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# HYBRIDIZATION OF DOMESTIC ORDER-MAKING IN THE CONTEMPORARY MENA REGION

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## ABSTRACT

The domestic political orders in the MENA countries are going through a period of crisis and restructuring. Since mass protests spread from Tunisia and Egypt to other countries in the region in 2011 a number of worrying trends have affected the forms and functions of states, regimes, contentious actors and collective identities. Conceptualizing these trends as part of a broader process of hybridization of domestic political order-making in the MENA region sheds light both on empirical developments and on the analytical categories that scholars make use of to describe and theorize them. By hybridization we refer to a process in which the political order-making in the region occurs according to new and hybrid patterns that transcend or escape the processes, concepts and categories known in the past and described in the existing academic literature.

## INTRODUCTION: TRENDS IN THE CRISIS

The domestic political orders in the Middle East and North Africa (MENA) are in a state of profound crisis. Since mass protests spread from Tunisia and Egypt to other countries in the region during the winter and spring of 2011 a number of worrying trends have affected the forms and functions of states, regimes, contentious actors and collective identities.

In different shapes and to varying degrees the region has, since 2011, seen a trend of decreasing capabilities of state institutions to effectively control their borders and administer their territories and populations. In countries such as Syria, Iraq and, to a lesser degree, Egypt, protracted rebellions and civil war have challenged the territorial integrity of the states themselves, leading to non-state actors proclaiming parts of the territory as independent states. In other places, such as Libya and Yemen, a multiplicity of factions and power centres have succeeded in their attempt to use the process of rebuilding state institutions as a means to secure power and authority and to exclude their competitors. In such places, the intense competition for control has further weakened nascent state institutions.

In parallel, the initial push towards a possible transformation away from authoritarian regimes in the MENA region in 2011 has given way to a trend of restoration of authoritarianism in some countries, and to illiberal turns in formal democracies in others, including Israel and Turkey. This process spans from the gradual adaptation and reconfiguration of power networks in Libya to the full or partial restoration of the authoritarian regimes that used to govern in Egypt through repression, exclusion and co-optation of competitors and challengers. In other countries, where

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incumbent governments remained in place after 2011 – such as Morocco, Algeria, Jordan and the monarchies in the Gulf – old or refashioned authoritarian governance practices have prevailed.

Furthermore, the mass mobilization of unarmed political activists, which dominated contentious politics in several MENA countries for shorter or longer periods between 2011 and 2013, has since given way to protracted militarization. This trend, which has been expressed in a multiplicity of forms, encompasses both cases of protracted armed rebellion against incumbent regimes, as, for instance, in Egypt, and smaller but growing armed mobilization against regimes in Tunisia, Morocco, Algeria, Jordan and the monarchies in the Gulf. It also encompasses the more complex processes of militarization in civil-war-torn countries such as Syria, Iraq, Yemen and Libya, where armed contentious actors fight each other as much as the weakened regimes and their regional and international allies.

Finally, a number of MENA societies have seen a trend of increasing pluralization of collective identities since 2011. This trend has taken different forms, including the multiplication, fragmentation, partial hybridization and/or polarization of sectarian, tribal or ethnic markers of identity that have become plural and often antagonistic in their expressions and claims. Opposite trends pointing in the direction of the consolidation of existing collective identities or the subsuming of different collective identities under a larger one, have also seen the light in specific cases across the MENA region. All this calls for a thorough reassessment of the dynamic of collective identities per se and, particularly, of the extent to which these pluralized forms of collective identification (or lack thereof) have been embedded into institutions and political processes. The rewriting of the constitutions in Tunisia and Morocco provided important spaces to discuss and negotiate the role of collective identities within the new architecture of the states between 2011 and 2014. In other contexts, such as in Egypt, Turkey and the Gulf countries, there has been no successful accommodation of alternative claims based on such pluralized collective identities.

In the present paper for Work Package 4 (WP4) of the MENARA project, we suggest conceptualizing these trends as part of a broader process of hybridization of domestic political order-making in the MENA region. By hybridization of domestic political order-making we refer to a process in which the political order-making in the region occurs according to new and hybrid patterns that transcend or escape the processes, concepts and categories known in the past and described in the existing academic literature. Hence, hybridization concerns, in our use of the word, both empirical developments on the ground that manifest themselves in new ways, and analytical concepts and categories that scholars subsequently make use of to describe and theorize these empirical developments.

The paper is structured with the aim of providing researchers and participants in WP4 (as well as outsiders with vested interest in this work) with a series of guidelines on how the subsequent reports and field trips that form part of the work should be focused and which theoretical questions we believe to be particularly pertinent for analysis. It does so by offering a fast-paced (and obviously often overtly simplistic) introduction to the ways in which scholars, struggling to analyse power and politics in the modern Middle East, have conceptualized each of the four above-mentioned factors affected by contemporary trends and changes: states, regimes, contentious actors and collective identities. Due to their centrality in the analysis of the domestic political orders in the MENA

region, there exists a substantial body of literature about each of these factors. The upheavals in 2011 did, however, challenge a number of key assumptions in the existing literature concerning how politics and power function in the domestic spheres of the region. From 2011, this literature has witnessed a still ongoing process of academic reassessment, critique and readjustment. It is our ambition that the work produced within WP4 shall contribute to this process. While later reports and publications produced in the Work Package will provide documentation on how each of the four trends mentioned unfold empirically, the present report aims to provide an overview of the way in which the existing academic literature conceptualizes and theorizes each of the factors.<sup>2</sup> To increase clarity, the report is divided into four subsections that each open with a brief review showing how the scholarly literature has conceptualized and treated the factor in question. Each then briefly sums up the main changes in the academic literature that the upheavals have prompted since 2011. Given the scope of the paper, each subsection will refer only to a few empirical cases to illustrate key points, but will neither claim to cover all relevant cases nor all relevant literature. We end each section by raising what we believe to be the most pertinent research questions for understanding how the developments and trends within each factor contribute to the current transformation and crisis of the region's domestic political orders.

Improving our understanding of how domestic power and politics work and the way in which they have become increasingly hybrid in the MENA region after the uprisings in 2011 is not exclusively an academic exercise. It is also an exercise that holds a strong relevance for international, and in particular for European, policy-making in the region. International and regional actors are not without influence or responsibility for the current domestic crises and conflicts. Both regional and international powers have seen the transformation of domestic political orders in the MENA countries as opportunities and threats to their abilities to project influence in the region and ensure their own stability and security. In a bid to sway the outcomes of the conflicts between domestic actors to their own advantage – or at least to ensure that their competitors do not succeed in doing so – regional great, middle and small powers from Iran, Turkey and Saudi Arabia, through to Egypt and Morocco, and further to the United Arab Emirates (UAE) and Qatar, have aggravated and protracted domestic conflicts by shielding, funding and arming local proxies. European and western states have done the same. While some, such as Russia, have arguably acted primarily to alter regional and international balances of power, others, including several western European powers, have sought to influence the outcomes of the domestic conflicts in ways that best represent their interests, or mitigate what they believe are direct threats against their security and stability. In this process, the initial boost in 2011–13 of western European support for “democratization” in the region has, over the past few years, given way to a reprioritization of anti-terrorism and anti-migration policies. In some cases this has led to the propping up of authoritarian military-led autocrats such as Egypt's Abdel Fattah al-Sisi. In other cases – for example, Italy in Libya – western powers have sought to prop up decentralized local actors in a bid to stem the prospect of a further influx of refugees and migrants from the region. Hence, better understanding how domestic power and politics operate is as much a political as it is an academic endeavour.

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<sup>2</sup> While the post-2011 period will remain the main point of reference for empirical research, it is possible that alternative timelines will be adopted so as to better capture, study and explain the existing reality and to formulate considerations about the future.

## 1. FIRST TREND: THE EROSION OF STATE CAPACITIES

The trajectories of the MENA states since 2011 indicate that the existing analytical paradigms do not allow us to understand the transformations of domestic power relations sufficiently. While the patterns and outcomes of the transformations that have happened as a result of the so-called Arab uprisings vary from country to country, there are some common trends: central state institutions have been seriously challenged in their capacity to fully control their territories and borders and to provide basic functions and services such as security, justice, health care and education. These central institutions collapsed after 2011, and their rebuilding has been impeded by serious domestic conflicts about the nature and form of the state, as well as by the fragility of nascent institutions that were too weak to resist the depth of social and political conflicts. In order to fully understand these dynamics, we argue that we need to understand to a greater extent both how power is exercised within and outside “political” institutions, and how such relations and institutions are conceptualized and actually translated into practice.

The state has been a key theme in literature on the MENA region, though no clear consensus has emerged on the definition and limits of the object under study. Ever since the emergence of the modern borders and political structures of the region during the second half of the 20th century, scholars have debated whether the modern territorial nation-state in the MENA region should be considered weak or strong (or both). While such literature purports to evaluate the same thing – the “state” – the criteria for evaluation differ and encompass a range of different factors such as administrative capacity, distributive capacity, the ability to compete with other ideological forces and legitimacy. This largely reflects debates within the social sciences around the nature of the state and its usefulness as an analytical category.

To give a brief historical overview of such literature: the initial assessment saw the MENA states in a rather pejorative light. Manfred Halpern, for instance, claimed in 1963 that they were “weak” and “artificial” creations made by external colonial powers in disregard of the stronger and better-rooted social forces linked to Arabism and Islamism.<sup>3</sup> From the mid- and late 1980s, this scepticism was, however, challenged by a new group of scholars. Drawing inspiration from the trends within comparative politics in the early 1980s and taking note of the persistence of postcolonial MENA states in spite of challenges and threats to their survival from societies, regional and international powers, Lisa Anderson suggested, in an article published in 1987, that “state-focused approaches to [...] politics” should take root within Middle East studies as a recognition of the overwhelming importance that the postcolonial nation-states had acquired as frameworks for political, economic and social life (Anderson 1987: 1).

The same year, Iliya Harik argued from a historical perspective that the postcolonial Arab nation-states were less artificial and externally created than had been previously claimed. According to Harik (1987), most of the states in the region were in fact based on pre-colonial economic, political or cultural power centres. Following the same line of argument, Giacomo Luciani wrote, in an introduction to an edited volume about the Arab states, that the collective efforts of scholars illustrated that the postcolonial states in the MENA, after an initial period of “turbulence”, had developed into more consolidated political units, and had such importance they could no longer be

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3 A decade later the same point was made in Michael Hudson’s work on Arab politics (1977).

excluded from any analysis of political processes (Luciani 1990).

During the 1990s, this perspective was further strengthened by transformations in the petro-exporting states in the Gulf and in North Africa. These states would, during this decade, provide ample empirical data in support of applying and further developing the theory of the “rentier states” – entities that circumvented Charles Tilly’s rule for “production states” (where tax collection forced rulers to share power) by using easily accessible “rent” from oil exports and geopolitical bargaining to buy off requests for power-sharing (Luciani 1990, Henry and Springborg 2010). The “strength” of these states was emphasized by their ability to survive even protracted crises from militant challengers, as in Algeria in the 1990s (Martinez 2000) and in Syria and Egypt in the 1980s (Hafez 2003). Hence, by the late 1990s and early 2000s, Middle East scholars such as Malcolm Yapp (1991) and Roger Owen (2000) would, in their textbooks on the modern political history of the region, argue that one of the most remarkable features of 20th-century Middle Eastern history was the emergence and subsequent consolidation of the modern territorial nation-state.

Challenges to such theories took the form of evaluating state capacity in relation to various criteria. Nazih Ayubi, for instance, based his monumental work on the Arab state on the assumption that his contemporary colleagues, together with state makers in the region, mistakenly “overstated” the capacities of the states. According to Ayubi (1995), the Arab states were weak not just in terms of popular legitimacy but also in terms of administrative capabilities. This assessment of the states’ performance and capacities gained further importance during the 2000s in correlation with two new empirical developments. On the one hand, the region’s rentier states found it increasingly difficult to perform to expected standards due to a combination of factors, including population growth, fluctuating prices of crude oil and increasingly assertive business communities whose exposure to global trends of political liberalization made them less inclined to accept the expected quietist approach embedded in the rentier state model (e.g. Luciani 2005, Ehteshami and Wright 2008). On the other hand, Middle Eastern nation-states, such as Palestine, Lebanon and Yemen, and, from 2003, Iraq, saw their sovereignty challenged by international and regional interventionism (Fürtig 2014).

The Arab uprisings that spread through the MENA region during 2011 initially challenged existing state-focused research paradigms and exposed their inability to fully explain power dynamics in the region. Most scholars first interpreted the Arab uprisings as challenges to governments, elites and regimes, focusing on those who were perceived as exercising power rather than on the overarching systems, institutions and contexts through which such power was exercised (e.g. Lynch 2011, Gause 2011a). However, the state came back into focus from late 2012, when academics found their initial analysis incapable of explaining locally rooted actors’ challenges to new and incumbent state elites and governments. Furthermore, the Islamic State’s (ISIS’s) subsequent seizure of territory, including the internationally recognized border between Iraq and Syria, further shifted most analysts’ attention and the dichotomy “state vs non-state” started to emerge. Steven Heydemann (2013) and Jean-Claude Luizard (2015), among others, analysed this act as both aiming to expose an apparent inherent weakness of the postcolonial states and to destroy the regional order based on a Westphalian conception of the inviolable sovereignty of territorial national states in the post-independence Middle East.

By 2016, Middle East scholars tended to argue that the MENA states were not just weak and illegitimate, but “eroded”, “failing” or even “failed” entities (e.g. Lynch 2016a). As a group of scholars associated with the Carnegie Endowment noted laconically in a report from late 2016, the MENA region had, since 2011, experienced “unprecedented state disintegration, particularly in Iraq, Libya, Syria, and Yemen” (Cammack et al. 2016). Several states, they pointed out, had

lost control of large swaths of territory to nonstate actors, including the self-proclaimed Islamic State. Former regional powerhouses, such as Egypt and Iraq, are now severely constrained by domestic weaknesses. Powerful states are increasingly interfering in the affairs of weaker ones, heightening internal and regional conflict. (Cammack et al. 2016)

A growing number of books, articles and edited volumes with a similar focus on “state erosion” in the MENA region are now emerging.<sup>4</sup>

While the empirical observations of scholars, such as those associated with the Carnegie Endowment cited above, cannot be denied, the analytical framework requires a greater level of explanation and attention. In 2016, for instance, Mehran Kamrava argued that “state weakness [...] is fundamentally a product of diminished capacity” (Kamrava 2016: 16). This he sees as brought about by four groups of factors:

structural and economic factors, such as endemic poverty or chronic armed conflict; political and institutional factors, such as crisis of legitimacy and authority and the weakness of formal institutions; social factors, such as lack of social cohesion and severe identity fragmentation; and international factors, such as global economic shocks and loss of powerful patrons. (Kamrava 2016: 10)

Arguably, however, the very factors Kamrava sees as causes of state weakness are also its symptoms: for example, armed conflict happens because the “state” no longer has a monopoly over the legitimate use of force.

Kamrava’s definition of state capacity as “the ability to implement political decisions, especially in the face of actual or potential opposition from powerful social groups” (Kamrava 2016: 10-11) thus seems insufficient to explain situations where multiple or parallel institutions exist and advance competing claims, as in the case of Libya in recent years. It rests on distinctions between state and society, which have become blurred in the MENA region as a result of the conflation of certain interest groups and political and institutional formations – if indeed such a distinction ever empirically existed: Mitchell, for example, argued back in 1999 that the state–society divide is a “line drawn internally” as a result of a specific set of practices (Mitchell 1999: 77).

While it is clear, therefore, that there are many examples in the Middle East where central authority structures are no longer able to perform functions such as “the provision of security, legitimacy, and wealth and welfare” (Kamrava 2016: 7) to the same extent that they did prior to 2011, the

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<sup>4</sup> Mehran Kamrava notes, however, that scholars writing in Arabic, unlike their colleagues writing in western languages, have tended to focus on state-building and state-formation processes rather than on state failure and collapse (Kamrava 2016: 21, footnote 94).

analytical tools that the discipline has produced thus far have been incapable of fully explaining this phenomenon. In seeking to better understand this, we suggest a focus on the dynamics of the relationships between political and institutional formations and power networks and how these contribute to and shape narratives of state erosion. In this, we follow Hamieri's argument that institutional capacity is "a term that only has analytical merit within a theoretical framework that has a concept of power" (Hamieri 2007: 124). With Del Sarto (2017a) and Okyay (2017), we furthermore suggest that the erosion of the state in the MENA region should also depart from a clearly expressed distinction between the international (or legal) aspect of state sovereignty and the domestic aspect of sovereignty, with the latter perhaps most clearly displaying hybridity.

## 2. SECOND TREND: THE RESTORATION OF AUTHORITARIAN REGIMES

Since the uprisings in 2011, the assessment of the capacities and capabilities of the authoritarian regimes in the MENA region has been hotly debated. While initial empirical developments seemed to suggest that several of the key assumptions about the nature and character of these regimes were misconceived, later developments have proven that several of these assumptions were closer to the truth than assumed back in 2011.

A quick glance at the literature prior to 2011 reveals that the study of authoritarian regimes and governments – as separate from the study of states – was a well-established field within Middle Eastern studies. As a response to the optimistic assessments of the potential for the "democratization" of governments in the MENA region during the 1990s (e.g. O'Donnell et al. 1986, Linz and Stepan 1996, Pridham 2000), political scientists specializing in the MENA would, in the late 1990s and throughout the first decade of the 2000s, draw on comparative studies of political regimes to create a growing body of literature about "Arab authoritarianism". In contrast to studies of the MENA states that focus on states' institutional, economic and territorial capacities, authoritarianism studies focus on how political elites operate, how they form alliances and what types of policies they produce vis-à-vis domestic, regional and international contenders and challengers. Pioneering scholars within authoritarianism studies, such as Lisa Wedeen (1999) and Eva Bellin (2004) writing on Syria or Eberhard Kienle (2001) writing on Egypt, document and analyse the mechanisms, practices and meanings of authoritarian governance within specific domestic settings. As the total sum of single-country studies accumulated, comparative studies of authoritarianism in the MENA were produced by scholars such as Steven Heydemann (2007), Oliver Schlumberger (2007) and Hamit Bozarslan (2011), to mention but a few. While they adopted different methodological approaches and referred to different empirical cases and periods, what brought their studies together into a relatively coherent body of literature was their consensus on two key issues. First, that Arab authoritarian regimes were hybrid in nature: while allowing a variety of forms of competition and contestation, for instance through multiparty elections (Lust-Okar et al. 2008) or a plural media scene (Sakr 2013), elites remained capable of tightly controlling political decision-making by resorting to, among other means, co-opted economic, security and political institutions, to repression and to neo-patrimonialism. Second, that Arab authoritarian regimes were flexible entities capable of adapting to rapidly changing environments and responding resolutely and in a calculated strategic manner to a host of endogenous and exogenous threats and challenges (Heydemann 2007).



The unravelling of the Tunisian, Egyptian, Libyan and Yemenite regimes under the pressure of domestic uprisings or international intervention during winter 2010 and spring 2011 initially seemed to challenge both these key pointers in the literature on Arab authoritarianism. The inefficient responses to the protests by the regimes in Tunisia, Egypt, Yemen and, to some extent, Libya, prompted leading scholars to question a number of key assessments in the existing literature on autocratic regimes in the region. Marc Lynch (2011), for instance, declared that the Arab uprisings in 2011 had undermined serious parts of the literature about the endurance of authoritarian regimes, and Gregory Gause (2011a and 2011b) pointed out a number of flaws and omissions in the picture that he and his colleagues had painted around the “myth of authoritarian stability”.

This early critique of the paradigm of authoritarian studies, however, also had its flaws. As pointed out by Steven Heydemann and Reinoud Leenders (and later also by Marc Lynch), the toppling of rulers and the collapse of regimes in early 2011 would also provide material for analysis of autocratic regimes in neighbouring countries such as Syria and Bahrain (Heydemann and Leenders 2013, Lynch 2016b). In these cases, authoritarian regimes would manage to ensure their endurance by meeting protesters within their own borders with mass repression on scales that surpassed much of what the region had previously seen.

This preservation of incumbent regimes through mass repression would, furthermore, be complemented by a process of gradual restoration of authoritarian regimes in several of the countries in which governments had been toppled in 2011. An illustrative case in point is Egypt, where the military coup against the democratically elected president Mohamed Morsi in July 2013 – less than three years after the fall of Hosni Mubarak – cemented the power of an elite in which many were drawn from the circles of the former Mubarak regime. As demonstrated by Hazem Kandil (2014), the revolution in 2011 did not erase the influence of Egypt’s incumbent military, political and business elites, but can be seen as a continuation of their internal power struggles and competition.

Furthermore, authoritarian regimes have prevailed in most of the states that were not profoundly affected by the uprisings in 2011. A case in point is Algeria. In spite of the incumbent president Bouteflika’s promises of reform, youth inclusion and democratization of the constitution, little progress has been made with regard to such issues. As Martinez and Boserup (2016) point out, the regime in Algeria thus remains a hybrid creature with its own specificities within the family of Arab autocracies.

Finally, formerly democratic regimes in the MENA region have recently, and in parallel with the processes initiated by the Arab uprisings, experienced illiberal turns that bend existing institutions and norms towards new hybrid forms authoritarian practice. As noted by Çağaptay (2017), President Erdogan’s tortuous political manoeuvring and “iron-fist” style of government has, over the past few years, led Turkey away from the liberal democratic prospects of the early Justice and Development Party (AKP) government towards an increasingly autocratic (or “sultanistic”) style of government embedded into the existing democratic institutions of the republic. Comparably, Del Sarto (2017b) has shown how the amplification of existing domestic and regional security threats by Israel’s neo-revisionist right-wing political circles, represented by Benjamin Netanyahu and the

Likud since the early 2000s, has led the country towards an increasingly exclusivist and conflict-generating type of government.

These parallel processes suggest that authoritarian regimes in the MENA region matter more than initially assumed in the early aftermath of the collapse of regimes in Tunisia, Egypt and Libya. Consequently, the trajectories of regimes in the MENA region since 2011 have revealed both flaws and strengths in the existing paradigms. While the sudden overthrow of several leaders of authoritarian governments in 2011 suggested that the literature had overemphasized the ability of authoritarian regimes to survive and endure, the parallel preservation of incumbent authoritarian regimes in some countries as well as the gradual restoration of autocratic elites in others, in combination with the illiberal turn in existing democratic regimes, suggested that the literature on authoritarian endurance and survival was right, in that regimes were mechanisms capable of observing, learning, adapting and expanding.

Rather than discussing whether authoritarian regimes will endure or not we therefore suggest focus be directed towards the ways in which authoritarian practices, institutions and networks have recently found new hybrid forms and ways to manifest themselves in the region. This calls, in turn, for attention to at least three parallel processes of authoritarian restoration and expansion. First, how elites in countries where regimes remained largely intact, such as Algeria, have managed to uphold their monopoly on political decision-making since 2011. How have they balanced repression, exclusion and co-optation, and inclusion? Second, how elites in countries such as Egypt, where governments were toppled but the state apparatuses remained relatively intact and central authority continued to be upheld in spite of severe challenges, have managed to return to monopolizing political decision-making. What roles have the state's coercive agencies had in this process? Third, in what ways have existing liberal democratic regimes in countries such as Turkey and Israel experienced illiberal turns.

### 3. THIRD TREND: THE MILITARIZATION OF CONTENTIOUS POLITICS

Developments in the MENA region since 2011 have shown that armed non-state actors, ranging from broad movements to tightly knit groups, state-financed militias and terrorist networks, have taken up new and increasingly important roles in the creation and transformation of the region's domestic political orders. While there exists a substantial body of literature on such groups, recent developments have shown that militarized contentious politics today manifests itself in new ways that challenge central ideas in the existing theories about the phenomenon. While the strong focus on individual cognitive changes in the so-called "radicalization theory" was critically scrutinized well before 2011, the weakening of the MENA states, combined with increasing regional and international meddling in the domestic affairs of several MENA countries, has, to varying degrees, challenged the state-centrist approach inspired by New Social Movement Theory found in much of the literature.

In this paper we therefore suggest it is useful to study if and under which conditions the current militarized mobilization in the MENA region transcends the framework of the nation-state and the implicit dichotomy between regimes and their national opposition, which dominated most political arenas prior to 2011. In a nutshell, we focus our analysis on the militarization and hybridization of

contentious politics in the MENA region since 2011. Broadening the prism in order to escape the constraints of the too state- and too regime-centrist approaches that emerged in parallel with the consolidation of modern nation-states and the incumbent authoritarian regimes during the 20th century does not, however, render the analysis of militarized mobilization a useless endeavour. Rather, it is precisely the mutual exchange between the increasingly hybrid forms of state and regimes that have emerged since 2011 that lends further importance to understanding the equally hybrid forms of militarized contentious politics. These hybrid forms range from the transnational and global expressions of groups such as al Qaeda and ISIS to subnational, local or tribal aspects, for example in militias and militant groups in Libyan and Yemen. That said, the above-described push towards authoritarian restoration suggests that more “classical” regime-versus-national contentious groups are still important in cases where states have remained more robust and regimes have continued to exist, as, for instance, in Algeria, Saudi Arabia, Jordan and so on, or where they have re-emerged forcefully as important factors in politics and power, as in Egypt or Tunisia.

Middle East scholars did accord a fair amount of attention to the issue of armed mobilization in the decades prior to 2011. In particular, scholars sought to conceptualize and explain how armed Islamist-led rebellions affected the domestic order-making of regimes in the postcolonial period, for example in Syria, Egypt (Hafez 2003), Algeria (Martinez 2000) and other places. While early studies of the phenomenon, dating back to the 1970s and 1980s, typically drew on so-called “strain-based theories”, which held that rebellions and protest movements emerged as psychological responses to collectively felt “strains” (either from modernization, urbanization or other large social processes) (Hafez 2003: Introduction), Middle East scholars would, in the 1990s, increasingly explain mobilization to rebellion as the outcome of one of two factors: theology or politics. Gilles Kepel, for instance, has argued in a number of volumes that theology was a key factor in jihadist mobilization. This argument was key in demonstrating how various segments of mainstream Islamists (e.g. what he refers to as the “pious” Muslim “bourgeoisie”) in several MENA countries since the 1970s paved the way for jihadist mobilization as a reservoir for support (e.g. Kepel 2002) and, subsequently, how theologically illegal conflicts between Muslims (*fitna*) played an important role in subsequent waves of demobilization (Kepel 2004). Within the more political and social reading, scholars such as Olivier Roy and (in a somewhat different manner) François Burgat argued that collective mobilization to jihad (and other types of armed rebellion) should rather be seen as responses to political and social developments. While Burgat’s critique of the authoritarian regime’s repression of non-violent Islamist contenders in the 1970s through to the 1990s gave the impression that he sought to justify jihadist mobilization, his diligent, rich and empirically supported analysis of the regime repression of Islamists in Syria, Palestine Egypt and Algeria in the decades after independence drew focus to the political nature of militant Islamist mobilization, including armed versions (Burgat 1997, 2008). In the decade of the 2000s, political scientists such as Mohammed Hafez (2003) and Quintan Wiktorowicz (2004) would, in a series of publications, aspire to link this type of political analysis reading of jihadist mobilization to broader theoretical debates within the social sciences, by analysing Islamist and jihadist mobilization in the MENA region with explicit reference to the vocabulary and methodology of the so-called New Social Movement Theory. Hafez in particular would align with the propositions made by François Burgat by arguing that armed militant resistance movements emerged in the MENA not as responses to collectively felt “strains”, but in response to changes in political opportunity structures, mobilizing

frames and organizational capacities (Hafez 2003).

For our present purpose of understanding both the hybrid forms of militant mobilization that transcend the regime–opposition dichotomy, the most important contribution was produced on the brink of the uprisings in 2011 by Joel Beinin and Frédéric Vairel. In their edited volume they drew on the most recent attempts by leading scholars and early pioneers of social movement theory, such as Charles Tilly, Sidney Tarrow and Doug McAdam, to accommodate the criticism of state-centrist bias in the analytical models by introducing the more dynamic and less state-centred analytical prism of “contentious politics” (McAdam et al. 2001, Tilly 2006 and 2008). As suggested by Beinin and Vairel in their MENA-focused volume, this model allowed more room for capturing how movements and groups operated in authoritarian settings in the MENA region in ways that escaped the logics observed in western nation-states. It did so, they argued, in part by providing more room and terminology for analysing multiple forms of power emerging not only from the state level but also from other competing local or transnational forces, without losing sight of the importance of the state level and the forms of political opportunities and responses created by the regimes (Beinin and Vairel 2011).

The most recent developments in the region confirm the importance of adopting the contentious politics perspective rather than other competing prisms when studying the ongoing and multiple forms of militant mobilization in the region. This perspective allows us to unpack and analyse, on the one hand, how contentious movements and armed groups in the early days of the mobilization after 2011 emerged in countries such as Egypt, Tunisia, Algeria, Syria, Bahrain and so on as opposition and resistance political organizations, making political claims on the incumbent authoritarian regimes. On the other hand, it allows us to pursue the study of the current trend of militarization of contentious political mobilization in the strongly diverse set of cases of the contemporary MENA region. Hence, it enables us to study hybrid localized and/or transnationalized mobilization forms in collapsed states such as Libya, Yemen, Syria and Iraq, where opposition to international intervention exists as side by side with subnational, local dynamics of mobilization rooted in tribal-, family-, neighbourhood- or city-based relations. It also allows us a common language and analytical prism for analysing how militarization continues to work in cases such as Egypt, Algeria, Morocco, Jordan or the monarchies in the Gulf, namely under the influence of the dynamics emerging from the weakened but still remaining state structures and the trend of increasingly repressive and exclusive policies implemented by incumbent or restored authoritarian regimes. Finally, the contentious politics prism permits us to expand the types of mobilization under scrutiny beyond religious groups of jihadists and Islamists and beyond cognitively “radicalized” individuals to also include militant secular, socialist and nationalist movements, groups and cells.

On this basis we suggest that the analysis of the current trend of militarization of contentious politics undertaken within WP4 questions to what degree, how and why militant mobilization in the MENA region has grown increasingly hybrid. In other words, whether, how and why the Egyptian, Algerian, Libyan and Syrian cases reveal a combination of subnational, national, regional and international drivers behind the militarization of contentious politics.

#### 4. FOURTH TREND: THE PLURALIZATION OF COLLECTIVE IDENTITIES

States, made up of institutions and bureaucracies, and regimes, constituted by political elites, do not exist in a vacuum but are embedded in a web of people-to-people relations that constitute societies. Belonging to a society more often means belonging to a specific group within it, hence the importance of collective identities in giving shape to society and to its relations with the state and the regime. In parallel to the hybridization undergone by states and regimes (and contentious politics), since 2011 collective identities in the MENA have also become more hybrid in nature and in their interaction with states and regimes. This is the result of the powerful forces that have been unleashed by the Arab uprisings. As a way of coping with this development, the literature on the MENA region has at least partially become more hybrid itself, by introducing new analytical categories and new tools. While, in the pre-2011 phase, most studies dealing with collective identities at the national, subnational and supra-national levels tended to adopt a rather static view of the nature of collective identities and of their relations to states and regimes, since that time the literature itself has become more malleable and more open to contagion by less mainstream approaches, thus highlighting the growing complexity of the matter. Compared to the trajectories of the states and the regimes (and the literatures associated with them) discussed above, this has, so far, been a fairly linear development towards an increasingly nuanced understanding of the form and role of collective identities in domestic order-making in the contemporary MENA region.

Framing MENA political developments through the lens of collective identities has long been a topic of debate among scholars. As discussed by Messari and colleagues (2017), collective identities, as opposed to individual ones, differentiate a group of people from the rest of society on the basis of one or more non-mutually exclusive traits. In the literature, collective identities have been identified on the basis of religion, ethnicity, tribe/clan/family affiliation, gender or age (Hourani 1947, Esman and Rabinovitch 1988, Kandiyoti 1996). Active or passive identification with one or more groups creates ambivalence about some of the terms that are usually associated with such identities in the scholarly debate. One such term – and an important strand in the literature about the MENA – is related to sectarianism, meaning a form of group feeling where distinctiveness is based on religious beliefs and identities (Harris 1997). Real or imagined kinship affiliations are instead the basis of tribal identities that are often used to discuss the organization of roles and relations within a group of people and with others and the environment. Important examples of this anthropological approach to tribes can be found in Khoury and Kostiner (1991). Finally, social differentiation and a sense of order can stem from ethnicity, namely certain common characteristics, culturally acquired and reproduced, that distinguish a group of people from others. The common characteristics that are mostly discussed with regard to the MENA are geographical origins, a sense of historical continuity, and shared language and customs (Thompson 1989).

All these terms – sectarianism, tribalism and ethnicity – are loaded with meanings and sensitivities that are frequently not self-attributed. The discourse about collective identities in the MENA has also often contributed to articulating a rather fixed and artificial image of the region and its identity make-up. A number of external observers and scholars have looked for identity markers when approaching MENA societies, thus providing grounds for simplistic and largely inaccurate culturalist readings (Esposito and Voll 1996). This “orientalist” flavour in the literature devoted to the region has barely been dispelled. A major attempt to do so has been in the work carried out

by Eickelman and Piscatori (1996), who, in their seminal text *Muslim Politics*, looked at the link between religion and politics in Middle Eastern societies and criticized the culturalist/essentialist position taken towards the region. Other authors argued, along the same lines, that identity and politics are mutually formed, thus providing substance to a very fruitful line of research that sees identities, political behaviours (i.e. regimes) and institutions (i.e. states) in a dialectic relationship (Wilson 1982, Khoury and Kostiner 1991). As such, more recent studies have tended to focus on the religious, ethnic or tribal bases of social and political structures (Johnson 2001, Natali 2005, Wiarda 2014). On the one hand, having a certain communal or group feeling shapes how people see themselves and others, as well as creating a particular framework for exercising power vis-à-vis other groups or state institutions. On the other hand, identities are the terrain upon which states construct institutions and regimes enact specific policies. States and regimes may indeed use or manipulate identity categories, while attempting to craft alternative ones, to justify a particular domestic order. As a result, the exercise of power creates expectations and causes people to see themselves as having identity and interests particular to them and to no others. In conclusion, the pre-2011 literature treated collective identities as a social construct and as part of political domestic order-making processes. Collective identities are not pre-modern or anti-modern forms of identification but rather modern political phenomena, as contended by Makdisi (2000) and Telhamy and Barnett (2002).

In this respect, few changes can be observed after the Arab uprisings, as states and regimes in the MENA largely continue to craft or sustain domestic orders on the basis of (often manipulated) collective identities. States, in general, tend to reach out to people and to perform duties towards them, in terms of the provision of representation, security and a minimum of welfare, by classifying them on the basis of categories of collective identities. This situation accentuates notions of distinctiveness and creates the conditions for people to compete for goods, assert their right to them and defend their allocation on the basis of their sense of belonging to a group. In their turn, political elites are often an extension of specific groups within societies and the claims that pertain to them. In Lebanon and Iraq, this has gone further, with the institutionalization of pre-defined notions of collective identities in state organizations. Up to the present time, senior positions in the legislature, executive, judiciary, civil service and army have been primarily allocated on the basis of sectarian identities (Khalaf 2002). Similarly, quite fixed collective identities were elevated to become the primary organizing principle of politics in Iraq following the US-led invasion of the country in 2003, and this has been maintained even after 2011. In both countries, clientelism and patronage politics are not only prevalent forces in the maintenance of domestic order, but provide conducive conditions that prevent the rise of another type of politics (Wehrey 2014). In addition, this situation accentuates the perception of communal differences and distinctiveness by reinforcing existing (geographical) separation, and creates competition and, in certain cases, violence.

In other contexts, such as Jordan, the modern political discourse of the elites has transformed the consciousness and identification of the individual with the community and has turned collective identity markers into “political artefacts” or an extension of the state (Weber 1978: 22-23). Today’s tribal consciousness has been shaped by the shared political experiences of its members against the backdrop of regime manipulation. Thus, tribal identities have become a narrative of the state in MENA politics – a narrative that has been actively pursued by and has become ingrained in state institutions in an attempt to deal with the challenges confronting the state after 2011. In this

light, the literature on the politicization of tribal identities focuses on the continued manipulation of tribalism by states and regimes with the purpose of reconstructing state–society relations (Yom 2014).

The process of reconfiguration of state–society relations in the MENA has been significantly shaped – in some cases more than in others – by what can be defined as the “pluralization of collective identities”. This dynamic concerns in particular those countries in which collective identities based on religious and ethnic but also ideological and political self-identification have emerged forcefully as drivers for contestation and political action during or after the Arab uprisings in 2011, although it does not exclude other cases as well. On the one hand, what has been observed is that collective identities have “exploded” and have given rise to a number of sub-identities that have put forth claims and competed for recognition and power. In this sense, “pluralization” does not necessarily mean that society has become “more pluralistic”, but simply that the number of collective identities that tend to define people’s sense of belonging and political action has increased. Collective identities, which used to be regarded and treated by states and regimes as homogeneous, have revealed fissures, and dynamics of competition and conflict have emerged (Colombo et al. 2012). For example, being labelled “Islamist” is not a clear enough description any longer to understand a group’s position vis-à-vis a number of issues such as participation in politics, the use of violence, the role of women and state–society relations in general, as this identity marker has become plural in itself, including starkly different positions and sub-identities. The trajectory of Tunisian Islamists is very telling in this regard (Voltolini and Colombo 2017). On the other hand, the growing exposition of MENA societies to different (global) identities, as discussed in Dalacoura et al. (2017), has led to the public emergence of previously dormant, unorganized or repressed collective identities. This has been accompanied by claims for better representation and more inclusiveness, which have been couched in terms of heightened identity self-consciousness. In Morocco, ethnic claims based on linguistic identity distinctiveness have been advanced by the Amazigh minority (Ennaji 2014). Similarly, age- and gender-based identities have found renewed meaning and impetus in the context of the – often short-lived – opening of spaces for contestation and participation that took place with the Arab uprisings (Al-Momani 2011).

While this trend is formulated here as a working hypothesis, to be confirmed or not by the unfolding of the empirical research to be conducted in the framework of WP4, there is more than one reason to argue that collective identities have undergone a process of multiplication, fragmentation, partial hybridization and polarization since 2011. When looking at potential future trends, it is, however, important to bear in mind that this process has not been the same in terms of intensity and scope across the entire MENA region. There are indeed important cases in which opposite trends, towards the consolidation of existing collective identities or the subsuming of different, pre-existing collective identities under a larger one, have been at play. Overall, the interest around this trend lies not in the study of collective identities per se, but rather in the impact of the pluralization of collective identities (or lack thereof) at the political and institutional levels. First, it means asking questions related to the nature, conditions, intensity and direction of this process or of its absence. Second, it means dwelling on the extent to which the sub-identities that have emerged from the pluralization trend have competing or alternative interests and claims compared to other similar groups, and on whether states and regimes in the region have acted upon these claims and have successfully enshrined them in state institutions and policies. This last point is

particularly important as it has a direct fallout on the type of domestic order that is created and maintained. Moving from that, the pluralization of collective identities (or lack thereof) can be studied at three different levels: the micro, the meso and the macro. The micro level of analysis is the level of the individual and of his/her immediate entourage (family, household, community). The micro level also involves elementary social or unorganized collective behaviour (e.g. crowd dynamics). Turning to organized collective behaviour, it takes place at the meso level of analysis, namely the level of organized groups (e.g. political parties, networks, trade unions, charities, social movements etc.) and of their actions and interactions. Finally, the macro level is the level of state policies and institutional structures (e.g. dominant social and cultural norms, constitutional legal systems etc.). This level is particularly important with regard to the countries undergoing transformation processes. At the same time, state policies and institutions are the products not only of domestic factors, but also of powerful external actors' pressure, influence and policies. Of the three levels of analysis, we are concerned here with the meso and the macro levels only. This amounts to studying organized forms of political action articulated around collective identities.

In conclusion, studying the hybridization of collective identities after 2011 means asking two interrelated sets of questions. First, to what extent have collective identities in the MENA become plural in the sense discussed above? Is this the result of the "explosion" of pre-existing collective identities along competing and/or conflictual fault lines or is this dynamic linked to the "bubbling up" of previously dormant collective identities? Second, what is the impact of collective identities on the restructuring or maintenance of the domestic political order? How do collective identities manifest themselves at the meso level? What kind of organized groups embody them? What types of interests do they pursue? What interactions with other societal groups and/or the political elites do they give rise to? Finally, how are these interests and claims taken into account by state policies and institutions? What domestic order emerges from this dynamic in terms of cooperation versus conflictuality?

## **CONCLUSION: STUDYING HYBRID ORDER-MAKING IN THE POST-2011 MENA REGION**

Since the uprisings in 2011 a series of interconnected and often overlapping political crises have profoundly affected the domestic political orders and order-making in the MENA region. In this paper for the MENARA project's WP4 we have suggested that a common characteristic of these interconnected developments is an increasing hybridity. Since the uprisings in 2011, states, regimes, contentious actors and collective identities have, we argue, become increasingly hybrid in nature. This is not, however, a linear process. Some states in the region have seen their capacities weakened and eroded, and have eventually all but collapsed. Others have fared better, drawing on better-consolidated structures or meeting less pressure from contentious political actors or competing and/or hostile regional or international actors. In parallel, great efforts have been mobilized within the region and outside of it to counter this process of state erosion and ensure that states become increasingly capable of policing their borders and controlling their populations. In this process, some of the more robust regimes have survived while several of the weakened and illegitimate elites who were toppled or removed from power have found their way back to political influence through the process of restoration of authoritarian governance. This



process of hybridization of states and regimes correlates, furthermore, with a parallel increase in the hybridization of militarized contentious politics and of increasingly plural collective identities.

It is our hypothesis that hybridity is a central element that defines the four major trends that we have pinpointed as important for the current order-making in the region. First, the trend of erosion of states' capacities, broadly understood as states' weakening ability to control borders, territories and population. Second, the trend of restoration of authoritarian regimes, understood as the multi-faceted process through which the elites of the incumbent authoritarian regimes have either retained power since 2011, primarily through repression and exclusion of challengers, or, following short periods of marginalization from political influence, have managed to work their way back to a position in which they today yield significant influence over political decision-making. Third, the trend of militarization of contentious politics, understood as a multi-faceted process in which non-state actors have adopted protest repertoires that involve premeditated armed and violent collective action as a means to achieve political outcomes. Fourth, the trend of pluralization of collective identities, understood as a process in which the total sum of publicly expressed collective claims based on identity-belonging have multiplied and become more conflictual.

We believe that each of these four trends have seen a significant increase in hybridity. States and regimes have sub- and supra-national centres of power that are able to challenge and overtake their core prerogatives. In correlation, contentious actors and collective identities have transcended the framework of national arenas and increasingly drawn on sub- or supra-national references. As we have shown, the increased hybridity of political order-making in the region challenges core assumptions in the existing literature about states, regimes, contention and identity. It questions the very nature of the state, it undermines the regimes, it challenges the key distinction between regimes and opposition groups and it makes past collective identities appear increasingly artificial.

For these reasons we suggest that the central goal of WP4 is to document, analyse and theorize about the hybridization of domestic orders and order-making in the region. We believe that a better empirical understanding and a stronger theoretical explanation of whether, how and why hybridization plays out in the ways it does across the region will greatly advance scholars' as well as policy-makers' understandings of the broader processes of order-making that connect domestic, regional and international dynamics in new ways inside the region, as well as between the region and outside powers, whether European or non-European.

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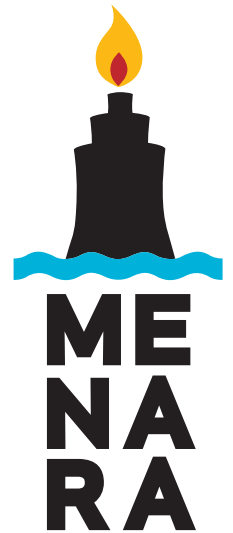
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**Middle East and North Africa Regional Architecture: Mapping geopolitical shifts, regional order and domestic transformations (MENARA)** is a research project that aims to shed light on domestic dynamics and bottom-up perspectives in the Middle East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



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