



MENARA Final Reports

No. 2, March 2019

IMAGINING FUTURE(S) FOR THE MIDDLE EAST AND NORTH AFRICA

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and Eduard Soler i Lecha**



This project has received funding from the European Union's Horizon 2020 Research and Innovation programme under grant agreement No 693244

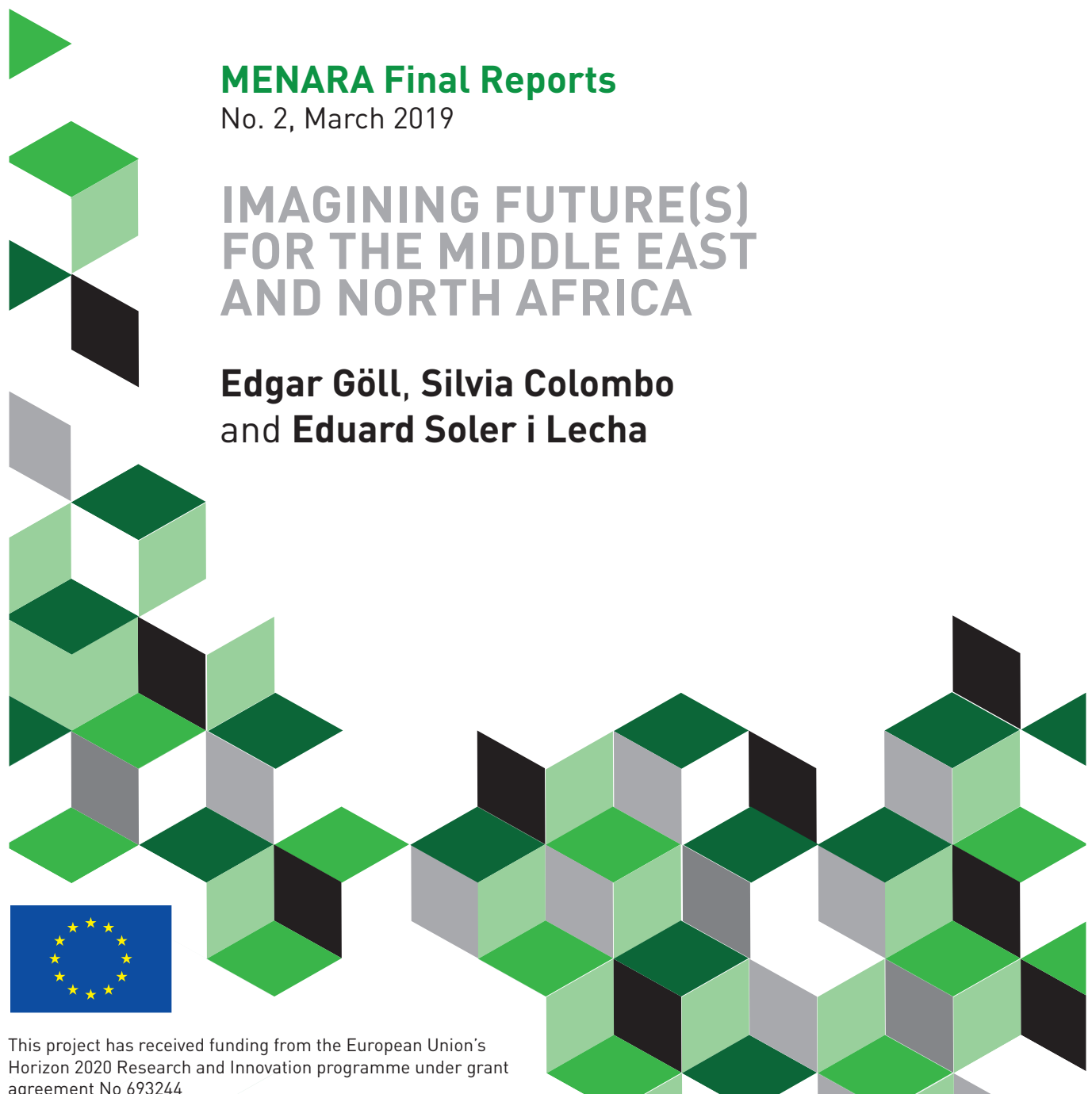


TABLE OF CONTENTS

Scenarios: What For?	p. 3
Scenarios: How?	5
Perceptions on the Future: Hope and Frustration	6
A Full Catalogue of Risks	7
A Diverse Region and Disparate Expectations	9
Many Games in Town	12
Scenarios for 2025	15
Scarce Natural Resources: Water, Food and the Effects of Climate Change	15
<i>What if food dependency is no longer associated with food insecurity?</i>	16
Oil Still Matters – But Decarbonisation Is Unstoppable	18
<i>What if Morocco becomes a renewable energy leader?</i>	20
Social Contract Under Threat: Inequalities in the Forefront	21
<i>What if female empowerment is more than a slogan?</i>	24
Fragmented Societies: Polarization and Pluralization	25
<i>What if Iraq is experiencing a renaissance?</i>	28
Intrusive Authoritarianism: Control, Repression and Disinformation	30
<i>What if digital media harbours the hopes of youth?</i>	32
A Militarized and Brutalized Region	33
<i>What if Syria moves from reconstruction to reconciliation?</i>	38
Foreign Meddling and Rebalanced Global Ambitions	39
<i>What if Africa is seen as an opportunity and a preferential partner?</i>	42
Scenarios for 2050	44
Unstoppable Climate Change	44
Post-Oil World	45
An Urbanized Region	46
Digitalization and Automation	47
Religiosity, Individualization and Citizenship	48
Strong or Fierce States	49
Managing the Effects of Today's Conflicts	50
China: Primus Inter Pares	51
Game-changing Africa	52
Europe and the MENA Region: A Family Issue	53

IMAGINING FUTURE(S) FOR THE MIDDLE EAST AND NORTH AFRICA

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ABSTRACT

Scenarios are imagined futures that can demonstrate how current actions may lead to dramatically different outcomes. As such they are useful tools to help guide strategy and shape the future. This report lays out scenarios for the Middle East and North Africa (MENA) with two time horizons: short term (2025) and long term (2050). The former is a kind of business-as-usual scenario that projects current trends in the region and is based on the conclusions drawn from research conducted over three years (April 2016–March 2019). These conclusions point towards greater conflict and contentious state-society dynamics, regional fragmentation and shifting centres of gravity, the region's embeddedness in global rivalries and disruptive socio-economic and environmental international trends. The report also points at several alternative paths in particular areas or countries where these trends could be reversed, or where specific sectors or countries could take divergent paths and how. Then the report sketches long-term scenarios for 2050 by identifying some megatrends that will inevitably shape the region's future and the way in which the region will relate to the rest of the world. The report explains why each of the selected issues is particularly relevant and imagines a series of opportunities as well as risks for the region.

SCENARIOS: WHAT FOR?

Scenarios are imagined futures, but they are neither forecasts nor prognoses. Scenarios can help to guide strategy and shape the future as they sharpen our ability to think about alternatives and open up thinking "outside the box". Scenarios can describe a societal system, its structures, basic drivers, powers, relations and other aspects. This is highly relevant because present imaginations and expectations will determine today's decisions and recommendations, which then will influence future developments and choices between different paths and alternative futures. Contrasting scenarios are meant to be eye-openers: they describe and visualize future developments, conditions and societal environments that a specific group is (or may in time be) prepared to consider. The ways in which scenarios are articulated and described can lead to a flexible and imaginative response to the range of future possibilities. They can help to prepare for unexpected but nevertheless major impacts on future developments. The trigger points that a future timeline identifies – circumstances that lead to disruptions and radical change – are highlighted so as to

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become alarm signals that will give early warning of relevant events that are just over the horizon. In sum, scenarios are imagined futures that can demonstrate how current actions may lead to dramatically different outcomes; they can therefore help manage or shape the future.

This report lays out scenarios for the Middle East and North Africa (MENA) with two time horizons: short term (2025) and long term (2050). This approach is meant to increase the robustness of the views of the future that is under construction and highlight the processes of change in selected issue areas in the region. This report proposes a baseline scenario for 2025, a kind of business-as-usual scenario that projects current trends in the region and is based on the conclusions drawn from research conducted over three years (April 2016–March 2019). These conclusions point towards greater conflict and contentious state–society dynamics, regional fragmentation and shifting centres of gravity; the region’s embeddedness in global rivalries; and disruptive socio-economic and environmental international trends. The report focuses on seven issue areas: environmental degradation, energy transition, inequalities, fragmented societies, authoritarianism, conflicts and foreign meddling. It imagines how the region could look if none of the current trends can be reversed. Those who assume this is the most likely trend would be advised to start designing mitigation and risk-contention strategies. To a large extent, this resonates with the idea of fostering resilience that was put forward by the 2016 European Global Strategy. However, this report assumes that this is not the only possible future and certainly one that is far from being desirable for the societies of the region or for the European Union. This is why the report points at several alternative paths in particular areas or countries where these trends could be reversed, or where specific sectors or countries could take divergent paths – and how and by whom that could be made to happen (“Focus Scenarios”). This exercise, formulated with the phrase “what if...”, points out the fact that there are contingencies, and that there is room both for transformative actions and forward-looking, evidence-based policies.

The report also sketches long-term scenarios for 2050. It is futile to imagine who will be in power in a particular country at that date or whether the economic indicators will have improved or not. And yet it is still possible to identify a series of megatrends that will inevitably shape the region’s future and the way in which the region will relate to the rest of the world. Some of them are relatively certain, such as demographic changes, whereas others are much more dependent on politics and power struggles. Megatrends are developments with a high impact that are unlikely to be reversed and last at least a generation. To a certain extent this concept resembles Fernand Braudel’s *longue durée* (long term), which includes not only socio-economic cycles and structural crises, but also “old attitudes of thought and action, resistant frameworks dying hard, at times against all logic”. In that vein, the report identifies ten issues that are very likely to shape the region by 2050: climate change, digitalization, religiosity, urbanization, decarbonisation, the role of the state, the effects of today’s conflicts, China’s consolidation as a global power, the intense connections between the MENA region and Europe, and the growing role of Africa. The purpose of this exercise is to anticipate the issues that will unavoidably shape not only the region but also policies towards it between now and 2050. This time horizon is almost two generations away, so room is left for alternative thoughts beyond the usual narratives. The report explains why each of the selected issues is particularly relevant and imagines a series of opportunities as well as risks for the region. While we can foresee why these issues will take up much energy and many resources in the next three decades, it would be misleading to conclude that there is only one way in which

these megatrends could develop. This fact should induce decision-makers and stakeholders to embrace the idea that change is possible, and that actions taken from now on could steer the region towards one or another future.

SCENARIOS: HOW?

One of the distinctive characteristics of this exercise is that the identification of topics, trends, key actors, critical junctures, risks and opportunities is based on the results of a multidisciplinary research project and particularly on the perceptions of relevant people and stakeholders regarding possible and likely futures, which have been collected through various means: face-to-face interviews, a Delphi survey and focus group discussions. In 2017 and 2018 the MENARA project conducted 269 interviews with a diverse group of relevant actors, including pro-government and opposition politicians, public officials, members of security forces, officials in international and regional organizations, members of the private sector, intellectuals, experts and civil society activists. Most of these interviews took place in the MENA region and covered the Maghreb, the Levant, the Gulf, Turkey, Egypt and Iran. Interviews were also conducted in countries that were undergoing or had undergone conflict, such as Syria, Libya and Iraq. In the case of Yemen, interviews were conducted with members of the Yemeni diaspora in Europe and the Middle East. Some interviews took place in neighbouring countries (Mali) as well as in Europe, Russia, China and the United States of America, so as to gather perceptions on external actors towards the region's future(s) as well. In these interviews actors were asked, among other things, about their perception of major threats and opportunities, and about the actors who are most likely to shape the region in years to come.

Furthermore, the report incorporates the results of a Delphi survey with seventy-one experts from and on the region. Delphi is a proven methodology for long-term foresight and discursive thinking. It can cope with a high degree of uncertainty and addresses highly complex issues through an iterative communication process involving experts. The MENARA project Delphi survey invited participants to leave aside the entrenched paths of daily thinking by presenting plausible sketches of the region's futures based on idealized visions (ranking of relevance, likelihood, adequate solutions, etc.). In most of the Delphi survey questions participants were asked to assess developments for both 2025 and 2050 and, when relevant, to differentiate impacts in different territories of the region. This was complemented by two stakeholders' engagement meetings (in Istanbul and Rome) and three focus groups (Rabat, Beirut and Brussels), which allowed for in-depth and forward-looking discussions on the peculiarities of specific sub-regions and the role of external actors. This report also builds on the assessment of fifty-eight earlier future studies that have been written about megatrends and trends in the MENA region or in parts of it.

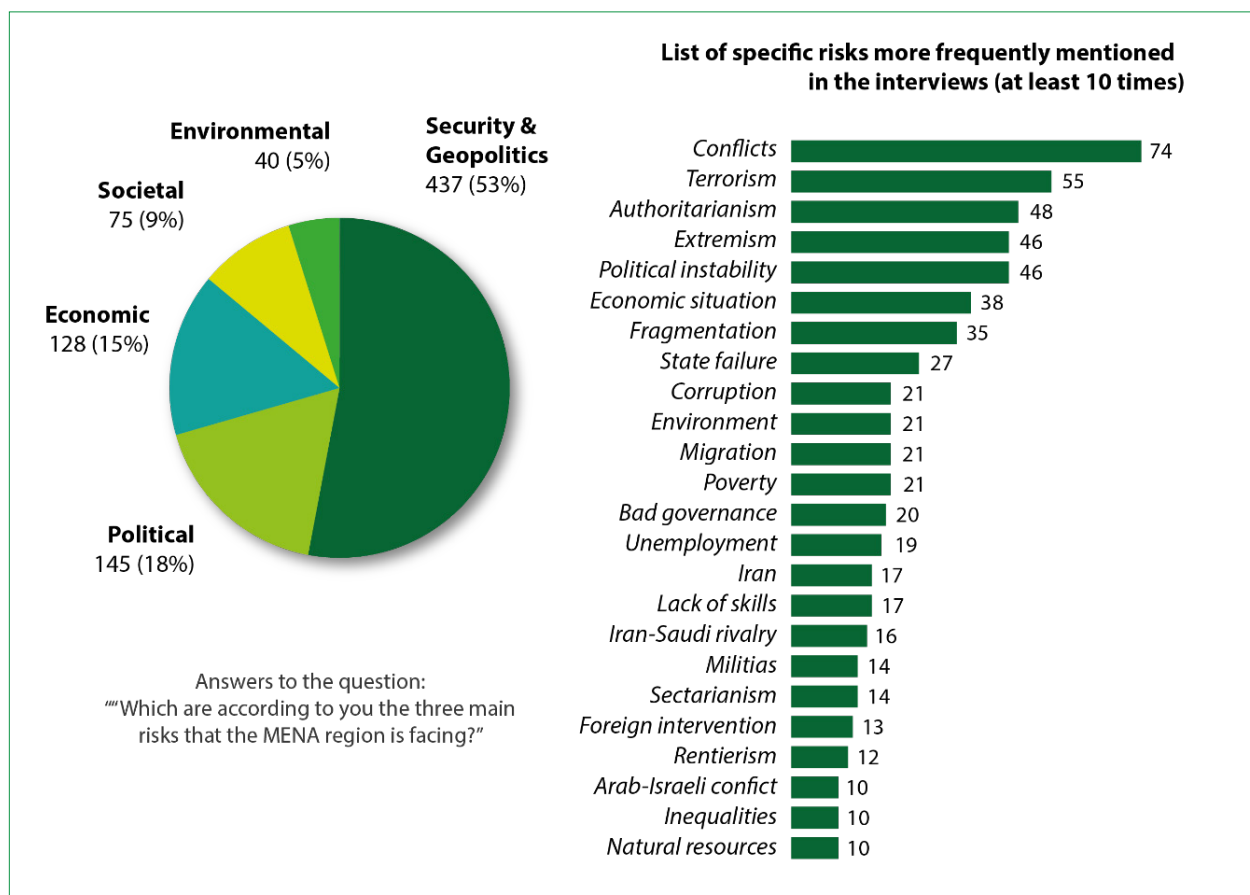
Because this prospective exercise is mainly built on the perceptions that were gathered through the research techniques outlined above, the first section of this report will focus on summarizing the elements for which there is a high degree of consensus in terms of intensity or possibility, but also the elements where perceptions differ based on territorial, gender, generational or sectoral factors. The report will then present the baseline scenario for 2025 and the alternative futures for specific issues or countries. It will end by widening the time frame to 2050. As one of the participants in the Delphi survey mentioned, 2025 is just "a stone's throw away from us and current dynamics

will still shape the scene”. In contrast, the exercise of imagining futures for 2050 widens the scope of what is possible, and eventually this could increase inspiration and the appetite for engaging in innovative policies and actions that are aimed at reversing current trends and fostering cohesion, cooperation and the embeddedness of the region in global constructive dynamics.

PERCEPTIONS ON THE FUTURE: HOPE AND FRUSTRATION

As noted in the previous section, the combination of different research techniques (interviews, Delphi survey and focus groups) has allowed the collection of a large and diverse sample of perceptions about the region’s possible futures and the main challenges that its societies and states are going to face, but also the issues that will shape the way in which global actors relate to this region. We can summarize these perceptions as follows: (1) the intensity and quantity of risks overtake opportunities; (2) the levels of hope and frustration are unequally distributed: respondents from some territories are far more optimistic than others, while experts expect diverging evolutions (and different distributions of risks) in specific territories or time frames; and (3) the future of the region will not be shaped by a handful of actors but by a large constellation of them, including local actors and heavily weighted towards regional powers.

Figure 1 | Main perceived risks for the MENA region



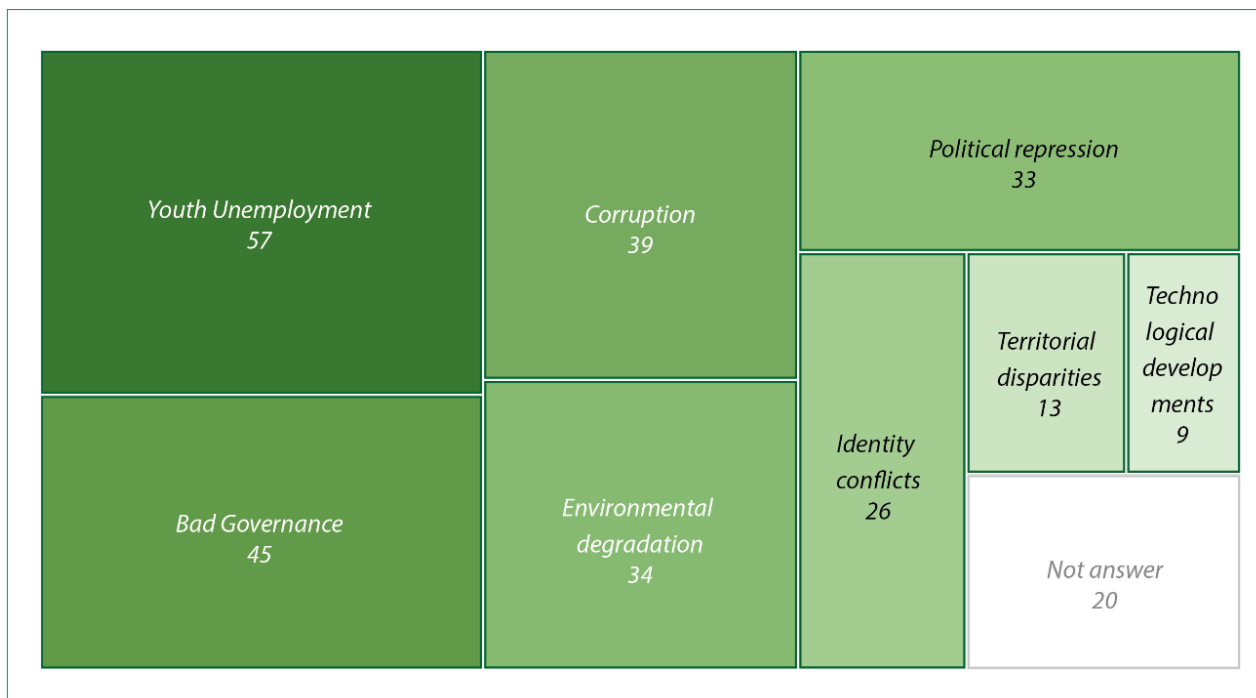
Created by CIDOB. Source: Aggregated and clustered results of the face-to-face interviews.

A FULL CATALOGUE OF RISKS

People interviewed during the project’s fact-finding missions or participants in the focus groups and stakeholders meeting found it easy to come up with a list of risks that could shape the region’s future. The dominant vision was that the MENA region is characterized by high levels of violence – conflicts were by far the most frequently mentioned risk, and terrorism came next. It is worth underlining that politically related risks such as authoritarianism and political instability as well as a fragile economic situation were also identified as potentially destabilizing factors.

This picture can be complemented by the assessment of the seventy-one experts who participated in the MENARA Delphi survey. These participants were asked to select the elements that could foster social unrest across the MENA region by 2025, based on their impact and probability. Youth unemployment, bad governance, corruption, political repression and environmental degradation were seen as the four most salient elements. In their responses, many argued that it is not one of these elements alone but the combination of them that significantly increases the risk of conflict and its destructive effects.

Figure 2 | Elements likely to increase social unrest across the MENA region by 2025



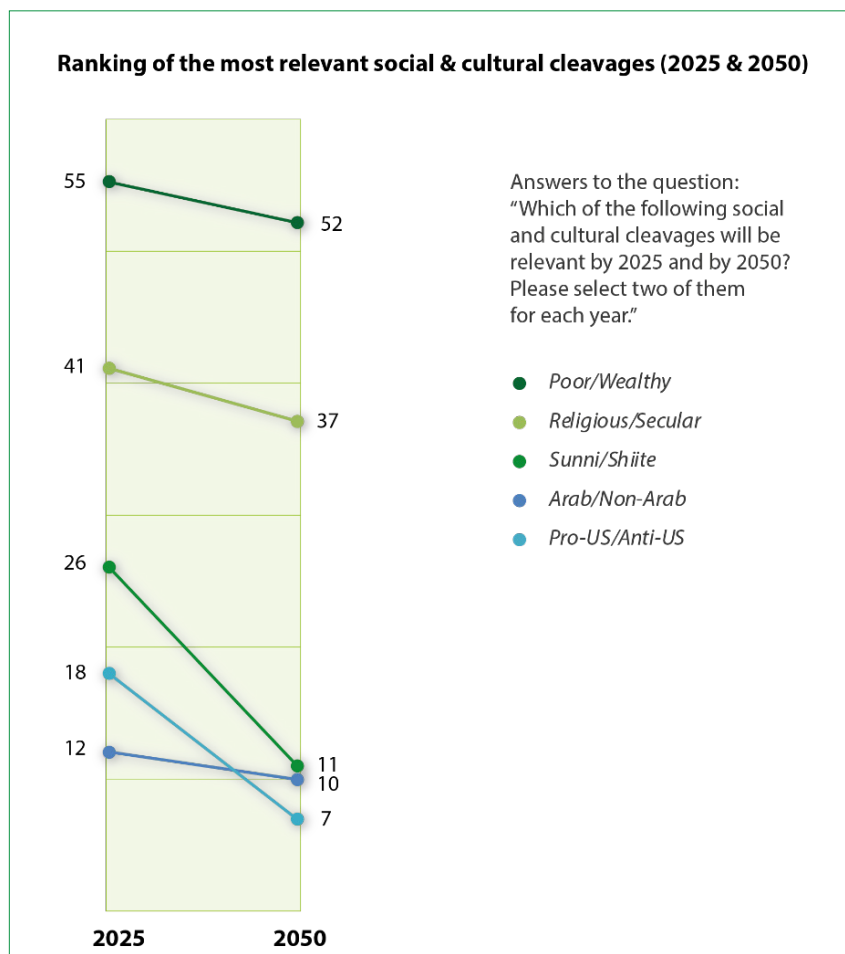
Created by CIDOB. Source: MENARA Delphi Survey.

In the interviews, informants were asked to list both risks and opportunities. This allowed us to measure their level of hope. To do so, responses have been codified as follows: “0” for those explicitly stating that “there is no opportunity” or those who listed risks without mentioning any opportunities; “1” if the number of risks provided was higher than the number of opportunities; “2” when the respondent listed as many risks as opportunities; “3” when the responses contained

a higher number of opportunities than risks; and “4” for those who mentioned only opportunities and no risks at all. The average level of hope in our sample is 1.29, a view closer to pessimism but still containing elements of hope. It is worth mentioning that there are significant variations regarding gender, location of the interviews and professional profile. The level of hope is slightly higher in Iran (2.13), the Gulf (1.74) and the Maghreb (1.48); also among female respondents (1.65) and the private sector (1.95). In contrast, the levels of pessimism are very high in Egypt (0.88) and also among politicians and public officials (0.94).

Finally, one of the main conclusions of the MENARA project is that the region will undergo a process of increased fragmentation, which ranks seventh in the top risks. In that vein, the Delphi survey asked experts about the cleavages that could be more salient in the future. The gap between the haves and have-nots and the fracture between religious and secular groups are seen as the most relevant and enduring divides. In contrast, sectarianism and pro-/anti-US cleavages are perceived as declining in the long term.

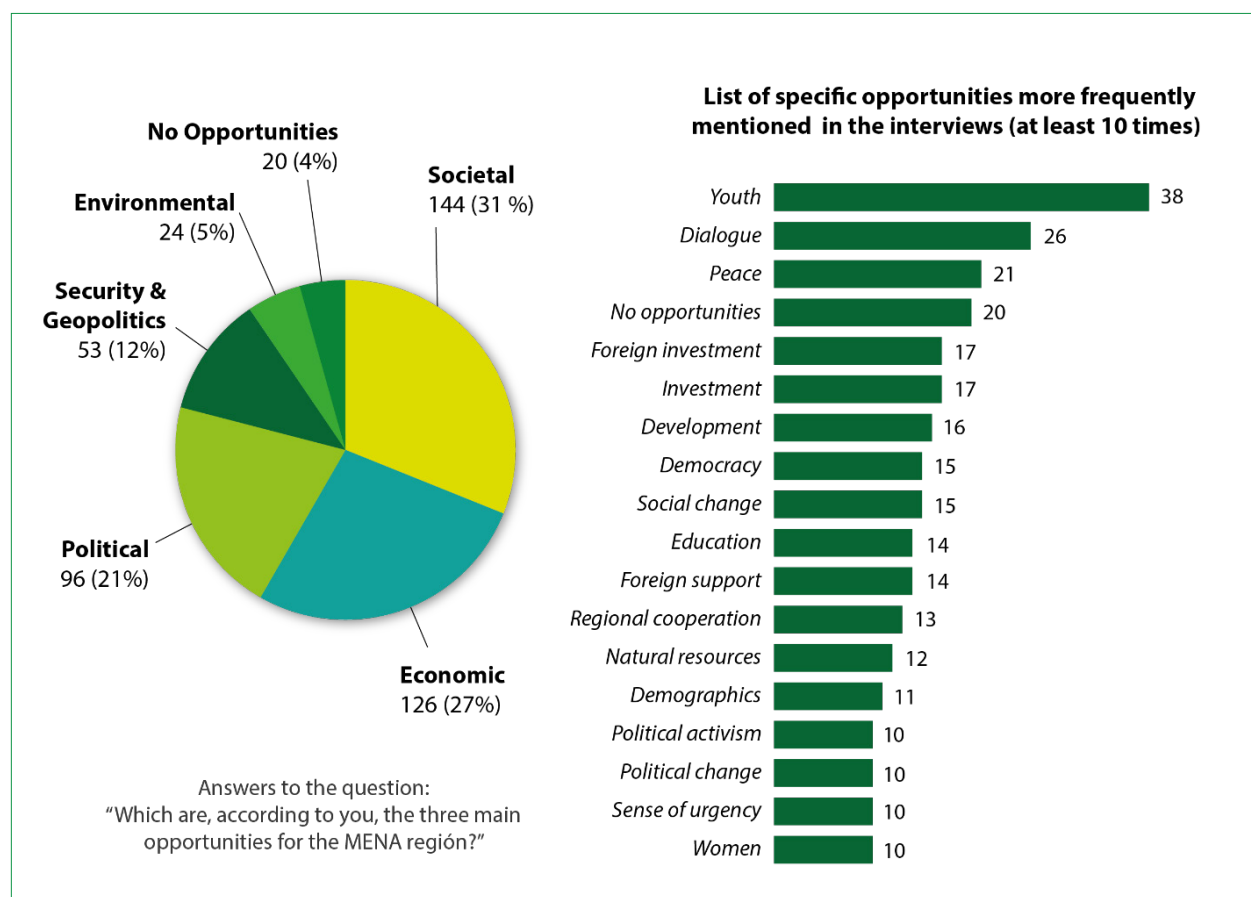
Figure 3 | Social and cultural cleavages in the MENA region by 2025 and 2050



Created by CIDOB. Source: MENARA Delphi Survey.

When asked about opportunities, responses are far more diverse. While risks are often associated with political and security dynamics, societal and economic elements are seen as more promising. However, a more granular analysis shows that besides youth (which tops the list), dialogue and peace are also perceived as opportunities for the region.

Figure 4 | Main perceived opportunities for the MENA region

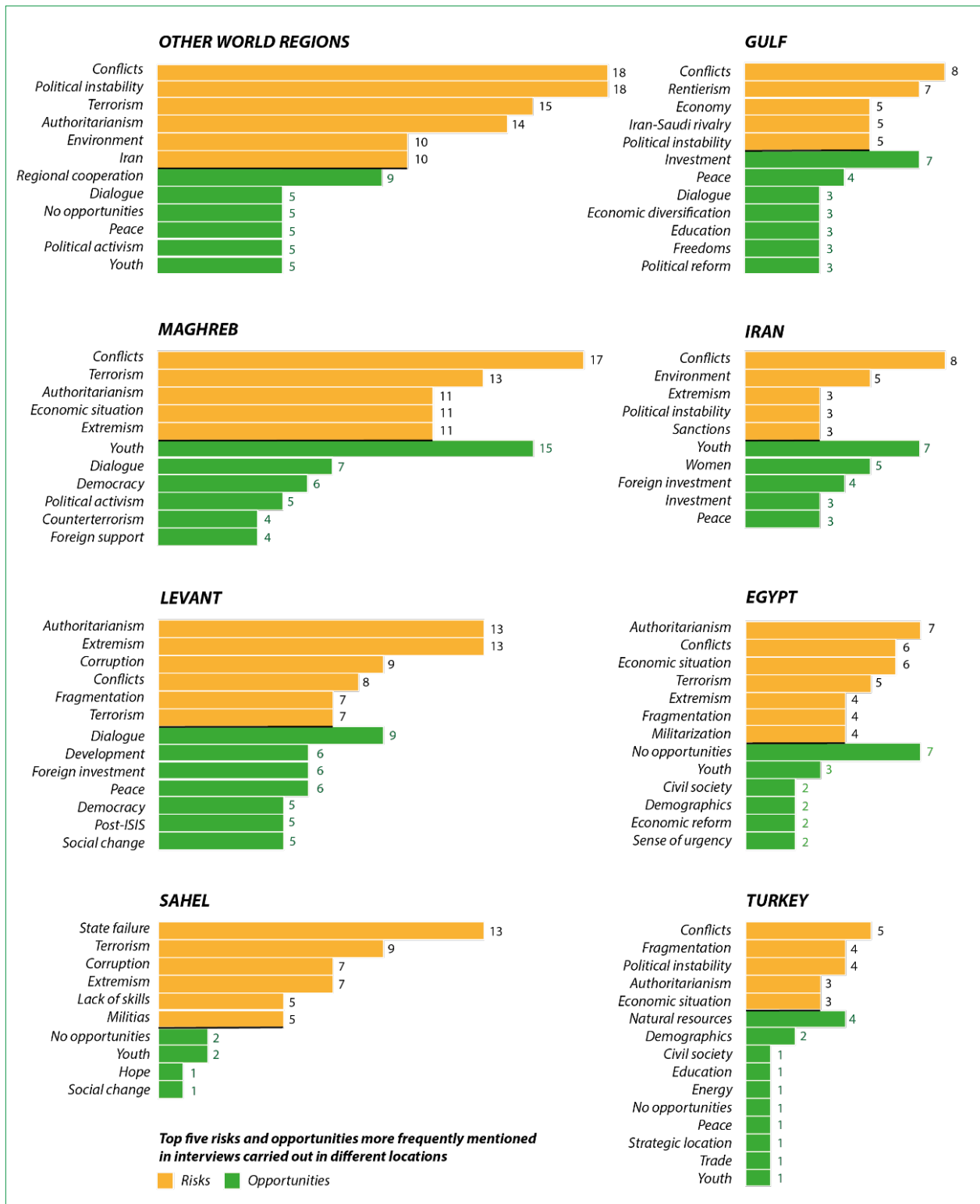


Created by CIDOB. Source: Aggregated and clustered results of the face-to-face interviews.

A DIVERSE REGION AND DISPARATE EXPECTATIONS

The huge differences regarding levels of hope are coupled with a distinct reading of what the main opportunities and risks are. While there are some commonalities (conflicts when it comes to risks; youth when mentioning opportunities), peculiarities are even more telling. The most frequent answer in Egypt when asking about opportunities is that there are none. One of Egypt's peculiarities is the importance given to authoritarianism in the risk assessment. As for environmental issues, it seems that external observers give them more importance than local actors (Iran being the exception). The Gulf is a world on its own: when it comes to opportunities, investment is frequently mentioned, and for risks, rentierism and the Iran–Saudi Arabia rivalry come to the fore.

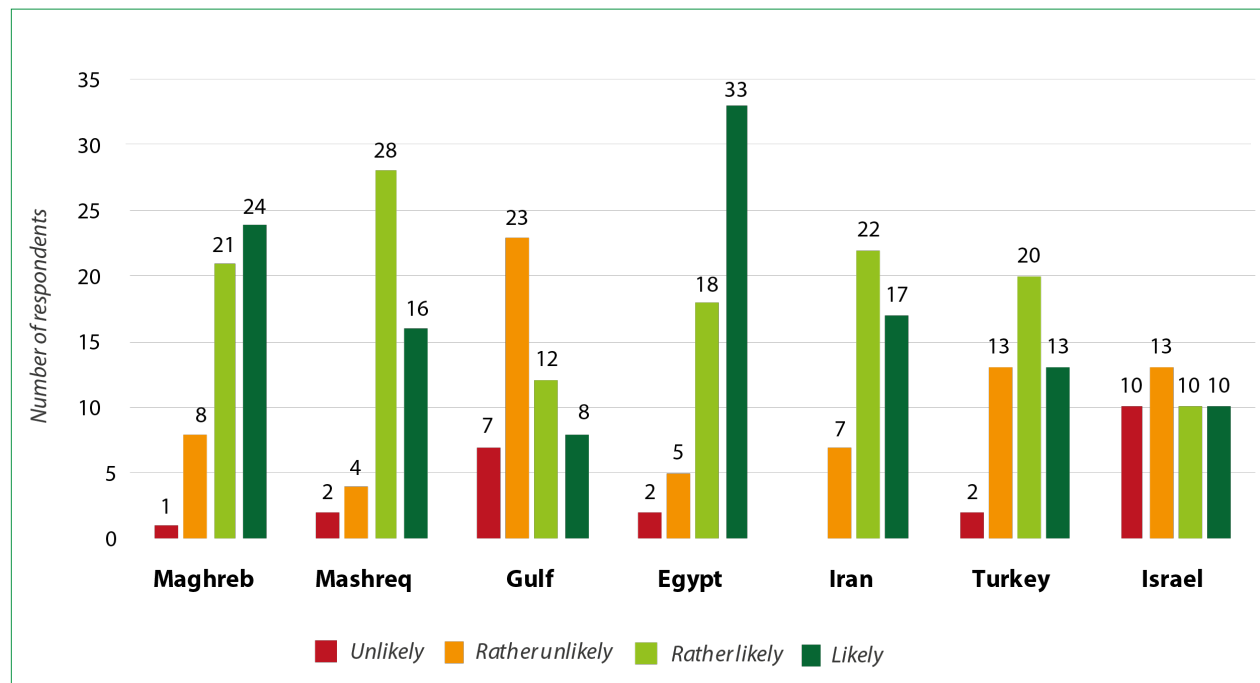
Figure 5 | Top risks and opportunities mentioned in different locations



Created by CIDOB. Source: Aggregated and clustered results of the face-to-face interviews.

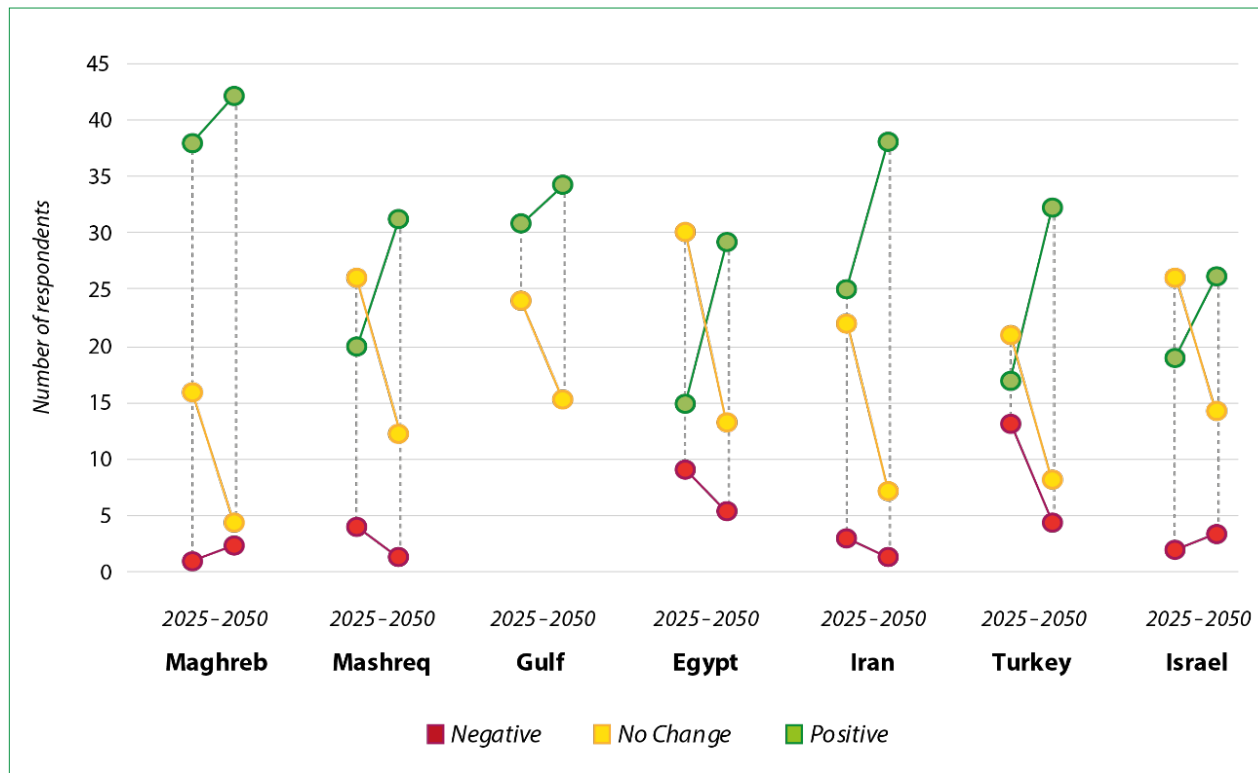
The dominant perception is that different parts of the region will take divergent paths in the future or evolve at different paces. This is clearly reflected in the responses of the experts who participated in the Delphi survey. For instance, the perception that urbanization could lead to social unrest is far more acute for Egypt than in other parts of the region. Gender equality is another significant case. While respondents tend to agree that there will be progress in the future, they are less optimistic when it comes to Turkey and Egypt, particularly in the short term. In contrast, the countries of the Maghreb are seen to be those that could advance more quickly according to this agenda. When looking at the long term, expectations are high for Iran.

Figure 6 | Will urbanization increase social and economic inequalities and fragmentation in the following countries and sub-regions?



Created by CIDOB. Source: MENARA Delphi Survey.

Figure 7 | Will significant formal progress in gender equality be reached in the following countries and sub-regions?



Created by CIDOB. Source: MENARA Delphi Survey.

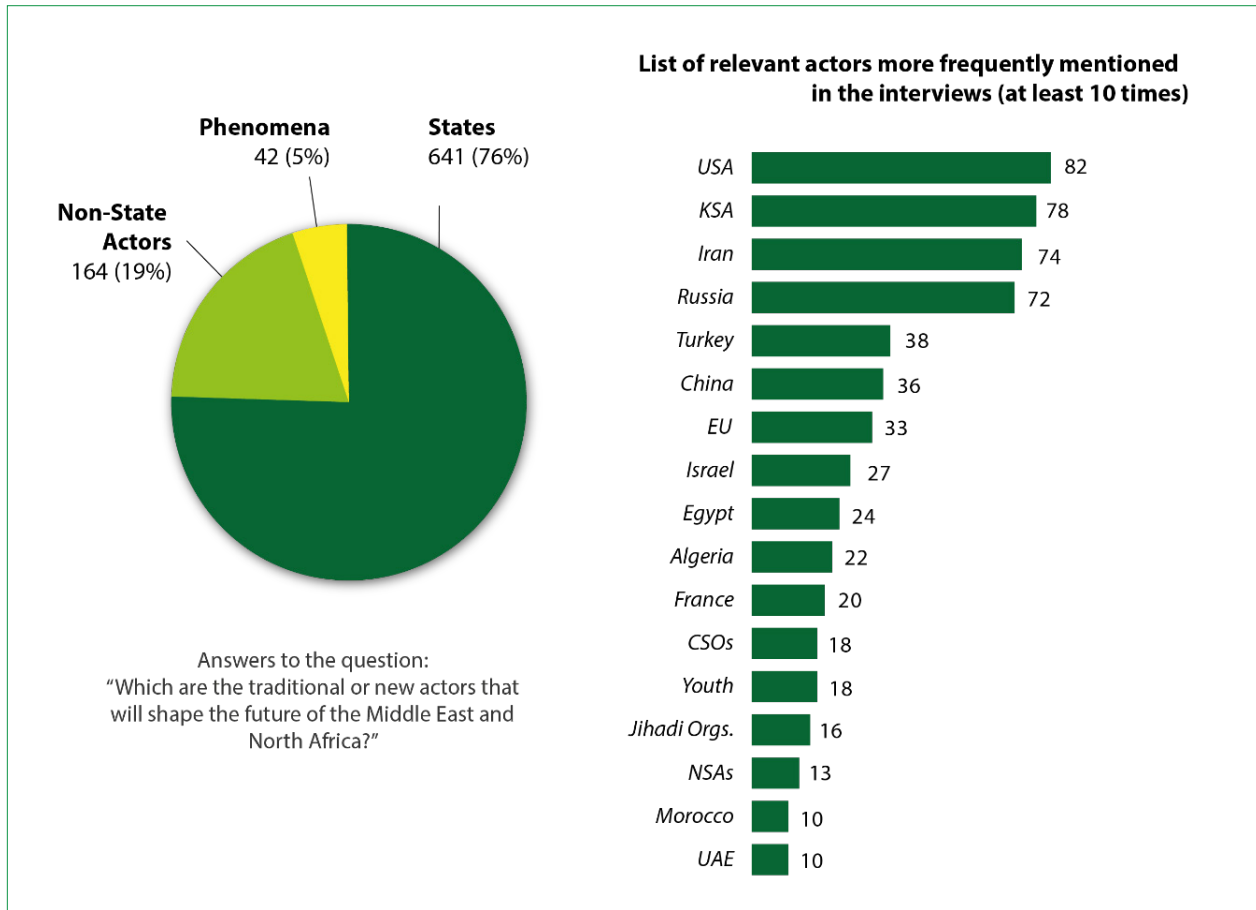
MANY GAMES IN TOWN

The face-to-face interviews seem to refute three ideas that have permeated the debate on the regional order in MENA: (1) the notion that the region has become bipolar owing to the rivalry between Iran and Saudi Arabia; (2) the assumption that regional dynamics are subordinated to global powers' agendas; and (3) the assessment that non-state armed actors have become central players.

Interviewees were asked to identify the actors that will shape the future of the region. Respondents spontaneously mentioned many actors and of very different kinds (local, regional and global). The top four players appear to be Iran, Saudi Arabia, the USA and Russia. This could be interpreted as a multilevel bipolar pattern. However, other regional powers and international actors were also significantly taken into consideration, reinforcing the idea of a multipolar region (see Figure 8).

Once more, a more granular analysis allows us to look at some additional peculiarities. Youth was mentioned as the third most relevant actor in the interviews that were conducted in the Maghreb; women made it to the top ten in the Levant and Iran; and civil society organizations were also listed as key players by external observers and respondents in Egypt and the Maghreb. Although terrorist organizations – and Islamic State (ISIS) in particular – were sometimes mentioned, only 29 per cent of the references to non-state actors correspond to armed groups.

Figure 8 | Actors that will shape the future of the MENA region

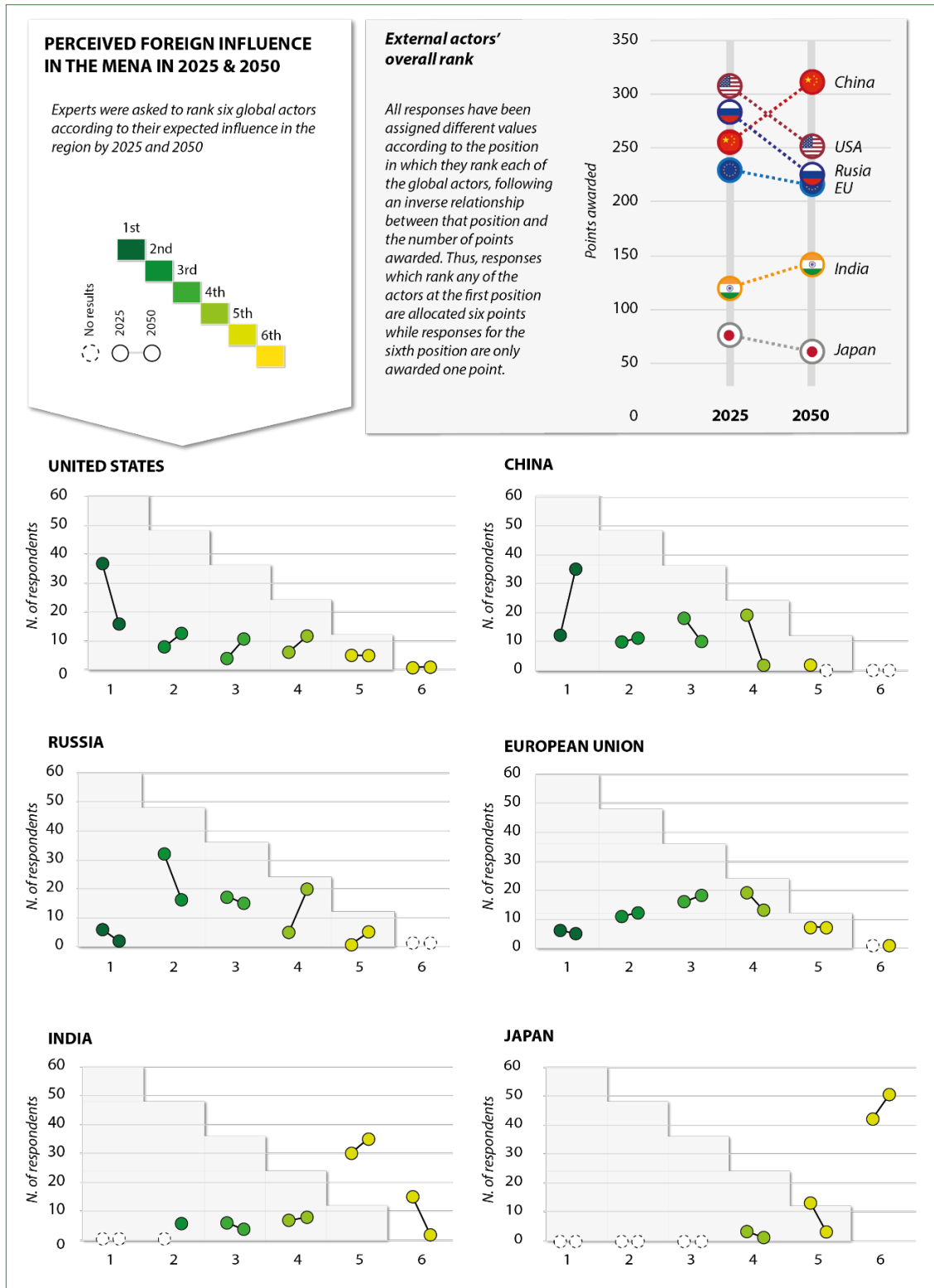


Created by CIDOB. Source: Aggregated and clustered results of the face-to-face interviews.

The Delphi survey also enquired about the role of global actors and asked experts to rank six of them (USA, Russia, EU, China, India and Japan) based on their influence in the region in the medium and long term (see Figure 9). While the EU's leverage is quite stable (in a secondary but meaningful position), we observe major differences among the other players: it is assumed that China will become the most influential actor by 2050; Russia's influence will significantly decline in the long run but will not completely disappear; and the USA will remain the most relevant power in 2025 but not in 2050.

One of the main conclusions that can be extracted from these findings is that any attempt to project future scenarios has to take into account a large and diverse number of actors who interact at local, regional and global levels. The actions and inactions of this constellation of players may exacerbate risks or foster opportunities that will shape the region's future.

Figure 9 | External actors' expected influence in the MENA region in 2025 and 2050



Created by Cristina Sala and Oriol Farrés (CIDOB). Data Source: MENARA Delphi Survey.

SCENARIOS FOR 2025

SCARCE NATURAL RESOURCES: WATER, FOOD AND THE EFFECTS OF CLIMATE CHANGE

In 2025, environmental degradation, coupled with demographic growth to well above 500 million people, is putting natural resources under stress and the effects on living conditions are visible. After a period in which the environment hardly made it to the top priorities of political and social leaders, it is now beginning to have an impact. The main concern is that the situation may get worse after 2025 owing to insufficient global efforts to tackle global warming, but also because of insufficient adaptation policies within the region to build resilience. Moreover, this is no longer purely an environmental issue but one with major political, social and economic ramifications. Decision-makers from the region and their global partners are beginning to realize this. There is an atmosphere of imminent gloom: is it too late? This is what many scientific and environmental activists are asking.



Delphi survey: I am convinced that economic disparities and the bad management of the social and economic effects of climate change impact on social economic life is already and will be the most important source of social problems.

Climate change has aggravated water scarcity. The region as a whole has less precipitation in 2025 than in 2018, although to date some countries have seen an increase in water supplies (mainly Turkey owing to better rainfalls, but also Sudan and Egypt as they rely on the upstream countries of the Nile Basin where rainfall has increased), However, increased temperatures and evapotranspiration have neutralized the potential benefit for agricultural production. Levels of water scarcity have increased in all countries of the region, but the intensity and effects of scarcity are particularly high in some of them. Iraq has been negatively affected by Turkey's dam projects in the Euphrates and Tigris and now receives reduced water flows. The Shatt-Al-Arab confluence of the Euphrates and Tigris basin in Basra is at its lowest and extremely polluted. Inhabitants of this region have been pushed out of the countryside and have had to settle in cities such as Basra and Baghdad.



Interview with a public official in Kuwait: The region faces many risks. Water scarcity is one of them, especially in countries with big agricultural sectors such as Morocco and Tunisia, but also with bad governance, which is very acute in countries such as Sudan.

The rest of the MENA region is suffering from frequent water shortages: only countries with small populations and available financial resources have been able to maintain water provision with the help of desalinization plants. The situation is much more worrying in poorer countries, such as Yemen or even Jordan. The sector that has been most affected by water scarcity is agriculture, with dire effects for food production in the region; the exception here is Turkey. By 2025 there has not yet been a climate-related food crisis. Governments have turned to global markets to gradually increase the import of cereals. However, several economists are warning that this is not sustainable in the long run, particularly in large countries such as Algeria, Iraq, Iran and perhaps even Saudi Arabia, unless foreign exchange generation increases at a similar pace in other economic sectors.



Interview with an expert in Qatar: Transnational challenges, like water shortage and other environmental issues, can force states to cooperate.

An additional effect of climate change and volatile rainfall patterns is desertification. The risk of this in the MENA region is higher than in any other part of the world. Desertification, and more generally environmental degradation, are said to be among the many factors that push inhabitants from rural areas to urban and peri-urban areas. The effects of environmental degradation are also a major concern for the region's economy. This is not only about agriculture. Eight business organizations from the tourist sector in Morocco, Tunisia, Egypt and Turkey, Spain, Portugal, Italy and Greece organized a major conference in Tunis in April 2025, and released a report pointing at the negative effects that environmental degradation has already had for the tourist sector in the region, and presented some projections for 2035 that should push governments to take action.

WHAT IF FOOD DEPENDENCY IS NO LONGER ASSOCIATED WITH FOOD INSECURITY?

By 2025 MENA has managed to improve food and water security by cutting back water consumption in agriculture and securing a reliable stream of food imports via improved trade relations and economic diversification. With different degrees of success, MENA countries have been able to generate the foreign exchange that is needed to pay for these food imports. Some countries such as Saudi Arabia and Egypt have cut back water-intensive wheat, alfalfa and cotton production. Many states seek to maintain a certain level of cereal production out of strategic concerns about reliable food imports in crisis situations (e.g. sanctions, war), but they are consistently focus on value added crops such as fruit and vegetables to get "more crop from each drop".

Improved irrigation techniques and dryland farming have made agriculture more water efficient. However, agriculture nevertheless has had to be cut back to prevent so-called rebound effects: in the past, efficiency gains of drip irrigation were used in places such as Morocco and Israel

to expand production, leading to increasing water consumption overall. Now governments seek to pair water efficiency gains with limits on agricultural production volumes. The goal is to reduce overall allotment to the agricultural sector and guide scarce water resources to the industrial and services sectors that make a much greater contribution to gross domestic product (GDP) and employment. There was considerable political resistance to this from farm lobbies, but other parts of the private sector, environmental groups and international organizations supported these policy changes on the part of the region's governments.

Cereal, meat and dairy imports of the region are rising, but some countries such as Turkey, Morocco, Tunisia and Israel continue to be important exporters of fruits and vegetables. Rather than denying their food import dependence as in the past, MENA governments now embrace and manage it. The "virtual water" that is embedded in the food imports has add a second river Nile to the region's water balance, managing to preserve scarce domestic resources of physical "blue water". Egypt and the United Arab Emirates (UAE) actively position themselves as food trading hubs for the wider region in an effort to bundle market power. MENA politicians seek to mitigate import risks by actively cultivating relationships with major food exporters such as Russia, the USA, Brazil, Australia, Thailand, Canada and France. They are also more cognisant of the risks that climate change poses to the production capacities in exporter nations. As a result, even the oil exporters among the MENA countries are more willing to engage in multilateral efforts to tackle emissions and mitigate climate change.

The oil-rich countries of the MENA continue to invest in food sectors abroad, but their approach has changed. Initially they aimed at acquiring land, but many of these projects never got off the ground and caused negative political backlash. The global debate on land grabbing accused the Gulf countries of compromising livelihoods in food insecure countries such as Sudan or Pakistan. Now investments are undertaken in developed agro markets such as Argentina, Australia and Canada, and rather focus on the downstream sectors of food trading, processing and distribution rather than outright land acquisition.

The necessary foreign exchange for food imports is not only coming from exports of oil and gas now. Gulf countries have diversified along the hydrocarbon value chain and are exporting refined and petrochemical products rather than crude oil. They have also expanded energy-intensive industries such as aluminium and seek to attract more labour-intensive assembly industries (e.g. car manufacturing) to create more employment. Some MENA countries, such as Morocco, have made considerable strides in renewable energies and have managed to attract more foreign direct investment and manufacturing capacities, such as textiles and a factory for electric cars in Tangiers, built by Chinese company BYD. Better Internet access has also enabled countries in the region to plug themselves more easily into the expanding market of globally tradable services. Agricultural downsizing, economic diversification, food trade management and improved food accessibility in the wake of inclusive growth have improved water and food security.

OIL STILL MATTERS – BUT DECARBONISATION IS UNSTOPPABLE

As in many other parts of the world, up to the year 2025 the overall energy demand is expected to increase in MENA countries, although at a slower pace (plus 15 per cent) than the global average (plus 25 per cent), thanks to significant measures that have already been implemented in order to foster the energy transition, as well as new policies and targets that have been announced. Significant differences can be observed between energy-importing and energy-exporting countries. Most The highest growth rates exist in the Gulf Cooperation Council (GCC) and Iran.



Delphi survey: The global economy is swiftly moving away from oil. Within the next decade, we are likely to see a profound and often disruptive transition toward more renewable sources of energy, though oil will remain an important commodity for some time. The Middle East is no exception, even if this transition takes longer than in many other regions.

By 2025 the MENA region is still very much dependent on fossil fuels, both for domestic consumption and as a generator of export revenue. Yet the region is in the middle of major transformations owing to changes in its own demand, but perhaps even more so owing to technological innovations at the global level. By this point we are not yet in a post-oil world, but the economic model that has prevailed in the region's rentier states has an expiry date. Economists and energy experts do not agree on when this will be, but they converge in saying that the current model will become obsolete.

The rapid increase in energy demand, for electricity in particular, is the most notable trend in the region. Fossil fuels still dominate the energy mix in most MENA countries in 2025, despite the growing role of renewables. Although oil has been the dominant energy source in the MENA region for a long time, its share in the energy mix has shrunk to below 40 per cent, whereas natural gas has gained importance across the region, surpassing oil as the primary source of energy and accounting for more than half of the total energy demand.

Crude oil production in the region has seen continuous growth to meet the growing energy demand both domestically and abroad. The MENA region's production accounted for around 38 per cent of total world oil production in 2016. The abundance of reserves and production volumes continue to make the region a key player in global oil markets. Most of the gas from the MENA region is currently exported to Asia Pacific (almost two-thirds – mainly Japan, South Korea, India and China), followed by Europe and the Eurasian region.

In 2025 the upward trend of domestic energy demand growth coupled with the slow implementation of renewable energy projects and the absence of demand-side management measures have become a major headache. Trade balances for energy-exporting countries have been negatively affected, putting state budgets under stress. This has led to the introduction of structural adjustment policies that cut subsidies, with the result of a new wave of protests by 2021. On a more positive note, pressure to diversify the energy mix has increased.

Despite the potential, the contribution of renewables to total primary energy demand is still below 10 per cent by 2025, and it is particularly low in hydrocarbons-exporting countries. It is expected that this situation will change over the following decade. The decreasing cost of renewable energy technologies, driven by major markets such as China, which started in the late 2010s, has become a major opportunity for MENA countries. It allows them to use renewables for domestic power generation, saving oil and gas for export to international markets. For the energy-importing countries, exploiting locally available renewable energy sources will increase their energy security. The opportunities are there, say the experts, but in the past the region has failed to seize them.

Most MENA countries have failed to meet the energy goals they fixed for 2025 and it is likely that some of the obstacles preventing them from doing so will not be removed in the short term: these are weak grid infrastructure, regulatory barriers, access to finance and, most important, subsidies for conventional energy and institutional inertia. To induce the deployment of projects, several countries have been adopting a mix of supporting tools, including renewable energy plans and objectives, tendering, price mechanisms (feed-in tariffs and feed-in premiums), quota systems and tax incentives as well as long term power-purchase agreements (PPA). In this development Morocco, the UAE, Israel, Egypt and Turkey are in the lead. Saudi Arabia, on the contrary, is falling short of realizing its “Vision 2030”, as regional and domestic tensions have diverted attention from this strategic transformation. Overall, in terms of energy demand by fuel, by 2025 most countries in the region continue their efforts in diversifying their energy mix, albeit with different degrees of success. However, achieving their ambitions is challenging, and requires a number of policy choices. Countries such as Morocco, Jordan and, to a lesser extent, Egypt are showing the way by implementing a real market transformation.



Delphi survey: The OPEC countries, despite the rhetoric of planning for a post-oil future, have little immediate incentive to change their energy supply system. The interests of the political elites are entirely bound to production and export of oil/natural gas.

Together with renewables, several countries from the region have increasingly been looking at investing in nuclear energy as an alternative energy source; not only because it would allow them to diversify its energy mix and increase the amount of fossil fuels to be exported but also because it conveys a geopolitical status and offers opportunities to intensify relations with Russia and China. Regardless of the motivation, in 2025 nuclear energy in the region has gained momentum. Beside Iran, the UAE and Turkey have been leaders. Saudi Arabia and Egypt have made progress too, and many others discuss the possibility. Egyptian and Russian authorities have confirmed that they expect to inaugurate the Dabaa nuclear plant by 2028, two years later than expected. However, because of the high up-front investment costs compared with other power-generating technologies, the nuclear option might not be feasible in all interested countries, especially those with government funding constraints such Jordan and Morocco. And even in oil- and capital-rich states, scepticism is increasing. Some nuclear projects have been cancelled or delayed owing to

strained public finances. Some governments might turn towards Russia and China in order to get technological and financial support for nuclear energy programmes. The regional as well as the geopolitical implications of these steps are highly sensitive and have major consequences for the power structures.



Interview with a Moroccan expert: There is a high potential of national resources, a favourable global market and the connection between Europe and North Africa. There are complementarities between the North-South and South-South countries and a context favourable to the development of renewable energy; technologies in continuous development, aiming to reduce investment and exploitation costs and to produce competitive KWh. The environmental sensitivity and the fight against global warming also help.

WHAT IF MOROCCO BECOMES A RENEWABLE ENERGY LEADER?

With the exception of Algeria and Libya, all southern and eastern Mediterranean countries are net energy importers. Morocco in particular has had a dependence rate on foreign resources of more than 90 per cent for some time. But already in the 2010s the Moroccan government and energy experts began to innovate in the country's energy sector. A decisive factor in this is that the country is located within the so-called Sunbelt, with global horizontal irradiance values ranging from 1,600 kilowatt-hours per square metre per year (kWh/m²/y) in coastal areas of the Mediterranean to 2,600 kWh/m²/y in the desert, and direct normal irradiance varying from 1,800 kWh/m²/y to more than 2,800 kWh/m²/y. This is one of the best endowed areas of the world with respect to solar energy for both solar photovoltaic and concentrating solar power applications. The potential for wind energy is also very high. Several EU foreign development organizations as well as the EU (Plan Solar) have supported projects in order to accelerate the transformation towards renewable energies.

By 2025, Morocco, and also Turkey, Egypt and Tunisia, have made significant progress in implementing renewable energy projects. Morocco achieved its 2020 renewable energy targets with more than 1.2 GW existing capacity in place. A number of large-scale projects are either under construction or under development, including the 850 MW wind project and the ongoing construction of the second, third and fourth phases of the Ouarzazate Noor solar complex as well as other solar projects.

In the early 2020s the Moroccan government started an ambitious programme for establishing renewables in its vast rural areas, which contributed to the full electrification of rural areas and induced a major boost to rural development projects, including agriculture, small businesses and education. This kind of decentralizing strategy was promoted by many national and international experts who were working in the new energy technology laboratory in Rabat,

supported by the International Renewable Energy Agency (IRENA) and EuroSolar.

To bring about project deployment, Morocco has adopted a mix of supporting tools, including renewable energy plans and objectives, tendering, price mechanisms (feed-in tariffs and feed-in premiums), quota systems and tax incentives as well as long term PPA. In particular, government-backed tenders have resulted in some of the most cost-effective projects at the global level for solar and wind, with record low prices in Morocco and the UAE. In Morocco, the 850 MW wind project with record bids of around \$30/MWh has among the lowest prices announced for wind energy in the world.

Nevertheless, the transformation to a renewable energy system is by no means guaranteed in Morocco or elsewhere. After price increases relating to several consumption goods, the Moroccan population demonstrated several times against the increasing of fuel and electricity prices, calling for the government's intervention to provide further regulation of the sector. In this context the partnership with the EU was deepened, especially with neighbouring EU countries. In Brussels the basic importance of clean and cheap energy supply for economic development was acknowledged and a broad programme was prepared. Among the countries of the Maghreb a discussion started in 2015 for a region-wide plan to disseminate successful elements of Morocco's energy strategy. The "Moroccan model" was discussed even in Jordan, Turkey and Egypt. For Morocco this energy policy was practised in order to intensify and diversify economic relations with its neighbours in the south, to stabilize the development of the region.

SOCIAL CONTRACT UNDER THREAT: INEQUALITIES IN THE FOREFRONT

According to official statistics, income inequality within individual MENA countries is not very high when compared with the international statistics. This is not necessarily reflected in people's perceptions. In fact, wealth inequality is considerably higher and under-reported, as large fortunes are not adequately accounted for in official statistics. Moreover, the picture changes dramatically when intra-regional rather than countrywide inequality is considered: the 2018 edition of the World Inequality Report concluded that MENA as a whole had the highest income inequality in the world: 10 per cent of the population had 61 per cent of the income. By 2025 the region has the widest gap worldwide between its wealthiest country (Qatar, which is also the world's wealthiest nation) and its poorest one (Yemen, which has been among the twenty-five poorest countries of the world since 2022). Differences are also huge among territories within several countries, particularly between big cities and coastal areas on the one hand, and rural areas and small and medium cities, which are poorly connected and have deficient economic and social infrastructures, on the other. Even in some of the most developed economies of the region this divide is a major problem. Turkey is a good example: already in 2014 the GDP per capita of Istanbul (the wealthiest region) was already five times higher than in Agri (the poorest region, in Turkey's east, close to the border with Iran). This has only increased.



Interview with an Iranian expert: One of the main risks in the region is the gap between haves and have-nots.

“The MENA region does not have one main problem but many. All need to be dealt with simultaneously and inequality is one of them,” said the newly appointed Chief economist of the International Monetary Fund, a Dutch economist of Moroccan background, at the 2025 World Economic Forum in Davos. The region needs to grow more to attract foreign direct investment, to increase intra-regional trade, to create decent jobs, particularly for young people and women, and to diversify those economies that still rely on fossil fuels. This has been the mantra repeated by experts and decision-makers alike for more than a decade, but for the first time the financial institutions are putting inequalities on the level of all other challenges. In fact, there is a growing consensus in academia that structural adjustment policies, while improving the macro-economic indicators, have translated into more inequalities in the MENA region.



Delphi survey: Social frustration, the youth bulge, a lack of job opportunities for the Arab youth, discontent about patronage networks, clientelism and corruption will still continue and further increase by 2025. This will widen the gap between underprivileged population and ruling elites if the respective governments are unwilling to implement more economic diversification, political freedom and administrative transparency. Thus, frustration will increase, followed by harsh repression, resulting in a dramatic identity crisis about the mismatch between leadership and population.

Inequalities, and the frustrations associated with it, are seen as one of the main drivers of the new wave of protests that shook the region in 2021, ten years after the first uprisings; some people referred to it as the Second Arab Spring. Egypt was, once more, one of the main epicentres of these protests. However, demonstrators failed to push for change and incumbent governments all across the region repressed them even more brutally than in 2011. Governments were able to curb the protest movement but at a very high cost: 5,250 people lost their lives in clashes with security forces according to the estimates of Human Rights Watch. The credibility of the international community was compromised. Donald Trump, recently re-elected, gave full support to the regimes and dismissed demonstrators' claims, disparaging them as a “bunch of rowdies” in one of his infamous tweets. Europeans expressed their concern but did not take any particular action to put pressure on MENA governments. When a reporter asked a central eastern politician why Europe was so shy, the politician answered: “what do you want, to let them in with all their problems? Everyone has the right and obligation to keep their own house in order.”



Delphi survey: When people can feed their families, even barely, they are able to put up with almost any level of mismanagement, corruption and repression. When they are not, they will act, often in desperation.

Despite the trauma inflicted by the repression of the security forces in 2021, the grievances that brought people into the streets have not vanished. In fact, since 2023 the region has witnessed an increase of scattered protests in several peripheral regions such as Algeria's southern provinces, Tunisia's centre-west, the middle Atlas and Rif regions in Morocco, Southern Iraq, al-Hassa in Saudi Arabia, around Tripoli in Lebanon, and even in Sharjah and Ajman in the UAE. This is not only an Arab phenomenon, as similar protests have erupted in Baluchestan and Kerman in Iran. Those protests rarely reach the capitals, and unlike the 2011 or the 2021 protests they are not portrayed as part of a region-wide movement. However, many experts are pointing to them as symptoms of a persistent problem of social discontent and territorial frustrations. An Egyptian-American economist from the Massachusetts Institute of Technology (MIT), who was awarded the Nobel Prize in economics in 2024, said in one of his first public interviews: "one day a tsunami of protests will catch everyone by surprise and it will be too late ... When this happens, I guess that some will try to blame economists for failing to see it coming. What I can already tell you early warning mechanisms will not have failed but rather our collective capacity to listen to the signals and increase the resilience of our societies and institutions." The Arab Development report published by the United Nations Development Programme in 2022 also made a similar case. It reminded that the 2002 report had already pointed out some of the issues that would trigger the uprisings nine years later. If the current signs of unrest were being ignored, the report said, regional and global leaders could be falling in the same trap again. The report also mentioned that none of the problems identified in 2002 had been effectively tackled and that, in addition, the region was and would continue to suffer the consequences of environmental degradation as well as declining trust in local and national institutions.



Interview with an opposition politician in Egypt: Impoverished classes in Egypt are deeply affected by economic mismanagement and this will sooner or later affect regime stability and its ability to endure. There is no convincing economic strategy to handle this ticking bomb.

While territorial inequalities have been a neglected flaw in MENA's economies, unemployment and in particular youth unemployment have attracted the attention of international donors and financial institutions since 2011. Countless projects have been funded to promote employability and entrepreneurship, but seen from 2025 the results are far from satisfactory. Youth unemployment has barely declined and the social effects are clearly visible. One of the many examples is the increased marriage age, both for males and females. This is seen to be a major generational

frustration. The region remains at the top of youth unemployment global rankings, despite all efforts. This stands in contrast with the improvement of this indicator in countries from Southern Europe such as Spain and Greece, which had even higher unemployment rates a decade earlier. Economists tend to agree that youth unemployment and underemployment in the MENA region should not be dealt with as a chronic disease but rather as the symptom of an unhealthy social and economic context.



Delphi survey: The Internet provides innovative mechanisms for individual entrepreneurship and particularly for women in the region.

WHAT IF FEMALE EMPOWERMENT IS MORE THAN A SLOGAN?

By 2025 the situation is far from perfect and there is still a long march towards equality, but progress achieved in female empowerment is much higher than other indicators, such as political freedoms, territorial inequalities or youth unemployment. Partly this is because the region started from very low levels. In 2017 the Middle East rates were the worst in the Global Gender Gap Index, and out of 144 countries Saudi Arabia occupied the 138th position. The World Bank development indicators also pointed out a very low labour force participation for women (around 20 per cent), the highest unemployment rate and the widest gender gap in entrepreneurship in the world. The only fields in which progress had been achieved was an increase in female representation in parliaments, owing to the introduction of gender quotas in many countries and female enrolment rates in secondary and high education.

The reforms passed by Tunisia for equal inheritance rights and the new laws criminalizing violence against women in countries such as Jordan or Algeria were seen as major legal milestones in empowering women. By 2020 the Saudi decision to put an end to the male-guardianship system together with the laws introduced in Tunisia, Morocco, Algeria and Jordan incentivizing women's participation in the job market were seen as major turning points. Tunisia was the first country to introduce these measures and the World Bank assessed that they were critical in explaining the renewed dynamism of its economy. Other countries are taking the same steps, with the hope that economic dividends will also materialize. Several studies suggest that the combination of three factors (urbanization, digitalization and social activism) has been key in explaining why some countries have achieved more progress than others.

The Time magazine person of the year for 2020 was Arab women. Since then, the participation of women in the labour force has steadily increased. There are two economic sectors in which women are catching up with men in terms of newly created jobs: e-commerce and tourism. One of the often-mentioned success stories is the case of a Syrian refugee in Lebanon who created a start-up with the aim of optimizing domestic energy consumption. She was awarded

the EU prize for women innovators in 2021, and soon after her company made it to the top ten environmentally-friendly companies in the world by Forbes's newly created ranking.

In the political sphere, the election of the first Arab female president in Tunisia was seen as a turning point in women's political empowerment. The newly elected mayors of Casablanca and Amman have also become national referents. In fact, this process is not limited to Arab countries. In Iran, women represent 20 per cent of the ministerial posts and in Turkey female politicians won a third of the assembly's seats. In the cultural sphere, the awarding of the Nobel Prize for Literature to a female Iranian poet in 2025 was celebrated as a symbol of women's cultural renaissance in the region.

Although women have been claiming a new role in society and family, the pending revolution is that of redefining masculinity. Yet the embeddedness of the region in the global trend for individualization and the emergence of endogenous cultural referents projecting new gender roles may pave the way for this much-needed transformation.

FRAGMENTED SOCIETIES: POLARIZATION AND PLURALIZATION

By 2025, persisting socio-economic inequalities are coupled with a general strengthening of collective identities along sectarian, ethnic, ideological, generational and gender-related lines. In most cases this is directly linked to the events of the Arab uprisings fifteen years earlier. These events have contributed to opening Pandora's box of claims and parochial interests that were passively dormant or actively repressed until 2011. In countries such as Libya and Syria, where fully fledged intra-state conflicts have raged for more than a decade, these collective identities have been further entrenched and have undergone a process of securitization. Even countries that were not hit by the Arab uprisings are nonetheless affected by this trend, and in 2025 have to grapple with the implications of heightened collective identity feelings among their populations. This is, for example, the case in Israel and Turkey.

Another transnational trend that has shaken the entire MENA region and beyond since 2011 is the fragmentation of the Islamist camp both domestically and regionally. On the one hand, the distinction between moderate Islamists and more conservative, purist views has widened – as exemplified by the entrenched doctrinal and political differences between the Muslim Brotherhood-derived groups and the Salafists in countries such as Egypt and Tunisia. The Madkhali sect, benefiting from Saudi Arabia's financial and political backing, has been on the rise in the last decade. In large parts of the region, but even more so in the Maghreb, this has provoked a popular reaction in which traditional practices of Islam are vindicated as more genuine than the foreign-funded Salafist vision. On the other hand, regional geopolitical tensions have become stronger as a result of conflicts over authority within the Sunni religious-political camp. This is the case, for example, in the rivalry between Turkey and Saudi Arabia that in 2025 has aggravated already existing intra-state and regional conflicts.

Political and institutional decisions partly explain the differences across the region regarding the way in which collective identities and their impact on the political arena have manifested themselves. The starkest difference is the one between polarization (understood as the hardening and entrenchment of previously existing collective identities, giving rise to conflictual intra-societal relations) and pluralization (understood as the process through which collective identities defining people's sense of belonging have increased in number and found a modus vivendi). The latter largely represents an exception compared with the former.



Interview with an Egyptian activist: Urban youth will influence Egypt's future. Look at the clothes of young people in popular neighbourhoods such as Imbaba! This is a micro-political cultural revolution, which is more likely to succeed than the largely failed macro-political revolution of 2011.

While some signs of this dichotomy were already evident in the responses to the Arab Barometer questions (2016–17) related to social, cultural and religious topics and in the attitudes of leaders in the different countries following 2011, it has eventually become one of the features differentiating North African countries from Middle Eastern ones. The pluralization that can be observed in countries such as Tunisia in 2025 started in the wake of the Arab uprisings and led to the gradual but steady emergence of new, once dormant or repressed collective identities.

Tunisia is the home of a vibrant and diverse community of political and social activists, and many civil society organizations define themselves in terms of collective identity-based interests and claims (be they ethnic, tribal, generational or gender-specific). As a result of this, the achievements in this country resonate across the region. The country's leadership has proved able to listen to the different positions, to reach compromises and to mainstream diversity and pluralism into its policies. This has taken place both at local and national levels, despite the many challenges that persist owing to other socio-economic territorial grievances and security concerns. To take but one example concerning Tunisia, the revival after 2015 of local identities – some of which are based on tribal affiliations – in some regions of the country (particularly around Sfax) led to the passing of a national bill in 2021 related to the usage and teaching of local dialects in the various Tunisian regions. Similarly, the activism of Tunisian women's movements laid the groundwork for the amendment of the Personal Status Code, thereby furthering gender equality including inheritance issues. The election of the first female president in the elections of 2024 is also seen as a major milestone.

Together with Beirut, Tunis is now one of the diversity poles in the region, and Tunisia flagships diversity as part of its international image. This successful process of fostering pluralization at political and institutional levels has been achieved thanks to social activism and also to a generation of moderate Islamist leaders of Ennahda who acted as a force for compromise and consensus-seeking. This attitude has been instrumental in fostering a new and sustainable Islamist-nationalist alliance, with the creation of the Ennahda-al-Nida' al-sha'bi coalition after the collapse of the previous Islamist-secular alliance.

A completely different picture emerges from most of the countries in the Middle East. Here the main trend is the polarization of collective identities, socially expressed through the articulation of us versus them narratives that were originally put forward by political and religious elites. A greater fragmentation at societal level is in 2025 accompanied by the conscious attempt to foster majoritarian readings of what the identity of the state should be, which marginalizes or openly represses other forms of collective identification around ethnic, religious or political lines. In Syria, large segments of the Sunni majority feel subjugated, and even those social groups that are seen to be closer to the al-Assad regime are concerned by the growing sectarianism. Spatial segregation and demographic engineering have been on the rise for a decade. In Libya, political conflicts are often expressed in territorial and tribal terms.



Delphi survey: When social inequality is not addressed (even discursively) generation after generation, it is very easy to inflame populations with hate for their neighbours and any group designated as “other”.

In Turkey, polarization reached its apex in around 2023 when Erdogan was re-elected. The coincidence with the celebrations of the centenary of the Republic of Turkey contributed to consolidate a narrative in mainstream media that portrayed the opposition as unpatriotic. This was even more acute for Kurdish opposition groups. Additionally, tensions are becoming increasingly visible between the local population and the Syrian refugees who had found refuge in the country ten years before. While a tiny minority of them returned to Syria, the vast majority remain in Turkey as “unwanted guests” who compete with the local population (and are scapegoated by it) for access to basic services. This creates the conditions for what some analysts define as “the Palestinization of the Syrian refugees” in Turkey. There is a heated debate about whether those guests should receive Turkish nationality, and this is one of the few topics that create divisions inside the camp of the AKP camp.

In Israel, the ethno-religious revisionist discourse is best illustrated by the process that pushed the Likud and the ultra-nationalist, far-right party Yisrael Beiteinu to compete on the extreme right of the spectrum to the detriment of more centrist positions. Although this triggered a split in the Likud, seen from 2025 Israeli society and politics have steadily turned towards the right and towards ultra-religious positions. This is not good news for any attempt to resolve the Israeli-Palestinian conflict, but the effects are also widely felt in Israel itself. Arab-Israelis are marginalized and the possibility of making the Arab List illegal is on the agenda. Secular groups have increased their protests against the privileges of the ultra-orthodox minority.

In both Turkey and Israel, the entrenchment of illiberal trends testifies to the extent that MENA is embedded in global dynamics when it comes to the prevailing societal and political cleavages. The picture of polarization and contentious state–society relations indeed mirrors the surge of nationalist-populist movements in North America, Europe and Latin America during the late 2010s.

Similarities also exist as far as the tools through which collective identities become entrenched and polarized. The MENA region is a fertile ground for digital disinformation campaigns and hate speech on social media.



Interview with a member of the civil society in Iraq: The Iraqi people are starting to realize that violence and killing will not solve any problems. They are moving away from sectarianism.

WHAT IF IRAQ IS EXPERIENCING A RENAISSANCE?

By 2025 Iraqis are extremely proud of the transformation of their country in the last decade. Iraqis and external observers alike are amazed at the progress achieved, particularly because the levels of violence and political tension in the rest of the region are still very high. Everyone talks about Iraq leaving behind its dark ages. When referring to this, some put more emphasis on the brutality of Saddam Hussein's dictatorship while others point to the sectarian violence that followed US intervention in 2003 and the trauma of the ISIS takeover of Mosul. Now, Iraq is said to be experiencing a renaissance in all fields.

Since 2018 the levels of security have consistently improved. Iraqi politics remain extremely complex but political tensions do not affect citizens' daily life and militias have effectively been integrated into the state security apparatus. On the political and social fronts one of the most promising developments has been the emergence of cross-sectarian platforms bringing together social and political activists from different ethno-religious communities around topics such as the fight against corruption, violence against women, environmental degradation and education. One successful result of the latest demonstrations about high-level education has been the launch of an intra-Iraqi university exchange programme. However, the strongest movement was the so-called "water-for-all movement" in 2022. Increasingly so, Iraqi politicians are being primarily judged on service provision, and water has become a major issue. More generally, one could argue that after the defeat of ISIS and the 2018–19 protests in Basra, the focus of attention moved southwards. Material-driven demands coming from the south strongly influence policymaking and sectarian narratives have become less instrumental when they criticize or support the actions of the federal government.

On countless occasions, those platforms have taken to the Iraqi streets and used the social networks to make their case. They have become agenda-setters, but their capacity to shape decisions depends on their ability to establish alliances with political leaders who are explicitly against sectarianism. In parallel, efforts to normalize relations between Baghdad and Erbil have borne fruit. Major steps were taken by both governments in 2019, starting with regular meetings between ministers. Kurdish leaders openly recognized that they miscalculated the effects of the 2017 referendum, and the Baghdad authorities increased cooperation with Erbil

in external border control and gradually increased financial transfers to the Kurdish Regional Government. A consensus agreement on the multi-ethnic status of Kirkuk was reached in 2024. After four years of negotiations (which started with a compromise to build an international airport in Kirkuk), representatives from the Iraqi government, the Kurdistan Regional Government and several provincial councils in the region agreed on a specific statute for the disputed territories, which now go under the official name of the North-Eastern Territories. Reducing tensions has been key to increasing energy production, and both governments realize the benefits of cooperation. Moreover, both the Iraqi government and the KRG have been working to diversify the energy sector and reduce their economies' oil dependence by developing gas fields in Anbar (south Iraq) and Sulaymaniyah. This move will enhance their chances of securing service provision and should mitigate tensions between Baghdad and Erbil regarding the management of oil reserves situated in the disputed territories.

Socially, everyone mentions the qualification of the Iraqi football team for the 2022 FIFA World Cup as a major turning point, the Lions of Mesopotamia beating Australia by 2–1 with a late goal at the end of regular time. A twenty-three-year-old Sunni striker from Mosul and a Kurdish midfielder from Suleymaniyah were the scorers, but the true star was the goalkeeper, a Shia from Basra, who was said to be the most valuable player of the game after saving a desperate header in the final seconds of the extra-time. Celebrations in the Iraqi streets lasted for three days. Iraq also did better than expected in the World Cup itself. The national squad achieved a historical pass to the round of sixteen, where they bravely fought and fell against Germany. Iraqis celebrated this defeat as a national victory and the players were received in Baghdad as national heroes. Iraqis proudly remember this achievement as an example that united they can go much further.

All these developments have transformed the way in which Iraq positions itself in the regional and international arena. The Iraqi foreign minister, in his speech at the Munich Security Conference in 2024, argued that Iraq is no longer a battleground but a balancing factor in an unstable region. Some analysts have started referring to it as the Finland of the Middle East, although experts on the Cold War reject this definition because there are major differences. Iran and the USA still have troops stationed in Iraq, but their presence has gradually diminished. Many argue that if they don't withdraw fully it is because none of them wants to be the first to do so. However, there is an increased political and social pressure in Iraq for them to leave, which is framed as "Iraq has proved to be able to take control of its own destiny". One of the most surprising developments on the international front is the efforts to diversify its international partnership. The Iraqi authorities have been reaching out to the EU, and vice versa. One of the first visits of the High Representative who was appointed in 2019 was to Baghdad and Erbil. This was seen as one of the many pushes towards normalization between the two governments, and also as a clear sign that Iraq was becoming a major priority for the EU in the Middle East.

INTRUSIVE AUTHORITARIANISM: CONTROL, REPRESSION AND DISINFORMATION

The 2025 reports of Amnesty International, Transparency International, Freedom House and Reporters without Borders depict a gloomy situation for political freedoms and human rights in the MENA region. The World Bank indicators on governance are equally depressing, pointing at Tunisia as the only case in which there has been significant progress in the last two decades.



Beirut Focus Group: The most likely scenario is the intensification of an authoritarian wave: President Abdel-Fatah Sisi will consolidate power, Mohammad bin Salman will use oppressive techniques to silence his critics and Syrian President Bashar al Assad will remain in power. This will be supported by international patrons and actors in the name of returning to regional stability.

Since 2011 authoritarian regimes have refined their strategies to co-opt or deflect dissent and have learnt from each other how to be more effective. The persistent socio-economic problems such as youth unemployment, inequality and low innovation and investment rates is increasing the perceived vulnerability of incumbent regimes. When this coincides with environmental degradation, pressure on basic services and legitimacy crises, the risk is even higher. The 2021 uprisings that unfolded were seen as a sign that the post-2011 strategies of social and political control were insufficient to contain social unrest, and this has triggered an even higher level of repression. Leaders of and activists for anti-corruption, environmentalist and women's rights movements are put in jail. Regimes perceive them as an even bigger threat than critical journalists and political activists, who were the main target of prosecution in the past. In fact, opposition forces have become so divided that they are no longer seen as actual challengers.



Interview with a governmental politician in Tunisia: Civil society has shown its ability to mobilize and bring change. And among them, the young people. But in the region they are facing increased restrictions and suffer from a lack of leadership.

One of the major turning points of this new wave of repression was the arrest of three Greenpeace representatives in Egypt who had participated in a local protest in the Nile Delta. They were accused of following external actors' agendas in an attempt to destabilize the country. The case made it to the front pages of international media and there were parliamentary debates in Europe, the USA and Canada about possible sanctions on Egypt. Despite this increased domestic pressure, Egypt's international partners turned a blind eye. Egypt and many other regimes in the region have successfully capitalized on domestic and global fears of instability.



Rabat Focus Group: The next generation would not relate to the Algerian, Libyan and Syrian civil wars. The memories of the latter will not avoid another revolution. Thus, authorities need to find new political discourse to counter revolutionary movements. Threatening with past memories will no longer work.

The other factor that fuels anxiety among authoritarian leaders is the perception that they could be betrayed by their own ranks. Several regimes are said to be suffering from underground factional fights but the opaque nature of those systems keep them away from the public eye. The hereditary successions that have taken place in some of these countries (Saudi Arabia, Bahrein, Oman, UAE), the election of a new supreme leader in Iran and the speculation about post-Sisi's Egypt unleashed these political frictions. One of the most destabilizing succession process was that of Saudi Arabia. King Salman disappeared from the public scene for three months and there were imminent rumours of abdication to his son Mohammed bin Salman. These were the circumstances that prompted internal rivals in the House of Saud to attempt a military coup in July 2021. They failed. The coup was suffocated within thirty-six hours and its promoters were sentenced to death. Since then, monarchs and presidents across the region have intensified purges against high-level officials. Mistrust has never been so high.



Interview with an activist in Tunisia: In general, the “masses” – whether they are represented or not – will be the most important engine for change (or lack thereof).

Simultaneously, the material and emotional gap between regimes and societies has only widened. The lack of transparency and accountability leads to worse governance – including higher levels of corruption – which in turn increases social and political dissatisfaction among large segments of the population. This is a vicious circle difficult to break. In this context information has become a major battleground between rival domestic factions as well as regional players. Digital media and satellite channels have been widely used to delegitimize political adversaries. The novelty is that disinformation campaigns have moved from open platforms to trusted closed digital spaces, such as WhatsApp.



Interview with a member of the civil society in Israel: There is a looming risk: young people who read fake news. We are seeing the rise of a generation that is wrongly informed, and this is very dangerous if we think about the terrorism/jihadism threat.

In this context the old elites are getting very modern: using and utilizing high-tech and the latest technologies in order to monitor, control and manipulate the population. Control of the Internet, of social media and underground digital platforms has become a priority for security apparatuses. They are known collectively as the e-Mukhabarat. Together with China, the region has become the laboratory of surveillance technologies and international companies are making profit from it.



Interview with a member of civil society in Algeria: In our country the new actor is the youth, we can see this with Facebook: there is a big liberalization of the information and this phenomenon has a huge influence over the public debate. Maybe the new elite, that will emerge from the youth and will be closer to the needs of the population.

WHAT IF DIGITAL MEDIA HARBOURS THE HOPES OF YOUTH?

Owing to the wide dissemination of information and communication technologies and the considerable access to the Internet in 2025, a growing number of people within the MENA region are preferring digital media formats for information, news and communication. Fewer and fewer people are using traditional mass media. Citizens and consumers have avidly adopted the Internet, smartphones and social media. In line with a global trend, more and more independent and transnational media have been providing high quality information and have become a platform for critical thinking. Members of the Maghrebi communities in Europe but also the Syrian diaspora worldwide are particularly active in this process.

Increased Internet penetration has enhanced access to a wider range of information about domestic, regional and global developments. Inevitably, this has also provided space for conspiracy-driven outlets spreading fake news and rumours. By using new sources of knowledge, people inform themselves about politics with a growing awareness of cultural and social changes regarding issues such as unemployment, identity, environment and social welfare, and engage themselves more actively in public debates. They also increasingly demand a higher degree of political participation – especially in Iraq, Iran and the Levant.

Authoritarian regimes' attempts to control digital media have failed owing to the spread of innovative tools to bypass this censorship. Tendencies that fostered polarization and radicalization a decade ago have been partially compensated for by new decentralized forms of digital media that supply highly diverse and more transparent information. Yet the increasing individualization and socio-cultural fragmentation, especially within the middle class, risks perpetuating echo chambers, where people communicate only with peers and ignore discourses in other settings. In contrast, groups that used to feel excluded by mainstream media discourses in the past have found in these new platforms a way in which to articulate their grievances. This is the case for women, unemployed youngsters and inhabitants of rural areas and urban peripheries.

In 2025 the new digital media landscape has facilitated the emergence of a virtual public sphere, therefore supporting a trend for social and political change. This is important because in some countries open and free public spheres have been almost non-existent or underdeveloped for quite some time. Now these media are the space where abuses are being denounced. One of many examples is the #mybled campaign that was started by an Algerian woman in the Aures region in 2020. She said that she had been sexually harassed by a local police officer and that her complaints were not heard. She invited other people to share stories of abuse by local authorities, particularly in small towns. In a few days, thousands of stories were shared on Twitter, Facebook and Instagram. These included cases of corruption, nepotism, deficient public services, racism and police brutality. Some testimonies came from urban areas and the Maghrebi diaspora in Europe too.

Since the Internet is able to connect people and provide new communication opportunities, people can now engage within a growing civil society, taking part in a citizenship culture and digital activism more actively. Hence, most MENA societies have gained new forms and degrees of social cohesion owing to these new forms of communication. One of the most dynamic developments has been the access to online higher education and vocational training programmes. Arab platforms have multiplied and the region is above the global average in terms of offer and demand.

While the population has found a free space in these media, authoritarian regimes are investing large amounts of money in improving surveillance capabilities. This process of authoritarian e-learning poses a threat in societies that have got used to speaking freely in the digital environment. This risk is even higher in countries with a high degree of social networks penetration, such as Saudi Arabia and the UAE. It is far from clear who will win the battle for information.

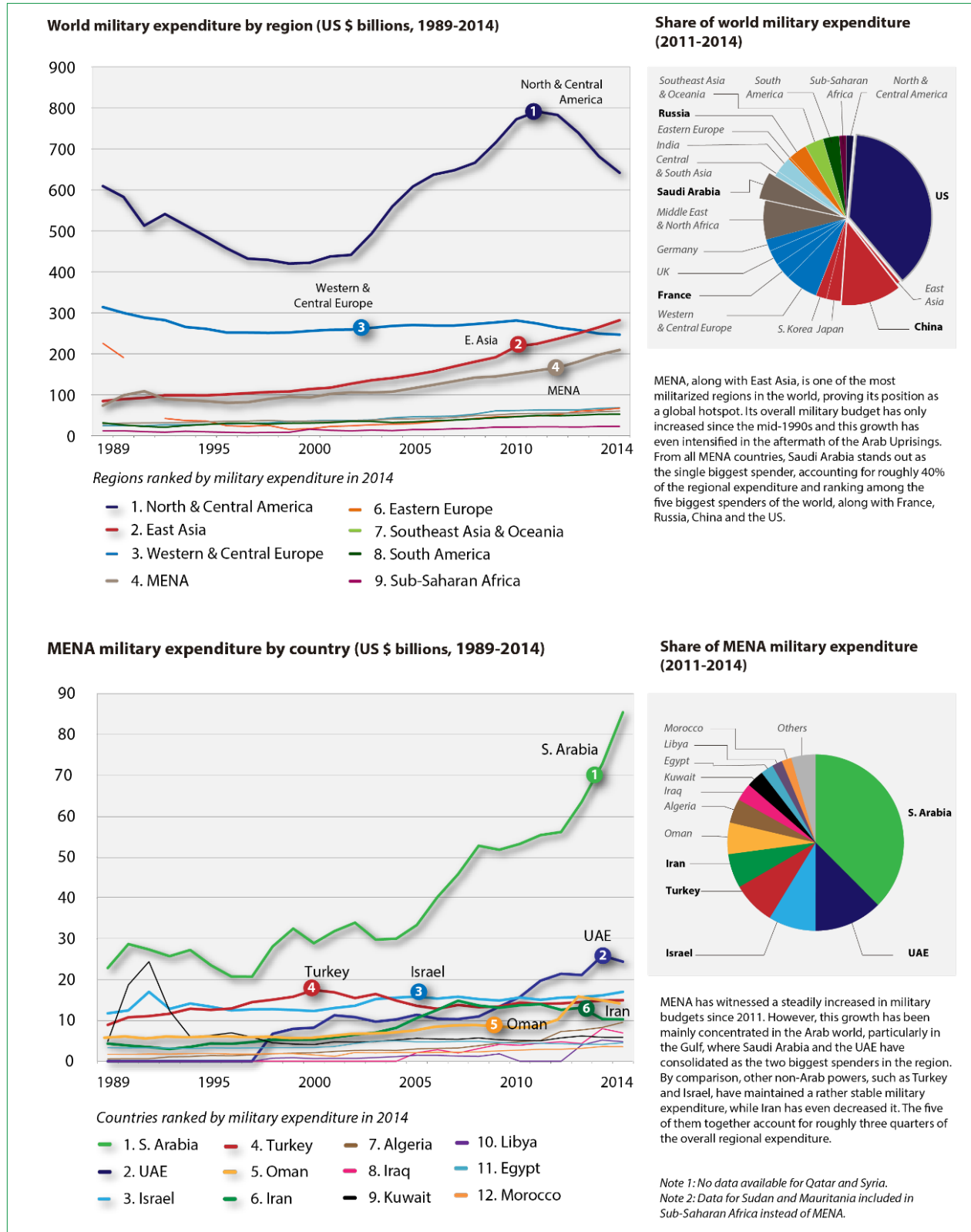
A MILITARIZED AND BRUTALIZED REGION

By 2025 the Middle East remains one of the least peaceful regions in the world, according to the Global Peace Index. It is an area that has been able to accumulate unsolved conflicts and persistent humanitarian crises. It is also one of the most-militarized regions in the world and one in which mistrust prevails, in the way in which countries look not only at their rivals but also at their partners and allies.



Interview with an activist in Tunisia: The trends towards the militarization of the region point in the direction of growing insecurity in the years to come.

Figure 10 | Military expenditure in MENA and the world



The level of support or opposition to Iranian policies in the region remains a polarizing factor. However, it is not the only one. Mohamed bin Salman's unilateralism, even more so since he became king in 2020, has infused confrontation with its own allies. Relations between Riyadh and Abu Dhabi are not as good as they were back in 2018. The division among those who advocate for normalization with Israel and those who label such a move as a betrayal is also igniting the region. Jordan is the epicentre as Gulf countries push Amman to further compromise with Israel, but its population is ostensibly against it. In Jordan, political and economic frustrations are a very dangerous cocktail. Analysts point out that tensions between Turkey and the Emirates are escalating, and that they are likely to project their ideological rivalry in the Horn of Africa, Libya and Palestine. Rumours of imminent Israeli or Israeli-US attacks on Iran have surfaced every now and then, but the two camps have preferred to flex their muscles in Syria and Lebanon.



Interview with an official of an international organization in

Lebanon: The affairs of the Middle East are being controlled by the two poles, Iran and Saudi Arabia. The leaders and the people alike in the region are mainly concerned with the future of the Iran-Saudi Arabia relations, since the two powers have been remotely controlling the future of peace and war in the region, evident in internationalization of wars in Syria, Yemen, and the ongoing and re-emerging issues in Bahrain and Iraq.

By 2025 the Arab-Israeli conflict remains the oldest confrontation in the world. After the Arab Spring many analysts said that it was losing its centrality in the region's geopolitics because of the war in Syria. However, the eruption of a third intifada in 2020 after a brutal Israeli operation in Gaza and the rising tension in the Syrian-Lebanese-Israeli border, which almost led to a new regional war, brought the Arab-Israeli issue to the forefront. Since then, several peace initiatives have been put on the table and subsequently failed. Palestinians are increasingly frustrated by the lack of support received by Arab leaders and the intensification of relations between Israel and the Gulf monarchies. Long-lasting supporters of the two-state solution are now acknowledging that it may be too late for that. The conflict and Palestinian aspirations are increasingly framed as a rights-based plea rather than a territorial dispute, and the Boycott, Divestment, Sanctions (BDS) movement has gained ground globally.



Interview with an official from the security forces in Lebanon:

Turkey, Iran, Saudi Arabia and Israel are the four major powers in the region, and Saudi Arabia and Israel have become a united bloc.

In Syria, the al-Assad regime has not needed any international conference to claim victory. In fact, by 2025 there is no force strong enough to challenge its rule in Syria. The 2019 campaign against the rebel stronghold in Idlib, with dire humanitarian costs, was seen as the last largest offensive of the regime to regain control over the territory. Although Assad himself and the international community pretend that the conflict has ended, violence on the ground is very much present in Syrians' daily life in the form of repression and guerrilla warfare. The regime repeatedly requested the presence of the Iranian Quds Force and cooperated with the mainly Kurdish People's Protection Units (YPG) to combat insurgency groups, but the price to be paid was increased tensions with Israel and Turkey. On more than one occasion a conventional inter-state war was about to start.



Interview with an official from a regional organization in Egypt:

The main risk could be the incapacity and inability to resolve the regional conflicts in Syria and Yemen and that they last longer than expected.

The conflict in Yemen formally ended after a peace conference in 2020, but the country has not yet recovered from one of the world's worst humanitarian crises. Libya is also far from being stabilized. The elections foreseen for 2026 are meant to be as divisive as those of 2014, and the UN special envoy has warned that a new wave of violence could erupt again. Still in the Maghreb, the Western Sahara question rarely makes it to the front-page, but 2025 is an exception because of its fiftieth anniversary. Instead of debating how to solve this issue, Algerian and Moroccan authorities are discussing with their European counterparts how to bypass it. The need to foster economic growth seems to be creating some pragmatism both in Rabat and Algiers, but they opt for ignoring the problem rather than solving it.



Interview with an official from an international organization in Mali:

Non-state actors will play a major role in shaping the region. Among them the drug-traffickers, the criminal economy, Jihadi organizations and rebel groups.

One of the few issues on which regional actors seem willing to cooperate is the fight against terrorism. Al Qaeda has proved to be resilient and by 2025 is said to be one of the oldest existing terrorist organizations. Yemen and the Sahel have become the main strongholds from which they target international presence and interests in the region. One of the novelties is that they are increasingly targeting Russian and Chinese interests too.



Interview with a US official: One of the main risks is the emergence of a group similar to ISIS. This will happen unless everyone manages the region better.

Al Qaeda is not the only man in town. In 2018 some international and regional leaders claimed that ISIS was defeated, but seen from 2025 those claims appear to be misguided. ISIS initially mutated into a plethora of mafia-like organizations, which later on sporadically launched violent operations pretending to defend the rights of disenfranchised Sunni communities in Iraq, Syria and Lebanon. Another more ideological, globally minded and de-territorialized offshoot of ISIS is said to have turned to cyberwar. Counter-terrorist agencies are extremely opaque in revealing details about the scope of this threat, but this e-terrorist group claims to have the capacity to attack critical infrastructures in telecommunications, transport, energy supply and financial systems.



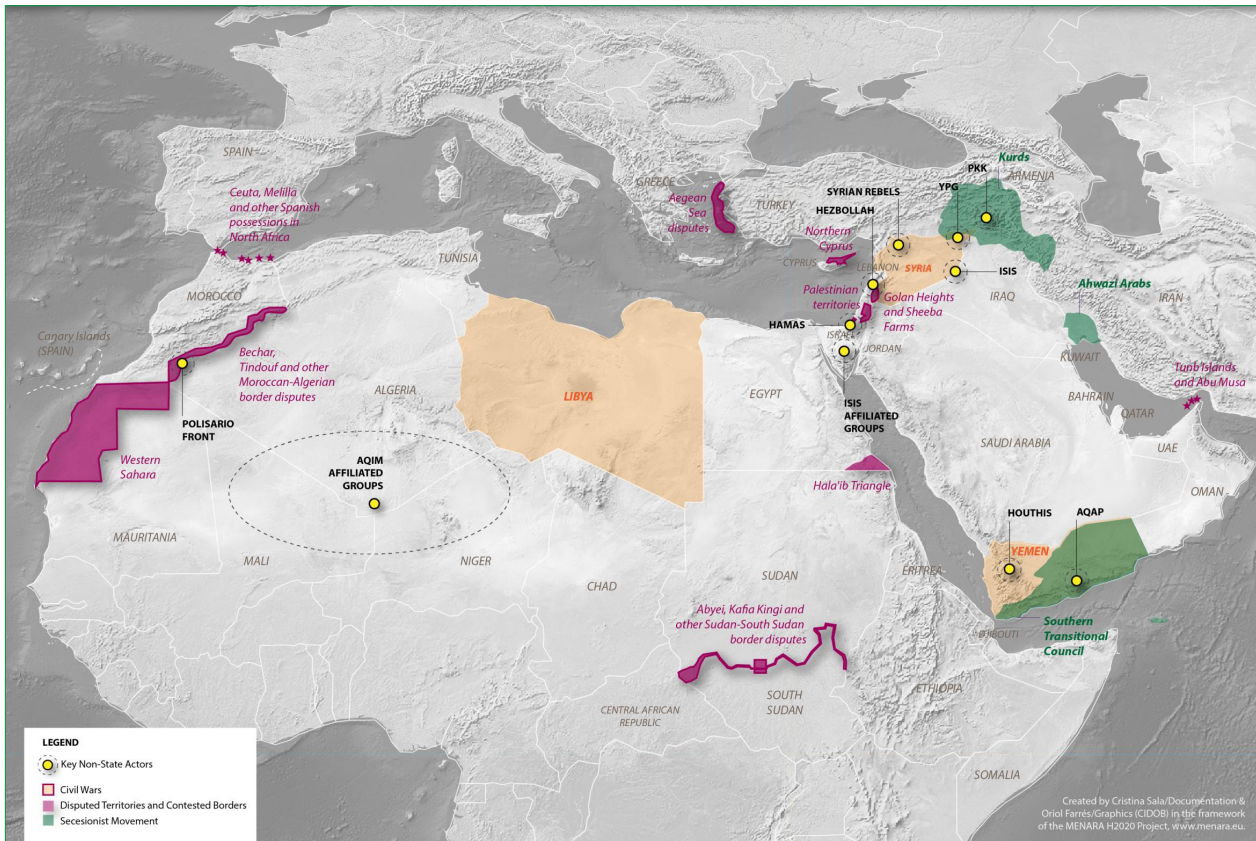
Interview with an intellectual in Egypt: Military is taking over the state in Egypt – all their vision of state is patriarchal and condescending towards civil society. They will succeed in the short term. In the long term it is less clear.

Persistent instability and the proliferation of conventional and unconventional threats have been a major push for militarization in the region. Since 2011 the region as a whole has witnessed a steady increase in military budgets and the arms trade but the growth has been mainly concentrated in the Gulf monarchies, which by 2014 already represented more than half of the overall regional military expenditure. Israel and Turkey have benefited from this situation by positioning their arm industries in the regional and world markets. The Istanbul arms fair has become as prominent as the one in Abu Dhabi. Locally, militarization is also a fact: the privileges of security elites in the region have increased, widening the gap between the security apparatus and the rest of the population. Their control on vital economic sectors is also one of the peculiarities of this region, and this is one of the reasons explaining the brutality of the repression in 2021 against popular uprisings.



Stakeholders meeting in Istanbul: The hundreds of billions of dollars that will be needed to help Syria and Yemen rebuild after the “crisis” stage show the urgent need for more international dialogue on where that money will come from and how it will be spent.

Figure 11 | Challenges to sovereignty in the MENA region



Created by Cristina Sala and Oriol Farrés (CIDOB). Source: Authors.

WHAT IF SYRIA MOVES FROM RECONSTRUCTION TO RECONCILIATION?

In 2025, instability in Syria can be said to have come to an end after a brutal conflict that destroyed the country and caused more than 600,000 deaths and millions of refugees and internally displaced people. The key factor prompting this course and setting Syria on a track of rebirth is the marked shift in the narrative about the conditions for moving beyond the conflict stalemate both domestically and among the external players. On the one hand, the Bashar al-Assad regime is still there as a result of the military victory achieved in 2019 with the fall of Idlib. The eight-year-long war has contributed to altering the relations between the regime itself and those sectors of the population who, despite not having openly fought and challenged its authority, have been reluctant to normalize such levels of violence and repression. This has increased the dependency of the regime on, for example, the confessional communities and business elites who have begun to demand the launch of a reconciliation agenda in return for their renewed support to the regime. The weakening of the Syrian opposition and the disconnection between leaders in exile and local groups have further enabled these moves. On the other hand, the main external sponsors of the al-Assad regime, namely Russia and Iran,

have made it clear that their support cannot be permanent as they need to redirect their attention to domestic issues. They have openly praised reconciliation efforts.

As a result of these pressures the Syrian regime has been forced to compromise with the international community, in particular the EU and some of its member states, particularly France and Germany. Until recently, the European Commission, Berlin, Paris and other like-minded governments were reluctant to engage in much-needed reconstruction. They are asking al-Assad to make gestures towards social reconciliation, and for the first time these demands resonate in Damascus. Segments of the regime have put forward the idea that focusing on reconciliation would move away international pressures on democratization.

This has been a gradual process, and different sets of events have contributed to anchoring the idea. Domestically, the sixtieth anniversary of the Ba'ath party coming to power was celebrated with great fanfare in 2023, and that was the first occasion on which Assad himself employed the term reconciliation in a public speech. Regionally, increased tension with Israel over the Golan Heights and Turkey's meddling in Syrian affairs provided the regime with unifying causes.

Several measures can be described as coming under the heading of reinvigorating Syria's sense of unity and nationalistic sentiments as a way to rebuild the fabric of the war-torn society. First, some concrete steps have been taken to work on the decentralization of power. The legacy of the civil conflict has been a formally united Syria with various liegemen or warlords scattered throughout the territory. This is particularly the case in those areas where recapturing the control of the territory and the full allegiance of the population has proved more difficult to achieve (i.e. the south-eastern part of Syria and the Kurdish regions in the North). Second, the selective and gradual return of refugees and internally displaced persons has been actively incentivized by the regime. The easing of the conditions to re-acquire properties or gain compensation thanks to an amendment to the infamous Law n. 10 has been a game-changer. Third, other sectors of the population, in particular the business elites and their families as well as the Syrian youth, are benefiting from re-integration programmes related to the economic and cultural life of the country, be they educational programmes or economic liberalization measures.

FOREIGN MEDDLING AND REBALANCED GLOBAL AMBITIONS

The so-called post-American MENA is not a reality by 2025. Even if the disengagement process that started amid the 2011 events has steadily continued, the role of the USA in the region is still fundamental. On 20 January 2025 a new president took the presidential oath at Capitol Hill. Trump is no longer there but the effects of his erratic policies towards the region can still be felt. Along the last decade the USA has had a major – but inconsistent – impact on the Middle East. This has had an ambivalent effect on its allies: some have felt emboldened to take hazardous decisions by themselves – namely Saudi Arabia, the UAE and Israel – while others have sought to diversify their alliances.



Interview with a businesswoman in Qatar: The USA has lost its hegemony. After that nobody leads, every state is for itself. Owing to the lack of trust and cooperation, no blocs emerge. Power is diffused among all states.

Major commitments could never be taken for granted: Turkey, Egypt, Jordan and Qatar might be at the top of that list. However, the prospect of presidential change in 2025 and the possibility of the USA returning to its former, stable foreign policy made regional actors keen not to over-react, understanding that the safe option was to let time pass and wait.

The “America first” logic has made the USA increasingly reluctant to assume the security burden of the region. Despite pulling out part of its military personnel, it remains the global actor with more troops and equipment deployed in the region. Moreover, support of Israel and confrontation with Iran remain the two magnets that impede the USA to fully disengage from Middle East affairs. By 2025 there have been no major changes in US foreign policy towards Israel and the Arab-Israeli conflict. The terms of the so-called “Deal of the Century” were more proof that Washington was not and does not aspire to be an honest broker. Regarding Iran, the USA has maintained its “stick policy”. The succession of the Supreme Leader, after Khamenei’s unexpected demise in 2023, opened space for the USA to further meddle with Tehran, but always with the same objectives in mind: delegitimizing the Islamic Republic and its leadership and toppling the regime.



Beirut Focus Group: The spread of right-wing, racist and populist movements in the USA and Europe member states may lead to more violence in the region as it would further stoke religious or sectarian tension, and in particular push even further Israeli aggression.

For more a decade analyses have been pointing at China’s ambitions in this region, and in fact Chinese presence has multiplied in investment and infrastructure (particularly around the Belt and Road Initiative (BRI) mega-project) but also cultural exchanges. By 2019 the crackdown on the Uighurs created some tensions with Middle Eastern countries but economic interests prevailed. This was a big test for Beijing to check how reliable their partners in the region were. Since then there has not been a major shift in China’s approach to MENA, and this has allowed Beijing to clarify what to expect from it and to plan significant changes for the upcoming decades. This continuity stands in sharp contrast to the volatility of US policy.



Beirut Focus Group: The Russians and Chinese are increasing their political and economic role in the region. The political support of these rising powers to authoritarian states undermines the rule of law and encourages human rights abuses.

Regional actors feel impelled to get closer to China in order to secure the much-needed BRI investments. This has been translated not only in high-level meetings and the signature of some new memoranda of understanding and contracts but also into steps towards facilitating the entry of Chinese investment and firms into regional economies as well. One of the clearest examples is the yuanization of fossil fuels trade commitments, initially implemented in Iran to bypass US sanctions and subsequently replicated by countries such as Algeria and Qatar. For energy exporters, consolidating their bilateral relations with a major consumer such as China has become a priority.



Interview with a Chinese expert: I am not sure about China's future role and influence in the region. We have never been a critical actor in the region. Now, the Belt and Road initiative demonstrates we are interested. Yet, traditional superpowers and particularly the USA are the ones who will remain critical in shaping the region's future.

Still, no major political and security involvement can be expected from Beijing. China sticks to its apolitical approach towards the region, following President Xi Jinping's stated priorities. By 2025 China is not in a position to block any decision taken by the rest of the major superpowers together and thus joins forces with the rest of the global community (mainly the USA and Russia) in whatever action they understand is necessary. A case in point is China's major involvement in the reconstruction of conflict scenarios in such places as Libya, Syria and Yemen (particularly in maritime infrastructures). In his September 2024 speech in front of the UN General Assembly, the Chinese president mentioned those efforts as proof that China is a globally responsible power.

On the other side of the spectrum, analysts debate whether Russia's political and military involvement in the region has an expiry date. In the past decade Moscow has opportunistically filled the void left by the USA in the post-2011 context. It has become the key player in tipping the balance of major regional conflicts. Syria is the best example. Since then all countries in the region, despite differences among them, have tried to reach out to Moscow. Arms deals and high-level political visits reveal the intensification of Russia-MENA links. However, Russian capabilities are starting to be overstretched – especially after years of low oil prices – and there is an increased need to redirect efforts towards domestic politics and its immediate neighbourhood. Still, it will seek to retain enough political and military assets in the region so as not to be excluded from any major decision. In this vein, Russia has invested a lot in its bilateral relations with Iran, Turkey and Egypt in order to prevent the USA or Europe from playing the Middle East against its interests.



Brussels Focus Group: The relations with the Middle East of the EU and some countries tend to be transactional. Overall, the EU's limited political and military involvement in the MENA region over the past years as well as the shortcomings of its EU Neighbourhood Policy created among MENA countries the feeling that the EU was not able or willing to deliver on its commitments.

Despite its potential and proximity Europe remains a secondary player in most of the area. The Maghreb and the Sahel are the exception, but even there Europeans face Russia's political competition and China's economic expansion. Moreover, this is a space where European states compete rather than cooperate. In fact, repeated French attempts to increase its own influence in the region have failed because of insufficient critical mass and lack of coordination with other European governments. All in all, Europe's declining role in MENA is mainly attributed to its own internal crises. The rise of radical right-wing populism on the one hand and the effects of a second economic crisis in 2020 on the other forced European leadership to focus on domestic affairs. Its image as a normative power has also been seriously compromised among civil society and political activists. The silence in the face of the repression during the 2021 protests was the last nail in the coffin.



Brussels Focus Group: The intention is to create a single instrument that will increase the EU's efficiency in strategic approaches in the MENA region. This approach will also be needed by the end of the Cotonou agreements (2020), when a new comprehensive strategy with developing countries, among them several countries of the MENA region, has to be presented. The concept of the "neighbours of the neighbours" has to be operationalized further.

WHAT IF AFRICA IS SEEN AS AN OPPORTUNITY AND A PREFERENTIAL PARTNER?

Africa is on everyone's thoughts and quite often in a positive way. Conflicts and development challenges are not yet addressed. Still the new state of mind is that Africa offers opportunities that cannot be found anywhere else. In 2025, Europe has realized Africa's untapped potential. The countries from the Maghreb successfully placed themselves as the connector between the two continents. This is laying the ground for an upgraded agenda of cooperation based on shared hopes and expectations. Not only has this brought the two continents closer to one another after decades of power asymmetry, the legacy of the colonial past and stark economic and political European dominance, but it has also created the conditions for the EU and Africa to forge a "multilateral alliance" tackling the global agenda, from climate change-related concerns to health issues.

A number of conditions on both sides have made this leap in EU-Africa relations possible. On the European side, the EU feels stronger after overcoming its internal crises. The robust economic growth of its economy, the decline of the nationalist-populist narratives and the growing room for a more coherent and constructive EU common foreign policy with an eye to the new Multiannual Financial Framework 2028-34 are some important examples of this new attitude. From the initial negotiations of the new budget it is clear that Africa is going to be a growing priority, which will substantiate the post-2020 post-Cotonou Partnership Agreement, a more ambitious policy towards the Maghreb and the EU's commitment to invest in Africa's future. Turning to the African countries, a new generation of globally minded and ambitious

leaders caters for the hopes of the continent's booming population and growing economic potential. From Cameroon to Uganda, the trend of the so-called "presidents for life" has been halted, in part thanks to the activism of African regional organizations, such as the African Union (AU) and the Economic Community of West African States (ECOWAS). New forms of accountability and effectiveness fuel dynamism in African civil society, economic and business communities, and educational actors. A key part in this equation is represented by the new African look towards Europe. Europe is seen as a partner with which, unlike other global players, it is possible to work on the multiple dimensions of a truly win-win relationship.

By 2025, EU–Africa relations have flourished at multiple levels, including EU–AU and EU–ECOWAS, thus providing a fresh and meaningful contribution to the implementation of inter-regionalism as a key cornerstone of multilateral governance. The Maghreb occupies a fundamental place in the reinvigorated EU–Africa relations. The Maghreb countries are key bridges between Europe and the whole of Africa, not only geographically but also functionally thanks to their growing bilateral relations with counterparts in business, energy, infrastructure, education and culture. Even regional institutions such as the Union for the Mediterranean have started to pursue a more pronounced African policy by developing activities in cooperation with several stakeholders – both from the public and the private sectors. In this regard, Maghreb–Africa relations represent a mutually reinforcing element to EU–Africa relations. Not only can the two sets of relations not be dissociated, but it is clear that the EU's proximity-based engagement to the Maghreb has to consider the broader African dimension. An unintended positive outcome of the EU–Maghreb–Africa nexus is that it has become an incubator of tools to overcome mutual mistrust and competition between Algiers and Rabat.

SCENARIOS FOR 2050



UNSTOPPABLE CLIMATE CHANGE

By 2050 climate change will be a decisive global reality, but its impact will differ from one region to the other. The countries of the Middle East and North Africa (MENA) will be among the most affected: the effects will be felt across the region in the form of extreme weather phenomena, heat waves and droughts, desertification, severe water shortages and a rise in sea level. One of the most vulnerable areas will be the Nile Delta, where a sea-level rise of about 50 cm could force 4 million Egyptians to resettle to other areas.

The region's governments and societies will have to deal with scarcity of natural resources, including food, price volatility and the risks associated with new pandemics. Environmental degradation will amplify economic and social challenges, particularly as this will coincide with a significant population increase. The capacity to anticipate these challenges and to react to them will be key to seizing opportunities and withstanding risks.

Opportunities:

- Early awareness could push national and local authorities to act decisively and join forces across the region. This move would mainly result from the realization that mismanaging environmental challenge increases regimes' vulnerability.
- The accelerating consequences of climate change could lead to new international agreements between countries of the MENA region and of the European Union. The environment could become a fertile ground for trust-building and cooperation.
- Environmental movements could be a catalyst for new forms of activism and social innovation. In fragmented societies, the fight against climate change could be one of the rare unifying factors.
- When facing sea-level rise and desertification, new coalitions of engineers, meteorologists, oceanic experts, city planners and politicians could generate design solutions for mitigation and adaptation, which in turn could be exported elsewhere. Moreover, environmental projects could create new jobs and foster innovation in the region.

Risks:

- The countries likely to be most affected by climate change are those that rely on tourism and agriculture and those that are already densely populated and lack sufficient financial resources to invest in mitigation and adaptation measures.
- By 2050 climate change could be responsible for a sea-level rise of 1 metre, directly impacting on 41,500 km² of coastal lands. Densely populated regions along the coasts of Egypt, Tunisia, Morocco, Algeria and the Gulf are among the most vulnerable spaces. Forced internal and international displacement could materialize.
- Large sectors of the population may blame authorities for having mismanaged this challenge. Deficient water supplies, agricultural losses, energy blackouts, recurrent natural disasters could fuel social unrest and eventually lead to violent conflict.
- The opening of new routes across the Arctic could divert maritime trade from the Mediterranean. The region could become more peripheral and previously attractive port cities may suffer a decline, even if the Chinese Belt and Road Initiative (BRI) sees the light across the MENA region.
- Climate change could endanger vulnerable ecosystems such as the cedar forests in Lebanon and Syria, mangroves in Qatar and the reed marshes of Iraq. Furthermore, public health may be negatively affected by increasing temperatures, which will bring changes in the geographical distribution of disease vectors such as mosquitos and waterborne pathogens. Water and air quality may deteriorate and infectious diseases such as malaria may increase, particularly in Egypt, Morocco, Mauritania and Sudan.



POST-OIL WORLD

By 2050 a post-oil world order will be in place due to profound changes in the global energy market. Such a new order will not be triggered by a lack of supply: on the contrary, fossil fuel production may even increase for a time, thanks to the exploitation of new reserves, innovative investments in oil and tar sands, the popularization of LNG and fracking development projects beyond the United States. Prices may remain relatively low for some time despite the high demand from emerging economies. But in the longer term the main driver of decarbonisation will be the gigantic steps forward in technological innovation for renewable energy production and storage capacities.

Moreover, clean energies will be affordable and popular due to global awareness vis-à-vis climate change. The two fastest growing world powers, China and India, will champion this transformation. Europe will also invest in this process and the MENA, the largest hydrocarbon producer in the world, has major stakes in this transformation.

Opportunities:

- Rapid global transition could have a positive impact by reducing the pace of global warming. The MENA region is particularly vulnerable to desertification and rises in sea level and therefore any progress in halting climate change would have positive spill-over effects.
- In order to fully exploit the economic potential of renewable energy technologies, most governments in the MENA countries could engage in ambitious restructuring of regional energy markets, in many cases supported by the EU and following the example of Morocco. Energy exporting countries could also invest oil dividends in renewables to satisfy their internal energy demand and support their economic diversification plans.
- Most of the oil-importing countries, with Morocco, Tunisia and Israel as the front runners, could increase their energy security through lessening their dependence on foreign energy sources and implementing strategies to increase the production and use of solar energy and other energy sources such as wind.
- Renewables and decarbonisation projects could be a fertile ground for economic cooperation of the region, with European countries but also with China and India.

Risks:

- The drop in oil prices, particularly in heavily populated countries such as Saudi Arabia, Iran, Algeria and Iraq, could force governments to introduce austerity measures. The most likely reaction by the population would be regular waves of unrest. These would trigger repression and region-wide destabilization.
- Many countries in the MENA region could face economic, social, political, regulatory and technological obstacles, preventing them from fully exploiting the potential of new energy technologies.
- The global weight of the MENA may shrink if individual countries in the region do not successfully embark on major economic transformations. Failed diversification strategies could stigmatize the region as the big loser of this new era.
- In a post-oil order nuclear energy is unlikely to lose its appeal. By 2050, some of the MENA countries may have opened new nuclear power plants, most of them in Saudi Arabia, but also (and with the help of Russian and Chinese investments) in Turkey, Egypt, Jordan and Iran. This could raise regional and global concerns regarding military uses of those nuclear programmes.



AN URBANIZED REGION

The MENA region is characterized by high urbanization. Some 60 per cent of the population was already urban by 2018 and this trend will not be reversed by 2050. Cities in this region will host 130 million additional residents and thus be highly overcrowded. Urban challenges will be particularly acute due to the rapidity of this process but also because of diminishing space and resources. Environmental degradation could accelerate processes of rural exodus but cities will also have to deal with environmental-related challenges.

While we are already familiar with “Mega Cities” such as Cairo and Istanbul, new ones will surpass the 10 million people benchmark. Baghdad and Khartoum, each with 15 million inhabitants, will be two of the fastest-growing cities in the region. Tehran, with 11 million inhabitants, and Riyadh and Jeddah (with 8 and 7 million respectively) and Algiers and Casablanca with well above 5 million will come next. The capacities of urban spaces to accommodate this new reality will depend on the pace of growth but even more on the resources deployed by local and national authorities to upgrade basic infrastructures such as public transport, sanitation and housing.

Opportunities:

- Big cities and urban agglomerations, especially “Mega Cities”, could attract foreign capital and foreign investment because of their density, highly diverse labour force, a sufficient infrastructure and attractive market opportunities. Some of these cities could become regional hubs for transport, culture and trade.
- Urbanization could be a catalyst providing new economic opportunities for women and young people, particularly if cities become technological hubs.
- Big cities could function as laboratories for urban solutions to environmental and social challenges, particularly if local governments have financial and administrative autonomy.
- Urban areas could be the launch pad for a new generation of politicians that base their appeal on their capacity to manage and respond to citizens’ needs and to find better solutions to address the challenges facing cities. This could produce a certain degree of “healthy competition” among politicians.

Risks:

- The urban space could be further fragmented. On the one hand, political, security and economic elites could gradually relocate to gated communities or even to brand new cities. On the other, most of the population – including migrants and refugees – may be forced to live in crowded neighbourhoods and informal areas with deficient public services. This could generate concerns in terms of public health and vulnerability to pandemics and would also be a fertile ground for social unrest.
- Another form of fragmentation could take place between capitals and second-tier cities. If inhabitants of the latter feel they are being treated as second-class citizens, protests could be triggered in peripheral regions.
- In conflict and post-conflict zones urban segregation is likely to be a contentious issue. In Palestine, for example, urbanization may be closely connected to the prospects of resolution of the Arab-Israeli conflict (or the lack thereof). Israeli settlements and new development projects in Jerusalem may be a recurrent source of tension.
- Persistent political instability and regime vulnerability may prevent any move towards decentralization, on the one hand, and increased cooperation among the MENA countries, on the other.



DIGITALIZATION AND AUTOMATION

Technologization will be a global megatrend by 2050. Digitalization will have significantly changed economic, social and cultural models and innovation will be the key to successful competition on the global market. Automation and Artificial Intelligence will radically transform job markets in most countries. The MENA region will be particularly affected by those trends due to the already high (and seemingly persistent) unemployment and underemployment rates, particularly among young people.

Varying capability in adapting to these economic and technological trends will further increase differences among countries and within each country. While the Gulf region and Israel may adapt more easily to these changes, other countries, with large working populations, strained job markets and insufficient governance (i.e. Algeria, Egypt, Iraq, Iran, Turkey) could face major social problems. Infrastructural investment, business culture, education and regulation will determine the ability to adapt to these megatrends.

Opportunities:

- Successful digitalization and automation could integrate the MENA region into global value chains, particularly if this coincides with a broader dynamism of the African economy, the accomplishment of the Chinese-led Belt and Road Initiative and transfers of technology and know-how.
- New, rewarding jobs could be created, and at the same time a reduction of working hours achieved through various models. Informal business sectors could embrace new technologies to facilitate the formalization of these sectors and improve states' fiscal health.
- Challenging traditional roles in the workplace and in society could offer new opportunities for women empowerment. Digitalization could increase female participation in the job market and incentivize entrepreneurship.
- If adequate digital infrastructures are put in place, the rural–urban gap could be reduced. Living conditions in rural areas could significantly improve and the spread of technology could also create a favourable environment for new businesses outside the big cities.
- Digitalization could offer new opportunities to bypass state monopolies and crony capitalism. Economies could modernize and productivity increase.

Risks:

- Automation could aggravate the lack and loss of jobs and increase income gaps among countries in the region, particularly in relation to the rural–urban divide and frustrated peripheries
- In the absence of adequate mechanisms to compensate the losers in such technological changes, the left-behinds could engage in regular episodes of social and political unrest and, in turn, authoritarian governments may resort to increased surveillance and the use of new technologies to control and repress their own populations.
- The adoption of digitalization is a double-edged sword: it could be used for more communication, transparency, education, empowerment, but it could also be used for greater control, censorship, manipulation and repression. The current trends in the MENA region suggest that, few exceptions notwithstanding, the latter would prevail.
- The region could become increasingly peripheral in global terms if it does not adopt strategies to cope with these technological developments.



RELIGIOSITY, INDIVIDUALIZATION AND CITIZENSHIP

Societal trends in the MENA in 2050 will result from the complex interplay between endogenous and exogenous variables. Whether the region, or parts of it, moves towards greater polarization or pluralization will heavily depend on political choices and leadership. In any case, attitudes towards religion will continue to be a major driver of societal and political dynamics and remain a highly contentious issue.

Fragmentation and centrifugal dynamics are likely to shape both the religious and the secular camps as well as societies as a whole. Individualization processes, among which the fact that religious or non-religious choices will be the result of each person's preferences, and the contestation of intermediate authorities (such as religious bodies) will further fragment each camp. Additionally, international migration will make the MENA region even more diverse from a religious point of view.

Opportunities:

- Individualization and religious diversity could be the basis for the rediscovery of cosmopolitanism as a key driving force for societal development, indirectly contributing to healing the wounds of identity-related conflicts.
- While collective identities and communitarian structures are likely to continue to play a prominent role, their polarizing potential within divided societies could be reduced if new emphasis were put on individual freedoms and rights. This would give substance to the claims for dignity and citizenship voiced by many of the MENA people irrespective of their socio-economic status and group affiliation. If religious establishments establish successful processes to accommodate these demands they could set an example for the region as a whole.
- A diversified religious sphere could make religious leaders accountable to individual believers. This would contribute to significantly reducing the instrumentalization of the religious discourse and to strengthening the separation of state power and religious institutions and organizations.
- All this could pave the way for a more robust and result-oriented inter-faith dialogue in the MENA region and beyond.

Risks:

- Fragmentation dynamics along the religious–secular divide and within the two camps could lead to even more acute identity-related conflicts. These could become entrenched and take up a life of their own beyond the control of state authorities and community leaders. Syria and Iraq would be particularly vulnerable.
- Citizenship and respect for diversity and individual rights could be endangered by the pre-eminence of primary identity affiliations and loyalties. As a result, the MENA could backtrack on women's empowerment and respect for human rights.
- The long-standing political instrumentalization of the religious and secular discourses could lead to further societal conflicts and to competition for leadership control in the two camps. Turkey is one country in which this polarization process could intensify. Across the region, anti-proselytism campaigns could infuse tensions with regional and global players.
- The case of Israel could stand out as that of a broken society under the pressure of the unbridgeable divide between the orthodox Jewish community, which is protected by state laws and policies, and the rest of society (secular Jews and Palestinians in particular). Deriving from the further strengthening of the ethno-religious discourse, this religious–secular societal polarization may well aggravate domestic conflicts, impede political reforms and heighten Israel's isolation at the MENA regional level.



STRONG OR FIERCE STATES

Attempts to erode or complement the role of states in the region will continue. This is likely to happen by efforts to curtail their size and prerogatives – for example through reform packages promoted by international financial institutions going in the direction of privatization. Next to this, challenges to the authority of states – be they at the sub-national or the supra-national level – will prompt analysts and pundits to speculate on the weakening or outright collapse of the state system and the redrawing of the regional order.

Yet MENA states could prove more resilient than some expected. By 2050 controlling the state will remain the main and often only guarantee for elite survival. This is likely to consolidate state centrality vis-à-vis non-state players. State agents (state elites, the public sector, security apparatuses) and the dynamics revolving around them (clientelism, state capitalism) will remain predominant in the region compared with other parts of the world.

Opportunities:

- Most of the opportunities are likely to materialize when forward-looking leaders have understood that being the main source and holder of power can only be achieved and maintained through cooperation and good governance. Sustainable and reflexive leadership positions require elites to pay attention to what ordinary citizens think of and expect from the state.
- Having robust states would provide an opportunity for some sort of engagement and power-sharing with other actors from society and the private business sector in the name of the sharing of responsibilities and co-development.
- Similar trends could be observed along the vertical axis of centre-periphery dynamics, more pointedly between the capital and the most marginalized regions in each country. This would lead to successful and creative attempts to decentralize power in order to bring the state closer to its own citizens and to unleash economic and cultural potentials.
- At the regional level this could create the conditions for a push for supranational cooperation. The MENA could become one of the last regions to resort to regionalism as a tool for individual states to better cope with globalization and other international challenges.

Risks:

- The MENA states could face the old capability-expectations gap. Citizens expect states to protect and offer them new opportunities in accordance with global standards. Yet they may feel that the state's main goal is to control them. This would lead to growing frustration and solidify the emotional divide between the elites and the rest of the population.
- States may project strength through repression and surveillance, especially if elites feel vulnerable and fear losing power. Fierce states would constantly learn from each other how to cope with social discontent and curb political opposition.
- At the regional level, state elites may aim at maximizing their power. Negative sum games would prevail as state elites accept losing if rivals lose even more. Not only would this concern their enemies but also their long-standing allies, all of whom are perceived as potential threats. Interferences and attempts to destabilize the other states will be a persistent driver of regional insecurity.
- Strategies favouring state fierceness over strength could backfire. The erosion of state legitimacy could turn them into failing or failed political projects. This could be aggravated by the absence of meaningful alternative forces, be they at the societal or supra-national levels. Additionally, this would also foster secessionist claims.



MANAGING THE EFFECTS OF TODAY'S CONFLICTS

It is impossible to determine which of the conflicts current today will be solved by 2050 and which will be still in place – let alone to predict new ones that may emerge. Nevertheless, we can take it for granted that the effects of today's conflicts will continue to be felt in the MENA countries in 2050. Even in those cases where effective solutions have been put forward, the post-conflict trauma will mark one or more generations.

In addition, new drivers of conflict are very likely to come to the fore. These are the tensions that arise from various megatrends and challenges: demographic pressure and accelerated urbanization; climate change and natural resources scarcity; energy transition and its effects on the labour market. All these phenomena can turn into sources for risks or opportunities depending on how they are managed by regional and international actors.

Opportunities:

- Post-conflict reconciliation in Syria and Iraq could be key to smoothing sectarian tensions across the region and particularly in composite societies such as Lebanon. These initiatives could result from collective efforts by local and national actors, with international support.
- Due to the deep emotional attachment of large parts of the Arab public to the Palestinian cause, any successful efforts to bring this conflict to an end would redirect many energies towards economic and social development across the region. "Peace dividends" could be very high for all sides.
- Climate change and environmental degradation could become a unifying factor due to their negative effects, which are felt across the whole region. A new "green agenda" could revamp regional cooperation. Such efforts could be particularly successful in the Maghreb and the Levant.
- A positive outcome of the gradual disengagement of the United States from the MENA could be the assumption of security burdens by regional powers. In view of the exorbitant cost of conflict and the risk of being left behind compared with the advancement of other regions this could prompt regional powers, particularly in the Middle East and the Gulf, to actually engage in de-escalation efforts and to take steps towards a new regional security architecture.

Risks:

- Syria could become the new Palestine. The lack of an effective reconciliation process could result in protracted refugee situations, destabilizing host countries. The region could be polarized around this issue, preventing any meaningful regional cooperation and creating a plethora of under-governed spaces in which terrorist and mafia-like groups proliferate.
- Well before 2050, in Palestine itself the two-state solution will be off the agenda. This conflict could evolve from a territorial one to a rights-based issue. Palestinian citizens could be further marginalized, Israel internationally isolated and global players forced to take face-saving actions.
- Militarization and reconstruction could divert many resources from other social and environmental needs. By 2050 the magnitude of such challenges may be unbearable. Natural resources scarcity and climate change effects could fuel environmental-related conflicts among neighbours and generate domestic social unrest.
- By 2050, Iran, Turkey, Saudi Arabia and the United Arab Emirates may have developed their own nuclear weapons. This would be the consequence of current insecurities and the lack of effective multilateral mechanisms to prevent it.



CHINA: PRIMUS INTER PARES

By 2050 China is likely to be the world's largest economy. Its annual growth rate will have remained considerably steady, keeping in check internal tensions associated with inequality and governance deficits. However, this does not mean that the United States and Europe will totally vanish from the global scene. The consolidation of China as the new key power on the international system will coexist with other players rescaling their objectives and strategies or taking a step back, yet still representing a voice to be heard in MENA regional governance.

After almost four decades since its inception, the Belt and Road Initiative has the potential to drastically transform the socio-economic landscape of the Asian continent and of the MENA region. On the basis of the positive returns of China's initial investments in the 2020s, the MENA's authorities willingness to engage with China will further increase.

Opportunities:

- Chinese investment could modernize the infrastructures and increase the connectivity of the MENA region. This could take the form of joint ventures and could reduce the region's level of dependency on the USA and European economies. Yet the countries and economies of the region could gain greater agency if they avoid subordination from and dependence on China. This would require preserving strong links with the West and developing connections with other Asian powerhouses such as India and Indonesia.
- By 2050 the embeddedness of the region in the global economy will no longer revolve around its energy commodities' exporting capacity but around its privileged geospatial position at the crossroads between major integrated regional markets. This will make the region less vulnerable to global energy market shifts and less prone to external interventions.
- China's ability to articulate solid alternatives to traditional global norms and institutions is likely to be perceived as a new opportunity in many parts of the MENA region. Regional actors may welcome the articulation of parallel global orders with new institutions offering alternatives to the International Monetary Fund, the World Bank and others. Regional governments will also salute Beijing's reconceptualization of the principle of non-intervention.

Risks:

- Autocratic regimes in the region could embrace new technological mechanisms of social control. Mimicking some of China's hi-tech devices (i.e. social scoring), regional autocrats could set forth novel surveillance and subjugation systems that perpetuate their power in what could be framed as autocratic diffusion.
- BRI could consolidate asymmetrical relations between the MENA region and China. Beijing could replicate former superpowers' policies after consolidating its privileged economic relations with most of the MENA countries. Chinese economic interventionism might be followed by political and military interventionism.
- China's new role in the region is likely to fuel regional competition. The price of not taking advantage of Chinese economic benefits and trade would be too high. Being left out might negatively and severely influence the immediate future of political regimes. It is possible that a regional formula for fairly distributing the benefits associated with the BRI will not be agreed. The reaction, by many, would be to bandwagon towards Beijing, dumping as much as possible no matter the consequences this might have on neighbouring regional states. This could also lead to the increase of tensions and sporadic violent episodes, especially among those regional actors with already-existing frictions.



GAME-CHANGING AFRICA

By 2050 the African continent could be home to 2.5 billion people. This is twice as many as in 2019. Nigeria's population will have reached 400 million and may rank 14th among the world's largest economies. The number of African workers will have already surpassed that of China. African mobility will be a major issue, both in terms of rural exodus and international migration. Africa's weight in global affairs will be one of the game-changers of the following decades.

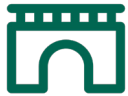
The MENA region will naturally look southwards, both in terms of opportunities and risks. Africa will be a powerful gravitation centre and Europe's relations with the MENA region will, to a large extent, be driven by the African factor. Not only will the MENA care more about African affairs, African leaders will also have a say in the evolution of the Middle East and the Maghreb.

Opportunities:

- 80 per cent of Africa's growth is likely to be concentrated in urban areas, which will thus require significant infrastructure investment. These and other development sectors could provide economic opportunities for the private sector in the MENA region and could translate into dynamic job creation, particularly in the Maghreb.
- The management of shared natural resources (the Nile Basin is the clearest example) but also the need to manage the effects of climate change and international migration could provide an opportunity for continent-wide cooperation.
- The acknowledgement that competition between Morocco and Algeria is detrimental to their mutual willingness to seize the opportunities that arise in Africa could push both countries to resolve their decades-long standoff.
- Europe and the MENA region stand to lose the most from the effects of missed opportunities in Africa, which could push them to revamp their cooperation and jointly design policies to support Africa's development plans. If successful, there could be positive economic spill-overs.
- A young and dynamic Africa could be a new power house of talent, innovation and creativity. Parts of the MENA region could develop a positive attitude towards the African continent, paving the way for re-embracing its African identity.

Risks:

- Increased pressure on natural resources would be a fertile ground for conflict unless effective cooperation mechanisms are put in place. This could lead to confrontational attitudes by Egypt and Sudan towards Ethiopia and, to a lesser extent, between Mauritania and Senegal.
- The combination of demographic growth, environmental degradation, deficient infrastructures and dysfunctional institutions could destabilize many African countries. This could lead to more violence, forced migration and recurrent humanitarian crises. Due to its geographic proximity, the MENA region is, after Africa itself, the region that could suffer most from the effects of these challenges.
- Forced migration from sub-Saharan Africa to the countries of the Maghreb could trigger racism and xenophobia, particularly among those sectors of the population that are also in dire economic and social need.
- Disagreements between European and MENA governments on how to handle this situation could prompt recurrent crises among them. All in all, this would only reinforce Europe's and MENA's securitized visions when looking south.
- If Europe and the MENA countries are absorbed dealing with their own crises, they could miss opportunities in Africa that would certainly be seized by others, namely China but perhaps also India.



EUROPE AND THE MENA REGION: A FAMILY ISSUE

Geographic proximity will remain a key factor in the relations between Europe and the MENA region. This is a constant. What is likely to change is the intensity of the societal bonds between these two spaces and what governments and the people make of it. By 2050, the proportion of Europeans with some sort of MENA background will be much higher than it is today. Such people will no longer be perceived as second- or third-generation migrants but as Euro-Arabs, Euro-Turks, Euro-Kurds and Euro-Amazighs. This diversity will not only be present at the level of the general population but also among the two generations of new political and economic elites.

The intensity of the connections between the EU and the region could further grow if some countries of the MENA region become members or reinforce their association with the EU. Turkey's possible accession by 2050 will be a major game-changer. Crucially, geographic and social proximity will not allow the EU to turn its back on the region. While countries such as China are likely to increase their influence in MENA and others such as the USA may gradually and selectively disengage, Europe is the actor whose interests, presence and projection in the region will remain stable.

Opportunities:

- Europe's influence in the MENA will largely depend on its capacity to appear as a unified, credible, reliable and generous actor. The adequate management of the migration dossier (which includes both irregular flows and integration policies) is likely to be a major test.
- Political deadlock in many MENA countries could propel the EU to further engage with societies and promote people-to-people cooperation programmes, thus going beyond a purely state-centric logic. The activism of Europeans of MENA background could be a major driver of a more dynamic and pluralistic relation.
- Acknowledging, enhancing and promoting its own diversity will increase Europe's legitimacy among societal and political actors in the region. This is likely to be a necessary step to foster the idea that Europe and the MENA region are part of the same community, have mutual interests and need to act together in order to manage the huge challenges of 2050.

Risks:

- Persistent racism and xenophobia in Europe against parts of its own populations with roots in the MENA could add new tensions in relations with some countries of the region. This could go beyond the governmental sphere as societal and religious actors and large segments of the population may perceive Europe as a hostile and antagonistic neighbour.
- Those in the EU advocating for further securitizing the borders ("Fortress Europe") could gain widespread support. This would happen if Africa is further destabilized or faces chronic development deficits and if there is a surge in transcontinental migration flows. With new surveillance technologies and the lowering of human rights standards, the Mediterranean Sea could become a sealed border, widening the gap between the EU and its neighbours and also fracturing European societies themselves.
- Europe could import tensions from the region via citizens of MENA descent if polarization and fragmentation in the region persist or multiply. This is particularly true in regard to internal struggles. Some European states may witness tensions among different ethnic groups, secular versus religious or on ideological grounds. Europe's political and social elites may not be well equipped to understand what is at stake and could unwillingly add fuel to these tensions. At worst this could provoke violent clashes.



Middle East and North Africa Regional Architecture: Mapping geopolitical shifts, regional order and domestic transformations (MENARA) is a research project that aims to shed light on domestic dynamics and bottom-up perspectives in the Middle East and North Africa amid increasingly volatile and uncertain times.

MENARA maps the driving variables and forces behind these dynamics and poses a single all-encompassing research question: Will the geopolitical future of the region be marked by either centrifugal or centripetal dynamics or a combination of both? In answering this question, the project is articulated around three levels of analysis (domestic, regional and global) and outlines future scenarios for 2025 and 2050. Its final objective is to provide EU Member States policy makers with valuable insights.

MENARA is carried out by a consortium of leading research institutions in the field of international relations, identity and religion politics, history, political sociology, demography, energy, economy, military and environmental studies.



This project has received funding from the European Union's Horizon 2020 Research and Innovation programme under grant agreement No 693244. This project has been funded with support from the European Commission. This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

