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Theme section

The Sectarian Surge in the Middle East and the Dynamics of the Regional States-System

Keywords

sectarianism; Middle East; regional system; Arab Uprisings; realism; power struggle

Abstract This article explores the role of sectarianism in the international relations of the Middle East. How has sectarianism altered the conduct of regional politics, and how has the regional states-system impacted on sectarianism? A framework combining constructivism and realism is designed and deployed to analyse the enduring dual features (material power balance, identity contests) of the regional states-system and then to dissect the interaction of sectarianism and the current regional power struggle.

This article explores the interaction between the surge of sectarianism and regional politics in the Middle East. It poses the question: how and how much does sectarianism matter for contemporary regional international relations? It seeks less to explain the sectarianisation of the region than to ask how this – as manifest in the agency of actors constructing and instrumentalising sectarian worldviews – has affected the practices of the regional system and how the systemic structure – the realist rules of anarchic systems – alters (exacerbates or dilutes) sectarianism's impact.

The article begins by arguing that the topic requires a synthesizing approach that links the role of ideational factors (such as identity, specifically sectarianism) with material structure

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(specifically that of the regional system); and that this can be achieved by bringing together realist and constructivist approaches to international relations, each of which respectively focuses on one of these two factors. Following the outline of a combined constructivist–realist framework, the article examines the enduring two-sided features of Middle East regional politics – an inter-states system embedded in supra-state identities. It then analyses the interrelations between the Middle East regional power struggle and the sectarian surge following the Arab Uprisings starting in 2011. The conclusion summarises the findings regarding the interaction of material and ideational factors (and realist and constructivist analysis).

To prefigure the argument, the article shows how regional rivalries built into the states-system, and inflamed by the Arab Uprisings, led regimes to instrumentalise sectarianism in their power struggles, and specifically in their competitive interventions in the civil wars that followed the Uprisings. This, in turn, rendered formerly recessive sectarian identities salient down to the grassroots level and drove a move towards the sectarian bipolarisation of the regional system. However, the insecurity thereby unleashed led all states to prioritise state security interests, overshadowing sectarian identities in the Sunni camp. The dynamics of an anarchic regional system trumped the power of sectarian identity.

Framework of analysis: towards a constructivist–realist synthesis

Sectarianism can usefully be understood as a version of identity, hence it can be framed by the debate as to whether and how identity counts in international relations. In the international relations of the Middle East, the debate is mirrored in two classic texts: Steven Walt's realist analysis, *The Origin of Alliances* (1987), and Michael Barnett's constructivist work, *Dialogues in Arab Politics* (1998). While the dominant major theories, realism and constructivism, tend to emphasise either the material or the ideational, each to the neglect of the other, analysts have increasingly come to accept that both material and ideational forces such as identity matter (Sorensen 2008). Thus Barkin (2003), deploring the false material–ideational dichotomy, argued for mar-

rying realism and constructivism. Each offers indispensable insights into the two factors that this article aims to address in analysing the current Middle East crisis: namely, the regional power struggle (realism) and identities, including sectarianism (constructivism).

For realism, it is material structure that matters most. The insecurity produced by the anarchy of states-systems drives power struggles in which states defend their national interests by building up military capabilities and forming alliances; the main constraint on their behaviour is the material balance of power. Constructivism, by contrast, sees identity as shaping interests and norms that determine what behaviour states see as appropriate. States' identities are constructed such that contests, both domestic and regional, over appropriate identities and derivative norms are regular occurrences. Differing norms in turn shape different kinds of anarchy, whose impact on Middle East states shape quite different propensities to conflict or cooperation (Wendt 1992).

Grasping the complexity of Middle East international relations requires combining realist and constructivist narratives. The most obvious reason for this is that the international relations of the Middle East embody, as realists would predict, a struggle for power. The Middle East is the world region with the highest level of militarisation. Only here does state-to-state war remain a regular occurrence; civil wars, proxy wars and rebellion are also endemic, creating high insecurity. Additionally, however, this is the region where contests between rival identities play the largest role in the power struggle, such that (as constructivists argue) identities are key drivers, constraints, and tools in that struggle. The power struggle is shaped by the interaction between agents that promote identities and systemic structure, mostly material, that constrains (or, alternatively, empowers) these; yet, further requiring a synthesis between realist and constructivist approaches, both agency and structure have interlinked material and ideational components. The inter-relation of the material and ideational can be seen in three aspects of regional international relations:

Identity, interest and insecurity. Agency in the regional power struggle refers chiefly to state actors (but also to certain trans-state actors, especially insofar as they acquire attributes of statehood, e.g. Hizbollah) which are locked in power competitions

in which identity plays a pivotal role. State leaders have an interest in constructing identities that will legitimise their rule and enhance their competitive position in regional politics. In interstate power struggles, states' identities shape how they see their interests (and thus threats to those interests). If I identify myself as an Arab leader, I am likely to see it as in my interest to defend Arab causes against the West and Israel; if I identify as a Sunni threatened by Shia Iran, I may ally with the West/Israel in order to balance against Iran. Identity and interests mutually feedback on each other, but, as a rule, in a high-insecurity anarchic system security (survival) imperatives usually take priority. More than that, in an anarchic regional system, state identity is typically shaped by insecurity, constructed against an "Other" – a different ethnic or religious identity or (usually) a neighbouring state (given how proximity elevates threat perception and how borders are often in dispute).

The two sides of power. To be effective, agents must deploy both material and ideational power. States need a well-rounded combination of material power assets, but to prevail in regional power struggles, they also need soft power, and they must be internally consolidated: and, crucially, enjoy legitimacy, the bedrock of which is a cohesive (national) identity congruent with territory that enables states to count on the loyalties of their populations. Weak and, especially, failing states that lack such assets present power vacuums that make them the targets of stronger states, particularly in proxy wars in which identities and material means (arms, money) are combined.

Agent and structure. Agents' actions are constrained by "anarchic" systemic structures. As traditionally conceptualised by realism, structure is predominantly constituted by the distribution of material power (state capabilities). But it is also made up of regional norms, which regimes can ignore only at risk to their legitimacy, and which they can promote or use against each other. And, as Wendt (1992) points out, structure is not uniform or fixed: rather, states' behaviour affects the kind of anarchy produced. This can vary considerably depending on the norms promoted in interstate power struggles – from Lockean versions, in which rivals acknowledge each other's vital interests and cooperation is therefore possible, to Hobbesian ones, in which an unrestrained struggle for power is the norm. For realism, it is hegemonic states possessing preponderant hard and

soft power that are best able to impose “regimes” – rules of the game – that shape normative variations in anarchy. Yet in a multipolar system, other states will tend to combine in order to prevent such hegemony. If a dominant normative order is nevertheless established, its stability depends on a congruence of material structure and legitimating norms; but to the extent that these are incongruent or that hegemonic power declines, revisionist movements or states will challenge the status quo.

The Middle East regional system: a states-system embedded in supra-state communities

This material–ideational duality is nowhere more manifest than in the Middle East regional system. The Middle East inter-state system is embedded in trans-/supra-state identity communities; thus both of the largely “material” features of the inter-state system – state capabilities and the balance of power – interact with the dynamics of identity.

The Middle East regional inter-state system is inherently semi-Westphalian: that is, it is a multipolar system defined by largely material balances of power among semi-sovereign states that engage in balancing against security threats, these being perceived predominantly as emanating from neighbours, particularly if territory is in dispute between them. Balancing mainly takes the form of self-help through building up military deterrent capabilities, but can also involve joining alliances against shared threats. Balancing tends to foster a security dilemma: as all states seek to increase their capabilities, all become less secure. The main basis of order in the system is (as realism predicts) either the balance of power congruent with the norm of sovereignty, or a “regime” imposed by a hegemonic power. In the Middle East, stronger states have regularly sought hegemony, while other states have tended to combine in order to balance and blunt such bids. The weakest states – mini-states lacking military capacity – have sought security either by appeasing (or “bandwagoning” with) stronger regional states or by “omni-balancing” – allying with a protective patron at the global level.

What makes the Middle East states-system distinctive is that it is embedded in an exceptionally potent trans-/supra-state public space or community defined by the ingredients of com-

mon identity, namely the Arabic language and the Islamic religion. Within this public space there are ongoing struggles over norms, foreign policy roles and regime legitimacy. These are conducted by means of discourse wars. Trans-state identities are widely instrumentalised in inter-state power struggles, since regional states are exceptionally permeable to trans-state media, networks and movements (Lynch 1999; Barnett 1993; Salloukh, et. al. 2004).

This situation originates in the formation of the regional system: specifically, in the historical imposition by Western imperialism of a Westphalian-like system of territorial states in the Middle East region in a manner that paid little attention to identity and thus fragmented what had formerly been a single large political space constructed over centuries by successive Muslim empires with a shared culture, indeed with all the ingredients of nationhood. In this process, often-arbitrary borders cut across existing sub- and supra-state identities, creating territorial states, but not nation-states with identities sharply differentiating them from their neighbours (Kienle 1990, 15–35). Thus the loyalties of populations were divided between supra-state and sub-state identities, with the result that individual states have never been able to count on their unreserved loyalty, as sub-/trans- or supra-state identities are often promoted against the state elite by opposition groups. Most states were therefore “born” already suffering from some degree of legitimacy deficit. Consequently most states feel some threat from their own populations, such that threats to regime security from within are often governments’ most immediate priority (Gause 2003/2004). Further, these threats often take the form of subversion by rival states wielding trans-state identity discourses aimed at internal legitimacy (David 1991; Gause 2003/2004), in which case the main defence is also soft power – the construction of opposing identities (enmities) against the threat.

It is important to note, however, that the power of sub-/trans-state identities is inversely related to the strength of states. Over time, variation in state strength in the region has described a bell-shaped curve. In the post-independence years, states were weak and highly permeable to trans-state movements and discourses, notably in the 1956–67 pan-Arab period. As state formation advanced in the 1970s and 1980s, in good part owing to the new availability of rent (from the oil boom) for co-opting

populations and financing the formation of large armies able to harden borders, states came to be less threatened by trans-state subversion, and more by their neighbours' armies. In the period 1975–90 the system appeared to be moving towards a classical realist system of material (military) power-balancing. However, this peaked as, after the late 1980s, economic crisis weakened states' co-optative and repressive capacities and in parallel they became more permeable to subversion via trans-state identities. State decline reached a nadir in the slew of state failures resulting from the Arab Uprisings. These opened states up both to the overt manipulation of identities such as sectarianism and the conduct on their soil of proxy wars by rival external powers.

As a result of the regional system's distinctive formation – that is, the incongruence between material (states and their borders) and normative (identity) factors – instability is built into its very fabric, manifest in the unusual incidence in the region of revisionist states. At the state level, where state territory and identity are frequently incongruent, irredentist and revisionist impulses drive states in powerful “pan” movements to reunite individual states in a larger community, or alternatively, where these cut across sub-/trans-state identities, to rework borders. Incongruence has also empowered more powerful states to use trans-state identities to interfere in the politics of other regional states. Indeed, the Middle East is arguably distinctive in that the region is perceived as a single political space, such that ambitious states regularly bid for regional hegemony in the name of a supra-state identity – historically either Arabism or Islam – and, often to this end, back sub- or trans-state opposition movements in rival regional states (Harkness and Van den Berg 1997).

Being seen to act on behalf of dominant regional norms is normally a requisite for the hegemonic bids of ambitious states. Thus would-be Middle East hegemonics regularly challenge the multipolar distribution of power in the name of a supra-state identity. Nasser's Egypt made the most successful bid for hegemony, in the name of pan-Arabism, establishing a normative pan-Arab “regime” that lasted over a decade. Iran made a bid for hegemony framed in pan-Islamic terms after its revolution, and Saddam Hussein tried to assume the dropped banner of pan-Arab leadership from Egypt after Nasser. Most recently, Turkey and Saudi Arabia have made bids for region-wide leadership in the name of a largely Sunni-framed Islamic identity.

However, such ambitions regularly provoke counter-balancing by coalitions of status quo powers in the name of sovereignty or a rival supra-state identity. This dynamic of a multipolar system has operated to ensure that no aspirant hegemon has been able to sustain hegemony beyond limited periods (Hinnebusch 2013). Ultimately the multipolar material balance is so intractable that such efforts are frustrated and the norm of sovereignty is reasserted. Bids for hegemony are dependent on how far a state can deploy a combination of material resources (such as a large population, army or oil) together with a historical identity congruent with the state's borders, such that it is relatively impervious to trans-state penetration and can hence instrumentalise a supra-state identity against others at minimal risk to itself (Egypt, Iran). Conversely, the most likely victims of the region's frequent identity wars are "artificially created" identity-fragmented states, readily subverted from without and lacking material resources. Historically these have included Lebanon, Yemen, Jordan, and now Syria.

Finally, the "anarchy" of the Middle East states-system varies from a relatively benign "Lockean" form that does not exclude inter-state cooperation to more Hobbesian, conflict-ridden forms. These variations depend, to a great extent, on identity and norms: on whether shared norms constrain aggression, and whether states construct their identity in opposition to the other (hence shaping notions of enmity), or else share an identity (Arab or Muslim) as a basis for amity. In the Middle East (Buzan and Waever 2003), enmity has historically been associated with the ethnic fault lines between the Arab and non-Arab states (Iran, Israel) – but largely to the extent that these coincide with struggles over tangibles, particularly territory involving disputed borders or irredentism. For some decades the threat from the non-Arab peripheries was compatible with the construction of a relatively Lockean order in the Arab core of the system, especially when the Egyptian hegemon was enforcing pan-Arab norms which confined the most egregious Hobbesian practices (notably war) to the fault lines between Arab and non-Arab actors in the system. The Iraqi invasion of Kuwait was, however, indicative of a penetration of Hobbesian practices to the Arab core of the regional system. Since then, with the rise of sectarianism that has cut across ethnic fault lines and has divided the region into Sunni and Shia, Hobbesian practices, notably

proxy wars, have thoroughly permeated much of the regional system. Multi-sectarian states such as those in the Levant and Yemen are now the epicentres of such enmity. The regional system provides the context within which the contemporary sectarian surge was unleashed – and, to an extent, has now receded.

The variability of identity: the road to sectarianisation

Identity has thus always mattered for Middle East regional politics, but not in a straightforward way, since there are multiple, often competing, identities in play (Patel 2010, 136): at the sub-/trans-state level (where communal minorities and tribes are often scattered across borders), the state level (when the state is seen by its citizens as representing the political community, legitimised by the norm of sovereignty), and the supra-state level (embracing many states via pan-Arabism, pan-Islam and, within the latter, sectarian trans-state Sunni and Shia identities). None of these identities can be said to be hegemonic, and identifications with the individual Middle East states, with Arabism and with Islam have, over time, each normally claimed the primary loyalty of about one-third of the Arab populations. There was, however, some variation as to which was dominant in a particular period.¹ Until 2011, the identities instrumentalised in inter-state rivalry were relatively inclusive pan-Arab or pan-Islamic identities. Pan-Arabism, nearly hegemonic from the 1940s to the 1970s, thereafter declined, and especially with the Iranian revolution, Islam became dominant. Political Islam, while in some ways as inclusive as Arabism in promoting religious identity as the basis of regional normative order (unlike pan-Arabism, it also includes non-Arab Turkey and Iran), nevertheless opened the door to conflict over the “true” Islam, in other words, to the potential for sectarianisation (Rubin 2014).

However, Sunni–Shia sectarianism had not played a major regional role since the instrumentalisation of these differences in the seventeenth and eighteenth centuries under Ottoman–Safavid rivalry, and for long periods the main line of movement was towards ecumenical coexistence. The main promoter of Sunni sectarianism, Saudi-fostered Wahhabism, was for long periods a marginal movement, contested by secular Arabism and

1. See the surveys of identity by Shibley Telhami's yearly Arab public Opinion polls undertaken with Zogby international: [brookings.edu/research/2010-arab-public-opinion-poll-results-of-arab-opinion-survey-conducted-june-29-july-20-2010/](https://www.brookings.edu/research/2010-arab-public-opinion-poll-results-of-arab-opinion-survey-conducted-june-29-july-20-2010/)

by moderate or modernist versions of Islam. Sectarianism had little resonance in the more identity-homogeneous societies of the region, and while it has always been a feature of the multi-sectarian Levant, sectarian identities there were often unpoliticised, “private” identity markers, or were overshadowed by more inclusive identities that were therefore compatible with sectarian coexistence. In a few multi-sectarian states, in certain periods at least, sectarian identities had been politicised and instrumentalised by political entrepreneurs in order to mobilise support and/or empower groups competing for power or resources. Such practices, however, not being founded in religious doctrine, lent themselves to compromise by adjusting shares among the contenders, and accordingly were often carried on without violent conflict. Most overt in Lebanon, sectarianism in Syria and Iraq also served to an extent as *assabiyeh* – a mechanism of solidarity binding groups that were struggling for power or over ideology – but this remained covert, because it lacked legitimacy in the public sphere. During the Iran–Iraq war, the overt identities in contestation were Iraq’s secular Arab nationalism (with Iran depicted as the Persian enemy) versus Iran’s revolutionary pan-Islam. Here the Sunni versus Shia cleavage was latent, but not overtly instrumentalised by either side, since this would have weakened both: it could have fragmented Iraq internally, as well as degrading Iran’s claim to lead all Muslims.

What is distinctive about the current period is that the Sunni–Shia dichotomy is increasingly taking the overt and explicit form of what might be called “militant” or high-intensity sectarianism. Militant sectarianism seeks to impose, if need be by force, a single true interpretation of Islam in the public sphere. It demonises those who do not comply as infidels, embraces martyrdom for the cause, and promotes public religious visions that cannot readily be compromised (Brubaker 2015). Militant sectarianism tends to be trans-state, operating across state boundaries; it flourishes in contexts of intense power struggles and insecurity, and particularly in societies that are sharply polarised by sectarian cleavages with little by way of cross-cutting cleavages to dilute them. It tends to provoke a defensive militancy in communities that are threatened as apostates or heretics (Malmvig 2012). At the inter-state level, it may be largely instrumentalised in the pursuit of material goals such as security or power, but its effect is to harden lines of enmity and amity be-

tween states into a “we” and “they” that may come to shape the actual identity of the actors.

How did this militant sectarianism become such a salient identity? A major igniting spark was the US invasion of Iraq, which set off a Sunni–Shia civil war in the country that spilled over into sectarian enmity all across the region. This was intensified by Saudi Arabia and Iran’s instrumentalisation of sectarianism in their own regional power struggles, which escalated following Saudi alarm at the empowering of the Iraqi Shia – and thus of Iran – brought about by the overthrow of the Saddam regime. Then, after 2010, the civil wars unleashed by the Arab Uprisings in several failing states propelled the spread of Salafist fundamentalism, which readily slipped into jihadism. As jihadism proliferated amid violent conflict, other previously majority non-violent versions of Sunnism that had accepted coexistence with other religions and versions of Islam were weakened. This included Sufis, whose “sectarianism” tends to be non-political and accommodationist with secular authorities and other religions; but it also included even the modernist political Islam of the Muslim Brotherhood brand, which, squeezed, notably in Syria, between regime repression and jihadi *takfiri* mobilisation, struggled to sustain its modernist discourse of a fairly inclusive civil state. In parallel with this, Sunni jihadism also stimulated more militant versions of Shia sectarian consciousness, notably in the phenomenon of Shia militias in Lebanon, Syria and Iraq.

The historical variation in the region’s dominant supra-state identities resulted in quite different consequences for the states-system. Arabism tended to be unifying, both within states and in the regional public space, and at least until Iraq’s invasion of Kuwait in 1990, it had placed some normative constraints on the power struggle between Arab states over its leadership and proper interpretation. By contrast, contemporary radical sectarianism prescribes an uncompromising and violent jihad within the Islamic *umma* against “false” religions and their state backers. It has promoted a Sunni–Shia bipolarisation of the region, in which all peoples and states are pushed to take sides and among whom compromise is difficult. It has generated a shift from a relatively benign Lockean to a Hobbesian system of intense enmity, in parallel with a move from discourse wars to violent proxy wars that tear societies apart. In this process, rival states have used sectarianism to introduce cleavages into target soci-

eties; while multi-sectarian societies suffering from some degree of state failure have become highly permeable to penetration by sectarian discourse, networks and movements.

The sectarianisation of the regional power struggle and its consequences: from sectarian agency to structural constraint

The post-Arab Uprisings regional struggle for power was not initially chiefly sectarian in character, yet the dynamic of the regional power struggle was decisive in soon empowering sectarianising agents that bifurcated the regional power system along identity lines. However, the structure of the states-system, in which rival states pursued interests and balanced against threats, ultimately restored the old realist rules of the multipolar game. The following section traces out the phases and watersheds in the rise of sectarianism and its interrelation with the regional power struggle.

Regional bifurcation in the 2000s

The sectarianisation of regional politics was initiated by the US invasion of Iraq. The invasion generated alignments that bifurcated the regional system of the 2000s into two rival camps, framed as the pro-Western “moderate” Sunni bloc (Saudi Arabia, Egypt, Jordan) and the resistance axis (Iran, Syria, Hizbollah, Hamas), dubbed the “Shia Crescent” by its opponents (Valbjørn and Banks 2011). The two camps fought for influence in sectarian-divided Lebanon and Iraq, and took sides over Israel’s wars against Hizbollah and Gaza. In the regional discourse wars, the resistance camp gained the upper hand by portraying its rivals as pushed by their alliances with the United States to betray the Arab cause and side with Israel in the latter’s wars in Lebanon and Gaza. The moderate bloc, its legitimacy damaged so long as the dominant identity was Arab–Islamic nationalism, fought back by portraying the issue as interference by Shia Iran in the Arab world against Sunnis. In the Arab street, however, this instrumentalisation of sectarianism at the state level initially acquired only limited resonance. Here the main enemy was seen as Israel, rather than Iran; for the Sunni masses, the non-

Sunni Muslim leaders of the resistance axis – Hizbollah’s Hasan Nasrallah, Syria’s Asad and Iranian president Ahmadinejad – were popular heroes in that they effectively combined Arab nationalist and Islamist discourses in a struggle against Israel and the United States (Valbjørn and Banks 2011). Nevertheless the invasion of Iraq was, at the same time, preparing the way for deeper sectarianisation. It unleashed a sectarian civil war that soon spilled over regionally, polarising the discourse in the more Islamist parts of the regional public sphere. In bringing Shia movements to power in Iraq at Sunni expense, the aftermath of the invasion seemed to empower Iran. This particularly alarmed Saudi Arabia, which redoubled its instrumentalisation of Sunni sectarian discourse against Iranian involvement in the Arab world. This “New Arab Cold War” (although the players were no longer only Arab, at stake was dominance in the Arab world) was still largely fought via media (not yet proxy) wars. It did not destabilise any of the rival regimes, which appeared able to contain trans-state activism, except for Iraq, where the US destruction of the state apparatus had unleashed near-sectarian civil war, and, to a lesser degree, Lebanon, where a low-intensity struggle paralysed a weak government.

Meanwhile a new actor had entered on the regional stage, initially, at least, to the advantage of the resistance axis. Turkey’s ruling party, the AKP, and its leader Tayyip Recep Erdoğan reversed the tendency of secular Atatürkist governments to eschew involvement in the Arab world (except insofar as it was seen as a security threat). Turkey under the AKP now sought “zero problems” with its neighbours; it also seemed to entertain what was termed a “neo-Ottomanist” ambition to restore Turkey’s status as hegemon of the post-Ottoman space, including in the Middle East. This resulted in the erosion of the 1990s alliance that the Turkish military had established with Israel and against the resistance axis. In the 2000s, by contrast, Turkey established a close alliance with Syria and posed as champion of the Palestine cause against Israel, both moves that were congruent with its new ambition for regional leadership. Turkey now moved into closer alignment with the resistance axis than the pro-Western camp.

In this period, therefore, the instrumentalisation of sectarianism was beginning, but was contained by nationalist counter-narratives that in the context of the time, including the struggle with Israel, were more persuasive than sectarianism at the grass-roots level.

The early post-Uprising regional struggle (2011–2013)

The post-Arab Uprisings regional power struggle initially appeared to be a continuation of the “New Arab Cold War”: the contending blocs were similar, the struggle still essentially over legitimacy. Yet the immediate issues at stake were now less those of relations with the West and Israel than the threats and opportunities issuing from the revolt against authoritarian regimes. The blocs had also been somewhat reconfigured, insofar as the Uprisings that debilitated foreign policy agency in Egypt and Syria (against the background of the prior debilitation of Iraq by the US invasion) knocked these historic powers of the Arab core out of the power game, leaving a vacuum that Turkey, Iran, and Saudi Arabia – the powers on the regional periphery – competed to fill. For this reason, this period might be better framed as a Middle East Cold War, even though the battleground was still chiefly the Arab world. Each of these “periphery powers” had enough power resources, internal coherence and immunity to the Uprising to be able to instrumentalise trans-state legitimacy discourses at reasonable risk. The main battlegrounds were the states that experienced the Uprisings; and the prospect of the moderate bloc losing Egypt and the resistance axis losing Syria made the competition to influence their trajectories pivotal to the power struggle. By comparison with the New Arab Cold War of the 2000s, the means employed now took the more intrusive form of “competitive interference”. Rival contenders sought to bring to power (or prevent the fall of) friendly forces inside Uprising states and hence to expand (or protect) their spheres of influence.

What was most different, however, in this round of the New Arab/Middle East Cold War was that the resistance axis lost the upper hand it had enjoyed in the 2000s. The dominant early discourse of demands for democracy and freedom in the Arab countries served to marginalise the traditional pan-Arab, anti-imperialist, anti-Zionist concerns on the back of which the resistance axis had risen (Rahim 2011; Tamlali 2011). The eclipse of Arab nationalism left an ideological vacuum that Islamism seemed initially to effectively fill. In parallel, the weakening of the largely secular Arab republics potentially empowered not only trans-state Islamist movements, but also the Arab monarchies that promoted Islamism, notably Saudi Arabia and Qatar. The Arab satellite media expressed the agendas of these monar-

chies, spreading discourse (whether “democratic” or Islamist) that was intended to undermine the authoritarian republics (Hijjawi 2011). The decline of secular ideologies and the rise of religious discourses, while not identical with sectarianisation, was a prerequisite for it.

Although Islamism appeared to benefit from the Uprisings, this was not uniformly so of its various rival variants. In particular, the anti-imperialist Islamic movements, notably Hamas and Hizbollah, were weakened. Hizbollah’s and Iran’s support for the Asad regime damaged their previous high standing in public opinion and made them vulnerable to accusations they followed a Shia sectarian agenda (Mohns and Bank 2012). Popular perceptions changed dramatically. In 2006, 75% of Arabs had approved of Iran, including 85% of Saudis, but by 2012 Iran’s approval ratings had plummeted to less than 25%, and in Saudi Arabia, to less than 15% (Zogby 2013). The main initial beneficiary of Islamism’s empowerment was the Muslim Brotherhood. Its organised branches in most Arab states, with their extensive charitable and educational networks, seemed poised to rise to power on the back of democratic transition in authoritarian regimes, most notably in Tunisia, Egypt and Morocco; it also benefited from the patronage of Turkey and Qatar, which viewed it as a vehicle for their regional influence. In parallel, Saudi Arabia, other Gulf states and rich individuals funded Salafists entering the political arena, partly as tools of Saudi influence, notably in Egypt, Tunisia and Syria (Haddadi 2011). The rise of Sunni Islamist parties and the debilitation of Hizbollah’s Arab nationalist discourse, seeming to expose it as a “Shia” movement fighting Sunni protestors in Syria, began to arouse sectarian consciousness in the Arab public sphere.

In parallel to this ideological transnational shift away from traditional Arab nationalism, at the inter-state level a similar tilt occurred in the balance of power in favour of Turkey and the GCC (the Gulf Cooperation Council of the Arab countries). The monarchies proved more resilient than the republics in dampening the domestic threat posed by the Uprisings, using a combination of repression (most obvious in Bahrain), political concession (most obvious in Morocco), and economic blandishments to citizens (most obvious in Saudi Arabia, where \$97 billion worth of jobs and benefits were promised, the equivalent of \$5,000 per citizen). The GCC was upgraded into a “Holy Alli-

ance” to contain the democratic threat, with the richer monarchies transferring billions to the poorer (Morocco, Jordan, Oman and Bahrain) and using petrodollars to promote Salafism, for instance against democratic youth in Egypt. The GCC also took advantage of the Uprising to weaken and undermine the legitimacy of the authoritarian republics. It used the pan-Arab media and the Arab League to legitimise Western intervention against Qaddafi, an old monarchic foe, and tried to do the same with Asad’s Syria. As the Arab Uprising began, Turkey (after an early misstep when it appeared to oppose the Uprising in Libya) seemed to successfully promote its own soft power as an Islamic democracy with economic prowess, and hence its status as a successful model to replace the authoritarian regimes threatened by the Arab Uprising. Erdoğan was welcomed as a big brother and inspiration in Egypt and Tunisia, where – briefly – the AKP’s ideological kin, the Muslim Brothers, held power. In general, the rise of Islamism at the expense of secular nationalism at all levels – states, social movements, and publics – prepared the way for sectarianism, since, even though the two were not identical, once religion is politicized the door is open to political conflicts over its proper interpretation i.e. over heresy, apostasy, etc.

Also preparing the way for sectarianization of the regional power struggle was the fact that the two main sites of the regional power struggle were sectarian-divided societies and specifically in the two states in which each rival bloc was most vulnerable: Bahrain and Syria. Bahrain was where the monarchy-led pro-Western bloc was most vulnerable, ruled as it was by a Sunni monarchy that discriminated against the large Shia majority. Having “lost” Iraq to Shia power as a result of the US invasion, the Sunni Gulf monarchies feared that Iran would benefit further from Shia empowerment in Bahrain. The GCC’s military intervention and escalating repression checked the Bahraini Uprising and inflamed Sunni–Shia tensions in the Gulf, to the benefit of the Sunni monarchies (Mathiesen 2013).

Syria, on the other hand, was the weak spot of the resistance axis. The Uprising turned it into a battleground, pitting Iran against Turkey and the GCC, which saw an opportunity to break the resistance axis. Qatar’s Al-Jazeera TV encouraged the Uprising, and Saudi Arabia financed anti-regime tribes and Islamist factions. Turkey’s Erdoğan turned against his former ally,

Bashar al-Asad, objecting to the violence with which pro-democracy protestors were repressed and urging that he share power with the Syrian Muslim Brotherhood. When Erdoğan was rebuffed, Turkey gave safe haven and support to exiled Syrian opposition politicians, and helped to train and back the “Free Syrian Army” that contested Asad militarily. Meanwhile, with the debilitating of the republics, the GCC assumed the leadership of the Arab League, where Qatar engineered the suspension of Syria’s membership and economic sanctions against it, amid calls for the internationalisation of the crisis. When Russia and China blocked internationalisation at the UN Security Council, the GCC states and Turkey turned to funding and arming insurgents, contributing to the militarisation of what was becoming a Syrian civil war with sectarian undertones. The most effective insurgents quickly proved to be, not Asad’s secular opponents, but Islamists; and the more jihadist they were, the greater their fighting prowess. This and ideological affinity with Gulf (often private) funders resulted in the bulk of external anti-Asad funding being channelled to jihadists such as *Ahrar al-Sham* and an al-Qaida offshoot, *Jabhat al-Nusra* (Abboud 2015). On the defensive, Iran sought to create a corridor connecting Iranian territory to Syria and the Lebanese coast via Iraq (where, in the wake of the US withdrawal, the Maliki regime’s repression of its Sunni rivals had made it increasingly dependent on Iran), allowing Tehran to supply Hizbollah and providing the Asad regime with a two-sided buffer that could help it survive (Goodarzi 2011). Thus Syria was becoming the incubator of what would quickly turn into a sectarian polarisation of the region.

Sectarian proxy wars amid state failure: from instrumentalisation to grassroots sectarianisation (2013–15)

In this middle Arab Uprising period, Saudi Arabia, Turkey, Qatar and Iran all deepened their competitive intervention, with arms, money and fighters sent to governments and insurgents in the identity-fragmented and failing states – above all in Syria, Iraq, Libya and Yemen. Crucially, each regional power increasingly instrumentalised sectarianism in their discourse and in their choice of proxies in the intervention.

The strategies of the main rival states differed, with consequences accordingly for sectarianisation. Saudi Arabia framed Iran as Shia, heretical, and non-Arab, hence as not entitled to involvement in inter-Arab politics. It sought thereby to mobilise the demographically superior Sunnis (85% across the region) on its side. Iran, on the other hand, heading the minority Shia camp, initially sought to portray itself as a pan-Islamic leader of resistance against US and Zionist imperialism, a construction wherein it would have the advantage over US-aligned Saudi Arabia. As, however, sectarianism deepened and as the appeal of this stance declined, Iran took up the role of defender of minorities against Sunni *takfiris*. Iran therefore sought to compensate for Shia demographic inferiority by means of more mobilised, unified Shia sectarian networks, at the same time taking advantage of what soon became greater divisions within the Sunni camp (Byman 2014).

The instrumentalisation of sectarianism was a continuation of the struggle of the 2000s, but what had changed was the Arab street. Hitherto relatively immune to sectarianism, now public opinion was mobilised by it – especially in the failing states, but also regionally, where for example sections of publics in states with small Shia populations came to view them with suspicion, if not actually as enemies. A vicious cycle set in between sectarianism and state failure. The existential struggle for power amid civil wars in the failing states incentivised both regimes and opposition to instrumentalise sectarianism in order to rally supporters and demonise opponents. This sectarian discourse precipitated unprecedentedly high levels of armed mobilisation, and exceptional levels of violence in several states wracked by civil war. These developments, above all in Syria and Iraq, also occurred to a lesser degree in Yemen. In Syria, Bashar al-Asad responded to the protests that were threatening to overwhelm his regime by characterising the opposition as Sunni jihadists to rally his base among the minorities. At the same time, Al-Qaida's various avatars instrumentalised sectarianism in its opposition to several regimes. In Iraq, for example, Zarqawi's Al-Qaida and its ISIS successor deliberately sought to provoke sectarian war by attacking Shia mosques, in the belief that this would force all Sunnis to rally around the jihadist leadership (Matthiesen 2015a). As states lost the capacity to maintain order, sectarianism seeped downward to the grassroots, activating the secu-

rity dilemma, so that ordinary people were forced to fall back on their primordial communities for protection amid fears of sectarian “cleansing” and massacres as exemplified in Syria and Iraq (Posen 1993). Jihad and martyrdom were embraced, as normal life gave way to a war economy in which sectarian warlords provided the means of survival; the most motivated fighters, fired by sectarian zeal and hatred, attracted the greatest external funding. Amid high levels of violence, radical sectarian voices, whether in social media or among armed factions on the ground, tended to marginalise those in the middle, whether these were non-sectarian secularists or moderate Sunnis.

As the curve of state formation reached its nadir in a slew of failed states, armed non-state/trans-state movements with a sectarian or ethnic character became empowered in an unprecedented way; not only were they becoming autonomous actors within states, breaking states’ monopoly of legitimate violence, but they were also challenging their borders and sovereignty (Stanfield 2013). What had been two key Arab nationalist powers, Iraq and Syria, became, with the Arab Uprising, an interconnected field of sectarian contestation across which trans-state sectarianised groups moved back and forth as the power struggle dictated. State borders and ruling regimes (of the other sect) were contested in an utterly unprecedented way. Sunni fighters from across the region and beyond swarmed into Syria to fight the apostate regime that was killing Sunnis; in reaction, Iran mobilised Iraqi and Afghan Shia militias (Knights 2012; Tamimi 2015). The collapse of Syrian and Iraqi state control over their territories allowed the ISIS movement to seize control over wide areas of western Iraq and eastern Syria, declaring the abolition of the Syrian–Iraqi border as part of the construction of a transnational “caliphate” that framed the Shia as the main immediate enemy. At the states-system level, sectarianism precipitated a bipolarisation of state alignments: all states were under normative pressure to take sides along sectarian lines.

Intra-sectarian contestation and the re-shifting of the regional power balance (2015–18)

If the main axes in the early Uprising years had by 2013 taken on a sectarian Sunni–Shia bipolarisation, this was soon diluted by growing fragmentation in the “Sunni” camp at both state and

non-state levels. This resulted from inter-Sunni rivalry and the overreach of several Sunni state actors.

First, inside the failing states, intra-Sunni contestation began, in which the radicals tended to squeeze out the moderates. Thus in the Syrian civil war the Syrian Muslim Brotherhood and the “Free Syrian Army” were marginalised by jihadists who then embarked on internecine battles. Rival jihadist movements such as Ahrar as-Sham battled for supremacy with Jabhat an-Nusra, as did the latter with ISIS, despite their similar ideologies.

Second, three years after the Uprising, Turkey’s bid for regional hegemony on moderate Islamist grounds had run aground on the rocks of the Syrian conflict. Erdoğan had envisaged installing a client Muslim Brotherhood-run Islamist democracy in Damascus, but he grossly underestimated the tenacity of the Asad regime, bolstered by its allies, Iran, Hizbollah and Russia. By 2014, Turkey appeared impotent even to manage the spillover from the Syrian crisis – refugee flows, Kurdish empowerment – on its borders. In deploying Sunni Islamic identity and backing the jihadists against Asad, Ankara had contributed to the radical sectarianisation that was destabilising the region. Indeed its tolerance, if not encouragement of ISIS provoked blowback against it once ISIS turned against Turkey. Turkey was also soon on bad terms with other Sunni states after objecting to the Saudi/UAE-backed military overthrow of President Morsi in Egypt and to Egypt’s subsequent moves to isolate Hamas in Gaza. When the Muslim Brotherhood had seemed to be mounting to power regionally, Turkey’s “no problems” strategy towards its neighbours and stance as a democratic Islamist hegemon in the Arab world had given it considerable reserves of soft power; but its regional position was debilitated by the marginalisation of the Brothers by both secularist and jihadist opponents, by the backlash against Turkish sponsorship of Sunni jihadists in Syria (notably the United States’ co-optation of the Syrian Kurds against ISIS), and by Ankara’s involvement in protracted warfare against the Kurds. Turkey’s military intervention, on the other hand, had carved out a Turkish sphere of influence in northern Syria but also further embroiled it as a partisan in the Syrian conflict.

In parallel, Saudi Arabia under its new King Salman and his son had ambitions to make Riyadh a more muscular power capable of counter-balancing Iran. It relied on its wealth to co-opt

allies and to “buy” soft power via pan-Arab media and trans-state educational and charity networks. While its Wahhabi version of Salafism, once marginal, had been effectively spread by Saudi-financed activists since the 1970s oil boom, it had nevertheless been contained by rival versions of Islam. In the new world of sectarian rivalry, however, Saudi Salafism came to command greater grassroots support in the region. Also for the first time, the Saudis tried to add hard offensive military power to the equation with their intervention in Yemen. This seemed to check Riyadh’s rising fortunes, for not only did the intervention get bogged down in protracted conflict that made Yemen’s Houthis more dependent on Iran, but also in wreaking great damage on Yemen the campaign seemed likely to generate enduring animosities that would blowback against the Saudis (Reidel 2017).

At the regional system level, each of the Sunni powers was promoting a version of Sunni identity that corresponded to regime interests, increasing against their fellow sectarians. Thus the affinity of the ruling AKP in Turkey with the modernist form of political Islam promoted by the Muslim Brotherhood and Qatar’s similar support put them at odds with the Saudis and the UAE, which, seeing the Brotherhood as a threat to the legitimacy of dynastic rule, branded it a terrorist group. Regime interests also cross-cut sectarian solidarity. Regimes whose interests would be damaged by the pressure for sectarian bipolarisation resisted it, including Egypt, which did not want to see Sunni Islamists empowered, and Oman, which was reluctant to antagonise Iran. Indeed, the al-Sisi regime in Sunni Egypt was brought closer to the non-Sunni Asad regime in Syria by the shared Islamist threat to their secular authoritarian regimes. Qatar’s oversized ambitions were being cut down to size as its main surrogate, the Muslim Brotherhood, suffered multiple setbacks. The crisis of 2017 in which other GCC states sought to isolate and punish Doha for backing the Brotherhood and for its hedging between Iran and Saudi Arabia – a crisis that precipitated a Turkish–Qatari counter-balancing, as well as tilting both states towards Iran – marked another major fracture within what had formerly been seen as a Sunni axis against Iran. These developments underscored how far the normative power of sectarian identities over the foreign policies of Sunni states was being over-ridden by regime/state interests – as realists would have predicted.

Iran recovered its position in the regional power balance, as

much from its rivals' mistakes as its own successes. It mobilised cross-state Shia militias and demonstrated its prowess in asymmetric warfare. For the Shia, there was no alternative regional leadership hence the main issue dividing them was whether Shia in other states such as Iraq or Lebanon would give political allegiance to Iran or to their own states. Those who saw Iran's *velayat al-faqih* as a transnational leadership had to contend with more "national" versions of Shiism, such as the moderate version promoted in Iraq by Ayatollah Sistani and the politicised populist version of Muqtada as-Sadr in the same country. But all Shia were driven together by the threat from Sunni *takfiris*, who legitimised killing them, and Iranian leadership was indispensable to the common defence. It was the greater solidarity of the Shia compared to the growing divisions among Sunnis, as well as the targeting of the Sunni ISIS movement by global powers, that allowed the Shia bloc to compensate for its considerable demographic inferiority and, indeed, to recover the initiative in the later post-Uprising power struggle. Iran's positioning as the major power-broker in Syria, Lebanon and Iraq, whether via its allies or its forces on the ground, had given, by this period, a new material reality to the "Shia Crescent". If Iran benefited from the "under-balancing" of the Sunni states against it, as Gause (2016) argues, it is because the Shia–Sunni divide had become increasingly cross-cut and diluted by the Islamist–secular and intra-Sunni cleavages, and because the different factions backed by Sunni states in the proxy wars had become rivals for power within those states. The Iranian advances provoked attempts at counter-balancing by the United States under Trump, forcing Iran in turn into greater reliance on Russia, particularly in Syria, where their interests were aligned but not identical.

Conclusion: material structure over sectarian agency

The sectarian surge in the Middle East was, in the first instance, an outcome of regional geopolitics: that is, of the interrelation of identity-promoting agents with the multipolar structure of regional politics, notably the enduring tendency for rival stronger states to bid for hegemony in the name of a dominant identity, and for their opponents to counter-balance against them.

However, this struggle was itself precipitated by an extra-systemic intrusion, the US invasion of Iraq. This, in deconstructing the Iraqi state, inflamed sectarian civil war that spilled over into regional rivalries in which sectarianism was instrumentalised. A further string of (at least partial) state failures precipitated by the Arab Uprisings created further power vacuums in which states instrumentalised sectarianism in “competitive interference”, by which they sought to affect outcomes in key states that were thought likely to affect the regional power balance, notably Syria and Bahrain.

Although instrumentalised, it does not follow that these sectarian identities were artificial. On the contrary, instrumentalisation presupposes the prior existence of authentic, if non-politicised (“everyday”) sectarian differences. But the politicisation and radicalisation of these identities was the outcome of region-wide political struggles, driven by geopolitical forces that seemed to sectarianise identity in dramatic ways. The rise of overtly sectarian jihadist movements, combined with divisive regional media discourse and internal civil wars, created an environment in which the grassroots of sectarian-divided societies, and even the rival regimes that were playing with the fire of sectarianism, came to perceive existential threats in the sectarian “other”.

The impact of sectarianism on the system was to destabilise states, further driving intervention, and to greatly intensify the power struggle in the regional system. In an earlier phase of identity wars, the period of Arab nationalism, actors had deployed media and subversion to overthrow rival governments in what were usually bloodless military coups. Now, by contrast, armed trans-state movements, often state-sponsored, were agents in violent proxy wars that enveloped whole societies along sectarian fault lines. If pan-Arabism had been compatible with a Lockean normative order, sectarianism now set the region on a transition to a Hobbesian system in which unlimited animosity, unconstrained by shared identities, started to become the norm. Although the agency of sectarian actors – jihadist movements and instrumentalising states – was pivotal in the surge of sectarianism, it was the regional structural situation – notably, failing states that lay open to proxy wars – that empowered them, making sectarianism appear a winning card when it had rarely been seen as such before. In normative terms, sectarianism had previously been widely seen as illegitimate; now, those who failed to

align with their sectarian peers became the ones who had to justify themselves. Thus for a period it seemed that sectarian identity might trump individual state interests. This became manifest in the Sunni–Shia bipolarisation of the region.

But sectarianism did not, in the end, manage to transform the regional system. The normative consequences of sectarianisation proved less enduring than the structural dynamic of the multipolar regional system, in which power-balancing “realist rules” came to trump “sectarian rules”. First, attempts by the main state rivals to use exclusivist sectarian identities to achieve regional hegemony provoked robust counter-balancing by those attached to the rival identity (in a way that had not been preordained when inclusive pan-Arab or pan-Islamic identities had been instrumentalised by would-be hegemons largely against outside powers). While this counter-balancing along sectarian lines might have locked the region into sectarian bipolarity, in fact this did not endure. Rather, by greatly deepening instability and chaos and thereby raising the level of threat perceived by all states, radical sectarianism amplified the tendency to self-help in an anarchic system, so that state/regime survival interests overrode sectarian identity and fragmented the “Sunni” camp whose nominal “members” began balancing against each other. The way the whole regional and global order came together to defeat ISIS was symptomatic of the resilience of the multipolar system to this most radical attempt to transform it. Thus although structure – hegemonic rivalry – had initially empowered sectarian bipolarisation, in the end, as the dynamic inherent in the multipolar system reasserted itself, structure was also decisive in constraining the Middle East’s sectarian surge.

In theoretical terms, the Middle East case demonstrates that constructivism is essential to understanding how agents’ identities shape their interests and behaviour in the short term. In the long term, however, as realism argues, the material structure prevails.

Abstract på dansk

Denne artikel undersøger sekterismes rolle i Mellemøstens internationale relationer. Hvordan har sekterisme ændret den måde regional politik udspiller sig på, og hvordan har det regi-

onale statssystem påvirket sekterisme? Artiklen udarbejder en analytisk ramme, som kombinerer konstruktivisme og realisme. Dette viser langvarige, dobbeltsidede aspekter (som materiel magtbalance og identitetskamp) i det regionale statssystem og belyser samtidig interaktionen mellem sekterisme og aktuel regional magtkamp.

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