The European Geopolitical Forum

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Geopolitical Trends

Issue 2/2016

Joining the dots and making sense of the key geopolitical developments in Europe, Eurasia and MENA

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Key points:

1. *After five years of conflict in neighbouring Syria, Turkey faces dreadful security scenarios: the emergence of an autonomous Kurdistan, and a regional conflict with Russia (and possibly Iran).*

2. *Escalating tension between Saudi Arabia and Iran needs to be seen against the backdrop of the changing regional order in the Middle East, where US leadership was not what it once was.*

3. *The questionable macro-security environment of the Euro-Atlantic area could be restored by comprehensive strategic dialogue inclusive of Russia and the West, and foreseeing the emergence of a revamped security architecture.*

4. *The political deadlock inside Ukraine has led to the stalemating of both the Minsk 2 peace process on the one hand, and Kyiv's pro-European reforms on the other, with Ukraine's oligarchs likely to have the last laugh.*

Turkey's predicament in Syria: living with an emerging Kurdistan and regional conflict with Russia (and possibly Iran)

Turkey's once touted foreign policy of "zero problems with its neighbours" lies in shambles. This strategy aimed to position Turkey as the dominant regional power in the Middle East by projecting its soft power through reforms at home, in parallel to mediating in the numerous crises taking place in its neighbourhood. However, Ankara has ended up in confrontation with most of its neighbours instead (most notably Russia, Iran and the regime in Syria), and presently appears to be rather isolated from its traditional Allies, including the United States and Israel. This turnaround has happened against the backdrop of five years of conflict in Syria, which seems to be leading Ankara towards dreadful security scenarios: the emergence of an autonomous Kurdistan in Northern Syria, and regional conflict with Russia (and Iran). Is there any way out for Ankara from this perplexing geopolitical situation?

"In an unexpected move on 26 December last year, the Syrian Democratic Forces (SDF), which is dominated by the Kurdish People's Protection Units (YPG), captured the Tishreen Dam close to Manbijin, Syria." (*internet: open sources*). Prior to that, the Turkish National Security Council had made clear that any incursion west of the Euphrates River by Kurdish forces would be a "violation" of a Turkish "redline". Despite Turkish warnings, the Kurds – with the support of the US-led coalition – proceeded to cross the Euphrates. Turkey had vowed to punish any attempts by the Syrian Kurds to unite their territories east and west of the Euphrates river because: 1) such a move would help the Syrian army advance against territory and logistics lines held by Turkey-supported Syrian rebels in and around the city of Aleppo; 2) Ankara fears al-Assad will reward Kurdish military support with broad autonomy over the entirety of northern Syria. The alleged links between the Kurdistan Workers' Party (PKK), the terrorist organization operating on Turkish soil since the 1980s, and the Syrian YPG might entice the emergence of Kurdistan (the land of the Kurds), an entity which might threaten to carve deep into Turkey's territorial integrity. Consequently, as of 14 February, Turkey started to shell the positions of the YPG in Syria, in spite of the opposition of its main ally, the United States.

The situation has gone from bad to worse also in Turkey's conflict with Russia. In last issue of EGF *Geopolitical Trends*, we noted Turkey's decreasing strategic relevance in resolving the Syrian conflict following Russia's military intervention in support of the Assad regime. Indeed, Damascus' forces, heavily supported by Russia, have gained ground from the Ankara-backed rebel Syrian forces.

In response, Turkey massed thousands of soldiers on the border with Syria, which triggered Russian Prime Minister, Dmitry Medvedev, to warn that: "the start of ground operations in Syria could result in a prolonged conflict in the country that could last years, maybe even decades." (*internet: open sources*) Meanwhile, in February Russia conducted a large scale military exercise in the Caspian and Black Sea region, which was apparently aimed at Turkey. On the other hand, it is not clear whether NATO would jump in to help Turkish forces if they countered the Kurdish incursions (supported by Russian airstrikes) in North-Western Syria.

In these harsh circumstances, the ceasefire brokered by the United States and Russia in Syria, which started on 27 February, might be a boon for Ankara, as far as it would freeze the current strategic situation on the battlefield. Joining the Americans and the Russians in supporting the resumption of the Syrian peace talks would be Ankara's best shot for the moment. At this stage, an inclination towards achieving compromise

could be more rewarding than military force in preventing Turkey's worst geopolitical nightmares. In this vein, re-building the broken bridges with the Turkish Kurds, and toning down the aggressive discourse against the Syrian president might be milestones on Ankara's way out of a most precarious security situation.

The battle for leadership of the Muslim world and the changing regional order in the Middle East

As discussed in some depth in our previous issues of EGF *Geopolitical Trends*, the Iranian nuclear deal concluded last July, and the changing strategy of the US in the Middle East have all but re-written MENA geopolitics in ways that still need to be better understood.

For example, take the conflict between Shiite Iran and Sunni Saudi Arabia. The regional rivalry between the two oil-rich contenders for dominance in the Islamic world started in the wake of the 1978-79 Islamic Revolution in Iran. At that time, Iran's Supreme Leader, Ayatollah Khomeini, challenged Saudi Arabia by advocating leadership across all Muslims nations.

Since then, both countries have fed sectarian identities in the region for their own purposes, drawing battle lines over religious identity that have helped fracture the Middle East like never before. More recently, Saudi Arabia and Iran have supported conflicting factions engaged in devastating civil wars in neighbouring Yemen and Syria.

"The Saudis feel betrayed, and now they feel like they must do something, even if it's the wrong thing" argues Farea al-Muslimi, a Yemen analyst at the Carnegie Middle East Centre in Beirut. This statement envisaged the Iranian nuclear deal, seen by Riyadh as a betrayal committed by American allies, and the apparent provocative execution of a Shiite Saudi cleric, Sheikh Nimr al-Nimr, on 1 January 2016. The latter sparked wholesale Iranian outrage with the country's present-day Supreme Leader, Ayatollah Ali Khameini, warning that "Saudi Arabia will face divine revenge for its actions" (*internet: open sources*). Subsequent violent mobs at the Saudi Embassy in Tehran were followed by the severing of diplomatic ties between Iran and the Saudi Kingdom.

The outlook for relations between Iran and Saudi Arabia is likely to be more of the same in the short-to-medium term: no decline in tension and further diplomatic incidents likely. While it is highly unlikely that the two countries would engage in direct warfare, since this would be highly inimical to the energy economies of both countries, growing support for their respective proxies in Yemen, Syria and Iraq should be expected. An energy war – where Riyadh and Teheran allegedly refuse to cooperate in order to help the oil price start moving back upwards – between the two regional rivals is already underway.

The new regional order in the Middle East should also be plotted against America's step backwards as a regional hegemonic power, Russia's return to the region via recent intervention in Syria, and Iran's steadfast rise as a new regional power. The emergence of an "Islamic Alliance", pitched by Saudi Arabia and potentially including Turkey, Egypt, Jordan and Qatar, as the main Sunni military entente capable of defeating ISIS (and possibly a counter-balance to Shiite Iran) may also become an element of the new regional order. As the 27 February cease fire brokered by them in Syria might suggest, the US and Russia could play the role of external mediators, with Moscow attempting to temper the Shiites, and Washington soothing the Sunnis. However, Moscow still needs to prove its capacities in undertaking such a delicate regional role – and needless to say so does

Washington. Nothing is as simple as it seems in these few brief words of analysis.

The prospects of Euro-Atlantic security: a new Cold War or security architecture 2.0 in wider-Europe

The annual Munich Security Conferences have traditionally been a venue for high-level Euro-Atlantic security dialogue, albeit of an informal nature. This year's event, held on 12-14 February, should not have been that different. However, in a grim atmosphere which mimicked the early post-WWII years, Russia and the West exchanged rounds of reciprocal accusations, pointing the figure at each other whilst accounting for worsening security developments currently prevailing in the Euro-Atlantic area.

Public opinion on both sides might have felt shivers running through the spine when listening to the Russian Prime-Minister, Dmitry Medvedev, conclude that "we are rapidly rolling into a period of a new Cold War". Or, indeed, when he wondered: "do we need one more, third global tragedy [*meant as WWIII*] to understand that what we need is cooperation rather than confrontation?" (*internet: open sources*)

Likewise, Western leaders' talk of a possible Russian intervention in Finland or in the Baltic States, hence the need for NATO to "become fitter -- able to react not just in weeks or days, but in hours" as it faces "a new urgency due to Russia's refusal to accept the territorial integrity of other nations" (*internet: open sources*), have also stirred the fear of tension between Russia and the West deepening further. Are we on the brink of a new Cold War between Russia and the West, or of something even more chilling?

In the opinion of Dr Robert Legvold, Professor Emeritus at Columbia University, we might have already reached that point. In Legvold's recently published book, "Return to Cold War", he argues that the pattern of relations between Russia and the West today vividly resemble those of the early Cold War years (1948-1956).

However, the 2016 Munich Security Conference has also left public opinion with a glimmer of hope for resuming the strategic dialogue in the Euro-Atlantic area. For example, Jens Stoltenberg, NATO Secretary General, while expecting further defensive measures to be decided at a summit in Warsaw in July, called for "more dialogue" with Russia. Further, Petr Pavel, the chairman of the NATO Military Committee, said he had heard calls for the "containment" of Russia, but he believed that approach would only increase the risk of a military confrontation. Conversely, he called for a combination of deterrence and engagement with respect to the West's Russia policy.

On the other hand, Russian PM Medvedev proposed "an intensive dialogue on the future architecture of Euro-Atlantic security, global stability and regional threats". (*internet: open sources*) Medvedev offered five possible areas for such a dialogue: responses to economic globalization; resolution of regional conflicts; the fight against terrorism; uncontrolled migration; restoring mutual trust.

Political leaders and officials from both Russia and the West might switch on to a new mood resembling that of the Cold War, where the prospect of a hot-war should not be underestimated lest an accident of some kind takes place in the likes of Ukraine, Syria or elsewhere – where the interests of Russia and the West continue to collide. Nevertheless, a comprehensive political, economic and strategic dialogue potentially leading to common approaches should be brought back on the Euro-Atlantic security agenda.

A new security architecture may eventually emerge from this dialogue, since a functional security mechanism is needed to replace those instruments which emerged at the end of the Cold War and are now largely invalid. As long as the new mechanism was not about defining spheres of influence or building up another Iron Curtain, Euro-Atlantic security architecture 2.0 – essentially an upgrade of the OSCE system which emerged more than four decades ago – would be the worst scenario for the future of Euro-Atlantic security, except for all the others.

Living with the Minsk 2 Agreements: Ukraine in domestic political deadlock and on the socio-economic road to nowhere.

The stalemate in the implementation of the Minsk 2 Agreements has persisted over the last months in spite of continued high level international efforts to move the process forward. We explained in the previous issues of this publication why Ukrainian elites prefer freezing, rather than resolving, the Donbas conflict in accordance with Minsk 2.

Since mid-January 2016, in the wake of a phone call between presidents Obama and Putin, international mediators have increasingly demanded that Kyiv reaches an agreement with the pro-Russian rebels on modalities for holding elections in the breakaway regions of Donetsk and Luhansk. However, without blocking political discussions outright, Kyiv maintained that the current security situation on the ground would not be conducive to such negotiations. Basically, the current deadlock originates from the Russian side wanting the Minsk armistice's political clauses to be implemented first, and the military and security clauses to be discussed later, while Ukraine insists on the opposite sequence. How could Kyiv stand up against combined Western and Russian pressure in order to escape from the current deadlock in the implementation of Minsk 2?

Apparently, Ukrainian oligarchs might have found an effective, though short-term, solution: a domestic political deadlock would block both the implementation of Minsk 2, as well as Western-oriented reforms. For Ukraine's oligarchs, this move was a case of killing two birds with one stone. How did this scenario play out?

On 3 February, the Ukrainian Minister of Economy, Aivaras Abromavicius, resigned, offering the following statement as a swansong: "Neither I nor my team have any desire to be a cover for open corruption, or to be a marionette of those who want to establish control over state money." (*internet: open sources*) He accused the old political elites of systematically blocking much-needed reforms and paralyzing the fight against rampant corruption. This resignation further triggered a political crisis driven by the long simmering conflict between reformists and oligarchs. Within the next days, one reformer after another resigned from the government, citing the impossibility of making any progress in a system that was still corrupt to the very core.

Finally, on 16 February, Ukrainian President Petro Poroshenko called for Prime Minister's Arseniy Yatsenyuk's resignation, officially ending their political honeymoon, if there ever was one. However, that very same day, the Yatsenyuk government unexpectedly survived a no-confidence vote in the Parliament with support from MPs allegedly having close relations with Ukrainian oligarchs Rinat Akhmetov, Ihor Kolomoiskiy, and Victor Pinchuk. The recent political deadlock in Kyiv has confirmed what many independent observers in the West had long noted: in Ukraine, oligarchs are still much stronger than reformers.

Nevertheless, a domestic political deadlock, conveniently blended with signs of a socio-economic failure, might offer a credible alibi for putting on hold the implementation of Minsk 2. A shaky government, marred by never ending political and socio-economic troubles, is hardly the remedy required for delivering on the implementation of the Minsk 2 agreements. Furthermore, the blockage of the Donbass peace process, and the ensuing "increasing Russian threat" might also offer a viable excuse for postponing the pro-Western reforms and anticipated anti-corruption measures.

On the other hand, the West cannot afford to leave Ukraine without a minimum level of financial assistance for fear that an economic collapse might trigger a deepening crisis on the doorsteps of the EU, and might eventually lead Ukraine back into the arms of Moscow.

In the short term, although possibly in repetitive scenarios, domestic political deadlocks in Ukraine will likely lead to stalemating of both the Minsk 2 peace process, and of the reform process. The West's efforts in Ukraine, in the meantime, are likely to remain prisoner of Ukraine's all-mighty oligarchs, who are currently having the last laugh.

EGF Geopolitical Trends
Published by European Geopolitical Forum SPRL

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