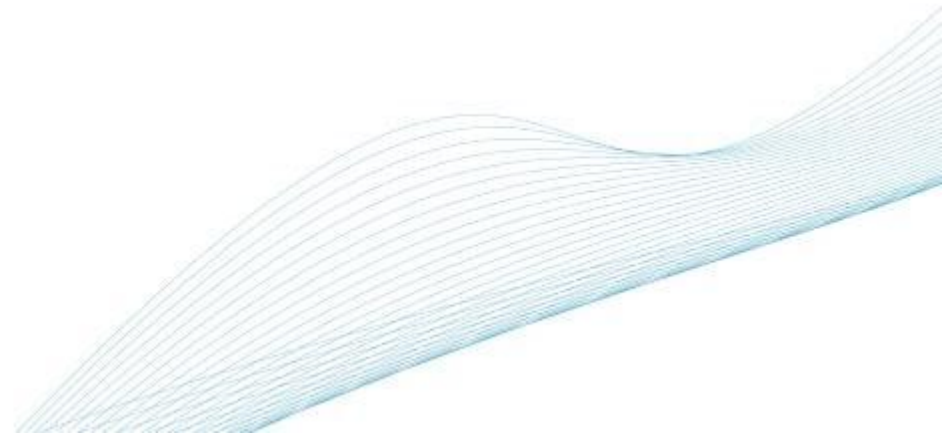


Middle East Security Overview A Round-up of the Region

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Control Risks

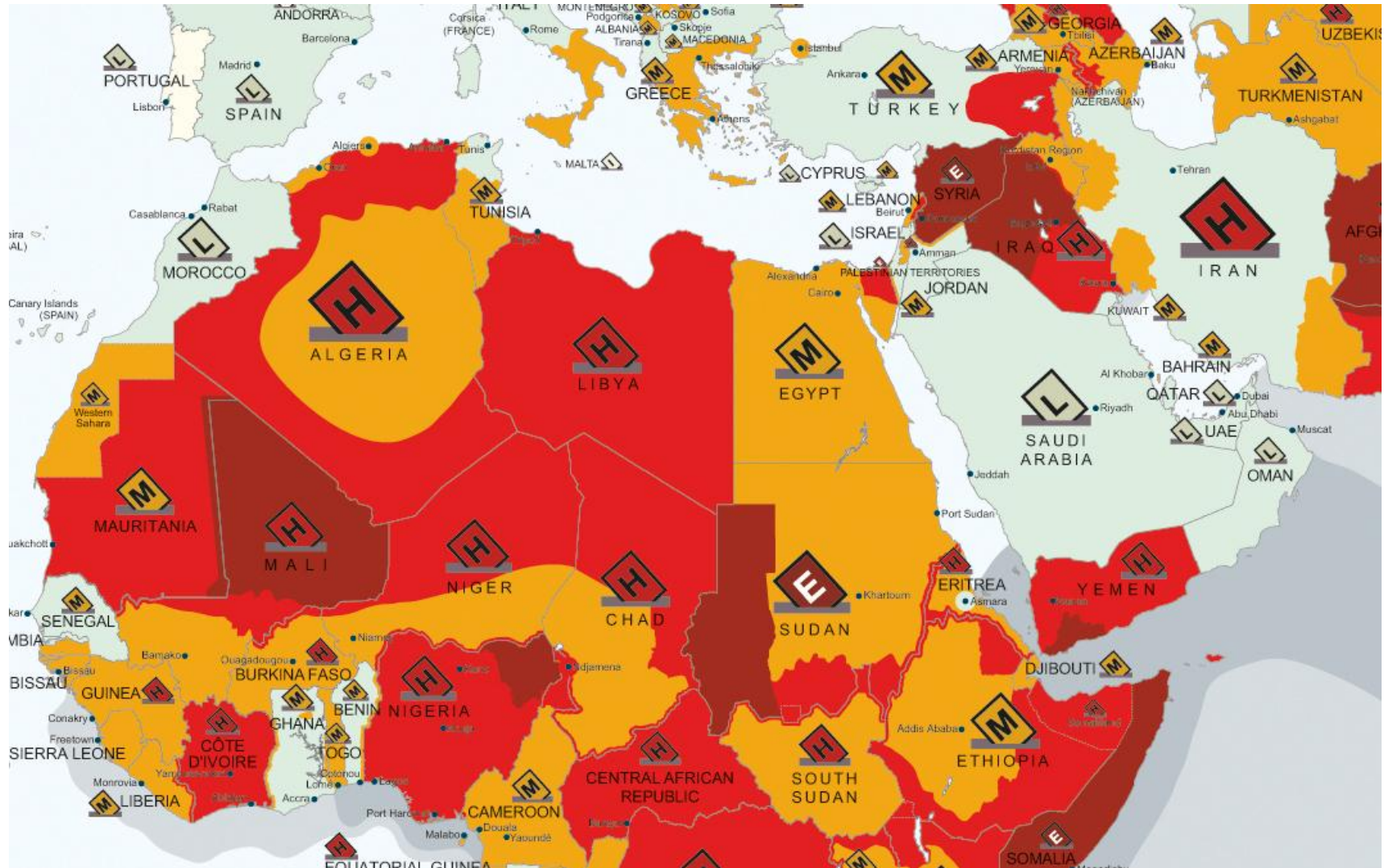
Introduction

- Political and security risk correlation
- Regional overview
 - Iraq
 - Syria
 - Egypt
 - Libya
 - Pakistan
 - Iran/Israel
- Common themes
- Risk mitigation



Control Risks

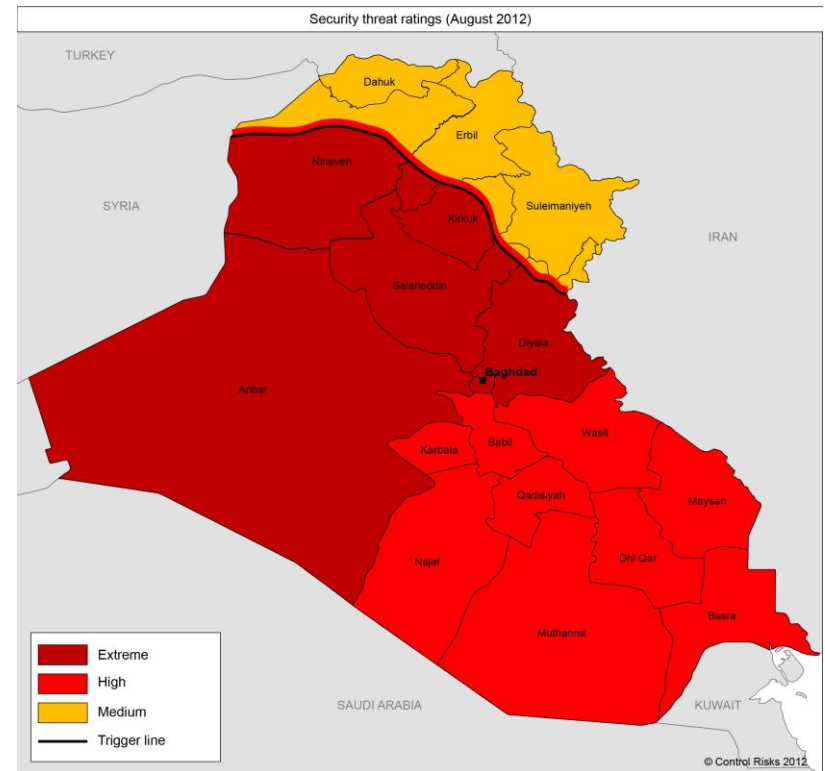
Political and security risk correlation



Control Risks

Iraq

- Political instability
 - Baghdad/Erbil relations
 - Unrest in Sunni provinces
 - Cross-sectarian appeal
 - Sectarian voting patterns
 - 2013/2014 elections
- Security environment
 - High baseline of incidents
 - Growing concern for local community issues
- Other concerns
 - Compliance, regulatory, corruption



Syria

- Conflict likely to worsen in 2013
 - Sustainable rebel gains
 - Regime's grip on power increasingly untenable
 - But, fall of Assad not sufficient to stem violence
- No clean solution
 - Less simple than Libya
 - Emergence of extremism
 - Fear of change
- Spillover
 - Direct security (all neighbours)
 - Political instability
 - Lebanon – proxy battles, political connections
 - Iraq – ethno-sectarian angle (Sunnis, Kurds)
 - Jordan – refugee strain



Egypt

- Political outlook
 - Muslim Brotherhood to remain in power
 - Some degree of military backing
 - Opposition is fragmented
 - Parliamentary elections likely to go ahead
 - FJP likely to win, but by smaller margin
- Highly dependant on external funding
 - IMF
 - \$4.8bn loan not yet approved, but likely in 2013
 - Egypt needs it for capital and confidence
 - GCC funding
 - Buys time to get the IMF loan
 - Not a long-term solution

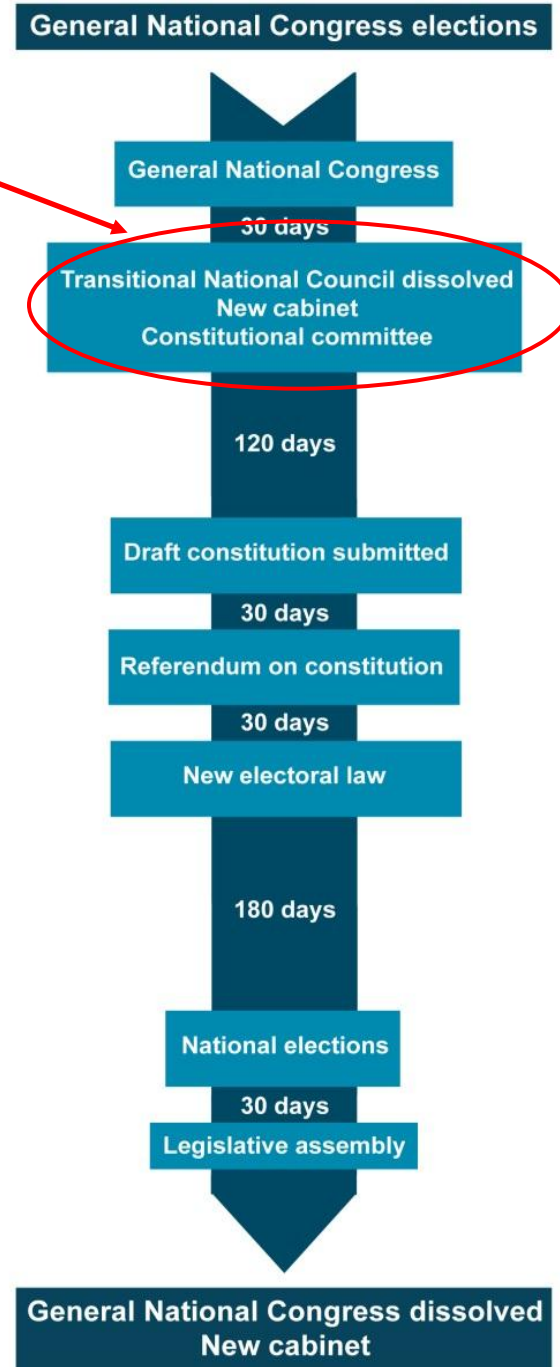


Control Risks

Libya

- Frequent political crises
 - Regional representation
 - Recognition of 'revolutionaries'
 - But gradual progress likely
- Fragile security conditions
 - Lack of disarmament
 - Fragmented guarantors of security
 - Potential terrorism threat
- Other challenges
 - Bureaucracy, regulatory, corruption
- Opportunities
 - Reconstruction, infrastructure, O&G

Current position of political transition



Pakistan

- Political outlook
 - General elections scheduled for May
 - Heightened potential for unrest and insecurity
 - Likely result: coalition government
 - Potential regulatory changes
 - Military political intervention unlikely, but possible
- Economy
 - Critical situation: insolvency approaching
 - External support difficult during political instability
 - Some potential for a solution after May elections
- Security environment
 - Worsening political, sectarian, extremist violence
 - High levels of violence used to justify political stagnation



Iran/Israel

- Israel unlikely to attack Iran unilaterally
 - No change since elections
 - Netanyahu still dominates security/FP discourse
 - Therefore strike cannot be ruled out
- Reasons not to strike
 - Disagreement in military/intelligence establishment
 - Success in inducing US sanctions
- Longer term outlook less certain
 - No clear window for reconciliation (including with the US)
- Potential regional impact
 - Asymmetric (Iraq, Lebanon)
 - Conventional: likely to be limited; depends on coalition
 - Victim card; acceleration of nuclear programme



Themes

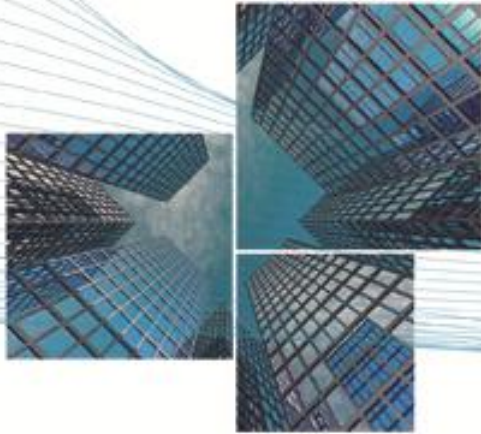
- Loss of centralised control
 - Common theme in many MENA countries, especially after Arab Spring
 - Changing guarantors of security
 - Potential for prolonged instability
- Opportunist extremism
 - Moving to fill security gaps
 - Provision of governance and services
 - Focus on destabilising local governments
 - Move away from ideological targets
- Cross-border spillover – political and security
 - Syria
 - Libya
 - Demise of nation state as basis of identity?



Risk mitigation

- Lessons from In Amenas
 - Controllable vs uncontrollable security threats
 - Need for resilience, response as well as mitigation
 - National security trumps other concerns regarding government response
 - Potential for insider involvement
 - Whether willingly or under duress
 - Complex tribal loyalties
- Stakeholder engagement
 - Understand and mitigate risks at source
 - Complement to hard security
 - Need to balance hard security with unobtrusive footprint
 - Uniquely Middle Eastern challenge
 - High terrorism threat
 - Politically aware and assertive populations





Open floor