

THE ARAB SPRING -- MIDDLE EAST REALIGNMENTS
REARRANGING THE MIDDLE EASTERN CHESS BOARD

ARAB SPRING HAS PROVEN TO BE BOTH A FASCINATING AND VERY COMPLEX PHENOMENON – MORE THAN ½ DOZEN COUNTRIES – EACH SOMEWHAT DIFFERENT CULTURAL, POLIT.& ECON. ISSUES BUT ONE COMPELLING DESIRE – TO RID THEIR COUNTRIES OF THE CORRUPT AUTOCRATIC RULERS AND THEIR ELITE CRONIES WHO HAVE REPRESSED LITERALLY HUNDREDS OF MILLIONS OF PEOPLE THRU-OUT A WIDE SWATH OF NORTH AFRICA AND THE MIDDLE EAST.

WE’VE ALL BEEN SWAMPED BY THE DAILY ACCOUNTS OF DRAMATIC UPRISINGS IN TAHRIR SQUARE, TUNIS, TRIPOLI, YEMEN, BAHRAIN AND SYRIA AND THE MORE RESTRAINED DEMONSTRATIONS IN MOROCCO, ALGERIA, JORDAN AND SAUDI ARABIA. BUT WHAT WE’RE JUST BEGINNING TO GET OUR ARMS AROUND ARE THE FASCINATING CHANGES IN RELATIONSHIPS WITHIN THE MIDDLE EAST THAT HAVE RESULTED FROM THE ARAB SPRING.

MOST OF THESE REALIGNMENTS ARE EVOLVING AS WE SPEAK, AND MANY WILL PROBABLY CHANGE SHAPE AS NEW REGIMES ARE LAUNCHED IN MANY COUNTRIES. IN FACT, TODAY THE ENTIRE MID-EAST SEEMS TO BE ONE BIG SUSPENSEFUL WORK IN PROGRESS THAT

SEEMS TO GET MORE COMPLICATED EVERY DAY.

I'VE CHOSEN THREE KEY COUNTRIES TO FOCUS ON, PARTLY BECAUSE REVIEWING THEM ALL WOULD KEEP US HERE UNTIL 3:00 BUT IMPORTANTLY BECAUSE I THINK THESE THREE WILL HAVE THE MOST IMPACT ON THE FUTURE DYNAMICS OF THE REGION. THEY ARE LIBYA, EGYPT AND, SYRIA, AND NEEDLESS TO SAY EACH OF THESE IS IN A DIFFERENT PHASE OF UPHEAVAL AND TRANSITION.

I'LL ALSO TAKE A LOOK AT HOW THE UPRISINGS COULD AFFECT FUTURE RELATIONS WITH THE U.S. AND THE EXTENT TO WHICH AMERICA'S STANDING IN THE THREE COUNTRIES MAY HAVE BEEN COMPROMISED, IN SOME CASES QUITE SERIOUSLY.

LET'S START WITH LIBYA, WHICH JUST A MONTH OR SO AGO I THOUGHT I WOULDN'T BE TALKING ABOUT BECAUSE PROSPECTS FOR THE INSURGENTS WERE VERY MUCH IN DOUBT. THAT ALL CHANGED WITH THE SUR-

PRISINGLY RAPID FALL OF TRIPOLI, AND JUST 2 WEEKS AGO THE TRANSI-

TIONAL NAT'L COUNCIL WAS GIVEN A HERO'S WELCOME AT THE U.N.

LIBYA INTERESTING BECAUSE IT WAS THE FIRST REAL TEST OF OUR NEW

“LEADING FROM BEHIND” POLICY AS PUNDITS LIKE TO CALL IT.

WILL RECALL OUR INITIAL ENGAGEMENT WITH INSURGENTS WAS EXTREMELY HESITANT. NO WAY WANTED ANOTHER IRAQ/AFG/VIET. OR GET INVOLVED IN THAT TREACHEROUS PROCESS OF “REGIME CHANGE”.

ONLY WHEN REBELS IN RETREAT BENGHAZI AGREED “HUMANITARIAN” INTERVENTION BUT ONLY UNDER THE AUSPICES OF NATO. BRITS & FRENCH WERE MUCH MORE AGGRESSIVE IN PUSHING STRONG NATO RESPONSE, WHICH IN LAST ANALYSIS PROBABLY TIPPED THE BALANCE.

RECALL U.S. PULLED BACK AIR POWER AFTER 1ST WEEK, THO THERE’S NO QUESTION OUR REFUELING TANKERS, DRONES & SURVEILLANCE FLIGHTS WERE A BIG HELP IN THE END. SO TO THE INSURGENTS U.S. LOOKED LIKE HALF-HEARTED ALLY, BUT WE PROBABLY HAVEN’T SUFFERED SETBACK IN FUTURE TIES. LIKELY WE’LL PUMP BIG AID TO GET NEW GOVT & OIL ROLLING. BIGGEST WINNERS --- U.K. & FRANCE, AND RECENT VISIT BY SARKOZY AND CAMERON TO TRIPOLI WAS VERITABLE LOVEFEST. REMAINS TO BE SEEN, BUT UK & FRANCE COULD END UP WITH PREFERENTIAL OIL CONTRACTS. BIGGEST LOSER BY FAR -- GERMANY – DECIDED NOT GET INVOLVED, WHICH BOOMERANGED, PRODUCED BIG BLACK EYE FOR GERMANY’S IMAGE IN NATO & WEST. FORCED MERKEL TO DEMOTE DEFENSE SECY. GUIDO WESTERWELLE, A

HUGE EMBARRASSMENT FOR ALL CONCERNED.

AND LIBYA'S UPRISING

IS SURE TO BRING A REALIGNMENT OF MANY OTHER OF ITS FORMER TIES.

AMONG OTHERS RIGHT NEXT DOOR IN ALGERIA. THE INSURGENTS CAN'T

BE HAPPY WITH AN ALGERIAN REGIME THAT, RATHER THAN SHOW SUPP-

ORT, SUPPLIED ARMS, FOOD TO QUADDAFI UP UNTIL THE END, AND

TOOK IN QUADDAFI'S WIFE AND 2 SONS. ALGERIA, WHICH IS SPOOKED

BY FEARS OF RISING ISLAMIC FUNDAMENTALISM, ALSO VOTED AGAINST

THE ARAB LEAGUE'S RESOLUTION TO ENCOURAGE NATO INTERVENTION.

ALREADY LIBYANS HAVE RENAMED

"ALGERIA REVOLUTIONARY SQUARE" IN TRIPOLI "ABU DHABI REVOL.

SQUARE". ON THE OTHER HAND, TO THE SURPRISE OF MANY, BOTH

QATAR AND U.A.E

WERE BIG REBEL SUPPORTERS, W/ QATAR SUPPLYING F-16 AIRCRAFT.

THE NEW LIBYAN REGIME WILL ALSO HAVE A BONE TO PICK WITH

NIGER, ITS NEIGHBOR TO SOUTH, WHICH GAVE ASYLUM TO QUADDAFI

FAMILY. BUT THAT GESTURE WASN'T REALLY SURPRISING,

GIVEN THAT OVER THE YEARS QUADDAFI HAD SHOWERED

MILLIONS IN AID TO MANY SAHARAN DESPOTS IN PLACES LIKE MALI,

CHAD AND NIGER TO WIN FRIENDS AND SHORE UP HIS BORDERS. AND

AS A SIDE NOTE, LOOK HOW
THE LAW OF UNFORESEEN CONSEQUENCES ALWAYS SEEMS
TO REAR ITS HEAD, MAY HAVE READ PIECE NYTIMES ON 200K NIGER
WORKERS FLEEING LIBYA, CUTTING OFF MAJOR SOURCE OF INCOME
AND STABILITY IN A DIRT- POOR COUNTRY. NOT TO MENTION THE
MAJOR FLOW OF DESTITUTE AFRICAN WORKERS IN LIBYA TO ITALY,EU
ALSO IN THE DOGHOUSE AS FAR AS LIBYANS ARE CONCERNED
IS SO. AFRICA, WHICH MADE FUTILE EFFORT TO MEDIATE A
DEAL OFFERING “REFORMS” TO REBELS. IN FACT TIES BETW. SO. AF.
& LIBYA STRONG FOR DECADES – NONE OTHER THAN NELSON MANDELA
AWARDED QUADDAFI THE “ORDER OF GOOD HOPE” AWARD IN 1997. FOR
HIS PART QUADDAFI HELPED FINANCE SO. AF. PRES. ZUMA’S ELECTION
CAMPAIGNS.
AND THEN THERE’S CHINA, WHICH HAS BUILT UP A FLORISHING TRADE
WITH LIBYA, IS AT WORK ON \$ BILLIONS IN INFRASTRUCTURE PROJECTS
AND HAS 35,000 CHINESE NATIONALS LIVING/WORKING THERE. THE
NATL TRANSIT. COUNCIL CLAIMS CHINA OFFERED TO SELL QUADDAFI
ROUGHLY \$200 MM IN WEAPONS AS LATE AS AUGUST, BEFORE TRIPOLI
FELL. THE CHINESE ARE GOING TO HAVE A LOT OF EXPLAINING TO DO.
LIBYAN REBELLION BRINGS UP SIDE ISSUE -- HOW DID NATO COME OUT

LOOKING IN ALL THIS? JURY IS STILL OUT, BUT MOST FEEL AFTER SLOPPY

START AND SOME INTERNAL WRANGLING NATO SHOULD GET A "B" FOR REASONABLY EFFECTIVE STRATEGIC EFFORT THAT DEFINITELY HELPED TURN TIDE. YOU'LL RECALL SARWAR KASHMERI WAS HERE IN SPRING DISCUSSING HIS BOOK "NATO 2.0, REBOOT OR DELETE". BASED ON ITS PERFORMANCE IN LIBYA, SOME FEEL WE SHOULDN'T HIT THE DELETE BUTTON YET, BUT A LITTLE REBOOTING MAY BE IN ORDER.

EGYPT -- UPRISING CREATED TOUGH DIPLOMATIC SITUATION FOR U.S. AS KNOW, WE HELPED PROP UP MUBARAK REGIME NOT 'CUZ LOVED HIM BUT 'CUZ HE WAS MAJOR STABILIZING FACTOR IN MID-EAST. RECALL CAMP DAVID ACCORD IN 1978 BROUGHT ERA OF RELATIVE PEACE, WHICH CONTINUED EVEN AFTER SADAT ASSASSINATED IN 1980. WHILE NEVER POPULAR ON EGYPTIAN STREET, THE PEACE TREATY BETWEEN ISRAEL & EGYPT, SIGNED IN 1979, PRODUCED A RELATIVELY STABLE STATUS QUO FOR THIRTY YEARS.. EQUALLY AS IMPORTANT, MUBARAK SOLD HIMSELF TO U.S. AS A BASTION OF RESISTANCE TO RADICAL ISLAM IN BOTH EGYPT AND THE ENTIRE MID-EAST, HE EFFECTIVELY KEPT THE MUSLIM BROTHERHOOD WELL SUPPRESSED FOR DECADES. FOR THESE REASONS THE U.S. RESPONSE TO TAHRIR SQUARE WAS AT FIRST SLOW AND RESTRAINED.

FIRST WE CALLED FOR “REFORMS”, “TALKS”, “NEGOT” ., ETC. IN
HOPES MUBARAK MIGHT SOFTEN ENOUGH TO COMPROMISE. ONLY
AFTER
REGIME STARTED CRUMBLE DID WE SAY MUBARAK “MUST GO”. AM
SURE
CERTAIN OPERATIVES IN STATE DEPT. HAD HYPOCRITICAL PANGS. THE
RESULT = CONSIDERABLE SUSPICION ON STREET RE U.S. INTENTIONS
AND A REAL CHALLENGE FOR U.S. TO MAKE GOOD WITH FUTURE
REGIME.
PROBLEM IS DON’T KNOW WHO WILL BE RUNNING SHOW. ALL READ
SAGA
OF INTERIM MILITARY CONTROL AND DISPUTE RE WHEN/HOW
ELECTIONS.
KEY ISSUE FOR WEST – WILL ISLAMIC BROTHERHOOD, WHICH IS CLEARLY
BEST ORGANIZED SEMBLANCE OF “PARTY”, PREVAIL AND POSSIBLY
ESTAB. RADICAL ISLAMIST GOV’T. MUCH WRITTEN RE WHETHER THE
BROTH. IS REALLY THAT RADICAL – SOME FEELING NOT HARD LINE. IN
THIS CASE, TOO, FLOW OF U.S. AID MAY TURN THINGS AROUND. BUT
THINGS WON’T BE MADE ANY EASIER FOR U.S IF FOLLOWS THROUGH
WITH THREAT TO VETO PALESTINE’S BID STATEHOOD IN SEC. COUNCIL.
BY FAR MOST DRAMATIC SHIFT IN EGYPT’S REL’SHIPS HAS BEEN WITH
ISRAEL OVER JUST LAST MONTH EGYPTIAN-ISRAELI TIES HAVE TAKEN
HUGE TURN FOR WORSE. AS KNOW, SHARP DETERIORATION FOLLOWING

SHOOTOUT NEAR EILAT ON GULF OF AQABA, WHERE TERRORISTS KILLED ISRAELI TROOPS AND ISRAELI REACTION SHOT EGYPT. BORDER GUARDS. ISRAEL'S APOLOGY DIDN'T PREVENT A MUCH NASTIER INCIDENT, WHEN A MOB BROKE INTO ISRAELI EMBASSY IN CAIRO, SACKED PART OF BLDG. AND FORCED AMBASS. FLEE ON ISRAELI.RESCUE PLANE. TWO OTHER DESTABILIZING FACTORS INCLUDE THE BLOWING UP OF EGYPTIAN GAS PIPELINES IN THE SINAI, WHICH SUPPLY CLOSE TO 1/3 OF ISRAEL'S NATURAL GAS, AND EGYPT'S MOVE TO PARTIALLY REOPEN THE BORDER CROSSING BETWEEN THE SINAI AND GAZA.

IN COMBINATION, THESE EVENTS HAVE PRETTY MUCH BLOWN THE LID OFF A FESTERING RESENTMENT ISRAEL ON EGYPTIAN.STREET.

NOW THE FEELINGS REPRESSED BY MUBAR. FOR 30 YRS. ARE VERY OBVIOUS AND VERY DANGEROUS.

ADDING EVEN MORE FUEL TO FIRE HAS BEEN NEW PLAYER ON SCENE, TURKEY. UNTIL RECENTLY THE ERDOGAN GOV'T HAD BEEN BUILDING POSITIVE RELATIONS WITH ISRAEL, BRINGING BIG HIKE IN TRADE.

THE NOW NOTORIOUS GAZA BLOCKADE EPISODE IN '09 PUT AN END TO ALL THAT, AND AS KNOW, ISRAEL HAS REFUSED TO APOLOGIZE TO TURK FOR DEATHS OF 9 TURKS ON THE TURKISH BOAT TRYING TO RUN THE BLOCKADE. SO TURKEY HAS RECALLED ITS AMBASS. TO JERUSALEM

AND HAS STIRRED UP EVEN MORE ANTI-ISRAELI SENTIMENT IN EGYPT.
IN VERY RECENT VISIT TO CAIRO, ERDOGAN WAS HAILED AS HERO AND
FED THE CROWD WITH STRONGLY WORDED CRITICISM OF ISRAEL.

SYRIA -- BEEN WATCHING FOR MONTHS AS SYRIAN REGIME OF
BASHAR AL-ASSAD SHOWN NO SIGNS OF RELENTING IN HIS
BRUTAL SUPPRESSION POPULAR UPRISING THAT'S SPREAD THRU
PARTS OF COUNTRY. THAT'S THE PROB. -- THE MASSIVE DEMONSTR-
TIONS WE'VE SEEN IN CITIES LIKE HAMA AND HOMS IN NORTH AND
AL-DERAA IN SOUTH HAVE FAILED TO SPREAD IN A MAJOR WAY
TO DAMASCUS OR ALEPPO, SYRIA'S BIGGEST CITIES.

FOR A WHOLE VARIETY OF REASONS
ASSAD HAS BEEN ABLE TO LARGELY RETAIN PUBLIC SUPPORT AMONG
MIDDLE & UPPER CLASS CITY DWELLERS, WHO DON'T WORSHIP
HIM BUT FEAR THE UNCERTAINTY / CHAOS THAT WOULD FOLLOW
HIS OVERTHROW. SYRIANS LOOK BOTH EAST AND WEST, TO IRAQ AND
LEBANON AND DEARLY WANT TO AVOID THE BITTER SECTARIAN STRIFE
THEY,VE SEEN IN BOTH COUNTRIES. DON'T HAVE TIME TODAY
TO FOCUS ON THE COMPLEX
RELIGIOUS &TRIBAL DIVISIONS IN SYRIAN SOCIETY, BUT THEY HAVE
COMBINED TO COMPLICATE PROSPECTS FOR UPRISING. BRIEFLY,
SYRIA HAS SIZABLE RELIG. MINORITIES BEYOND THE PREDOMINANT

SUNNI SECT. THESE INCLUDE THE DRUSE, CHRISTIANS AND THE ALAWITES, WHO FOLLOW AN OFFSHOOT OF SHIISM. AND, THERE ARE REGIONAL DIVISIONS ALSO, WITH THE KURDS IN THE NORTHEAST BEING QUIESCENT SO FAR BUT VERY FOCUSED ON SETTING UP AN AUTONOMOUS REGIONAL STATE. THE MINORITY ALAWITES HAVE RUN SHOW SINCE 1970, WHEN HAFEZ AL-ASSAD, BASHAR'S FATHER, LAUNCHED A COUP THAT IN EFFECT KEPT ALAWITES IN CONTROL OF THE BUREAUCRACY OVER 40 YRS. HAFEZ, MAY RECALL, FAMOUSLY PUT DOWN UPRISING IN HAMA IN 70'S BY KILLING THOUSANDS WITH POISON GAS. MANY HAD HOPED BASHAR, WHO WAS PARTLY SCHOOLED IN LONDON & IS AN OPHTHOMALOGIST, WOULD LIBERALISE REGIME, BUT OPPOSITE HAPPENED. TO MAKE MATTERS WORSE, BASHAR DOESN'T HAVE THE PERSONAL APPEAL & DIPLOMATIC SKILLS OF HIS FATHER TO WIN OVER THE SYRIANS ON THE STREET.

THE U.S. RESPONSE TO THE INITIAL OUTBREAK OF UNREST IN SYRIA WAS, AS WITH EQYPT AND LIBYA, MUTED AT BEST, WITH THE USUAL CALLS FOR DIALOGUE, COMPROMISE, CONCESSIONS, ETC. IT BECAME CLEAR OUR STATE DEPT. HAD A DIM VIEW OF WHAT A COLLAPSE IN SYRIA WOULD BRING – CIVIL WAR, INCURSIONS BY IRAN, YOU NAME IT. AND STILL, MONTHS LATER, THE U.S. IS FAR FROM BACKING ANY

KIND OF JOINT OR INDEPENDENT MILITARY ACTION TO BACK THE INSURGENTS DESPITE INCREASING EVIDENCE ASSAD HASN'T THE VAGUEST INTENTION OF BACKING DOWN. AS ALL KNOW, U.S AND WESTERN POWERS HAVE DEMANDED BASHAR STEP DOWN, WHICH IS OF COURSE A MEANINGLESS EXERCISE WHEN A TYRANT WANTS STAY IN POWER. IN LAST MONTH, WEST HAS GOTTEN MORE PRO-ACTIVE WITH AN EMBARGO ON TRADE AND OIL EXPORTS, THO RESULTS HERE APPEAR QUESTIONABLE. AMONG OTHER THINGS, SYRIA IS VERY SMALL OIL EXPORTER. OF GREATER IMPORTANCE, IN LAST FEW MONTHS ASSAD HAS BECOME A VIRTUAL PARIAH THRUOUT ALMOST ALL THE MID-EAST. FROM EGYPT TO SAUDI & EVEN IRAQ, GOV'TS ARE CALLING FOR HIM TO STOP THE SHOOTING AND BACK DOWN.

TURKEY CHIMED IN A FEW WEEKS AGO, WHICH MAY COMPROMISE WHAT HAD BECOME A MAJOR TRADING RELAT. TURKEY KNOWS IF SYRIA COLLAPSES, IT COULD HAVE MAJOR REFUGEE. PROBLEM.

AND OF ALL COUNTRIES, IRAN ADDED 2 CTS WORTH BY CALLING FOR REFORMS RATHER THAN BULLETS. OF COURSE IRAN IS CONFLICTED, AS ITS BEEN A BIG ASSAD SUPPORTER TO DATE, BUT IT DOESN'T WANT APPEAR TOO HYPOCRITICAL AS IT, TOO IS A "REVOLUTIONARY" REGIME AND FEARS IF ASSAD GOES UNDER IRAN COULD LOSE ITS ROLE AS POWER

BROKER IN MID-EAST. EVEN ITS NEIGHBOR LEBANON, WHICH IS A VIRTUAL SATELLITE OF SYRIA, CRITICIZED ASSAD FOR DESTABILIZING THE REGION.

BUT ASSAD REGIME APPARENTLY STILL HAS A FEW HALF-HEARTED FRIENDS -- RUSSIA, CHINA AND BRAZIL HAVE SO FAR DECLINED TO BACK TOUGH SANCTIONS ON SYRIA, ONE REASON WHY ASSAD CAN BE CONFIDENT HE WON'T BE SUBJECT TO U.N. SANCTIONS AT LEAST FOR NOW. WE CAN BE SURE THAT RUSSIA, CHINA AND BRAZIL WILL BE OPPORTUNISTIC PLAYERS IN THE GAME OF OSTRACIZING SYRIA, AND MAY CHANGE THEIR TUNE AT ANY TIME.

AS TO THE U.S., OUR TIES WITH ASSAD REGIME COULDN'T GET MUCH WORSE. THERE WAS HOPE 7-8 YRS. AGO THAT WE HAD FORGED AN OPENING WITH ASSAD, WHO ACTUALLY ASSISTED THE U.S. IN ITS INVASION OF IRAQ, BUT A FEW YEARS AGO ASSAD SWUNG BACK INTO THE ARMS OF IRAN AND HEZBOLLAH. ISRAEL'S MOVE TO TAKE OUT THE CLANDESTINE SYRIAN NUCLEAR FACILITY IN THE EASTERN DESERT 2007 FURTHER HELPED PUT A NEAR FREEZE ON U.S. - SYRIAN RELATIONS. JUST LAST WEEK YOU PROBABLY READ WHERE THE SYRIAN AMBASS. TO THE U.N. LAMBASTED THE U.S. AND WESTERN POWERS FOR MEDDLING IN INTERNAL SYRIAN AFFAIRS AND EFFECTIVELY TOLD US TO GET LOST. AND JUST DAYS AGO AMBASSADOR FORD CAME CLOSE TO BEING

ASSAULTED BY GOVT. SYMPATHIZERS.

SO TO CONCLUDE,

BOTTOM LINE, THE U.S. HAS A CHALLENGING ROAD AHEAD TO WIN BACK ITS COMPROMISED INFLUENCE IN EGYPT AND WILL HAVE TO USE ITS ROLE AS ENABLER TO WIN OVER SYMPATHY IN LIBYA. AS FAR AS SYRIA GOES, IF ASSAD HOLDS ON WE'LL BE RIGHT BACK WHERE WE STARTED.

ANYWAY YOU LOOK AT IT, THE ADVENT OF DEMOCRACY IN MUCH OF MIDDLE EAST , OR SOMETHING CLOSE TO IT, WILL MAKE THE REGION MORE UNPREDICTABLE THAN EVER BEFORE. AND IT SEEMS INEVITABLE THAT ALONG WITH MORE DEMOCRACY WILL COME A SIGNIFICANT RISE IN ISLAMIC INFLUENCE IN POLITICS, GIVEN THE SOCIAL AND RELIGIOUS REALITIES OF THE REGION. FOR THE U.S THIS WILL BE A TOTALLY NEW BALL GAME, AND WE. HAVE NO CHOICE BUT TO RE-ENGINEER ITS FOREIGN POLICY WITH THE REGION ON A CASE-BY-CASE BASIS. AND LOGIC SUGGESTS IT WOULD BEHOOVE THE U.S. TO START A DIALOGUE WITH ISLAMIST GROUPS IN EGYPT, LIBYA AND OTHER COUNTRIES TO REACH AN UNDERSTANDING OF WHAT EACH SIDE'S INTERESTS ARE BEFORE IT BECOMES TOO LATE TO NEGOTIATE. HOPEFULLY FOR THE U.S THE ARAB SPRING WILL NOT COOL OFF INTO AN ARAB WINTER.

QUESTIONS - MIDDLE EAST REALIGNMENT

1.

