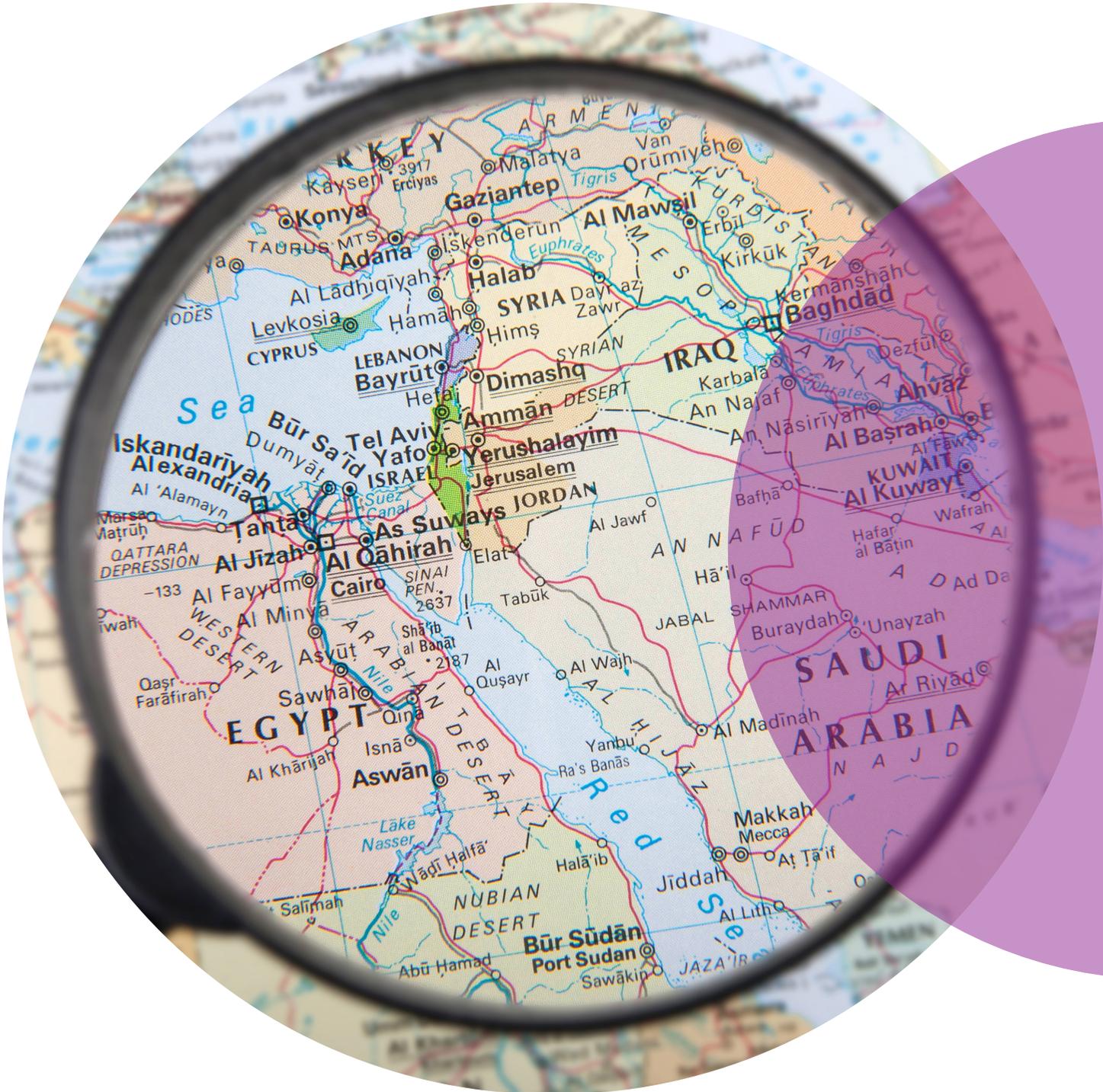


MENA: Four political trends shaping the hybrid threat landscape



Hybrid CoE Trend Reports highlight trends and theme clusters related to hybrid threats. They provide multiple perspectives on current security challenges and generate academic discourse on the topic. They aim to distinguish between what constitutes a threat, what appears to be a threat but is not necessarily one, and what has the potential to become one.

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(Hybrid CoE) is an autonomous, network-based international expert organization dedicated to addressing hybrid threats. Hybrid CoE's mission is to enhance the security of its 35 Participating States, the European Union, and NATO by providing expertise, training, and networks to counter hybrid threats. Its core values are excellence, integrity and respect. The Centre is located in Helsinki, Finland.

Responsibility for the views expressed in this paper ultimately rests with the authors.

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Summary

The Middle East and North Africa (MENA) region is embroiled in a series of conflicts and crises that have profound implications for the stability and future of the region, as well as for how the regional dynamics may affect the rest of the world. The MENA region is a geographical crossroads and, as such, is intricately woven into the fabric of global power relations. This Hybrid CoE Trend Report presents four cross-cutting aspects that are essential to understanding and anticipating potential developments in the MENA region. In general, there is a widening gap between the expectations, values, and interests of the ruling regimes and those of their societies. In many countries, elites have driven a revival of authoritarian practices, including transnational repression targeting their diasporas in the region and beyond. In particular, the transactional normalization agenda between certain Arab regimes and Israel, known as the “Abraham Accords”, exemplifies the rift between these regimes and their societies. This rift, together with the rise of authoritarian tendencies, means that transnational repression – and the technologies mobilized for this purpose – will remain a major challenge for the Euro-Atlantic community.

The future of the region largely depends on the current escalating dynamics between Israel and Iran. The Iranian nuclear issue also has regional implications, as Russia will seek to position itself as an important player. Iran’s nuclear edging strategy, combined with Russia’s intention to create strategic counterfires to gain more leeway in its quest for success in Ukraine, engenders a dangerous situation.

Strategic competition for resources, trade routes and access is also in full swing. Trade in technology is being mobilized to serve geopolitical interests, and trade infrastructure is becoming heavily contested. The Gulf States consider their importance and bargaining power as a geopolitical actor to be on the rise. The landscape of strategic competition will see its stakes rise and become more volatile and potentially more violent, with unclear cascading effects.

The conflict between Israel and Palestine warrants scrutiny, not only because of the inhuman suffering it has caused and continues to cause, but also because the precedents it has set have decisively weakened key tenets of international law. This is important because it undermines the frameworks of state accountability at the global level. As a crystallization point for the region and its public opinion, the conflict has very strong symbolic and historical significance for societies in the region, and the Euro-Atlantic community's attitude towards it is being closely observed. Adversaries resorting to hybrid threats may seek to occupy the information space and accuse states in the Euro-Atlantic area of moral duplicity.

The analysis mostly covers developments up to August 2025.

Introduction

Understanding the Middle East and North Africa (MENA) region is essential to ensuring the security of Europe and the Euro-Atlantic community. The MENA region is the scene of a series of frozen or ongoing crises and conflicts that have a profound impact both within and outside the region. This Trend Report attempts to provide a series of keys to understanding the shifting and constantly evolving reality. The dynamics of normalization between the Arab states and Israel, as well as the various initiatives for détente between regional actors, particularly between Iran and Saudi Arabia, have been key elements of the analysis presented in this report. The impact and explosive consequences of the attacks by Hamas on Israel on 7 October 2023 also have a central role in this work. Developments in the Iranian regime and the conflictual dynamics with Israel and the US are also addressed, as are the effects of the Syrian revolution and the toppling of the Assad regime. The trends presented in these pages have sought to take due account of the diversity of countries and societies while attempting to find some common denominators for analytical purposes.

The report identifies four trends that characterize the environment in and through which hybrid threat activity could manifest in the foreseeable future.

- First, regimes and societies are separated by an ever-widening gap, creating the potential for future societal and political crises. Since the “Arab Spring”, Arab regimes have undertaken transformations and reforms that have ultimately amounted to a continuation of authoritarian rule, with only cosmetic changes. This has left very little room for societal expression, participation, or inclusion. The normalization agendas with Israel, which are largely unpopular among Arab societies, illustrate this growing divide that fosters societal and political unrest.
- Second, the dynamics of the conflict between Iran and Israel will only become more volatile and dangerous, with an increased likelihood of open confrontation and miscalculations in deterrence. This second trend reflects how the deterrence relationship between Iran and Israel is undergoing transformations that have regional consequences.
- Third, the report points to a shift in geostrategic influence in the region, based on the access of regional and external powers to hubs and resources. In particular, Israel’s technological diplomacy towards its neighbours is a security policy instrument that drives transactionalism and normalization while sidelining the Palestinian issue.
- Finally, the report examines how breaches of international law committed in the context of the war between Hamas and Israel are leading to a detrimental undoing of state accountability and responsibility. This in turn has strategic implications for the potential and nature of hybrid threat activity towards Europe and the Euro-Atlantic community.

While attempting to identify common denominators and cross-cutting developments in an extremely diverse region, greater emphasis has been placed on countries in the Middle East, while the North African region remains, in comparison, somewhat less explored for the purposes of this report. The reason for this emphasis is that the scale and significance of events and developments in the Middle East have had greater importance and impact at the regional and global levels than events in the North African region. Nevertheless, many of the considerations presented in this report – and factors such as the Abraham Accords or the relationships between states and their societies – cover the whole region.

Several case studies and stocktaking commentaries on the conclusions of the 2021 Hybrid CoE Trend Report were commissioned from key academic experts. A workshop bringing together experts from Chatham House, IRSEM, IFRI, the NATO Defence College, the Royal Higher Institute for Defence (RHID), and Hybrid CoE was held in Helsinki in January 2025. The trends presented in this report reflect the results of those consultations and discussions. This work to define trends is by no means exhaustive, but seeks to refine lines of thought in order to draw conclusions about the situation in the MENA region and its most direct implications for hybrid threat activity. The report understands the Middle East and North Africa region as extending horizontally from Iran to Morocco.

Trend 1 – The widening gap between regimes and societies

State power structures and governance throughout the region are largely characterized by their authoritarian dynamics. The inability of regimes to reform and open up to changes in societal norms, political inclusion and participation in political life has often acted as a catalyst for crises and instability.¹ This first trend refers to the way in which regimes and societies across the region are divided by a widening gap that could trigger future social and political crises. This is not a new trend, but rather a constant feature of the region. Since the Arab Spring, regimes have attempted to reform along the lines of what political science terms “authoritarian continuity”. This series of practices will be presented below, along with its consequences. While the authoritarianism of regimes persists, societies are characterized by a high degree of transgenerational trauma and the lasting impact of various events of collective violence, wars and conflicts. This creates a very specific set of societal and social demands. This widening gap between regimes and societies is also reinforced by approaches to transactional normalization with Israel, brushing aside the Palestinian question.

Authoritarian continuity since the Arab Spring: the shrinking space for societies

The Arab Spring uprisings of 2011 led authoritarian regimes to seek new ways to assert their power and exert control over

their populations, further curtailing societal freedom. Authoritarianism refers to political regimes characterized by limited pluralism, severe constraints on political participation, and concentrated power, resulting in restrictions on civil and political freedoms. David Beetham considered authoritarianism to be a “mode of governing which is intolerant of public opposition and dissent”.² Such regimes are marked by high degrees of repression and coercion. They can be classified in different ways: religious theocracies such as Iran; patrimonial monarchies such as the UAE and Qatar; regimes marked by state capture and violent repression, such as Syria under the Baath regime, with a high degree of ethnic power concentration and militarization; and military authoritarianism combined with economic capture, as in Egypt. Societies in the region have long experienced repression by authoritarian regimes, leaving very little room for increased inclusivity and political participation – a tendency that intensified in the aftermath of the Arab Spring. The drivers of societal change in the region have generally been independent of power structures, as the latter were determined to resist political inclusion and democratization.³ Exclusive elites have accumulated social, financial and political power, and have consequently worked against social and political liberalization. The Arab Spring uprisings were triggered in large part by resistance to rentier,

1 Robert Barron, ‘Building Pluralistic and Inclusive States Post-Arab Spring’, Conference Report (Baker Institute, Edward P. Djerejian Center for the Middle East, 26 April, 2018), <https://www.bakerinstitute.org/research/building-pluralistic-and-inclusive-states-post-arab-spring>.

2 Oliver Schlumberger, ‘Authoritarian Regimes’, in *Oxford Handbook of Topics in Politics* (Oxford University Press, 2015).

3 Sandra Halperin, ‘Social Power and Development in the Middle East: a Transnational Perspective’, Working Paper (Institute for New Economic Thinking, April 2014), <https://www.ineteconomics.org/research/research-papers/social-power-and-development-in-the-middle-east-a-transnational-perspective>.

patrimonial states that ruled with arbitrary power in a context of persistent insecurity.⁴

The conceptual model of hybrid threats established that authoritarian regimes seek self-justification through hostile interference abroad. This is one of the root causes of hybrid threat activities carried out by authoritarian states against liberal democracies. Authoritarian political regimes in the region have not been inactive since the Arab Spring. They have adapted and evolved to strengthen their grip on power by three main means: intensified personalization of power, more diverse technological forms of control and surveillance, and transnational authoritarian solidarity have all contributed to authoritarian continuity in the region.⁵

Many regimes in the region have gone on to personalize power. A particularly striking example is that of Saudi Arabia, where the Vision 2030 policy has been made possible by the personalization of policymaking.⁶ Crown Prince Mohammed bin Salman, as the de facto ruler of the country, has achieved unprecedented centralization and personalization of power, with effectively no checks or balances to counter his political

objectives. Qatar, Saudi Arabia, and the United Arab Emirates have experienced a rejuvenation of dynastic power that has reinforced trends towards personalization and concentrated authority in younger, more charismatic leaders. This has moved these regimes away from more consensus-based policymaking towards more personal authoritarianism.

Power personalization denotes power that is concentrated in the hands of a leader and their entourage, a pattern also observed in Morocco, where Human Rights Watch published a detailed report providing evidence of repressive practices against journalists, activists, and opponents of the regime in general.⁷ Tunisian President Kais Saied has likewise strengthened his personal control over power with a new constitution that effectively centres power on the presidency.⁸ The Tunisian case exemplifies a clear lurch towards authoritarianism and the personalization of power, playing on a populist agenda fuelled by the issue of migration in Tunisia.

While the cult of personality is a common feature of many authoritarian and dictatorial regimes, recent events and the affordances of social media have made this trend a means

4 Gilbert Achcar, 'La "Grande Révolte arabe" du XXI^e siècle: considérations sur le bouleversement en cours dans l'espace arabophone' [The "Great Arab Revolt" of the 21st century: reflections on the ongoing upheaval in the Arabic-speaking world], *Lettre du Collège de France*, December 2013, <https://journals.openedition.org/lettre-cdf/2394>.

5 André Bank et al., 'Authoritarianism Reconfigured: Evolving Forms of Political Control', in *The Political Science of the Middle East: Theory and Research since the Arab Uprisings*, ed. M. Lynch, J. Schwelder, & S. Yom (Oxford University Press, 2022).

6 Andrew Leber, 'Personalization and domestic policy outcomes: evidence from Saudi Arabia', *Democratization* (2024): 1–25.

7 'Morocco and Western Sahara: Events of 2021', *World Report 2022* (Human Rights Watch, 2022), <https://www.hrw.org/world-report/2022/country-chapters/morocco-and-western-sahara>.

8 Karim Mezran & Alissa Pavia, 'As Saied increases his grip on power, Tunisia's democracy is being squeezed', *Atlantic Council, New Atlanticist*, 4 October 2024, <https://www.atlanticcouncil.org/blogs/new-atlanticist/as-saied-increases-his-grip-on-power-tunisia-democracy-is-being-squeezed/>.

of creating soft power for regimes. This diminishes the opportunities for institutions and intermediary bodies to be present in the system and to offer avenues for change. Over the past decade, information technology has also made repression more affordable for powerholders in the region.

Repression and political control of society require fewer human resources today to be effective and targeted.⁹ Technological tools and techniques have given rise to new modes of coercion. Ahmed Mansoor, a prominent human rights defender and blogger in the UAE, was one of the first to be infected with Pegasus spyware in 2016 as part of a campaign to crack down on dissident voices in the country.¹⁰ The same spyware was used by Saudi Arabia against Jamal Khashoggi prior to his murder. These examples clearly show how authoritarian states are taking advantage of technological advances to target their opponents both domestically and transnationally.¹¹

Transnational dynamics also explain the continuity of authoritarianism in the region. Since the Arab uprisings, autocracy promotion and sponsorship have played a major role in keeping political change in check and rulers in power, particularly in Iran and Saudi Arabia. Bahrain in 2011 is a case in point, when Gulf Cooperation Council (GCC) countries mounted

an intervention to help the authorities crack down on protests.¹² The transnational spread of authoritarianism has also been observed through simultaneous restrictions on NGOs, bans on freedom of expression, and anti-terrorism legislation that has stifled dissent within a very short period in the region. These factors, which have led regimes to evolve towards authoritarian continuity, not only demonstrate a pervasive transnational authoritarian logic – with regimes ready to help each other and consolidate their respective power – they also imply a rapid development of both domestic and transnational repression technologies. This dynamic is creating increasingly powerful and scalable tools and devices, the proliferation of which could make it more affordable for other states, and even non-state actors, to use invasive surveillance software and cyberespionage tools.

Violence coupled with domestic and transnational repression

Authoritarian rule relies on varying degrees of violence to assert power, control societies, and conduct foreign policy. Societies in the Middle East and North Africa have historically experienced more violent conflict than those in Europe or America, particularly with regard

9 See Andrea Kendall-Taylor et al., 'The Digital Dictators: How Technology Strengthens Autocracy', *Foreign Affairs*, 6 February 2020.

10 Ottavio Marzocchi & Martina Mazzini, 'Pegasus and surveillance spyware', In-Depth Analysis (European Parliament – Policy Department for Citizens' Rights and Constitutional Affairs, May 2022), [https://www.europarl.europa.eu/RegData/etudes/IDAN/2022/732268/IPOL_IDA\(2022\)732268_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/IDAN/2022/732268/IPOL_IDA(2022)732268_EN.pdf).

11 Marc Owen Jones, *Digital Authoritarianism in the Middle East: Deception, Disinformation, and Social Media* (Hurst Publishers, 2022).

12 'Timeline: The 2011 uprising in Bahrain and what's happened since', *Reuters*, 16 February 2021, <https://www.reuters.com/article/world/timeline-the-2011-uprising-in-bahrain-and-whats-happened-since-idUSKBN2AG1K6/>.

to non-state conflicts since 2011.¹³ This is not to suggest that the MENA region is inherently prone or predisposed to violent conflict. Rather, it indicates that the issue of violence must be understood in relation to the way in which the region emerged through its political practices, governance arrangements and processes. These dynamics have contributed to making the region particularly conflict-prone.

Jean-Paul Chagnollaud and Pierre Blanc contended in 2014 that a common denominator of forms of violence in the region is that states and their authorities are failing to fulfil their role as regulators and mediators of political disagreements. States are failing to propose and create processes for dialogue, to reach compromises, and to legitimize instruments of the rule of law.¹⁴ From a longer-term perspective, it can be argued that political violence is largely the result of the creation and consolidation of states in the region throughout the 20th century.¹⁵ Most of these states were born out of the dissolution of the Ottoman

Empire, and their origins and consolidation are closely linked to colonial violence.¹⁶ The region is strategically important due to the Suez Canal, its abundant oil resources, its significant ethnic and religious diversity, and the fact that it is home to the holy sites of the three monotheistic religions.

State-formation processes in the region have been structurally characterized by a diverse set of sub-state solidarity networks within the societies they sought to govern. The existence of cross-border religious and ethnic groups, and leaders and elites competing for resources, has often resulted in state capture. Societies have undergone several generational traumas in the aftermath of violent conflicts, brutal social inequalities and collective shocks.¹⁷ With the Middle East being “the most unequal region in the world”,¹⁸ force often prevails over political deliberation within states and in foreign relations between countries in the region.¹⁹

Qualitative studies and surveys have identified a series of recurring themes in the

13 Shawn Davies et al., ‘Organized Violence 1989–2023, and the prevalence of organized crime groups’, *Journal of Peace Research* 61(4), (2024): 673–693, https://criminologie.org.ro/wp-content/uploads/2025/03/Davies-et-al_Organized-Violence-1989-2023_Prevalence-of-Organized-Crime-Groups_2024.pdf.

14 Pierre Blanc & J.-P. Chagnollaud, *Violence et politique au moyen-orient* [Violence and politics in the Middle East] (Les Presses de Sciences Po, 2014).

15 Eberhard Kienle, ‘Violences “politiques” au Moyen-Orient: le legs perpétuellement reconstitué d’inégalités mondiales’ [‘Political’ violence in the Middle East: the perpetually reconstituted legacy of global inequalities], *Colloque*, 23 June 2022, Collège de France, <https://www.college-de-france.fr/fr/agenda/colloque/la-violence-politique-vue-par-les-historiens-du-moyen-et-de-extreme-orient-suite/violences-politiques-au-moyen-orient-le-legs-perpetuellement-reconstitue-inegalites-mondiales>.

16 Allison Spencer Hartnett, ‘Colonial legacies of uneven state development in MENA’, *Social Policy in the Middle East and North Africa*, (2018): 7–10, <https://www.belfercenter.org/publication/colonial-legacies-uneven-state-development-mena>.

17 Expert Workshop, Helsinki, 30 January 2025.

18 Facundo Alvarado et al., ‘Measuring Inequality in the Middle East 1990–2016: The World’s Most Unequal Region?’, *WID.world WORKING PAPER SERIES*, April 2018, https://wid.world/www-site/uploads/2017/12/WID_WORKING_PAPER_2017_15_MiddleEast_AAP.pdf.

19 Robert Springborg, *Political Economies of the Middle East and North Africa* (Polity, 2020).

way Arab populations in the Middle East tend to deal with political violence and conflict.²⁰ The sense of constant threat, the normalization of war and violence, experiences of injustice and inhumane treatment have disproportionately led to feelings of disillusionment, loss of hope and trust, loss of identity and resentment among Arab populations. Experiences of violence and war have also emphasized the importance of social and family support in sharing and coping with traumatic experiences. Palestinian society is a typical example of the influence of violent experiences in Arab societies.²¹ Parallels can be drawn between Arab societies due to their common cultural characteristics, diasporic and transnational links, and sense of identity and belonging to a community. This development is also particularly important for understanding the situation of Middle Eastern diasporas in Europe, especially among refugee populations fleeing violent conflict and organized violence.²² Refugee populations fleeing war and violent conflict tend to have a higher incidence of mental disorders, particularly post-traumatic stress disorder (PTSD).²³ The prevalence of

PTSD among the displaced Syrian population is seven to eight times higher than in the general population.²⁴ This higher prevalence, combined with the associated public health risk it poses, can easily give rise to distorted arguments in misinformation and disinformation campaigns aimed at portraying migrants as a threat to European security.

The impact of violence on societies can also be seen in the way authoritarian regimes seek to extend their repressive reach abroad, towards their own diasporas. Egypt, for instance, is now among the top ten perpetrators of transnational repression globally.²⁵ Researchers have found that Iran, Syria, Egypt and Libya, in particular, have used proxy repression techniques to target dissidents and activists located abroad. By targeting the families who remain in the country, these regimes have adopted practices such as confinement, threats and harassment, travel bans, and the deprivation of resources.²⁶ Iran, in particular, has used the most violent and direct transnational repression techniques, engaging proxies from criminal networks to harass and threaten its dissidents in Europe and to carry

20 See Ayah Hamadeh et al., 'The experiences of people from Arab countries in coping with trauma resulting from war and conflict in the Middle East: A systematic review and meta-synthesis of qualitative studies', *Trauma, Violence, & Abuse* 25(2), (2024): 1278–1295.

21 Faye Mahamid et al., 'Development of a context-specific trauma scale among a Palestinian adult population living amidst military violence', *Global Mental Health* (2023), <https://pmc.ncbi.nlm.nih.gov/articles/PMC10755377/>.

22 Petter Tinghög et al., 'Prevalence of mental ill health, traumas and postmigration stress among refugees from Syria resettled in Sweden after 2011: a population-based survey', *BMJ Open* (2017).

23 Fatma Aysazci-Caker et al., 'A systematic review of prevalence and correlates of post-traumatic stress disorder, depression and anxiety in displaced Syrian population', *Journal of Affective Disorders Reports* Vol 10 (2022), <https://www.sciencedirect.com/science/article/pii/S2666915322000890>.

24 Fatma Aysazci-Caker et al., 'A systematic review'.

25 Nate Schenkkan & Isabel Linzer, 'Out of sight, not out of reach: the global scale and scope of transnational repression', Report, (Freedom House, 2021), https://freedomhouse.org/sites/default/files/2021-02/Complete_FH_TransnationalRepressionReport2021_rev020221.pdf.

26 Dana Moss et al., 'Going after the family: Transnational repression and the proxy punishment of Middle Eastern diasporas', *Global Networks* 22(4) (2022): 735–751.

out violent actions against them. In the most extreme cases, Iranian agents have reportedly carried out targeted assassinations on European soil.²⁷

Transactionalism and normalization: towards a widening state–society rift

The transactional normalization agenda for the Middle East, promoted by the US, Israel and the Abraham Accords signatories, could lead to a growing divide between states and societies in the region. The Abraham Accords are a series of bilateral agreements on Arab–Israeli normalization signed between Israel and the UAE, between Israel and Bahrain, and between Israel and Morocco in 2020. Sudan signed in 2021, but the agreement has yet to be ratified. This is a normalization agenda that directly contradicts the 2002 Arab Peace Initiative, which called for collective normalization of Arab states’ relations with Israel in exchange for the creation of a Palestinian state based on the 1967 borders.²⁸ By contrast, the current transactional normalization agenda emphasizes economic incentives while leaving aside the issue of a Palestinian state.²⁹

The transactional normalization agenda is being driven by parts of the political and economic elite, while other elements of the

political divide and economic powerholders are capitalizing on the strong popular hostility to this development. It should be noted that the persistence of authoritarianism – and, in some countries, its return – is linked to Israel’s agenda for the region. It leads Israel to re-establish and foster ties with authoritarian regimes that stand in stark contrast to the nature of its own democratic institutions.

The agenda of transactional normalization between Israel and the region’s Arab states runs the risk of widening state–society rifts in the countries concerned, as it distances populations from their regimes, introduces authoritarian dynamics, and increases opposition both to Israel and to the Arab regimes involved in normalization.³⁰ This dynamic could lead to a significant resurgence of Islamist opposition, which had largely been suppressed during the “Arab Winter”. Ongoing developments in Syria also point to the possibility of such a resurgence.

The transactional normalization agenda brings together public and private actors in agreement, while personalizing and concentrating power in the hands of narrow transnational elite circles. It also pushes diplomacy further out of public view.

27 Hannah Neumann, Transnational repression in the EU: legal and institutional responses to Iran’s actions. *Parliamentary Question E-001318/2025* (European Parliament, 31 March 2025), https://www.europarl.europa.eu/doceo/document/E-10-2025-001318_EN.html.

28 Elie Podeh, ‘Israel and the Arab Peace Initiative, 2002–2014: A Plausible Missed Opportunity’, *Middle East Journal* 68(4), (2014): 584–603.

29 Yoel Guzansky, ‘Israel and the Gulf States’, in *Routledge Handbook on Israel’s Foreign Relations*, ed. J. Peters & R. Pinfold Geist (Routledge, 2024); Clive Jones, ‘Israel and the Gulf monarchies: a new regional security or just complex regional security?’, *Middle Eastern Studies* 61(3), (2025): 321–328.

30 Dana El Kurd, ‘Arab–Israeli Normalization, Repression, and Impunity’, *Current History* 123(857), (2024): 354–356.

The normalization is driven by the emergence of transnational elite structures whose origins date back to the 1990s.³¹ The logic of securing and opening up access to resources, technologies, and trade routes brings together the political and economic elites of the Abraham Accords,³² which brought to light – and normalized – the informal trade relations that Israel had established with the signatories in previous years.

In the Gulf States and Israel alike, business elites have formed close alliances with state leaders, and market actors have played a key role in shaping and advancing state interests. Israel's emergence as a global leader in the innovation economy increasingly allows it to use its financial and technological power as a means of breaking the Arab boycott and building tacit and open alliances with key Arab states, especially in the Gulf. The new techno-financial entrepreneurial class in the Gulf has close ties to the ruling families, and therefore provides an access point into the state.³³

Sovereign wealth funds such as Saudi Arabia's Public Investment Fund and the United Arab Emirates' Mubadala in Abu Dhabi are key organizations through which capital flows into international markets and Israel. Mubadala, for

instance, has invested more than 100 million USD in Israeli venture capital firms that focus on Israeli start-ups.³⁴ Saudi Arabia's investments related to normalization networks are more difficult to trace, but it is apparent that the Japanese venture capital firm Softbank and its Future Vision Fund (in which Saudi Arabia has invested 45 billion USD) is one of the key investment arms of the Saudi royal house – along with the more modest 2 billion USD investment made in President Trump's son-in-law Jared Kushner's venture capital firm Affinity Partners – which invests in Israeli markets.³⁵

On Israel's side, the key private actors advancing the transactional normalization agenda include some of the country's leading industrialists, such as Stef Wertheimer and Shlomi Fogel, as well as leading venture capitalists in the high-tech sector, such as Chemi Peres of Pitango, Erel Margalit of Jerusalem Venture Partners, Jon Medved of OurCrowd, Dorian Barak of Indigo Global, and Michael Eisenberg of Aleph.³⁶ Importantly, Palestinian elites – including both Hamas and Fatah leaders and affiliated businesspeople – have also sought to reap the financial benefits offered by the prospect of normalization.

31 Markus Bouillon, *The Peace Business: Money and Power in the Palestine–Israel Conflict* (I. B. Tauris, 2004).

32 Elham Fakhro, *The Abraham Accords: the Gulf States, Israel, and the limits of normalization* (Columbia University Press, 2024).

33 Adam Hanieh, *Money, Markets, and Monarchies: The Gulf Cooperation Council and the Political Economy of the Contemporary Middle East* (Cambridge University Press, 2018).

34 Globes, 'UAE's Mubadala invests \$100m in Israeli VC Firms – report', 16 January 2022, <https://en.globes.co.il/en/article-uaes-mubadala-invests-100m-in-israeli-vc-firms-report-1001398762#:~:text=Mubadala%20Investment%20Co.%2C%20which%20manages,a%20spokeswoman%20told%20the%20WSJ>.

35 Israel Desks, 'Saudis commit USD 2 billion to Jared Kushner's Israel investment fund', 2022, <https://israeldesks.com/saudis-commit-usd-2-billion-to-jared-kushners-israel-investment-fund/>.

36 Antti Tarvainen & Benoît Challand, 'Innovation as erasure: Palestine and the new regional alliances of technology', *Transactions of the Institute of British Geographers* (49)2, (2023), <https://rgs-ibg.onlinelibrary.wiley.com/doi/10.1111/tran.12663>.

Since the early 1990s, the economic theory of transactional normalization has been based on the idea that aspirations for Palestinian statehood and actors involved in resistance and political violence could be contained through economic incentives.³⁷ While the Fatah-ruled West Bank has largely complied with this depoliticization, Israeli efforts to contain Hamas in Gaza through economic incentives have proved unsuccessful.³⁸ The so-called 'Qatargate' affair is an apt illustration of the failure of economic incentives to pacify Hamas leaders. In 2025, Israeli media revealed that the police were investigating close associates of Prime Minister Benjamin Netanyahu for illegally facilitating the transfer of millions of US dollars from Qatar to Hamas entities in Gaza, both for financial gain and with the aim of pacifying the enclave's leaders.³⁹ This 'Qatargate' scandal exemplifies the long-standing unofficial links put in place by Israeli politicians and businesspeople with Qatar, which is still legally considered a hostile entity by the state of Israel because of its relations with Hamas.⁴⁰

Transactionalism also further alienates Palestinians from their political leaders, who are perceived as corrupt and more responsive to Israel than to their own citizens.⁴¹ If the transactional model of normalization continues

without a genuine political process towards a Palestinian state and the recognition of Palestinian rights, the rift between state and society, both in Israel and in the Arab world, is bound to widen.

The transactional agenda is currently facing a crisis due to the breakdown of the ceasefire between Israel and Hamas, and Israel's return to occupying large swaths of Gaza in spring 2025. Saudi Arabia has frozen all attempts at normalization, indicating that, despite shared transactionalist interests, Arab regimes retain some accountability to their populations and can advance transactional normalization only under certain permissive conditions. The Arab states that have normalized relations, or been on the verge of doing so, will now face increased pressure from the 'Arab street' to reverse their approach towards Israel.

Across the Middle East, there has been a significant shift in perceptions towards greater solidarity with Palestine since the war.⁴² The most significant change has taken place in countries that have normalized relations with Israel or have been lobbying for such normalization. While in 2022, 69% of the Saudi population regarded Palestine as a fundamental issue affecting all Arabs, by 2024 this proportion had risen to 95%. In Morocco, the percentage

37 Bouillon, *The Peace Business*.

38 Alaa Tartir, 'Securitized development and Palestinian authoritarianism under Fayyadism', *Conflict, Security & Development* 15 (2015): 479–502.

39 Haaretz Podcast, "'Qatargate': Explaining the scandal that has Netanyahu Panicked', 28 March 2025, <https://www.haaretz.com/israel-news/podcasts/2025-03-28/ty-article-podcast/qatargate-explaining-the-scandal-that-has-netanyahu-panicked/00000195-d873-d93e-a3df-f9fb3d560000>.

40 Gur Megiddo, 'How a Billionaire Netanyahu Associate Sought to Buy Quiet in Gaza, With Qatari Money', *Haaretz*, 14 March 2025.

41 Toufic Haddad, *Palestine Ltd. Neoliberalism and Nationalism in the Occupied Territory* (Bloomsbury Publishing, 2018).

42 Arab Center Washington DC, 'Arab Public Opinion about Israel's War on Gaza', 8 February 2024, <https://arabcenterdc.org/resource/arab-public-opinion-about-israels-war-on-gaza/>.

soared from 59% in 2022 to 95% in 2024, and in Sudan, from 68% to 91%. Unsurprisingly, criticism of normalization has grown across the Arab world, particularly in countries that have concluded peace agreements or are pursuing normalization agendas with Israel.⁴³

A poll conducted by the Washington Institute in December 2023⁴⁴ showed that 96% of Saudis believed that all Arab states should “immediately break all diplomatic, political, economic, and any other contacts with Israel, in protest against its military action in Gaza”. In Saudi Arabia, Jordan, Egypt, Sudan and Morocco, populations have become overwhelmingly supportive of the idea that the state of Israel should not be recognized⁴⁵ – meaning, in effect, that normalization and peace agreements with Israel should be rescinded in light of events in Gaza. While the UAE, for instance, had been considered a model state for the majority of young people in the Arab world before the war,⁴⁶ polls conducted after the war in Gaza indicate that a majority of the population now views the UAE’s policy of normalization very negatively.⁴⁷

Authoritarian regimes in the region will face considerable challenges within their own societies if they fail to acknowledge the

opinions of their populations. Mohammad bin Salman’s recent statement that he “could end up getting killed” because of normalization is an indication that the regimes are aware of the conundrum they face.⁴⁸ The resurgence of solidarity with Palestine across the Arab world, alongside perceptions of ‘Arab betrayal’ of the Palestinian cause, has the potential to reignite the anti-regime mobilization of the Arab uprisings. Arab countries where strong pro-Palestinian sentiments co-exist with repressive and Israeli-friendly regimes (Morocco, Jordan, Egypt) are potential flashpoints for such a scenario.

While Saudi Arabia, which represents the most significant future potential for normalization, has currently frozen its attempts in this respect, this does not imply that the momentum for normalization has completely ended. In Saudi Arabia, citizens have been detained for posting anti-normalization and pro-Palestine messages on social media.⁴⁹ This goes hand in hand with the general trend towards increasing authoritarianism that accompanies the expansion of normalization, as Arab regimes seek to stifle and contain local criticism.⁵⁰

43 Ibid.

44 Washington Institute for Near East Policy, Washington Institute 2023 Polling Data and Analysis, *Fikra Forum*, Fall 2023, <https://www.washingtoninstitute.org/policy-analysis/washington-institute-2023-polling-data-and-analysis>.

45 Arab Center Washington DC, ‘Arab Public Opinion’.

46 Ibid.

47 Ibid.

48 Middle East Eye, ‘Saudi Crown Prince said he personally “doesn’t care” about Palestinian issue’, 27 September 2024, <https://www.middleeasteye.net/news/saudi-crown-prince-personally-doesnt-care-palestine-issue>.

49 Middle East Eye, ‘Saudi Arabia “detains people for anti-Israel social media posts”’, 2 May 2024, <https://www.middleeasteye.net/news/saudi-arabia-detains-people-anti-israel-social-media-posts-gaza-war>.

50 Dana El Kurd, ‘The Paradox of Peace: The Impact of Normalization with Israel on the Arab World’, *Global Studies Quarterly* (3)3, (2023).

Although it is highly unlikely to materialize, the idea of normalization is being discussed in the Lebanese public sphere. This is due to the recent weakening of Hezbollah, which has created political space for raising the issue of normalization in public debate. However, Lebanese public opinion would not be ready to welcome such a perspective at present.⁵¹

The transactional normalization agenda, which sidelines the Palestinian question, is being used as a means of pressure and a bargaining chip by the US and Israel, which are in a strong negotiating position vis-à-vis weaker Arab states such as Lebanon, which has far fewer assets with which to resist such pressure. The Lebanese political leadership finds itself under mounting pressure to sign up to normalization agreements with Israel. With Hezbollah politically weakened in Lebanon, recent statements seem to suggest an opening for publicly discussing the possibility of normalizing relations with Israel.⁵²

Future-oriented conclusions

This trend is important from a hybrid threat perspective because it concerns the very seams of societies whose evolution may have significant security implications for Euro-Atlantic societies, due to diasporic proximity and the narrative manipulation that developments in the MENA region exert on public opinion. The widening gap between states and societies is exacerbated by authoritarian governance practices, which suppress dissent and discourage political participation. Societies

in the region have experienced high levels of violence, and although indirect in nature, contacts between societies in different countries and diasporic links create a public space in which sensitive political issues arise in terms of reconciliation, transitional justice, and demands for stability and dignity. The normalization drive between an increasing number of Arab regimes and Israel also risks widening this gap further, as elites and populations have diverging perceptions and interests vis-à-vis Israel.

- Authoritarian regimes have continued to evolve towards greater centralization and personalization, as well as stronger solidarity among different regimes and the rules they abide by. Personal relations and a shared interest in maintaining patrimonial regimes encourage authoritarian states to cooperate in order to consolidate their respective hold on power.
- Authoritarian states may be driven to expand their transnational repression practices. Authoritarian regimes have accelerated the deployment of surveillance technology to crack down on political dissent both at home and abroad. This has created new avenues and affordances for more granular and precise repression of political mobilization and expression.
- Societies in the region tend to be highly traumatized by experiences of war and violent conflict. This applies in particular to Palestinian, Syrian, Lebanese, and Israeli

51 Courrier International, 'Au Liban, la normalisation avec Israël n'est plus taboue' [In Lebanon, normalisation with Israel is no longer taboo], 4 April 2025.

52 Lazar Berman, 'Lebanese source says normalization with Israel not on table after official in Jerusalem claimed otherwise', *The Times of Israel*, 12 March 2025.

societies, as well as to refugee and migrant diasporas in Europe that have fled violent conflicts.

- The transactional normalization agenda being pushed by the US, Israel, and Arab Abraham Accords signatories runs counter to the aspirations and political identities of Arab societies. This creates additional tension between regimes and societies in the Arab world, as the process is largely elite-driven and entails the erasure of the Palestinian issue in the context of normalization.
- States and regimes are likely to be reinforced, at least temporarily, through transactional foreign policy practices: rulers may be better able to demonstrate tangible results, which in turn can further legitimize authoritarian rule.

Recommendations

- The commercial proliferation of increasingly advanced and scalable cyber tools must be closely monitored. Authoritarian regimes that deploy technological surveillance and repressive tools against their populations create a market for the development and diffusion of such technologies, which will continue to become more affordable for both state and non-state actors. The proliferation of such devices in the hands of organized crime or terrorist organizations could pose serious security risks for Europe.

- Transnational repression targeting Middle Eastern diasporas in Europe must be deterred through appropriate law enforcement measures. Authoritarian states may also use surveillance technologies abroad. States hosting significant diasporic communities should have robust operational and legal frameworks to detect, counter and prosecute acts of transnational repression on their soil.
- With important exceptions, the presence of large Middle Eastern diasporas in Europe carries a risk of importing conflicts from the region and feeding into identity-based violence on European soil.^{53, 54} The evolution of narratives, representations, and patterns of violence must be closely monitored by law enforcement and on digital platforms in order to anticipate potentially disruptive events. States should be better equipped to detect, counter and – where appropriate – prosecute actors behind digital foreign interference intended to manipulate narratives and information with a view to brutalizing and polarizing societies.
- The possibility of a large-scale revival of the Islamist opposition cannot be ruled out in light of developments in Syria and the many directions that political transition could take in the country, given the existing and widening rifts between regimes and their societies – a pattern that Syrian society clearly reflects.

53 Dilyara Müller-Suleymanova, 'Remembering and dealing with violent past: diasporic experiences and transnational dimensions', *Ethnic and Racial Studies* 47 (2024): 259–273.

54 See Elsa Hedling, 'Social identities and democratic vulnerabilities: Learning from examples of targeted disinformation', Hybrid CoE Paper 24, <https://www.hybridcoe.fi/publications/social-identities-and-democratic-vulnerabilities-learning-from-examples-of-targeted-disinformation/>.

Trend 2 – Escalation between Israel and Iran

The conflict between Israel and Iran was largely a shadow confrontation until April 2024, when the two countries directly attacked each other in an escalation unprecedented since the 1979 Islamic Revolution in Iran.⁵⁵ Israel's attack on Iran's consulate in Syria led Iran to retaliate by launching a battery of ballistic missiles directly from its own territory, rather than through any member of the so-called "Axis of Resistance".⁵⁶ Further escalation followed with direct US strikes on 22 June 2025 and the associated breakdown of ongoing nuclear negotiations.⁵⁷ The direct attacks of April 2024 had already triggered a reorganization of the deterrence relationship between Israel and Iran, involving a heightened risk of escalation and miscalculation.⁵⁸ This second trend examines how and why the balance of deterrence between Israel and Iran is being reshuffled and reset, and the consequences this has in terms of escalation risks and regional destabilization. By design, and in light of the recent nature of direct US involvement in strikes against Iran, the specific consequences of those strikes are not assessed in detail in this report.

Domestic politics in Israel shape much of the country's foreign and strategic posturing

in the region. In particular, the perception that neighbouring states and the broader region pose an existential threat to Israel serves to radicalize and escalate its foreign and security policy. Iran currently finds itself in a complicated predicament in which, for a number of reasons, the country needs to rethink and recreate the balance of deterrence that was disrupted when Israel and Iran directly attacked each other in the spring of 2024. Regional power dynamics are also important in contextualizing this escalatory dynamic between the two countries. The normalization agreement reached between Saudi Arabia and Iran in 2023 is not perceived as a positive development by Israel, as it could lead the US, in supporting Saudi Arabia, to soften its threat perception vis-à-vis Iran.

Israel and the politics of existential threat

Israel's internal politics play an important role in the potential escalation and destructiveness of the Israeli–Iranian conflict. Israeli political discourse is dominated by perceptions of the existential threat stemming from Gaza, Hezbollah, and, above all, Iran. This discourse produces a particular political dynamic that, objectively, perpetuates incentives for

55 Al Jazeera, 'Iran attacks Israel with over 300 drones, missiles: What you need to know', 14 April 2024, <https://www.aljazeera.com/news/2024/4/14/iran-attacks-israel-with-over-300-drones-missiles-what-you-need-to-know>.

56 On 1 April 2024, seven Iranian IRGC officers were declared killed in an Israeli airstrike on Iran's consulate in Damascus. Among those killed were two Iranian generals: Mohammad Reza Zahedi of the Quds Force and his deputy, Mohammad Hadi Haji-Rahimi. In retaliation, Iran launched hundreds of explosive drones and missiles towards Israel on 13 April.

57 MENA Expert Workshop, 30 January 2025, Helsinki.

58 Mohamed Gomaa & Reem Mohsen Al Kindi, 'The erosion of Iran–Israel deterrence and the subsequent direct escalation: causes and implications', *Trends Research & Advisory*, 21 April 2024, <https://trendsresearch.org/insight/the-erosion-of-iran-israel-deterrence-and-the-subsequent-direct-escalation-causes-and-implications/>.

conflictual rather than peaceful relations with Iran.⁵⁹

Before the 7 October 2023 attacks by Hamas, Israel's internal politics had become extremely polarized, resulting in the longest and most widescale protest movement in the country's history. The government's planned judicial reforms were seen as an attempt to shield Prime Minister Netanyahu from legal accountability, as he was facing multiple corruption charges. The 7 October attacks served to create a rally-around-the-flag effect among the fragmented factions of Israel's Jewish population. Although the war in Gaza caused a temporary lull in the protest movement that threatened Netanyahu, protest activity continued throughout the conflict, particularly in relation to the issue of hostages. In Israel, once the sense of emergency had subsided, a strong comeback of the protest movement was expected.⁶⁰ Consequently, Netanyahu finds himself in a position in which a prolonged existential crisis has become a condition for his political survival.

The unprecedented direct military confrontation between Israel and Iran in April 2024 must therefore also be factored into the maintenance of a state of existential crisis in Israel. Attacks on Iranian soil, including the assassination of Ismail Haniyeh, and on Iran's embassy in Damascus prior to the exchange of missiles, must be read in this context.

The state of quasi- permanent conflict in which Israel has lived since the inception of the Jewish state in 1948 has long made the unification of the people against a common enemy a recurring feature of the political toolkit of Israeli governments. Security in Israel is essentially a theological concept at the heart of the state's *raison d'être*, and Netanyahu now seeks to exploit this factor to remain in power.

While the discourse portraying Iran as an existential threat is not new, significant constraints existed in the past on direct military action. The politics of fear in Israel sustain a self-reinforcing loop whereby "securitized sectarian identities, which become largely independent of materially defined security threats, are internalized and create further insecurity among domestic groups, thereby facilitating their leaders' sectarian securitization strategies even further".⁶¹

The military and intelligence leadership had long advocated restraint for Israel. Since 7 October, Israel's strategy has been to keep imposing a permanent state of exception, warranting dramatic escalation dynamics. This strategy has been applied in Gaza and the West Bank, but has gradually become a regional *modus operandi* for Israel, with Iran as the primary target, after initially targeting Hezbollah. The current Israeli government has argued that Iran was behind the 7 October

59 Raffaella Del Sarto, 'Sectarian securitization in the Middle East and the case of Israel', *International Affairs* (97)3, (2021): 759–778, <https://academic.oup.com/ia/article/97/3/759/6210559>.

60 Kat Lonsdorf & Daniel Estrin, 'Why Israel's having some of its biggest protests since the war in Gaza began', *NPR*, 19 May 2025, <https://www.npr.org/2025/03/25/nx-s1-5339490/israel-protests-netanyahu-hostages-gaza-war>.

61 Del Sarto, 'Sectarian securitization'.

attacks, although this claim still lacks convincing proof.^{62, 63} It has, however, been successfully mobilized within Israel to maintain political unity. This narrative speaks to the fragile political status of the Netanyahu government, which is dependent on a seemingly never-ending and escalating horizon of war, both in the Palestinian territories and throughout the regional theatre. Netanyahu's need to shift the blame for the events of 7 October onto the security and intelligence apparatus may provide an opportunity to restructure the military and intelligence leadership to better serve his own interests. As military and intelligence leaders have often publicly challenged and criticized the government's decisions on security matters, this reshuffle could lead to a significant escalation.

Regional escalatory dynamics are also present in Syria and in Lebanon, where Israel has strategically sought to capitalize on power vacuums and the waning of Iran's influence. In Syria, the fall of the Assad regime to Hayat Tahrir al-Sham created a power vacuum that allowed Israel to deploy troops to the United Nations-controlled buffer zone, which had served as a demarcation line separating Israeli and Syrian forces on the strategically significant Golan Heights since 1974. Israel declared that the 1974 Disengagement Agreement with Syria had "collapsed" and took control of the demilitarized buffer zone in the Golan Heights in December 2024.⁶⁴ From Israel's point of view, one of the key reasons for the takeover was to

prevent the return of Iranian influence in Syria. At the same time, the occupation of Syrian sovereign territory has increased tensions with Syria's new government and its supporters, such as Turkey and Saudi Arabia. Israel's ultimate goals in Syria remain unclear. In late spring 2025, Israeli media revealed that the Israeli military was co-organizing trips with settlement organizations in the recently occupied territories, reinforcing fears that the occupation may become permanent.⁶⁵

Since the invasion of southern Lebanon on 1 October 2024, Israel has maintained a military presence in several strategic areas there, in contrast to the ceasefire agreement signed between Israel and the Lebanese government on 26 November 2024. According to Israel, the occupation in Lebanon is legitimized by efforts to prevent Iranian-backed Hezbollah from regaining strength and posing a threat to Israeli border settlements. Lebanon's inability to resist the Israeli occupation further underscores the state's fragile position and its lack of legitimacy, creating a power vacuum that can be filled by actors – such as Hezbollah – capable of actively resisting Israel.

Israel's regional campaign, however, is heavily dependent on support from the US, which provides strategic weapons as well as financial and diplomatic backing. Paradoxically, while President Trump presents himself as Israel's greatest friend, his attitude towards the country is less predictable than that of the previous

62 Zachary Cohen et al., 'Initial US Intelligence suggests Iran was surprised by the Hamas attack on Israel', CNN, 11 October 2023, <https://edition.cnn.com/2023/10/11/politics/us-intelligence-iran-hamas-doubt/index.html>.

63 Ben Samuels, 'US assesses Israel will face Hamas resistance for years to come', *Haaretz*, 11 March 2024.

64 Jon Donnison, 'Israel seizes Golan buffer zone after Syrian troops leave positions', BBC, 9 December 2024, <https://www.bbc.com/news/articles/c77jrrxxn07o>.

65 Gilad Carmeli, 'IDF approves guided tours inside Syria military zone during Passover', *ynet Global*, 4 March 2025, <https://www.ynetnews.com/travel/article/h1nkpmn6je>.

administration. From the perspective of the Trump administration, Israel is increasingly seen as an ally that is both costly and unpredictable. Furthermore, while Netanyahu requires enemies for regime preservation and the maintenance of an external threat, the Iranian regime faces fundamental challenges (economic, political, military) and has every interest in avoiding full-scale war and returning to the status quo instead.

The contradictions of the Iranian regime

The Iranian regime faces a growing contradiction in terms of its stability.⁶⁶ The breakdown of Iranian deterrence is likely to lead Iran to rethink some of the factors that have constituted its policy in the past. The first of these concerns irregular warfare capacities. Since the 1990s, Iranian military doctrines have outlined a deterrence strategy relying on irregular warfare capacities in order to avoid direct military confrontation at all costs.⁶⁷

Contemporary Iranian foreign and security policy has its roots in the history and experience of the 1980–1988 Iran–Iraq War, during which the two sides suffered approximately one million casualties combined. The Iranian people, as well as the country’s governing elite, are largely guided by the legacy of this war, which has ingrained into Iranian nationalism the idea that Iran’s territory should be a sanctuary and that only unconventional warfare will allow Iran to

prevail and avoid direct military confrontation.⁶⁸ The doctrinal work of the Islamic Revolutionary Guard Corps (IRGC) since the 1990s presents Iran as belonging to a dangerous and volatile strategic environment, while its armed forces and conventional capabilities are far inferior to those of other powers in the region and especially to those of Western powers, as demonstrated during the Gulf War.⁶⁹ During the 1990s and 2000s, the IRGC developed and institutionalized an elaborate doctrine of irregular warfare on land and at sea, to which it added certain religious and cultural dimensions after 9/11 and the invasions of Afghanistan and Iraq.

The second factor is the “Axis of Resistance”, an informal yet strategically important network of Iranian partners and proxies that serves Iran’s deterrence doctrine through irregular warfare. The Axis conducts this irregular warfare under the auspices of, sometimes under the guidance of, and very often with the support of the IRGC. Although coordination between the members of the Axis and Iran is neither automatic nor systematic, it is important to note that during the 2010s the Axis developed a “Unity of Arenas” doctrine, based on the idea that members should remain active and come to one another’s aid if one of them is attacked or becomes involved in a conflict. Since the 1980s, Iran has, through its “Axis of Resistance” proxies, practised aggressive interference in its immediate and more distant neighbourhood.

66 MENA Expert Workshop, 30 January 2025, Helsinki.

67 Pierre Pahlavi, ‘Guerre irrégulière et analyse institutionnelle: le cas de la stratégie asymétrique des Gardiens de la révolution en Iran’ [Irregular warfare and institutional analysis: the case of the asymmetric strategy of the Revolutionary Guards in Iran], *Études Internationales* 42(4), (2011): 473–492, <https://www.erudit.org/fr/revues/ei/2011-v42-n4-ei5005288/1007551ar.pdf>.

68 Ibid.

69 Adam Seitz & Anthony Cordesman, *Iranian weapons of mass destruction: The birth of a regional nuclear arms race?* (Praeger Security International, 2009).

The Axis is a coalition of armed groups and movements subject to varying degrees of Iranian control. These movements emerged in contexts where they engaged in resistance against local regimes, as well as against US, Western and Israeli interventions in the Middle East over the past two decades. The Axis is largely coordinated by the IRGC, and in particular by its Quds Force, which is in charge of operations abroad and support for like-minded movements. Lebanon's Hezbollah is the most prominent Iranian partner within this so-called "Axis" and the actor most likely to receive direct orders from Iran. The history of this movement provides a clear example of how Iran has sought to build support, access and partnerships since the Iran–Iraq War. Iran's support for Hezbollah from the 1980s onwards was a means of backing the Shia political movement in civil war-torn Lebanon, while also enabling Iran to align itself with Hafez al-Assad's Syrian regime. Syria, which occupied a significant part of Lebanon at the time, was a major supporter of the Shia movement during the Lebanese Civil War (1975–1990). This partnership placed Iraq in a difficult position while providing Iran with the support of an important Arab regional power. Support for Hezbollah also gave Iran access to the Mediterranean, while allowing it to present itself, in the eyes of the Muslim world, as the sponsor of the only movement that succeeded in putting Israel in a vulnerable position in Lebanon in 2006.

The Axis also includes pro-Iranian Shia militias operating in Syria, such as the Fatemiyoun and

Zainabiyoun brigades, which are composed of Shia from Afghanistan and Pakistan, and are directly connected with the IRGC. However, Shia militias in Iraq enjoy a greater degree of autonomy from Iran, since there is no clear consensus among them and internal divisions have become more pronounced.⁷⁰ The Houthis in Yemen have also gained international notoriety following their attacks on shipping lanes in the Red Sea, including the blocking, bombing or seizure of vessels closely or more loosely linked to Israel and the US. The Houthis are the product of a complex set of social and identity dynamics rooted in Yemen and its history. Iran and the Houthis forged a gradual alliance between 2004 and 2010, during the first phase of the country's civil war. This alliance was based on religious proximity and came to fruition in 2014, when the Houthis took control of the Yemeni capital.

The Saudi Arabia-led intervention in 2014–2015 brought the Houthis and Iran closer together. Visceral opposition to Israel is a constitutive feature of Houthi ideology and a key justification for combat. Iranian support for the Houthis is a complex issue. To date, there is no evidence of any large-scale shipments, or training and mentoring operations by Iran directly benefiting the Houthis. The gradual increase in the Houthis' competence and capacity to extend violence beyond Yemen's borders and to target and seize ships in the Red Sea points to probable foreign intelligence collaboration.⁷¹ The Houthis' rhetoric has changed since October 2023, following the

70 Geneive Abdo, 'Iraq's Intra-Shia Struggle Over Iranian Influence', *The National Interest*, 18 December 2018, <https://nationalinterest.org/feature/iraqs-intra-shia-struggle-over-iranian-influence-39057>.

71 See Fabian Hinz, 'Made in Yemen? Assessing the Houthis' arms-production capacity', IISS, 10 April 2025, <https://www.iiss.org/online-analysis/missile-dialogue-initiative/2025/04/made-in-yemen-assessing-the-houthis-arms-production-capacity>.

Hamas attacks on Israel, and it became clear that they were aligning themselves with the members of the Axis of Resistance. Since 2004, and particularly after 2015 and more clearly after 2023, the Houthis have been integrated into Iran's networks of violence, disruption and influence abroad. However, they tend to emphasize their support for the Palestinian cause and their image as actors in it, targeting only – or attempting to target – ships and vessels linked to Israel, the US and the UK. Yet they also enjoy considerable autonomy and leeway to pursue their domestic agenda and their own geostrategic interests.

Hamas in Gaza is another important player within the Axis of Resistance, although it remains fairly autonomous from Iran. Iran and Hamas supported opposing sides during the Syrian civil war, with Hamas backing opposition groups against the Iranian-backed regime. This illustrates Hamas's ability to resist pressure from Tehran. Official Iranian statements after the 7 October attacks also indicated that Iranian officials were displeased with the operation and that it caught them off guard. Iran has been accused by Israel of planning the 7 October attacks, but the degree of penetration of Iranian state structures by Israeli security services argues against the likelihood that the attacks were coordinated. In this respect, the Israeli strike on the Iranian consulate in Syria in April 2024 shows a high degree of intelligence penetration, which speaks against the possibility

that such coordination could have taken place without being detected.⁷²

Regardless of historical contexts and varying degrees of control and proximity to Iran among the members of the Axis of Resistance, Iran's strategic interest in nurturing this network lies in its capacity to function as a buffer zone, allowing Iran to fend off potential large-scale attacks by the US or Israel. As such, it constitutes an essential tool for regime preservation. Since the Islamic Revolution of 1979, Iran has sought to present itself as a defender of the Muslim faith and of the interests of Muslims abroad. The political message underlying the Axis of Resistance is to show that Tehran cares about the injustices suffered by Muslim populations in the region. This is particularly relevant in the framework of the Palestinian issue, as it portrays Iran as the leading Muslim power willing to confront Israel and its American and European backers, and sends a powerful signal to the public. The Axis also serves as a powerful argument contesting Saudi Arabia's hegemony in championing Islam abroad.

However, the Axis has recently proved more of a liability than a life insurance policy for Iran.⁷³ After Iranian officers were killed in Syria in a strike on the Iranian consulate in Damascus, Iran was compelled to resort to a direct missile and drone attack launched from its own territory against Israel, for the first time in the history of the two countries' shadow confrontation.⁷⁴

72 RFI, "“Very serious”: Israel's blows against Iran expose infiltration", 8 November 2024, <https://www.rfi.fr/en/middle-east/20241108-very-serious-israel-s-blows-against-iran-expose-infiltration>.

73 MENA Expert Workshop, 30 January 2025, Helsinki.

74 Following the killing of seven Iranian officers in a strike on Iran's consulate in Damascus on 1 April 2024, Iran needed to demonstrate resolve and support for its overseas operations, particularly for members of the Axis of Resistance, by striking Israel directly from its own territory. This direct attack was intended to signal backing and support, and to show that Iran was ready and able to retaliate.

Iran may also view the Axis as a liability insofar as groups such as the Houthis in Yemen or Hamas conduct actions in the region that result in growing tensions with Israel, thereby increasing calls by the US and Israel to strike Iran directly.

Although Iran has an interest in demonstrating its ability to direct irregular warfare in the region through various proxies, it is worth noting that this strategy can also generate a dangerous escalation narrative for which Iran is not adequately prepared in terms of its conventional military forces. Iran's economic crisis also makes it appear less financially sustainable in the eyes of the population, providing an increasing groundswell of opposition towards the regime. The Iranian regime may therefore have shifted its perception of the utility of the Axis of Resistance, increasingly viewing it as a liability in the region rather than as a shield or form of insurance. This could explain why Iran has intensified its proxy actions on European soil in recent years, where the potential for plausible deniability is higher and the risk of strategic destruction of its proxy capacities is lower. Iran's recruitment of organized crime groups to conduct transnational repression against dissidents, to surveil segments of its diaspora abroad, or even to carry out anti-Semitic and anti-Israel attacks follows a logic of deniability and efficiency in conducting destabilization operations. As the Axis in the Middle East has become relatively weakened and exposed, Iran views proxy actions in Europe and North

America as a more affordable and prudent means of influencing Western decision-making.

Iran's gradual edging towards military nuclear capability is another important factor in understanding the complex deterrence-escalation interplay between Iran and Israel. The development of a nuclear deterrent is intended to make the regime more secure against foreign intervention or attack. It is designed to protect Iran's territory and to deter regional rivals from striking it. While Iran is a member of the Nuclear Non-Proliferation Treaty, its nuclear programme has drawn sustained international scrutiny, as Iranian leaders may consider it in the regime's vital interest to retain the capacity to scale up nuclear activities and manufacture a weapon within a few months if needed. Tehran's nuclear programme continues to advance without clear justification in terms of civilian nuclear needs. Iran can therefore be described as a threshold nuclear power, falling short of full military nuclear capability while preserving the capacities required to develop it. It has the capacity to enrich uranium to military levels⁷⁵ and possesses delivery vectors that could accommodate nuclear charges.⁷⁶

The grave and deep economic crisis facing the country, however, places significant strain on the resources and funding available to develop Iran's nuclear programme, and in particular to scale it up to military-grade levels. Iran's nuclear programme has effectively violated all stipulations of the Joint Comprehensive Plan of Action (JCPOA) agreed in 2015, with stockpiles, enrichment levels, and centrifuge installations

75 Stephanie Liechstenstein, 'UN Report: Uranium particles enriched to 83.7% found in Iran', AP, 1 March 2023, <https://apnews.com/article/iran-nuclear-uranium-enrichment-germany-israel-c9b3669a7721bd8929d465117c81b70f>.

76 Gregory Jones & Henry Sokolski, 'Iran could build a nuclear weapon sooner than you think', *Foreign Policy*, 10 October 2024.

exceeding the thresholds set by the agreement. Iran has also edged closer to withdrawing from the NPT. It is worth noting that, in the view of Iranian leaders, respecting international law and international commitments does not yield tangible benefits in dealings with the United States. The US withdrawal from the JCPOA is a case in point and has become a strong disincentive for Iran to comply with its obligations or to place trust in international law. Since October 2023, and particularly since October 2024, when Israel destroyed Iran's S-300 air-defence systems,⁷⁷ Iran has found itself in a difficult predicament with regard to the potential development of its nuclear weapons: the prospect of developing a nuclear weapon remains an absolute red line for Israel and the United States. Iran's nuclear potential has served as a bargaining chip in developing its regional foreign policy. However, its position on the escalation ladder is difficult to pinpoint: the development of nuclear capabilities is unlikely to ever be tolerated by Israel, and the current context gives Israel unprecedented leeway in calling for, planning and potentially implementing strikes more devastating than those of April 2024.

Striking Iran decisively would also align with US interests in the context of the Trump administration's broader approach to China.⁷⁸ Recent and ongoing US–Iran negotiations should also be factored into this analysis. The Trump administration's rhetoric towards Iran,

including threats of unprecedented strikes, should be understood as a direct pressure mechanism aimed at the Iranian regime. The nuclear file is also important for Russia, as it allows Moscow to position itself as a responsible nuclear power that could seek to insert itself into the negotiations as a third party, offering stockpiling capacities, for instance, or the transit of fissile material to its territory, thereby enabling Iran, in practical terms, to comply with stockpiling restrictions should such measures be agreed during negotiations. Such a Russian position could be construed as part of a broader effort to identify opportunities for cooperation and dialogue with the United States, within a bipolar logic.

The regional implications of the Iranian nuclear file: Saudi Arabia and other external actors

Tehran's efforts to increase regional integration have paid off, as demonstrated by the Saudi–Iranian rapprochement brokered by China in March 2023.⁷⁹ The agreement led to the reopening of embassies and the resumption of diplomatic relations, which had been suspended since 2016. Saudi–Iranian normalization marks a dramatic change in the geopolitical landscape of the Middle East, with tensions in Yemen and Syria easing as a result. For Saudi Arabia, the main motive for normalization is economic, as it seeks to bolster the Kingdom's

77 Alex Plitsas, 'Iran is at an unprecedented crossroads over its nuclear program', Atlantic Council, MENASource, 10 April 2025, <https://www.atlanticcouncil.org/blogs/menasource/unprecedented-crossroads-irans-nuclear-program-and-trumps-deal/>.

78 MENA Expert Workshop, 30 January 2025, Helsinki.

79 Lina Khatib, 'Saudi Arabia, Iran and China offer the US a lesson in pragmatism', *WPR World Politics Review*, 14 March 2023, <https://www.worldpoliticsreview.com/saudi-arabia-iran-relations-yemen-war-china-us/>.

attractiveness to international investors under its Vision 2030 strategy.⁸⁰ The Saudis expect Iran to exert pressure on its proxies in Iraq and Syria, especially on the Houthis in Yemen, in order to calm the situation in the Red Sea and move towards a political solution.⁸¹ However, the unresolved and unstable regional dynamics in Yemen, Syria, and the Horn of Africa also carry risks for the further advancement of normalization. Stability in the Strait of Hormuz is equally important for Iran, the Gulf States, and Iraq. Cooperation between Iran and Saudi Arabia, as two major oil producers, could bolster energy security and stabilize global oil markets, which would be advantageous for both nations as well as for the global economy.⁸² Iran, for its part, prefers the path towards normalization (with Egypt as the next prospective candidate) as a means of increasing economic opportunities and strengthening the internal stability of its regime. While Saudi–Iranian relations have undergone a momentous transformation, tensions between Tehran and Riyadh have not been defused completely, and Saudi Arabia expects Iran to

play a more active role in regional stabilization efforts.⁸³

From the perspective of great-power geopolitics, the Iran–Saudi deal represents an important diplomatic victory for China, which is the leading trade partner of both Iran and Saudi Arabia in the energy sector. While the Iran–Saudi agreement is without a doubt China’s most significant and successful diplomatic engagement in the region to date, and a setback for the US,⁸⁴ China seeks to be seen primarily as driven by economic motives and to avoid being perceived as an overtly political actor in the Middle East.⁸⁵ Importantly, Saudi–Iranian normalization appears to be diametrically opposed to the long-standing US and Israeli agenda underlying the Abraham Accords, as it reduces the geopolitical tensions between the Gulf States and Iran while simultaneously increasing China’s influence in the region.⁸⁶

The attitude of the Trump administration towards the Saudi–Iranian rapprochement is difficult to assess over the longer term. Much depends on Israel’s ability to convince the US of

80 Sebastian Sons & Stefan Lukas, ‘China, Corona, Climate change: Three gamechangers for the Arab Gulf States’ (Carpo Reports, 27 June 2023), https://carpo-bonn.org/media/pages/publikationen/carpo-reports/china-corona-climate-change/960559f4a8-1733145287/carpo_report_11_27-06-23.pdf.

81 Magdalena Kirchner, ‘A break in the clouds over Yemen’, *Democracy and Society*, 16 March 2023, <https://www.ips-journal.eu/topics/democracy-and-society/a-break-in-the-clouds-over-yemen-6581/>.

82 Abdolrasool Divsallar, ‘From normalization to non-aggression: The next step in Iran–Saudi ties’, *The Middle East Institute*, 15 September 2023, <https://www.mei.edu/publications/normalization-non-aggression-next-step-iran-saudi-ties>.

83 Layla Ali, ‘Saudi–Iran Reapprochement: One year on’, Gulf Research Center, March 2024, <https://www.grc.net/documents/65f6b6585aaa2KSAIranReapprochementOneYearOn2.pdf>.

84 Alam Saleh & Zakiyeh Yazdanshenas, ‘China–Iran strategic partnership and the future of US hegemony in the Persian Gulf Region’, *British Journal of Middle Eastern Studies* 51(2), (2023): 377–400.

85 William Figueroa, ‘Iran–Saudi normalization: A regional process with Chinese characteristics’, Foreign Policy Research Institute, 24 March 2023, <https://www.fpri.org/article/2023/03/iran-saudi-normalization-a-regional-process-with-chinese-characteristics/>.

86 Saleh & Yazdanshenas, ‘China–Iran strategic partnership’.

the level of existential threat posed by Iran and, conversely, on Iran's ability to offer something to the US administration in return for a more accommodating attitude. Iran, Saudi Arabia, the US, and China may all find their interests aligned in promoting greater stability through Saudi–Iranian normalization. Even Russia, which is seeking to expand its influence in the Gulf States, has geoeconomic reasons to support normalization. Paradoxically, the Saudi–Iranian normalization agenda may significantly improve Iran–US relations and increase the likelihood of an agreement, as the Saudis have announced that they will support Iran–US normalization,⁸⁷ thereby risking bypassing Israel. It should also be noted that Russia is seeking to gain a foothold in Iran–US nuclear negotiations,⁸⁸ which would offer Russia an opportunity to be perceived as a useful great power along with the US in managing a file of regional importance.

The conjunction of Israel's sustained sense of emergency and Iran's need to establish a new balance of deterrence vis-à-vis Israel – and the US – renders the dynamics of the Iran–Israel relationship highly unstable and potentially escalatory. This situation can be construed as a classic security dilemma, in which actions taken by some states to enhance their security are perceived and felt by other states as actions reducing their own security, warranting

further countermeasures. In the Iran–Israel relationship, this security dilemma is shaped by Iran's forward-defence and warfare capabilities through its Axis of Resistance, but also by the sophistication of its nuclear programme, which is geographically dispersed, fortified underground, and therefore invulnerable to a single decisive strike. At the same time, Israel's operational memory, and its Osirak paradigm in particular,⁸⁹ speaks for a culture of boldness and self-reliance in protecting the state of Israel when the international community is not able to do so.⁹⁰ Operation Orchard in Syria in 2007, when Israel struck a suspected nuclear facility, also corresponds to this strategic paradigm. Iran considers it necessary to maintain its status as a potential nuclear-armed state, as it is precisely this potential that could deter Israel from attacking it. At the same time, Israel cannot accept the prospect of a nuclear-armed Iran. In the absence of talks and concessions, this situation is likely to deepen the security dilemma between the two countries and render their relationship increasingly escalatory and unpredictable.

Conclusions

The escalatory conflict dynamic between Israel and Iran harbours significant hybrid threat potential. The way in which Israel and Iran,

87 Vivian Nereim, 'Saudi Arabia opposed Obama's deal with Iran. It supports Trump's. Why?' *The New York Times*, 20 April 2025.

88 AP, 'Iran seeks Russia's support for its nuclear talks with US', 18 April 2025, <https://apnews.com/article/iran-russia-us-nuclear-negotiations-2bae3b073bcac464ad9b44a8d5a4c581>.

89 The "Osirak paradigm" refers to the Israeli air operation that destroyed Iraq's fledgling nuclear programme in 1981. Performed by a single Israeli squadron in just 90 seconds, the operation is celebrated to this day as a symbol of military prowess.

90 Jay Pasquarette, 'Osirak's Shadow: Israel and the Iranian Dilemma', *Small Wars Journal*, 5 December 2025, <https://smallwarsjournal.com/2025/05/12/osiraks-shadow-israel-and-the-iranian-dilemma/>.

as regional powers, reshuffle their respective deterrence postures has implications in many domains of sub-threshold confrontation. In particular, while Israel is characterized by a strong strategic culture favouring decisive strikes within a heightened security dilemma, Iran has historically relied on irregular warfare to fend off conventional aggression. The nuclear dimension of this conflict dynamic makes sub-threshold and multi-domain repercussions even more likely.

- Israel's foreign and security policy has become increasingly politicized, thereby keeping the discourse of existential threat very much alive, in a context marked by the reorganization of its defence and security apparatus, which allows greater leeway for political risk-taking. The legacy of the Osirak raid on Iraq in 1981 is central to understanding Israel's strategic culture and its propensity for decisive action. The temptation to resolve the Iran issue militarily may therefore grow, with potentially unpredictable and destabilizing consequences for the region, as also illustrated by Operation Orchard in 2007. The legacy of both operations validates a strategic culture of using decisive military force as a means of achieving political success.
- The doctrine of Iranian irregular warfare as a means of deterrence and protection is being called into question. The credibility of the Axis of Resistance has been undermined by its perceived lack of effectiveness, as Iran ultimately resorted to striking Israel directly in an unprecedented move. Members of the Axis of Resistance may seek to increase their utility to Iran by intensifying their attacks, adding further volatility to the Iran–Israel conflict dynamic.
- Iran's nuclear edging increases the risk of miscalculation. Nuclear ambiguity could lead to a potential breaking point whereby Israel would see Iran's developments as intolerable and could justify launching a crippling attack on its nuclear and oil facilities. The experience of open warfare between India and Pakistan, two nuclear powers, shows that large-scale conflict can occur despite the presence of nuclear deterrence.
- As a permanent member of the UN Security Council, Russia seeks to be present in Iran–US nuclear negotiations, positioning itself as a useful actor while opening opportunities for dialogue with the United States. At the same time, stalling negotiations is also seen by Russia as a useful ploy, as instability in the region provides a convenient distraction from developments in Ukraine. Russia's involvement in the Iran–US negotiations may have ramifications for other conflict theatres, as Moscow may try to use its position as a bargaining chip to extract concessions on other issues and files.
- The Iran–Saudi Arabia normalization agenda seeks to strengthen economic ties and stability, while sidelining Israel and its narrative on regional security. Successful normalization of relations between Iran and Saudi Arabia, and between Iran and other Arab states, could alter the security calculus

underpinning US support for Israel, such that Iran may no longer be perceived as a primary security threat. This prospect could, in turn, prompt Israel to step up its efforts to derail these diplomatic advances.

Recommendations

- Iran's history and strategic culture surrounding irregular warfare capacities point to the potential for the country to intensify its use of proxies in Europe and North America to conduct intimidation, assassination, and transnational repression. Iran's attempts to internationalize the conflict by extending it across domains constitute a major law- enforcement and diplomatic challenge that should be addressed jointly. Iran recruits vulnerable individuals involved in criminal activity and organized crime to carry out violent actions in Europe. EU and NATO states should adopt a coordinated approach to detecting, countering, and prosecuting such actions to ensure an appropriate level of accountability for perpetrators.
- As Iran increasingly relies on nuclear ambiguity to sanctuarize its territory against attacks, this poses a global nuclear proliferation risk, particularly in light of the planned revision of the Nuclear Non-Proliferation Treaty in 2026. Attention should be paid to ensuring that current US–Iran nuclear negotiations do not result in a triangular relationship involving the US, Iran, and Russia without an international supervisory mechanism. EU and NATO states must counter the narrative that Russia may try to spin around Iran–US negotiations, portraying itself as a responsible global nuclear power and as a useful intermediary, for instance in the transfer of quantities of enriched Iranian uranium to Russian territory.

Trend 3 – Hostile strategic competition

This trend addresses the repositioning of key regional and global players in response to the heightened stakes of competition over technology, resources, and strategic hubs. The notion of hostile competition refers to the strategic interests of both state and non-state actors in securing their role and presence in the region, whether through market power, technological control, or the use of hard and soft power.⁹¹ This competition takes place in a context marked by the breakdown of the status quo, including increased multipolarity and the unpredictability of US Middle East policy. It has generated an open-ended, multipolar and multi-nodal transitional moment that is reshuffling geoeconomic control over strategic hubs as well as access to resources and technology.⁹² Technology trade, access, and control are particularly important in this trend. The analysis therefore focuses on how Israel uses technology trade, especially surveillance products and systems, as a tool of public diplomacy and as a means of advancing the transactional normalization agenda. It also examines how trade infrastructure is turning into a hotspot of strategic contestation. Multiple trade routes and their associated infrastructure create competing agendas among states in the region. This has the effect of placing the Gulf States at the intersection of international dynamics, increasing their clout and influence while also prompting Europe to pay closer attention to the agendas of global powers active in the region.

Technology trade serves geopolitical interests

In the context of the MENA region, cutting-edge technologies and private sector interests are deeply embedded in broader geopolitical agendas. Israel is a key player in this respect, possessing a technological edge that spans cyber, drone, and AI technologies, as well as agro- and water technologies, and strategically deploying its innovation ecosystem to cultivate geopolitical alliances. Israel has developed a unique system in which technological development for the private market is dependent on military units that produce expertise and solutions for commercial markets.⁹³ Countries that have joined the Abraham Accords – particularly the United Arab Emirates, Bahrain, and Morocco – are attracted to geopolitical normalization circuits by the prospect of accessing Israeli technology.

The most important player in this context is Saudi Arabia, which represents a major potential market for Israeli technologies. Saudi Arabia's ambitious Vision 2030 strategy, which aims to accelerate the country's transformation from fossil fuels towards high-tech production, is creating a demand for Israeli technologies in the kingdom, which Israel intends to exploit. Israel is actively harnessing its advanced position in the fields of cyber and surveillance technologies to open up diplomatic and economic horizons with authoritarian states, as well as with states in the Middle East, the BRICS group,

91 Joseph Nye, *Soft Power: The Means to success in world politics* (PublicAffairs Books, 2005).

92 Ferid Belhaj, 'Africa and the Middle East: The Shift from Geopolitics to Geoeconomics', Policy Brief (Policy Center for the New South, October 2024), <https://www.policycenter.ma/publications/africa-and-middle-east-shift-geopolitics-geoeconomics>.

93 John Butler & Ori Swed, 'Military Capital in the Israeli Hi-Tech Industry', *Armed Forces & Society* 41(1), (2013): 123–141, https://www.researchgate.net/publication/258834011_Military_Capital_in_the_Israeli_Hi-Tech_Industry.

and the “Global South”, in an effort to weaken international solidarity towards the Palestinian agenda. In this process, some of Israel’s leading venture capitalists and tech leaders have become unofficial representatives of the Israeli government, laying the groundwork for diplomatic normalization through covert economic collaboration.⁹⁴

Technologies sold by Israeli startups in fields such as cybersecurity, surveillance, smart-city applications and counter-insurgency are in high demand in authoritarian Arab countries and have paved the way for the expansion of Israeli–Arab partnerships in the region. Cyber – a sector that is deeply embedded in the Israeli military and in which Israel is a global leader – has been the most important medium for opening economic and security relations between the Gulf States and Israel. By way of illustration, the UAE was the first country to purchase an Israeli cyber-surveillance system as early as 2007. In 2012, the Israeli state, in collaboration with the Israeli firm Check Point Software Technologies, assisted Saudi Aramco in defending against a cyberattack, reportedly originating from Iran. The growth in Iranian cyberattacks against Saudi Arabia, Bahrain and the UAE has led to increased demand for Israeli products in the region. In addition, aggressive surveillance technologies (such as the Pegasus spyware developed by NSO Group) have been sold to all partners of the Abraham Accords. Cyber has also emerged as a symbol of regional collaboration, with

both Israeli and Emirati officials talking about developing a shared regional ‘cyber dome’ against Iran. Cooperation in the domains of cyber and surveillance – often through startups and venture capital financing – is perceived as the first step towards broader regional access to Israeli military technologies, intensified regional intelligence sharing, and the development of regional security structures.

Israel’s technological advantage has traditionally been highly dependent on US venture capital and military aid. Under Netanyahu’s leadership, however, Israel has sought to diversify its geopolitical and economic base to reduce its dependence on the US through the strategic use of its technology ecosystem.⁹⁵ This diversification strategy has opened a new chapter in China–Israel relations.⁹⁶ China has boosted its investment in Israel since the early 2000s, with average annual investment rising from USD 20 million to more than USD 200 million by 2022. These capital flows nevertheless remain modest when compared with the multi-billion-dollar flows between the US and Israel. Furthermore, the majority of Chinese investments are in the software and healthcare sectors, rather than in dual-use or military technologies.

The geopolitical power of Israel’s technology sector can be seen most clearly in its ability to erode pro-Palestinian solidarity in the international arena beyond the Arab world through its technology exports. In effect,

94 Tarvainen & Challand, ‘Innovation as erasure’.

95 Arie Kampf, ‘The territorial logic of an export-led growth strategy: Israel’s regime change after the Second Intifada’, *European Journal of Economics and Economic Policies: Intervention* (21)1, (2024): 172–193, <https://www.econstor.eu/handle/10419/290110>.

96 Zeying Wu & Richard Yarrow, ‘Engaging Israel in the Belt and Road Initiative: China’s Techno-Nationalism in the Middle East’, in *New Nationalisms and China’s Belt and Road Initiative*, ed. J. Rajaoson, & M. M. Edimo (Palgrave Macmillan, 2022), 259–276.

Israel has used its technological advances in surveillance, population control, and counter-insurgency solutions – many of which are developed in the occupied Palestinian territories and tested on Palestinian populations before being exported to global markets – to build alliances with authoritarian and illiberal states in both the Global South and the Global North.⁹⁷ Authoritarian and illiberal leaders, concerned about external and domestic instability, are increasingly incentivized to turn to what they perceive as the most effective solutions available on the market, which are often found in Israel.

Trade infrastructure as strategic contestation hotspots

The MENA region is facing increasing contestation over access to trade routes, financial resources, natural assets, and strategic military sites. Actors such as China, India, Russia, and the US are competing for control over economic and security infrastructure in the region, in a context characterized by increasingly transactional interstate relations, the militarization of foreign policy, and growing multipolarity. Efforts to secure and capture resources and strategic military positions amplify the role of external powers and destabilization dynamics in the region, thereby turning trade infrastructure into a series of strategic contestation hotspots.

Trade infrastructure, such as ports and large-scale infrastructural economic corridors,

constitutes two fundamental resources for both the economy and security: connectivity and access. The Red Sea – which serves as a gateway to the Suez Canal and carries 10–15% of global trade – including around 30% of container traffic – is one of the key sites where geoeconomic rivalries and uncertainties are concentrated.⁹⁸ The Red Sea also functions as a key route for the transport of oil and gas from the Middle East to global markets. China has emerged as an important player in this space, making substantial investment in port infrastructure in the Gulf (Khalifa Port in the UAE and Duqm Port in Oman). Among external powers, the US maintains a hegemonic position through its strategic partnerships with countries such as Saudi Arabia and Egypt, as well as through continued investment in port infrastructure around the Red Sea. At the regional level, the leading actor in the control of port infrastructure is the UAE (primarily through its state-owned company DP World), a country that is betting on a multipolar strategy to increase its regional and global impact. In developing its trade infrastructure, the UAE is collaborating with Israel, the US, China, Iran, and Russia. Saudi Arabia is another major regional player, with a vision to quadruple its port capacity by 2030 and take over the UAE's dominant position. The US is also seeking to reinforce its influence over global trade routes, with the Trump administration recently demanding free passage for US shipping through both the Panama Canal and the Suez

⁹⁷ Antony Loewenstein, *The Palestine Laboratory: How Israel exports the technology of occupation around the world* (Verso Books, 2023).

⁹⁸ Wei Yim Yap & Dong Yang, 'Geopolitical tension and shipping network disruption: Analysis of the Red Sea crisis on container port calls', *Journal of Transport Geography* 121 (2024).

Canal,⁹⁹ while also engaging in direct military action against the Houthis in Yemen.¹⁰⁰

In parallel with the growing economic presence of great powers in the Red Sea, recent years have also seen increased investment in military capabilities. Countries such as the UAE, Egypt, and Saudi Arabia have invested in new military bases, while China has deployed naval forces, Russia plans to construct a naval base in Sudan (on the coast of the Red Sea), and the US Navy's Fifth Fleet is based in Bahrain.¹⁰¹ Israel's war on Gaza has further heightened tensions in the Red Sea, as the Houthi movement has demonstrated its ability to disrupt global trade through insurgent tactics, effectively imposing the first-ever maritime blockade by a non-state actor. Sudan constitutes another important theatre of destabilization, with both the UAE and Russia involved in the civil war and seeking to benefit from the country's strategic maritime position and resources. Iran also has an interest in Port Sudan, as it provides support to the Sudanese Armed Forces.¹⁰² Taken together, rising tensions and rivalry in the Red Sea create a systemic tendency towards proxy wars in which non-state actors engage in sabotage.

In the Mediterranean theatre, Israel has invested in its ports in Ashdod and Haifa, as the country has sought to capitalize on the Syrian civil war by replacing Syria as the main hub of Mediterranean port infrastructure connecting Asia, the Middle East, and Europe. The Chinese state-owned company Shanghai International Port Group (SIPG) established a significant foothold in Israel after winning a 25-year tender to operate the Port of Haifa in 2015.¹⁰³ India also advanced its presence at the Port of Haifa through the Adani Group's deal.¹⁰⁴ As a sign of intensified competition over port infrastructure, the US company BlackRock – which has close ties to President Trump – recently finalized an agreement to purchase 12 ports from the Hong Kong-based CK Hutchison across the Red Sea and the Mediterranean. This move has attracted significant attention, as it challenges the dominant role of the UAE in controlling Middle Eastern waterways and seeks to curb Chinese influence.

Increasing competition over not only existing but also future trade infrastructure is shaping geopolitical tensions in the region. Along the US–China axis, the main competition appears to be between the India–Middle East–Europe

99 Mathieu Pollet, 'Trump wants free pass for US ships in Panama, Suez canals', *Politico*, 27 April 2025, <https://www.politico.eu/article/donald-trump-wants-free-pass-us-ships-panama-suez-canals/>.

100 Kevin Liptak, 'Dozens reported killed after Trump orders "decisive" strikes against Yemen's Houthis', CNN, 16 March 2025, <https://edition.cnn.com/2025/03/15/politics/trump-houthis-military-action/index.html>.

101 Estifanos Liyew, 'Geopolitics of the Red Sea: Implications of foreign military bases expansion to the Horn of Africa security', *African Security Review* (2024): 294–306.

102 Eric Lob, 'Iran's intervention in Sudan's civil war advances its geopolitical goals – but not without risks', *The Conversation*, 28 May 2024, <https://theconversation.com/irans-intervention-in-sudans-civil-war-advances-its-geopolitical-goals-but-not-without-risks-229989>.

103 Yoram Evron, 'Israel and China', in *Routledge Handbook on Israel's Foreign Relations* (Routledge, 2024), 204–215.

104 Dev Kachari, 'Adani's Haifa Port acquisition gives fillip to the development of India–Arab–Mediterranean Corridor', *ETInfra*, 18 July 2022, <https://infra.economicstimes.indiatimes.com/news/ports-shipping/adanis-haifa-port-acquisition-gives-fillip-to-the-development-of-india-arab-mediterranean-corridor/92959456>.

Economic Corridor (IMEC) – announced at the G20 Summit in 2023 – which aims to create an integrated economic network linking India, the Middle East, and Europe, and the Development Road Project (DRP) led by Turkey and Iraq, which offers a competing route from the Gulf to Europe.¹⁰⁵ Both IMEC and the DRP, currently at the design stage, aim to become the leading trade corridor between the East and Europe, creating a scenario where one project's success is seen as a loss for the other. India regards IMEC as a response to the growing influence of China,¹⁰⁶ a perception shared by the US, which sees the corridor as a way to counter China's Belt and Road Initiative in the region. A high level of uncertainty characterizes both projects, as IMEC is dependent on normalization between the Gulf States and Israel (currently at an impasse due to the Gaza war), while the success of the DRP hinges on stability in Iraq and its bilateral relationship with Turkey. The decision by the Kurdistan Workers' Party (PKK) to lay down arms and dissolve constitutes an important development in relation to those projects since it has regional repercussions not only in Turkey but also in Syria and Iraq.

For China, the competition between IMEC and the DRP is not a zero-sum game. While the DRP has officially welcomed Chinese participation – if not leadership – China may also stand to benefit should the IMEC project materialize, due

to its close relations with the Gulf countries, which occupy a key position in both initiatives. It should also be noted that Russia is attempting to expand its trade and economic presence in the Mediterranean by continuing to invest in Marshall Khalifa Haftar's militias and territory in eastern Libya. Russia's "security for resources" scheme has continued even after the demise of the Wagner Group.¹⁰⁷ Russia is also seeking to strengthen its economic and legacy ties with Algeria, for instance through arms trade and acquisitions, particularly fighter aircraft, implying significant structural dependencies in the longer term.¹⁰⁸ Syria's situation is also an important variable for both IMEC and the DRP. Finally, it is worth noting that Russia has a vested interest in the stability of Iran, given the International North–South Transport Corridor (INSTC), a multi-modal trade route connecting India, Iran, and Russia.

The hedging and bargaining power of the Gulf States increases

The Gulf States are well placed to play the multipolar geopolitical game thanks to their strategic position in the Middle East's economic, security, and trade architecture. In effect, there is a clear trend towards increased hedging and bargaining power among certain states, such as Saudi Arabia, the UAE, and Qatar, all of which benefit from rising multipolarity. While the

105 Abdullah Baabood, 'The Geopolitics of Economic Development in the Middle East', Carnegie Endowment for International Peace, 15 February 2024, <https://carnegieendowment.org/research/2024/02/the-geopolitics-of-economic-development-in-the-middle-east?lang=en>.

106 Noor Ul Ain et al., 'Geo-strategic Competition between India and China: A Comparative Analysis of BRI and IMEC', *Pakistan Social Sciences Review* 8(2), (2024): 532–543.

107 Jennifer Holleis & Maria Katamadze, 'Libya: Russia's Wagner Group makes further inroads', DW, 29 February 2024, <https://www.dw.com/en/libya-russias-wagner-group-makes-further-inroads/a-68394810>.

108 Defense Express, 'With plans to deliver six Su-57s to Algeria in 2025, Russia may struggle to include the weapons for them', 27 May 2025, https://en.defence-ua.com/news/with_plans_to_deliver_six_su_57s_to_algeria_in_2025_russia_may_struggle_to_include_the_weapons_for_them-14652.html.

Gulf States have traditionally opted to develop security, economic, and political relationships with the US, France, and the UK, recent years have seen an increase in partnerships with BRICS countries, particularly China¹⁰⁹ and Russia.¹¹⁰ Rather than aligning with one side, leading Gulf States seek to serve as intermediaries – or bridges – between various regional and global rivals in an increasingly unpredictable international system.

The Middle East is facing an interregnum, as US hegemony in the region is waning and as yet uncrystallized forms of multipolarity and competition are emerging. When it comes to the regional security architecture, the Gulf has played a key role in US strategy, hosting a network of US military bases in Saudi Arabia, Qatar, Bahrain, Kuwait, and the UAE. While the US remains the most important security partner for the Gulf States, there is growing interest in engaging in security exchanges with actors such as China and Russia. The Gulf States have refrained from imposing sanctions on Russia following its attack on Ukraine, paving the way for increased Russian influence and capital in the region,¹¹¹ despite Western pressure to lower oil prices by increasing production in order to undermine Russia's energy markets.¹¹² Russia had a significant presence at the 2025 IDEX weapons fair in Dubai, showcasing technologies it seeks to sell to the Gulf States. Qatar, a country that has a bilateral Defence Cooperation Agreement

with the US, has set up a joint investment fund with Russia, with each nation contributing upwards of USD 1 billion. Rather than replacing the US security umbrella with Russian or Chinese alternatives, the Gulf States are seeking to capitalize on their strategic position in the Red Sea and the Horn of Africa as a crossroads of overlapping yet contradictory security arrangements.

The bargaining power of the Gulf States vis-à-vis the United States has also increased as a result of the war in Gaza, as US influence and popularity in the region have waned while the strategic importance of the Gulf has grown. Saudi Arabia, for instance, is in a stronger position than ever to demand formal security guarantees, access to top US military and nuclear technology, and major investments in its Vision 2030 agenda in exchange for US partnership. If the US administration continues to push the Abraham Accords normalization agenda, Saudi Arabia will be in a better position to insist on these demands.

While the US remains the most important security provider for the Gulf, China has become the leading trade partner for countries such as the United Arab Emirates and Saudi Arabia, and plays a decisive role in the energy markets of Oman and Kuwait. According to the London-based Asia House think tank, by 2027 trade between the Gulf States and China is expected to surpass their trade with Western economies,

109 Thomas Demmelhuber, 'Playing the diversity card: Saudi Arabia's foreign policy under the Salmans', *Italian Journal of International Affairs* 54(4), (2019): 109–124.

110 Leonid Issaev & Nikolay Kozhanov, 'Diversifying relationships: Russian policy toward GCC', *International Politics* 58, (2021): 884–902, <https://link.springer.com/article/10.1057/s41311-021-00286-4>.

111 Cinzia Bianco, 'The Ukraine conflict has Persian Gulf monarchies hedging their bets', *The Washington Post*, 14 March 2022, <https://www.washingtonpost.com/politics/2022/03/14/ukraine-russia-saudi-arabia-oil/>.

112 Jens Heibach & Luiza Cerioli, 'Saudi Arabia's ambivalent stance on the Russia–Ukraine war: Balancing regime stability and equal sovereignty', *Contemporary Security Policy* 45(4), (2024): 670–683.

marking a significant shift in global economic dynamics.¹¹³ China's role as the Gulf's largest energy customer, coupled with its growing energy demand, underscores the deepening economic ties between the two regions.¹¹⁴ Concurrently, the Gulf States are implementing economic diversification strategies to reduce their reliance on hydrocarbons, with the aim of creating more sustainable and diversified economies. Significant investments by Gulf sovereign wealth funds across Asia further illustrate these strategic economic shifts.¹¹⁵ Alongside this, an increasing number of commercial deals and partnerships are being established, reinforcing bilateral trade and cooperation.

High-profile political engagements, such as UAE President Mohammed bin Zayed's state visit to China in 2024, highlight the strengthening diplomatic relations and mutual interests between the Gulf States and China.¹¹⁶ China, however, is only one of several actors that the Gulf countries seek to attract to their markets.

The leading Gulf States hold massive reserves of liquid capital and have demonstrated a willingness to open their domestic markets and access routes to external players. In this respect, the UAE's openness to hosting Russian capital during the Ukraine war is significant.¹¹⁷ Saudi Arabia's NEOM project, including its Vision 2030, are prime examples of the Gulf States' strategy of becoming a key global hub for infrastructure, trade and investment.¹¹⁸ For these states, the strategy of economic liberalization and diversification is aimed at increasing autonomy in pursuing foreign policy and amplifying the influence of their regimes.¹¹⁹

Importantly, inter-state competition in the Gulf is anything but over. Increased regional rivalry and tensions are to be expected between Saudi Arabia and the UAE over access to trade routes and international investments. Saudi Arabia aims to supersede the UAE as the local maritime superpower through the smart city NEOM project, which includes the creation of a new logistical hub for world trade.¹²⁰

113 Asia House, 'The Middle East Pivot to Asia 2024 – Growing Gulf–Asia cooperation in a new era', Press Release, 5 December 2024, <https://www.asiahouse.org/research-analysis/the-middle-east-pivot-to-asia-2024-growing-gulf-asia-cooperation-in-a-new-era>.

114 Faris Al-Sulayman & Jon Alterman, 'China's Essential Role in the Gulf States' Energy Transitions', Center for Strategic and International Studies, 11 December 2023, <https://www.csis.org/analysis/chinas-essential-role-gulf-states-energy-transitions>.

115 Salam Alshareef, 'The Gulf's shifting geoeconomy and China's structural power: From the petrodollar to the petroyuan?', *Competition & Change* 27(2), (2022): 380–401.

116 Mordechai Chaziza, 'China's economic diplomacy towards the Gulf Cooperation Council States', *Journal of Contemporary China* 34(152), (2024): 214–231.

117 Charles Sullivan, 'The Bear, the Eagle, and the Falcon: Russia, America, and the United Arab Emirates in a Time of Great Power Rivalry', *Asian Affairs* 55(3), (2024): 400–427.

118 Tingyi Wang, 'The Arab Gulf States in Transition: Power Centralization, Economic Transformation, and Neo-Nationalism', in *Countries and Regions*, Palgrave Macmillan, 2024.

119 Alex Vile, 'War in Gaza: Turbulence for the GCC', Eurasia Strategy Insights, 3 January 2024, <https://www.eurasiastrategyinsights.com/reports/gaza-war-impact-gcc>.

120 Abdullah Baabood, 'Seas, checks, and guns: Emirati and Saudi maritime interests in the Yemen conflict', Carnegie Endowment for International Peace, 16 March 2023, <https://carnegieendowment.org/research/2023/03/seas-checks-and-guns-emirati-and-saudi-maritime-interests-in-the-yemen-conflict?lang=en>.

The project is only one part of a larger push towards financialization in Saudi Arabia, which aims to replace Dubai and Abu Dhabi as the number one destination for international company headquarters in the region.

In addition to the continuing inter-state tensions, great power rivalry over trade routes and access to resources incurs significant uncertainty and risks of escalation. Managing and balancing Iranian, US, Russian, Indian, and Chinese interests, all of which converge on the Gulf countries, may become increasingly difficult for the Gulf States. Consequently, the strategic advantage they currently enjoy in the context of multipolarity could evolve into a risk.

Conclusions

The region is the setting for hostile strategic competition between regional and global players over resources and hubs. This dynamic involves a reshuffling of the presence of regional and global powers within and throughout the region. While it is difficult to predict the outcome of such competition, it has significant hybrid threat potential in the context of multi-domain competition.

- The Chinese infrastructural and economic penetration of the Middle East should be viewed with concern in terms of its hybrid threat potential. The export of technologies and the deployment of investments come with narrative offensives seeking to bolster China's image in the region at the expense of European and American interests. Beijing's investments and loan policies create

imbalanced relationships in which debtors may be subject to China's geopolitical expansion and political pressure. China is also exporting its surveillance technologies and Safe Cities concept to the Middle East, which gives it additional access and market power. Not only does this situation result in the export of authoritarian governance, but it also increases the narrative offensive against the Euro-Atlantic countries.

- Israel has used its technological advances in surveillance, population control, and counter-insurgency solutions – many of which are developed in the occupied Palestinian territories and tested on Palestinian populations before being exported to global markets – to build alliances with authoritarian and illiberal states. In terms of hybrid threat potential, such proliferation of advanced surveillance technologies could offer tools for state and non-state actors to cause harm online and in the physical world.
- The increased competition for access to resources, infrastructure, and trade facilities is opening up the Middle East to more regional and global players vying for an optimal and strategically significant presence in the region. This creates interests and stakes that powerful state and non-state actors consider worth competing over across multiple domains. Competition over trade infrastructure and its strategic locations is densifying the region's infrastructure network. This places the region in an increasingly important position for global trade routes and supply chains.

- The geography of military presence, and the imbrication and proximity of competing military bases, increase the risk of destabilization and render the region more vulnerable to changes and conflicts occurring outside the region. The position of military forces and bases complicates risk calculation and makes the region more volatile and vulnerable to global security crises, while raising the stakes for state actors.

Recommendations

- As Russia is one of the great powers seeking to advance its strategic advantages in the region, attention should be paid to anticipating the issue areas in which it will seek opportunities to align its MENA agenda with that of the US administration, in an attempt to create channels for dialogue with the US on an equal footing. There is a risk of triangular cooperation, with a view to Russia presenting itself as a useful – and in some cases indispensable – power in resolving contentious issue areas. The Euro-Atlantic community should proactively identify those issues of strategic interest in the region in which Moscow would seek to intervene.
- The new government in Syria must be closely monitored, as Russia in Syria is likely to wait pragmatically, hoping that the new Syrian authorities will distance themselves from the Europeans, betting that the new government will not be able to align with political conditionality thresholds. Attention must be paid to the Russian presence in Syria as it may serve as a buffer between external actors' respective areas of interest. The resilience of Russia's military presence in the wider region, with transfers of personnel and equipment from Syria to Libya, points to the latter country as the next fallback option.
- The role of the Organization of Petroleum Exporting Countries (OPEC) in relation to Russia must be monitored closely. Russia will seek to exploit this, as well as the Gulf countries more broadly, to achieve economic diversification.¹²¹ Against the backdrop of a volatile US foreign policy agenda, Europe's approach to the MENA region must be thought through strategically and with a view to connecting Russia's posturing on the European stage to its actions on the global stage. Russia will seek to link the war in Ukraine with other regional and global issues as part of a more assertive transactional approach. EU and NATO states must anticipate which issues might be triangulated with the war in Ukraine in the context of relations between Russia and the United States.

121 Mark Trevelyan & Gleb Stolyarov, 'Russia strikes deal with Dubai's DP World to develop Arctic sea route', Reuters, 24 October 2023, <https://www.reuters.com/markets/commodities/russia-sets-up-joint-venture-with-dp-world-develop-arctic-sea-route-2023-10-24/>.

Trend 4 – The Israel–Palestine conflict weakens international law

The Israel–Palestine conflict crystallizes ideologies and fault lines in the Middle East and beyond. In the context of the ongoing war in Gaza, this conflict has returned to the fore as a defining issue through which divisions between alliances and adversaries are constructed. As a strong marker of division throughout the region, the conflict mobilizes Arab peoples beyond Palestine and spills over into Middle Eastern diasporas in Europe and North America. On either side, the conflict also crosses the thresholds of the laws of war and of international humanitarian law. War crimes and violations of international humanitarian law create precedents that weaken the overall framework of state accountability in the application of international law. Not only do Israel's actions in the conduct of the conflict shatter adherence to numerous standards of responsible state practice, including proportional and discriminate use of force in armed conflict, but they are also in direct and continuous contradiction with the law of occupation.¹²² The application of international human rights law does not depend on reciprocity. This trend draws attention to the fact that disregard for international law in this conflict directly contributes to its weakening in other conflicts, with direct implications for

European security. The conflict also undermines accountability frameworks under international law. These developments have the potential to deepen divisions between diasporic segments of the population in the Euro-Atlantic area and to drive ambient radicalization over several generations.

A global focal point of conflict mobilizing populations across the MENA region and beyond

The Israel–Palestine conflict has acted as a conflict crystallization point both regionally and globally. It has endured due to the shortcomings of the Oslo peace process since the 1990s.¹²³ While both Palestinian and Israeli intellectuals have voiced criticism of the Oslo peace process since its inception, this critique has remained marginalized.¹²⁴ The Oslo process increased Israel's control over the Palestinian territories and the Palestinian political system, creating an economic and political dependency structure between Israel and the Palestinian elites that increased the appeal of more radical alternatives such as Hamas.¹²⁵

Israel has faced few to no consequences from its partners for continuously expanding its illegal settlements and intensifying its racially structured political system of control

122 ICRC, 'Israel and the Occupied Palestinian Territory: The law of occupation must be respected', 21 July 2024, <https://ir.icrc.org/en/2024/07/israel-and-the-occupied-palestinian-territory-the-law-of-occupation-must-be-respected/>.

123 Mandy Turner, 'Security, co-optation and resistance: Peacebuilding-as-Fragmentation in the occupied Palestinian Territory', in *Hybrid Forms of Peace: From Everyday Agency to Post-Liberalism* (Palgrave Macmillan, 2012), 188–207.

124 Sara Roy, *Failing Peace. Gaza and the Palestinian–Israeli Conflict* (Pluto Press, 2007).

125 Mandy Turner, 'Building democracy in Palestine: Liberal peace theory and the election of Hamas', *Democratization* 13(5), (2006): 739–755; Leila Farsakh, 'Undermining democracy in Palestine: The politics of international aid since Oslo', *Journal of Palestine Studies* 45(4), (2016): 48–63.

across Israel–Palestine.¹²⁶ The Abraham Accords, promoted by the US as a transactional normalization process between Israel and its Arab regional neighbours, consciously disregarded the political question of Palestine. Issues such as Jerusalem and the right of return are not included in any normalization process with Israel, meaning that Israel is under no obligation to concede anything of substance in exchange for normalizing relations with the Arab states. The Abraham Accords perpetuate failed visions of peace, exacerbating the hopelessness and sense of suffocation experienced by Palestinians.¹²⁷ On 17 July 2024, Israel's parliament officially rejected any two-state solution,¹²⁸ proving that the Israeli political apparatus is not disposed to make concessions in favour of a negotiated political settlement. The Oslo peace model and transactional normalization remain unchanged, continuing to sow the seeds of new escalatory dynamics and violent systemic shifts.

After the 7 October 2023 massacres in Israel and the ensuing war in Gaza, with its regional repercussions, the question of Palestine has re-emerged as a primary marker of division on the world stage. It has become a focal point for inter- and intra-state tensions and divisions on an unprecedented scale. Across the Middle

East, there has been a resurgence of Palestinian solidarity, more negative perceptions of Israel and the US, and mounting criticism of Arab governments that have either normalized relations with Israel or supported such normalization. Some of the key developments include the following. The US has lost significant legitimacy in the Middle East, with 51% of Arab populations polled across 16 countries between December 2023 and January 2024 now considering the US to pose the greatest threat to security and stability in the region.¹²⁹ This represents a notable shift from 2022, when 39% held a similar view. Seven per cent of those polled saw Iran as the biggest threat, while 4% regarded Russia as the primary destabilizing actor. In 2022, 41% considered Israel to be the most significant threat. This figure had fallen to 26% by 2023–2024, indicating that the US is primarily held responsible for the ongoing war in Gaza.

Anti-American sentiment and the loss of the US's status as a peace negotiator have created space for regional alliances to be reshuffled, and a window of opportunity for states such as Iran, China, and Russia to strengthen relationships. China has stepped in as a peace mediator, seeking to foster Palestinian unity by bringing Hamas, Fatah, and other factions into

126 Omar Dajani & Hugh Lovatt, 'Rethinking Oslo: How Europe can promote peace in Israel-Palestine', European Council on Foreign Relations, 26 July 2017, https://ecfr.eu/publication/rethinking_oslo_how_europe_can_promote_peace_in_israel_palestine_7219/.

127 Dana El Kurd, 'The paradox of peace: The impact of normalization with Israel on the Arab World', *Global Studies Quarterly* 3(3), (2023).

128 Jacob Magid, 'Knesset votes overwhelmingly against Palestinian statehood, days before PM's US trip', *Times of Israel*, 18 July 2024, <https://www.timesofisrael.com/knesset-votes-overwhelmingly-against-palestinian-statehood-days-before-pms-us-trip/>.

129 Arab Center Washington DC, 'Arab Public Opinion': Figure 9.

negotiations.¹³⁰ Russia has also recently hosted Hamas delegations,¹³¹ but lacks the resources and capabilities required for a sustained systemic effort. The US's position as the leading agent of peacemaking in Israel–Palestine is also being challenged by European states such as Spain, France, Ireland, and Norway, which have begun to develop alternative peace agendas that are not reliant on the US.¹³² Such internal fragmentation is expected to continue and deepen, creating scope for European states that have the capacity to shift from passive followers to active participants in the Israel–Palestine issue. The question of the recognition of the State of Palestine is a case in point.

Rather than being solely a Middle Eastern issue, the question of Palestine has global reverberations, including in Europe, the US, Asia, and Africa. According to data from ACLED, the Armed Conflict Location & Event Data monitor,¹³³

between October 2023 and October 2024 more than 32,000 demonstrations were organized across the world in relation to the war in Gaza, with 92% of these demonstrations expressing solidarity with the Palestinians. According to the same data, during this period one out of every five demonstrations organized globally was related to Israel–Palestine. Recent polls indicate that a majority of citizens in EU countries such as Germany, Italy, France, Sweden, and Belgium do not support their governments' policies towards Israel, but are in favour of banning arms trade, prosecuting Israel's state leaders before the International Criminal Court, and consider Israel's actions in Gaza to constitute genocide.¹³⁴ In the UK, 55% of polled citizens support cutting arms trade with Israel.¹³⁵ As Israel's largest trading partner, the EU exercises significant influence over the development of the Israel–Palestine conflict and the war in Gaza.

130 Ahmed Aboudouh, 'The Fatah–Hamas agreement increases Chinese influence in Palestinian affairs. But the road to unity is rocky', Chatham House, 24 July 2024, <https://www.chathamhouse.org/2024/07/fatah-hamas-agreement-increases-chinese-influence-palestinian-affairs-road-unity-rocky>; Yamaguchi Shinji, 'China's Role in Conflict Mediation in the Middle East: Normalization of Relations between Iran and Saudi Arabia and the 2023 Israel–Hamas War', *Asia-Pacific Review* 30(3) (2024): 99–114.

131 Ivan Nechepurenko, 'Hamas leaders arrive in Moscow as the Kremlin attempts to showcase its clout', *New York Times*, 26 October 2023, <https://www.nytimes.com/2023/10/26/world/middleeast/hamas-russia-moscow.html>; Times of Israel, 'Hamas delegation to visit Moscow on Monday, Russian state media reports', 2 February 2025, https://www.timesofisrael.com/liveblog_entry/hamas-delegation-to-visit-moscow-on-monday-russian-state-media-reports/.

132 Oxford Analytica, 'Europe will remain divided over Palestinian statehood', Emerald Expert Briefings, 14 August 2024; George Kyris, 'The Recognition of a Right to Statehood and Palestine', *Ethnopolitics* 24(5), (2024): 511–521, <https://www.tandfonline.com/doi/full/10.1080/17449057.2024.2362510#abstract>.

133 Ciro Murillo & Christina De Paris, 'Global demonstrations in response to the Middle East crisis', ACLED, 18 November 2024, <https://acleddata.com/2024/11/18/global-demonstrations-in-response-to-the-middle-east-crisis/>.

134 YouGov Polls (2024). See Germany: https://d3nkl3psvxxpe9.cloudfront.net/documents/PIPD_March2024_Germany_tables_w.pdf; France: https://d3nkl3psvxxpe9.cloudfront.net/documents/PIPD_France_March2024_tables_w.pdf; Italy: https://d3nkl3psvxxpe9.cloudfront.net/documents/PIPD_Italy_March2024_tables_w.pdf; Sweden: https://d3nkl3psvxxpe9.cloudfront.net/documents/PIPD_Sweden_March2024_tables_w.pdf; Belgium: https://d3nkl3psvxxpe9.cloudfront.net/documents/PIPD_Belgium_March2024_tables_w.pdf.

135 YouGov / Medical aid for Palestinians survey results, July 2024, https://d3nkl3psvxxpe9.cloudfront.net/documents/Results_MAP_240731_W.pdf.

The conflict, and European states' policies towards Israel, risk widening rifts between states and societies in Europe. Germany is a case in point: while the government actively supports Israel, public opinion is increasingly critical, creating a series of challenges in policing pro-Palestinian demonstrations.¹³⁶ This is particularly the case among young, highly educated populations in urban centres and within diaspora populations.

Recent Pew polls in the US show that 53% of Americans now have an unfavourable view of Israel, up from 42% in 2022.¹³⁷ There is a growing generational shift in the US, ignited by the war in Gaza and the response of US administrations, with younger generations being more supportive of Palestinians than of Israelis.¹³⁸ A similar generational shift is also evident among Jewish Americans, with Jewish peace movements playing a significant role in demonstrations and acts of civil disobedience in American urban centres and on university campuses.

The Israel–Palestine question has become increasingly politicized in the US, with particular groups (American Jews, Muslim Americans, and Evangelical Americans) reporting that the conflict is either *very important* or *important* to them personally.¹³⁹ The Trump administration's crackdown on anti-war and pro-Palestinian demonstrations, as well as the prosecution of individual movement leaders at American universities, has increased polarization and tensions around these issues.¹⁴⁰

The Trump administration's public support for forced population displacement in Gaza, backed by the extreme right in Israel (the Gaza 'Riviera plan'), is likely to increase polarization over Palestine within the US and globally. Discourses around Palestine and the question of Gaza are increasingly taking on more essentialist and dualistic tones and serving to mark divisions between friends and enemies.¹⁴¹ The US administration's discourse, as well as that of far-right Israeli decision-makers, promotes a binary

136 Vanessa Thompson & Pinar Tuzcu, 'Intervention – "Policing Palestine Solidarity: Moral urban panics and authoritarian specters in Germany"', Antipode Online, 15 May 2024, <https://antipodeonline.org/2024/05/15/policing-palestine-solidarity/>; Anna Younes & Hanna Al-Taher, 'Erasing Palestine in Germany's educational system: The racial frontiers of liberal freedom', *Middle East Critique* 33(3), (2024): 397–417, <https://doi.org/10.1080/19436149.2024.2383444>.

137 Laura Silver, 'How Americans view Israel and the Israel– Hamas war at the start of Trump's second term', Pew Research Center, 8 April 2025, <https://www.pewresearch.org/short-reads/2025/04/08/how-americans-view-israel-and-the-israel-hamas-war-at-the-start-of-trumps-second-term/>.

138 Laura Silver, 'Younger Americans stand out in their views of the Israel– Hamas war', Pew Research Center, 2 April 2024, <https://www.pewresearch.org/short-reads/2024/04/02/younger-americans-stand-out-in-their-views-of-the-israel-hamas-war/>.

139 Silver, 'How Americans view Israel and the Israel– Hamas war'.

140 Myah Ward & Irie Sentner, 'Trump's pro-Palestinian activism crackdown closely mirrors a plan from the creators of Project 2025', *Politico*, 4 June 2025, <https://www.politico.com/news/2025/04/06/project-2025-project-esther-university-crackdown-plans-00272750>; Ethan Mayer-Rich, 'The Crackdown on Pro-Palestine Activism Intensifies in the United States', Arab Center Washington DC, 26 February 2025, <https://arabcenterdc.org/resource/the-crackdown-on-pro-palestine-activism-intensifies-in-the-united-states/>.

141 Merje Kuus, 'Policy and Geopolitics: Bounding Europe in EEurope', *Annals of the Association of American Geographers* 101(5), (2011): 1140–1155; Enzo Traverso, *Gaza Faces History* (Other Press LLC, 2024).

framing of good versus evil, following a logic familiar from the “New Middle East” project advanced during the post-9/11 War on Terror. Self-reinforcing binary logics between ‘the West’ and ‘the Rest’ are being exploited by multiple players. Iran, for instance, seeks to portray itself as the protector of the Palestinian cause and the leader of the ‘Axis of Resistance’ – an image that is also enthusiastically propagated by the US and Israeli administrations. Such framings can easily become self-fulfilling prophecies, leading to escalatory dynamics. This appropriation of the Palestinian question by conservative and reactionary forces risks obscuring the root causes of the conflict (the occupation) and preventing rational approaches to conflict resolution and peacebuilding.

One of the global repercussions of the Israel–Palestine conflict is its tendency to spill over into diasporas outside the region. It may pit groups against one another based on their identities, ideologies, and allegiances, and may also have wider reverberations in European and North American societies. The stifling of protest movements, combined with the general rise in pro-Palestine sentiment and increasing critique of state-level policies towards Israel across Europe, the US, and the Middle East, has the potential to lead to increased state repression, illiberalism, and authoritarianism, as well as internal polarization between state and society, and among different polarized groups within society. Anti-regime sentiment within societies both in the Middle East (particularly among Israel’s Arab partners) and in the West

(with Islamophobic, anti-Semitic, right-wing and leftist tendencies) is therefore to be expected. The acceleration of binary geopolitical divisions increases the probability of inter- and intra-state violence and also serves hardline politicians and political parties. A simplistic, binary understanding of the conflict favours illiberal, populist, and authoritarian tendencies. Israel has a vested interest in fostering mutual understanding and connections with the European far right, which in turn mobilizes strongly anti-Muslim and anti-Palestinian rhetoric.¹⁴²

International law and state accountability frameworks weakened

Israel’s war on Gaza following the attacks by Hamas on 7 October 2023 has seriously eroded the effective implementation of international humanitarian law standards and the law of armed conflict.¹⁴³ Both Hamas and Israel have committed war crimes, engaged in inhumane treatment of civilians, used disproportionate force in civilian areas, and disregarded international humanitarian law more broadly. These actions have resulted in an unprecedented level of civilian suffering within the Israel–Palestine conflict. Israel’s response has drawn the US and certain European countries into open defiance of the foremost institutions of international law, including the ICC, the ICJ, the UN Human Rights Council, and entities such as the United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA). This creates the conditions for a ripple effect

142 Azriel Bermant, ‘Israel’s Relations with the European Far Right: Implications for Czechia and the EU’, IIR Prague, Policy Publications, 6 February 2025, <https://www.iir.cz/en/israel-s-relations-with-the-european-far-right-implications-for-czechia-and-the-eu-1>.

143 Tor Krever et al., ‘On international law and Gaza: critical reflections’, *London Review of International Law* 12(2), (2024): 217–301.

in which states and state leaders act more openly against the norms of international law, international humanitarian law, and human rights.

Despite the ICJ ruling of December 2024 on violations of the Convention on the Prevention and Punishment of the Crime of Genocide, including a historic finding of plausible genocide and an order to halt military actions in Gaza, Israel has continued its operations.¹⁴⁴ The ICJ's rulings have included provisional measures to prevent genocidal acts, as well as a declaration that the occupation of the Palestinian territories is illegal. In spite of this, the majority of Israel's partners have not implemented any practical policy measures to enforce the ICJ's rulings. The ICC, in turn, has issued arrest warrants for Israeli Prime Minister Benjamin Netanyahu and Defence Minister Yoav Gallant on charges including "starvation of civilians as a method of warfare" and "extermination". While the US and Israel are not signatories to the ICC, some ICC member states appear to be evading their legal obligations. Hungary, for instance, openly defied the ICC ruling by welcoming Netanyahu for a state visit. In Germany, France, and the UK, officials have also indicated that they would not comply with the arrest warrants, effectively advocating immunity for Israel's state leaders under international law.¹⁴⁵

There is a risk that ICC signatory countries that do not enforce its ruling could be accused of pursuing a policy of double standards. They could also be increasingly perceived as the

main guarantors of Israel's impunity, with the US protecting Israel in the UN Security Council, and the US and Germany acting as the largest exporters of weapons to Israel in 2023 and 2024. As a result, the perceived universalism of international law and international institutions is increasingly being questioned, and accusations of Western double standards are accumulating. This creates an opening both for alternative actors to appear as the torchbearers of international law and for alternative conceptualizations of the universal to become the bedrock of international relations.

Alternative actors may include states such as South Africa, which seek to profile themselves as defenders of international law, or states such as China that embody alternative conceptualizations of the 'universal' in international relations. These alternative actors, and the alternative conceptualizations they promote, can become factors in fostering new alliances and opening geopolitical relationships in the Middle East. For China, the West's perceived and de facto support for Israel's impunity constitutes a strategic opening to export its perceived non-interference agenda to the Middle East. The erosion of both Western credibility and international norms thus accelerates the progression towards multipolarity and increases contestation over hegemony. In addition to world-systemic transformations that concern the very nature of universalism and hegemonic positions, Israel's impunity creates a trajectory whereby

144 International Court of Justice, Summary of the Order of 26 January 2024, Case 192 – Application of the Convention on the Prevention and Punishment of the Crime of Genocide in the Gaza Strip (South Africa v. Israel), <https://www.icj-cij.org/node/203454>.

145 See Germany: <https://www.dw.com/en/merz-invites-netanyahu-to-germany-despite-icc-arrest-warrant/a-71788069>; see France: https://www.lemonde.fr/en/international/article/2024/11/28/why-france-ordered-netanyahu-concessions-over-icc-arrest-warrant_6734435_4.html.

other states may more openly experiment with defying mechanisms of accountability.

In summary, three distinct trajectories can be observed emerging from Israel's impunity. First, international norms and institutions are increasingly undermined, losing relevance and credibility. This creates openings for increased state aggression in both domestic and external relations. Second, the West's normative power decreases due to its de facto and perceived role in supporting Israel. Further splintering within the 'West' is therefore to be expected, with some states increasingly profiling themselves as defenders of international norms, while others contribute to their erosion. Third, the undermining of state accountability mechanisms accelerates the trend towards multipolarity, contestation, and hegemonic shifts that benefit countries such as China, which seek to expand their influence in the Middle East.

Conclusions

The devastation wrought by the war in Gaza extends beyond the humanitarian disaster that has struck the enclave. The consequences of the war, and Israel's unabated actions in Gaza, harbour significant hybrid threat potential, as they set a series of precedents for state behaviour during conflict that may ultimately be used to justify malicious actions by authoritarian states elsewhere in the world. Since hybrid threat activity involves the transgression of commonly accepted norms, the fact that a democracy sets precedents for state practice at the expense of the protection afforded by international human rights law constitutes a key

strategic accelerator and source of incitement for authoritarian states.

- The Israel–Palestine conflict is a crystallization point for the region, increasingly mobilizing people against their governments, particularly in Arab countries engaged in transactional normalization processes with Israel. The mobilization of people and states around this conflict crosses multiple domains and tends to be escalatory.
- The Israel–Palestine conflict poses a risk of radicalization and polarization among Middle Eastern diasporas in Europe and North America, thereby directly importing the conflict's division lines into host societies. The conflict will always have an inherently international dimension due to the presence of diaspora communities elsewhere in the world. This could lead to inter-community violence, assassinations, and digital foreign interference in parts of Europe and North America.
- While international law is the bedrock of national security for the majority of states, Israel's impunity undermines the relevance and credibility of the principal safeguards of international law. It also weakens the normative power and credibility of Israel's supporters globally, who are more readily accused of applying double standards in the implementation of international law. This constitutes a key susceptibility to hybrid threat activity across the information and diplomatic domains.

- The weakening of state accountability frameworks provides leeway for authoritarian states to implement alternative visions of international law and allows alternative conceptions of international law to gain traction. China is actively pushing such alternative conceptions. Weakened state accountability furthers the authoritarian agenda for international law, making state sovereignty and non-interference prevail over international human rights protection standards.
- As a major authoritarian state using hybrid threat activity to push the boundaries of acceptable state behaviour, Russia will continue to seek closer relations with Israel as a means of creating space for dialogue with the US. Russia has toned down its rhetoric on Iran and Palestine to leave room for dialogue with Israel. While Russia must maintain good relations with the Arab world and its broader public, European and North American decision-makers should anticipate that Russia will increasingly move closer to Israel in multiple domains, ranging from military cooperation to culture.

Recommendations

- The radicalization and brutalization of diasporas in Europe and North America will require programmes to anticipate, detect, and counter inter-community violence. This is primarily a law enforcement and rule of law challenge that should be anticipated at relevant operational levels by states hosting significant diasporic communities. Over the longer term, the challenge of ambient and generational radicalization, as well as experiences of violence, will call for a comprehensive approach to this issue.
- To sustain their normative credibility, EU and NATO states should articulate a clear and convincing policy position towards Israel and its manifest violations of international law, including international human rights law and the law of armed conflict. Such clarity would be essential in the context of the narrative warfare that Russia, China, and Iran are waging, and will continue to wage. Russia may use the Israeli example in its narrative to discredit the Euro-Atlantic community's normative standpoint. The Israeli example is particularly important for Russia, as it can be spun as a case of a democracy crossing every threshold of acceptable behaviour under international law.

Conclusions

This Trend Report has highlighted the potential for hybrid threat activity stemming from the MENA region, or related to developments within it. The report is not an exhaustive foresight analysis, nor does it propose scenarios for future developments. Instead, it seeks to group under several common denominators a series of developments and directions deemed important on the basis of expert consultations, discussions, and desk research.

The four trends highlighted in this report capture some of the most significant hybrid threat potential stemming from, or linked to, developments in the Middle East and North Africa region. These trends concern internal dynamics, such as relations between states and societies; regional conflict dynamics, including those between Iran and Israel; and forms of international competition affecting the region, particularly with regard to resources and political presence. The trends also address the normative implications of conflicts and developments in the region for international law. To this end, the report outlines a pattern of threat potential that European and North American governments should monitor closely in the foreseeable future.

The oppressive relationship between states and societies leads to a widening gap between them and creates potential for future crises and instability. This dynamic carries significant hybrid threat potential for Europe and North America. Authoritarian states are increasingly centralized and have gained greater prowess and reach in transnational repression. The proliferation of surveillance technologies also

carries risks of disruptive technologies falling into the hands of destabilizing actors.

The escalatory conflict dynamic between Israel and Iran has regional and global hybrid threat implications. The prospect of direct warfare between the two countries would be heavily destabilizing for the region, with the potential for conflict expanding into new geopolitical areas. Iran's irregular warfare and proxy practices have significant repercussions on European and North American soil, with targeted attacks, assassinations, and intimidation carried out by criminal networks on Iran's behalf.

The Iran nuclear file also offers significant scope for Russia to put itself back on the map and to connect its war of aggression in Ukraine to its role and clout in the Middle East. Russia's position as a permanent member of the UN Security Council and a nuclear-armed state suggests that the Russian regime may seek to position itself within, or close to, international negotiations on Iran's nuclear question. With the return of snapback sanctions and the effective end of the implementation of the JCPOA, addressing the Iran nuclear issue could prove an attractive avenue for Russia to present itself as a responsible great power offering practical and workable ways of diffusing tensions around Iran's nuclear programme.

Increased strategic competition across multiple domains among global and regional powers over trade, resources and infrastructure raises the stakes of confrontation, while making the region more contested and prone to global crises. Transactional normalization approaches open additional domains for competition.

One of the most significant hybrid threat potentials lies in the way the Israel–Palestine war deepens global and regional conflict, while Israel’s conduct continues to undermine key tenets of international law. More strategically, the fact that a democracy such as Israel continues to cross thresholds of acceptable state behaviour unimpeded and unabated discredits the framework of international law and sets a precedent for authoritarian states to disrespect this law.

The presence of large diaspora communities in European and North American countries carries an obvious risk of importing conflict, with its associated security and law enforcement implications. States in the MENA region have demonstrated an inclination to deploy a range of tools of transnational repression to maintain a firm grip on their diaspora communities abroad. Transnational repression is a major conduit for hybrid threat activity.

The developments covered by these trends all – to varying degrees – illustrate how conflicts and strategic competition increasingly cross numerous domains and thresholds of intensity. They also show how authoritarian states have become more proficient and tech-savvy in oppressing their people at home and abroad, thereby posing a direct threat to the national security of countries hosting diaspora communities targeted by transnational repression practices. The region and its development also provide an opportunity for Russia to return to the forefront of the international arena, helping it to break its international isolation and to cajole countries in the region. Ultimately, developments in the region, and the ways in which Europe and North America respond to them, will have a strong impact on normative and value-based foreign policy, as well as on the robustness of international law grounded in universal human rights. In terms of hybrid threat potential, it is highly probable that European and North American states will face challenges in the domain of perceptions with regard to their stance on the Israel–Palestine conflict.

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