palestinian conflict and clearly sided with Tel Aviv. The MAG workshop participants also named the fact that France has the largest Muslim population in Europe and has been hit by jihadist terrorism harder than any other European country as another strong incentive for France to engage in the MENA region – even militarily.

With regards to the narratives of regional powers, experts outlined the following: starting with Israel, the sheer existence of a Jewish state is deeply rooted in more than 2000 years of Jewish exile and diaspora which culminated in the Shoah. History, therefore, illustrated that the Jewish people will need to take care of their own security (self-reliance). Hence, for Israelis, a Jewish state is an end of itself to ensure Jewish security interests. With the 1973 peace agreements, Israel's security interest seemed to be finally met – only to see that it couldn't win the peace against an increasing asymmetrical threat imposed on the Israeli society by terrorist groups. With the breakdown of the Oslo Process ("Land for Peace") and the breakout of the second Intifada, Tel Aviv had to adapt to a multifold asymmetrical security situation that triggered an "earthquake" in the military mindset of the IDF. Ever since, Israel is seen to fight on two different fronts: one to contain asymmetrical warfare from Hezbollah and Hamas; another one to contain Iran which – with the breakdown of the Syrian regime – stands at Israel's doorstep. This situation, experts noted – taking also into account the withdrawal of the United States from the MENA – might lead to a new power dynamic in the region. Discussants stressed that it remains to be seen which role Saudi Arabia and the UAE will play to overcome Israel's strategic loneliness and regional isolation; especially after Tel Aviv's loss of Turkey as a longtime ally.

Discussions found that strategic loneliness and regional isolation are also Iran's main security issues: with the US/UK-sponsored *coup d'état* that ousted Prime Minister Mossadegh in 1953 in mind, Tehran's main concern is an external intervention to bring about regime change. How fragile Iran's security can quickly become was shown not only in the protracted first Gulf War with Iraq (1980-1988), but also since the early 1990s when ten thousands of US and UK soldiers fought a war against Iraq right at its border. With this experience in its clothes, Tehran tries to push security threats as far away from its borders as possible (forward defense) – first to contain the so-called Islamic State and to ensure that there will be no IS backlash on Iran; then through involving proxies to keep Iran's arch-enemies (Israel, the US, Saudi-Arabia) occupied elsewhere. Politically, the Joint Comprehensive Plan of Action (JCPOA) served the same purpose, i.e. changing the policy field in order to gain trust, time and to end the era strategic loneliness and regional isolation. All this ended when Donald Trump revoked the so-called Iran Nuclear Deal.

Experts noted that increased pressure and coercion could indeed lead to a strategic revision in Tehran – if it can pursue Washington to issue a guarantee for the country's and the regime's integrity that needs to include security guarantees from Saudi Arabia and Israel. While Israel can rely on a strong political and military alliance with the United States, Iran has no such safety nets – neither in, nor beyond the region. With a gun at its sleeve, Tehran will not be ready to negotiate a new deal. Hence, the MAG experts saw the need for the international community to first create a level playing-field – not easy after the unilateral breakup of the JCPOA by Washington.

Finally, workshop participants shed light on the United Arab Emirates (UAE) security perception: the UAE is the youngest Arab country, only formed in 1971 as a federation of seven Emirates that gained independence from the British Empire the same year. While the first decades after the UAE's formation were mainly dedicated to consolidation (with the formation of the Gulf Cooperation Council in 1981), the UAE (as well as Qatar) after the failure of the Arab Spring became more self-assured, built its own socio-political narrative of "East meets West" and invested into security to shield against external interventions but also to be able to contain domestic protests. The UAE also sells its relative stability and economic success as an alternative model to the rest of the (more fragile and instable) MENA region. It thereby – at least to a certain extent – succeeds in accumulating soft power targeting Libya, Tunisia and Egypt to which, for instance, France already buys into. With the retreat of the US from the region, the UAE – like other countries in the region – have to readjust. However, according to the experts, the UAE already punches above its weight. Its population consists of 85% foreign workers and this, one day, might lead to a serious security threat for the patchwork nation.

These rather random snapshots of historic trajectories and their consequences for peace and security in the region delivered a faint idea about the hyper-complexity the MAG experts had to deal with when searching for a new angle to peace and security in the broader MENA region. It became clear during the debates that the common theme of strategic loneliness and regional isolation is an experience that is widespread throughout the region. Following the brief historical analysis, the MAG experts discussed global, regional and sectoral security trends and identified different key driving forces for change in individual country-specific working groups. By utilizing morphological boxes and back-casting the predicted future state of the region, the experts developed different scenarios that were narrowed down to the eight most likely trajectories.

II. Eight Scenarios for Peace and Security in MENA 2030

Based on the analysis of historical trajectories above, the members of the Mediterranean Advisory Group developed the following scenarios that depict the most plausible development of peace and security in the MENA region in 2030 viewed from eight different perspectives – the EU, Iran, Egypt, Israel, Russia, Saudi Arabia, Turkey and the United States of America – representing the most active actors in the region that can shed light on political realities in the near future. Each scenario is presented as a short narrative, describing the conditions of peace and security in 2030 to illustrate how things might unfold during the next decade.



Together Forever, or Till death do us part

In 2030, the migration challenge from the MENA region will still be high up on the EU agenda given demographic patterns in the region, the continuous brain drain, increasing unemployment leading to social discontent and loss of faith in the MENA countries, water scarcity and energy patterns. The failure of neo-authoritarianism to address these problems only deepened social and economic challenges; and the failure of the EU to address ambitious migration policy – driven by populist concerns – and the impossibility to reach common EU position and approach (including on foreign interventions) led to a complete gridlock.

The rise of far-right nationalism (white identitarianism) in Europe causes additional social pressure and leads to the inability of the EU to act as a whole. Moreover, the Arab diaspora is neither integrated in Europe nor does it play a part in shaping EU policies towards their region; as a consequence, Arab minorities recreate proximity with their countries of origin.

The European Neighbourhood Policy (ENP) is being judged only by security concerns which narrows down the spectrum of actors, while the EU at the same time is unable to be economically ambitious. Realpolitik takes the scene. In the region, the role of civil society groups is being marginalized; hence, they are not capable to counter the erosion of rule of law and fundamental rights and freedoms. The lack of digital literacy and critical thinking play into the cards of authoritarian regimes which benefit from the dual use of technology to perfectionate their repressive regimes through sophisticated surveillance mechanisms. As a result, civil society experiences even further shrinking spaces.

In such an ecosystem, the EU is not able to tackle Chinese competition in the region and in Africa overall. Gridlock and a race to the bottom are the consequences of (a) the failure of the EU to reactivate multilateralism or (b) to compete effectively in a plurilateral world. Even though China and Russia will also lose influence in the broader Middle East, the outcome for the region will be anything but rosy – dystrophy is the ruler of the game.



Life as Always (Phoenix' rise from the Ashes)

Even though the Iranian government has successfully set up a system to undermine and bypass US policies, eight years of US sanctions have led Iran's economy to the brink of implosion. At the same time, global technological innovation pushed world energy markets to a revolutionary shift – away from fossil fuels into renewable energy technologies, leading to global oil prices at historic lows. Hence, Iran finds itself caught in a vicious cycle: due to US sanctions, the Iranian regime is neither able to compete for market shares on the global energy market, nor can it play a role in the global energy transformation – it simply lacks access to breakthrough technologies. The only way out for the regime, therefore, is to continue to diversify away from hydrocarbons – in a sanction-driven environment, a very bumpy ride.

As a result of this economic gridlock, youth unemployment soars and the middle class is largely reduced to a marginalized scale – with major impacts on the role of civil society and political participation. While elections are mere window-dressing, nationalism and the support for a strong Iranian security apparatus are becoming the order of the day; regional rivalries absorb most of the government's attention and resources, but they also play into the regime hands.

Out of necessity, Iran adheres to the military clauses of the JCPOA but sunset provisions freeing Iran's ability to develop a nuclear program led to a softer course of the West vis-à-vis Tehran. When interests align, Russia is a reliable tactical partner for Tehran in the region. Moscow (and Beijing) provides the Iranian Armed Forces with the latest gear, but cyber vulnerabilities remain a strong strategic concern; Iran simply has neither the know-how nor the equipment to compete with Russia, China, or the US on this front.

Even though there is much talk about a possible change of course after a succession of Supreme Leader al-Khamenei (who turned 85 in July 2024), a dramatic shift in Iran's posture seems unlikely. Too tight is the regime's grip on its population and most intellectuals and members of the middle class already went into exile. So, the prospects for a better future look grim – and the situation is being further aggravated by environmental and climate change stress: while the country's population is heading towards 88 million, the natural habitat is shrinking.



Uprising 3.0

By 2030, there will be a number of drivers of instability in Egypt:

Demographically, the population of Egypt will be 130 million; approximately 20% will be under the age of 25. This will put immense pressure on the state's ability to provide services, education, training and jobs for the population.

Environmentally, over the next decade Egypt will feel the impact of climate change. The effects will likely include higher temperatures, changes in rain patterns, higher sea levels and potential increases in catastrophic weather events, which create significant threats to communities and the agricultural sector. In addition, Egypt's water supply is limited and is projected to come under ever-greater stress, further putting pressure on the population.

Politically, under el-Sisi's rule there has been an increase in repressive measures that the Economist described as 'worse than [under] Mubarak'. Thousands remain incarcerated with minimal due process or legal protections, including many youth activists who were at the forefront of the 2011 uprising. It is expected that repression levels will continue to increase.

Economically, an unfortunate consequence of the ongoing reforms is the increased economic hardship they place on the majority of Egypt's population. While floating the Egyptian pound did entice the return of some foreign investment, at the same time the currency lost more than half its value, sharply driving up the cost of living as prices for fuel, food and public utilities reached unprecedented levels. Economic hardship will continue, and inequality will increase.

The combination of these factors, are likely to cause another uprising that is likely to be much more violent than 2011. The key actors in that scenario would be: the Army, the protestors in the street, the Islamists and other (weaker) political parties.

Prospect: In 2028, President Sisi was elected for his 4th term which he says will be his last. In 2030, he announces that he will run one more time, and the combination of security, political, environmental and economic issues sparks protests that spread across the country. After a brutal crackdown, the Army steps in and offers concessions, including the offer to re-integrate Islamists into the polity and in the end push out Sisi. As in 2011, there will be a political opening, and semi-fair elections, but the military will remain the key actor in Egyptian politics.



A full Middle Eastern Cyberwar Erupts

Article in the Jerusalem Post, 4 May 2030

This week, Israel ended its full annexation of the West-Bank. This marks an end to the Palestinian Authority and the full rights of Palestinians on the former Palestinian territory. The long discussed one-state solution with an Apartheid-like regime towards the Palestinians has now become a full reality.

Turkey and Iran reacted by starting a full cyberwar against Israel. The other neighbouring countries, Egypt and Saudi Arabia are still in internal turmoil and too divided to react. Islamist groups in both countries used the annexation by Israel to put into question the policy of their governments even more.

Although the United States has disengaged in recent years from diplomatic engagement in the Peace Process and the region as a whole, it expressed its support for Israel's move. Russia and China, which have done efforts to engage more with Israel in the last few years, also decided to remain neutral.

This move of Israel is a final result of the political fragmentation that started at the elections of April 2019 and the subsequent indictment of former Prime Minister Benyamin Netanyahu. The consequent

minority government, dependent on small right-winged parties, was responsible for the final collapse of the Peace Process. The following domestic political conflict was the ultimate argument for Israel to make an end to the situation that existed since 1948. In its communication, Israel added that it will not accept the aggression from Turkey and Iran and that it will strike back.



A Cardboard Tiger

Russia's role in the broader Middle East is largely dependent on drivers of change (or continuity) within Russia:

Power transition after 2024: One way or another, Vladimir Putin will dominate Russian politics after 2024 – whether through another swap of positions with a puppet-leader or through a change of the Russian constitution. Hence, the foreign policy course will continue in the second half of the 2020s (same security-focused elites and narratives, no liberalization). Russia will continue to heavily rely on hard power projection – particularly in the post-Soviet space and the broader Middle East (building upon its gains in the Middle East made during Putin's second presidential tenure).

Inward looking economy: Economic considerations are not a strong pillar of Russia's foreign policy towards the Middle East. Against the backdrop of growing alienation from the West and deepening Western sanctions, Russia will continue to pivot towards Asia. Whereas oil loses its significance as a political factor, Russia's economic engagement in the MENA region relies on arms, energy (LNG, nuclear) and wheat.

Middle East as Russian Cordon sanitaire: For the sake of its own regime persistence, Russia is a proponent of authoritarian stability (Syria, Algeria, Egypt, Turkey). This is why it aims at staying relevant in the MENA region (even though it punches beyond its actual weight, but yet very successfully because it is not being challenged by other key actors in the region). For now, it plays the role of a spoiler as it lacks an agenda of engaging other regional powers (i.e. to build a security framework in or for the region).

Beyond its aim to spoil other actors' intentions and interests in the region, Russia has a genuine interest in fighting the growing threat of terrorism from the region. While Russia consolidates its forward position (arguably to fight terrorism instead of fighting it at home), its reemergence in the MENA region leads to increased great power tensions and rivalries. With the help of its allies in the region (Turkey, Iran), Russia's influence continues to grow; at the same time, Russia is limiting space for other global actors (A2/AD strategy).



A Middle East of Spheres of Influence

When a massive Chinese cyber hack espionage against US corporations was uncovered in 2020, marking the beginning of a US-Chinese confrontation, US attention and resource allocation to the MENA ceased abruptly, putting a halt to the US security umbrella/patronage in the MENA.

Faced with a sudden security vacuum, Saudi Arabia sought a closer alliance with Israel, leading to hostile reactions from Iran. When the situation escalated between Tehran and Riyadh/Tel Aviv, Russia stepped in to offer mediation to end the hostilities, followed by parallel talks of Astana-Plus-2 (Saudi Arabia, UAE) and the newly created Saint Petersburg Process (Russia, Turkey, Saudi Arabia, Israel and China).

The two processes led to moderate de-escalation, and over time to a de facto division of the region in spheres of influence, with Russia (and China) as key mediators.



Extra-marriage affair with Russia, incomplete divorce from NATO

In 2028, Erdogan's second turn ends with a change in the constitution and early elections that give him additional two years in office. A completely centralized, authoritarian decision-making system now is the defining feature of the political culture in Turkey. The Central Bank, the Judiciary, the Parliament – all have lost or willingly surrendered their constitutional powers.

The quality of life and purchasing power decreased dramatically in Turkey. The economic success story of the early 2000s now appears like faint memory of the past. Today, Turkey is no longer a reliable country for foreign investments. The Lira is in free fall, high unemployment rates led to a massive reduction of the middle class. Those who can get a job in the government – most likely in the overcrowded security sector – at least have a steady income. The education system is in dire straits: generations of students lack basic critical thinking tools feeding into even more populism and fake realities. As a consequence, anti-Western sentiments grow throughout the country.

In the immediate neighborhood, Syria still is in a stalemate, but with a pronounced Kurdish autonomy in the Northern belt supported by the United States. Assad is out but the Syrian regime stays pro-Russian. Turkey continues its military buildup in the vicinity of Kurdish forces, creating a tense balance between the US and Turkey.

In 2030, Turkey – at least on paper – is still a member of NATO. But given its power ambitions in the Near East, its tough stance on the Kurds, its leaning towards Russia (acquisition of S400/SU35/SU57 systems), its rough course *vis-à-vis* Tel Aviv, Turkey is being excluded from NATO's Russia agenda. Also, Turkey no longer takes part in major NATO projects or exercises. Even though there was no official divorce from NATO, Turkey's membership in the alliance de facto came to an end. NATO's LandCom no longer operates out of Turkey and the US military presence decreased strongly; also, the US Department of Defense has relocated all tactical nuclear weapons which were stored on Turkish soil.

Given these massive changes in the security architecture of the alliance (and at the cross-roads between Southeast Europe and the Middle East), Turkey increasingly is a capable military power in its own right. It has forward troop deployments across Qatar, Somalia, Northern Iraq, etc. and it tends to use military tools more often in order to solve regional conflicts. Turkey has more freedom of movement in its inventory and is one of the leading powers in unmanned systems and robotic warfare, especially drone capabilities. With arms exports of about USD 5 billion annually and a defense budget of about 15 to 20 billion, the political priorities are clear: Turkey should rise to a strong regional power, able to project Turkish interests beyond its immediate geographical reach – all at the expense of economic sanity and social welfare. How long Turkey can walk on this slippery slope largely depends on third actors: Russia, Iran and China (Astana-Plus-1).



UNITED STATES OF AMERICA

Purgatory 2030

2030, the MENA region is now entering its second decade of instability. Since 2011, a cascade of state implosion, terrorism, (mostly failed) regime change, internal conflict and regional competition has plagued the region. In 2030, while transnational terrorism has declined, pockets of insurgent and terrorist activities continue to destabilize a series of countries, creating pockets of limited governance. Russia continues to be a regional player, with military presence and strong bilateral ties in Syria, Libya, Egypt and, to a lesser extent, Algeria and Saudi Arabia. China's economic ties, especially in the Gulf, continue to expand, as do their investments in critical infrastructure.

However, neither Russia nor China have succeeded in establishing themselves as the hegemonic external power in the region. US military presence and power projection continue to play a significant but not leading role. Although the United States maintain their traditional alliances, the level of commitment and predictability on both sides is low and more transactional, issue-based.

The lack of a strong regional security architecture has contributed to the protracted instability and prevented a substantial American withdrawal. Yet the overall level of engagement has declined. This is partly due to the fact that the region has lost some of its geo-economic importance to the United States, as a result of energy independence. However, maintaining a presence in the MENA region remains important for global power projection, also because of the role of shipping lanes.

The regional balance of power is characterized by an ongoing antagonism between Iran, Israel and the Saudi-led alliance. However, short of a number of small-scale skirmishes, a conventional war has been avoided. Iranian-Russian relations have soured over the future of Syria, contributing to enhance Iran's isolation – with the exception of the strong bilateral ties between Teheran and Baghdad.

Syria remains divided, with strong foreign involvement and competition and with a withdrawn regime. Despite the failed 2025 internal coup, the upper echelon of the regime remains in power, under the Assad family. A similar situation reigns in Egypt, where a foiled attempt to remove President Sisi, only led to him tightening his grip on power. Meanwhile, President Sisi continues to groom his son Mahmoud al-Sisi to take over after he steps down.

Key Take-Aways for Peace and Security in the MENA 2030

The scenarios outlined above show that the Middle East and North Africa region is undergoing a new wave of significant changes that are detached from the ramifications that materialized in 2011. The region is experiencing yet another transition phase with the breaking down of old structures and the creation of new ones that will impact security and crisis response in the MENA. This dynamic takes place at a time when the southeastern flank of NATO is eroding, the rentier economies of the Middle East will soon lose their oil and gas-related assets, youth bulges demand their place at the table, climate change is aggravating an already dire water and natural resource situation, and new technologies make it even harder for the societies of the region to play their part in the global economy.

The scenarios suggest that what will be seen in the MENA region over the next ten years will be the dissolution of traditional arrangements and the emergence of new forms of cooperation and cross-regional alignment in the face of increasing domestic pressures such as population growth, climate change as well as increased political fragmentation and economic hardship. In addition to the continuation of already existing prolonged conflicts, the next ten years might add new layers to regional crises and see an increased risk for growing militarization in and around MENA; a region that was supported in its creation by states that are now scaling down their engagement and held together by institutions and alignments that are now – slowly but steadily – eroding. According to the workshop discussions outlined above, this dystrophy caused by the disintegration of traditional structures can lead to significant alterations in the regional security setup. The following trends are an expression of these processes.

Avoiding the Short Straw: Unsure Realignments in the MENA

The states of the MENA region are currently in a rumbling negotiation phase of self-assignment associated with the dynamic competition between global and regional powers for reordering their relations and lines of conflict. No-one wants to draw the short straw in regional power politics, yet the odds are not clear enough to know what will prove to be the best way to save national interests – which increasingly became the main reference point for regional security policy. In the past, conflict management in the MENA was, to a large extent, externalized. The retrenchment of the United States and *fait accompli* by the Trump Administration have changed the security landscape of the region and the insertion of new players into the power game already impacts the strategic priorities of the states of the region in order to avoid the short straw.

Playing Solitaire: Between Strategic Loneliness and Over-Ambition

The MENA region lacks its own regional security architecture, based on the principle of collective self-defense. Instead, what was observed during the workshop is a collective experience, if not trauma, that can be dubbed strategic loneliness. In light of the ongoing antagonism between individual states and adversarial blocks in the region and the crumbling of long-standing alliances, many states such as Israel, Turkey and Iran feel pushed back into a strategic culture of self-reliance. This widely spread feeling of being abandoned and left isolated in old alliances among states of the region might encourage governments to overestimate their own capabilities and take things into their own hands instead of engaging in regional dialogue with their neighbors.

Inside Out: Disintegration and De-regionalization

These observations suggest that, until 2030, the MENA region will further disintegrate. Regional institutions such as the Arab League will, at best, not have been successful in bridging regional rivalries and political fragmentation. Multilateral negotiations and regional cooperation initiatives will have reached a gridlock. The re-nationalization of strategic priorities in foreign affairs and security policy will drive the countries of the region further apart. Aggravating this trend of disintegration, North African

countries might have reoriented themselves towards Africa (and China) driven by the economic imperatives dictated by their national interests.

International Institutions Crumbling towards Irrelevance

While the US is largely withdrawing its presence from the region and challenging NATO which, in turn, is likely to lose touch with its direct point of contact to the Middle East, namely Turkey, the European Union appears heavily fragmented over member states' foreign policies by 2030. The failure of the EU to reactivate multilateralism in its southern neighborhood might thus further paralyze EU engagement in the region. Although individual member states will continue to partake in the regional power competition, the scenarios suggest that the West will play a more marginalized role in MENA than in the past. Additionally, most MENA countries are expected to have lost trust into the United Nations while the Syria case, most probably soon to be followed by Libya, could become a blueprint for the future of crisis management in MENA, where the West has little say.

The Advent of Fragile Authoritarian Alliances

Besides that, the region is witnessing a shift towards authoritarian structures, heightening nationalism and identity politics. The democratic achievements of the developments in 2011, where successful, have been largely rolled back. According to the scenarios above, this trend will continue over the next ten years. In light of increasing domestic pressures and national governments reaching the limit of their capacities with demographic, technological and environmental changes, the region might witness an already looming emergence of alliances between authoritarian regimes (Iran, Turkey, Russia and Saudi Arabia, Egypt, the UAE) that feel confident enough to play a role in the region beyond mere self-enrichment. Although this new order may not sustainably bring about stability and in itself might trigger significant social and political changes, it could save the region from a complete collapse of state structures. New forms of authoritarian multilateralism might emerge that can challenge the global liberal order.

Interest-based Ad-Hoc Alliances

Despite the fact that the set-up of a region-spanning security architecture is not deemed likely, experts noted that the MENA region will still witness the opening of pockets of cooperation and interest-based ad-hoc alliances between those countries that face similar risks, share a common historic experience and have a comparable future trajectory. Already today, countries that would have been perceived as natural antagonists a few years ago (Israel and Saudi Arabia, Turkey and Russia) are cooperating in security and defense affairs based on their national interests. The establishment of stable order led by Turkey, Iran and Russia, however, will not come about.

On a Positive Note

There are opportunities for common approaches with regards to long-term challenges that similarly affect all states of the region. As key risks and opportunities which might enhance cooperation between individual countries of the region were mentioned first and foremost the fight against transnational terrorism and trans-border crime, the acknowledged necessity for incremental political reform (regime evolution instead of revolution), economic diversification and a fair share in the post-hydrocarbon global economy. Similarly, the fight against water scarcity in the face of climate change might arise as a field for early cooperation on enhancing human security to save the lives and livelihoods of MENA populations. With this as a starting point, through building single-issue institutions and multilateral trust, other chapters for cooperation might open up.

The **Mediterranean Advisory Group** (MAG) was launched as a series of dialogue rounds to contribute to the strategic debate on the ongoing processes in Europe's Mediterranean neighborhood to help in better coping with the various changes and challenges. MAG is a Euro-Mediterranean network of experts and practitioners, which reviews and analyzes developments in the region connected to security, foreign policy and migration. The meetings take place on a bi-annual basis. The findings and recommendations of the MAG are intended to inform decision-makers and are published regularly in the Mediterranean Dialogue Series.

Annex I: Preparatory Online Survey

In preparation of the three-day scenario workshop, participants were asked to identify opportunities and obstacles for enhanced cooperation on peace and security in the MENA region in an online survey. They were also asked about the main internal and external factors of change that might have an influence on how peace and security will develop in the region until 2030. These were the main findings of the survey:

Opportunities and obstacles for cooperation

| Opportunities for cooperation (North Africa) | Obstacles for cooperation (North Africa) |
|---|--|
| Radical Islam and Terrorism | Regional conflicts and tensions |
| Transnational crime and migration | External powers, role of EU and EU member states |
| Political reform and political participation | Trust, Governance |
| Globalization, Trade, New Technologies, Modernization | (Economic) integration and development |

| Opportunities for cooperation (Middle East) | Obstacles for cooperation (Middle East) |
|---|--|
| Terrorism, end of radical Islam / ISIS | Authoritarianism, Bad Governance, Fragility, lack of national identity |
| Globalization, Trade, Modernization, Diversification, Digitalization and New Tech | Role of external powers |
| Reconstruction and stabilization; International initiative towards region | Iran-Saudi struggle; Intra-regional frictions and conflicts |

Trends and key drivers of change until 2030

| Social Trends and Key Drivers | Technological Trends and Key Drivers |
|--------------------------------------|---|
| Youth bulge | Energy revolution and breakthroughs |
| Migration and Brain Drain | Digitalization, Automation, AI (also: impact on work) |

| Economic Trends and Key Drivers | Military/Security Trends and Key Drivers |
|--|--|
| Macro-economic structure and performance | Internal / intra-regional conflicts; Foreign interventions |
| (Youth) unemployment | Terrorism, Proliferation, Arms Trade |

Political Trends and Key Drivers

Authoritarianism

Regional and international (dis)order; alliances
and power competition

Environmental Trends and Key Drivers

Water scarcity

Climate Change (also leading to migration)

Cultural/Soft Trends and Key Drivers

Xenophobia; Populism–Nationalism–
Identity politics/sectarianism

Role of religion (or its decline)

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