

The IHS Country Risk team assesses the states in the Middle East and North Africa most likely to suffer from security instability during 2014

MIDDLE EAST AND NORTH AFRICA FLASHPOINTS

SYRIA

The conflict in Syria is unlikely to be resolved in the coming year. While the government has made military gains around Homs and Damascus in the last few months, it probably does not have enough troops to secure its borders or to hold areas it has cleared. Moreover, while both Turkey and Jordan are not comfortable with the presence of jihadi groups on their border, they most likely do not wish to see President Bashar al-Assad victorious. As such, they will probably allow enough weapons to be smuggled to the insurgents to prevent them from being completely militarily defeated, but not enough to allow them to ensure victory. A political resolution is also unlikely. The government is increasingly reliant on auxiliary military forces that it does not fully control, and who are benefiting financially from the war economy. The opposition is incapable of presenting a united front at any

peace negotiations.

The continuing war in Syria will probably allow Sunni groups in Iraq and Lebanon to expand their operations, with additional bombings targeting Shia civilian areas, and a higher risk of communal violence. In Lebanon in particular, by late 2014, the state is likely to lose control of parts of the Bekaa Valley, as well as of Tripoli and some neighbourhoods in Beirut. In Jordan there is an increasing risk of terrorist attacks against the government, security forces, diplomatic assets and tourist sites aimed at punishing the Jordanian government for its attempts at reining in and disrupting salafi networks in the country that provide material, financial and manpower support to jihadi groups in Syria. However, the strong capability of Jordanian security forces and their ability to infiltrate jihadi groups strongly mitigate the risk.

ALGERIA

An Algerian security forces spokesman quoted in the media on 24 October said that the army had found a cache of around 100 anti-aircraft missiles, several hundred anti-helicopter rockets, landmines, and rocket-propelled grenades (RPGs) in the southern province of Illizi on the Libyan border. The discovery follows the report that Algerian security forces on the Libyan border had been ordered to stop sharing information with Libyan militias deployed to guard the border. The Libyan Defence Ministry has denied Libyan and international media reports that Tebu, Tuareg and Zintan militias guard the Libyan border, saying that all border guards are under ministerial control. We assess that loyalties to tribal and militia commands are likely to take precedence over loyalty to Libya's central government, however, and that Libyan militias or individual guards would be more inclined to allow jihadists or weapons smugglers safe passage into Algeria if this brought financial benefit to them. Algeria is probably particularly concerned that Libya's Tuareg may be facilitating jihadist activity, given past co-operation between jihadists and Tuareg groups in northern Mali.

The large size of Algeria's desert borders means that, despite the deployment of around 20,000 troops to the border in early September, Algeria is unlikely to be able to prevent all jihadist penetration from neighbouring countries.



TUNISIA

A suicide bomber blew himself up on a beach near the Riadh Palms hotel in the tourist town of Sousse on 30 October, apparently after failing to gain access to the hotel. This was the first attempted bombing of a tourist target in Tunisia since 2002. On the same day, another suicide attacker on foot was arrested at the mausoleum of former president Habib Bourguiba in Monastir, another tourist town. Bourguiba symbolises the secular state, and Bourguiba-era officials are frontrunners to replace prime minister Ali Laarayedh from the Islamist al-Nahda party once he fulfils his commitment to hand over to an independent transitional leader, probably in the next month. The low attack capability suggests it was not directed by an established group such as al-Qaeda in the Islamic Maghreb (AQIM) or al-Mourabitoun, although it is feasible the attackers had trained with such a group. AQIM has so far supported peaceful proselytisation and lobbying of Islamist parties in Tunisia, probably fearing that attacks on the post-revolutionary state would alienate its potential supporters. The main trigger for rising risks will be al-Nahda's upcoming resignation from government, however. Foreign-led jihadist groups and domestic salafists are likely to point to this as proof that peaceful Islamist politics have failed, and that only violent jihad can defeat secularism.

Attacks would probably target secular politicians and unionists, state, government, secular media and security forces targets in Tunis and other towns such as Sidi Bouzid, Sfax, Kasserine and Jendouba. Hotels in Tunis, Monastir, Sousse, and other coastal resorts would also be at risk, as would other places serving alcohol to tourists. The involvement of more established groups would heighten the risk of more sophisticated tactics such as vehicle-borne improvised explosive devices (VBIEDs) being used, including against energy targets in south Tunisia. Tunisia's tourism sector has made significant recovery since 2011 (just post-revolution), with the government estimating visitor numbers in 2013 would near their pre-crisis peak of seven million by year-end. A drop in tourism revenues back to 2011 levels as the result of a terrorist campaign would not in itself lower Tunisia's reserves to under three months of imports. But, if it occurred at the same time as sustained strikes affecting phosphates, or a jump in oil price (given that Tunisia is a net energy importer), the risk of a currency crisis would become greater.

EGYPT



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On 3 July 2013, the army removed President Morsi and suspended the constitution, in response to nationwide anti-government protests that exceeded 2011 levels. Mass civil unrest, occasionally consisting of hundreds of thousands of protesters, is likely to continue periodically through 2014, however. It is unlikely the interim government will be able to address economic grievances over food prices, standards of living, education, healthcare and housing in the one-year outlook. The interim government has been left with depleted foreign currency reserves, a GDP fiscal deficit of 13.4 per cent and the need to cut spending, especially on fuel subsidies.

Furthermore, the army's crackdown on the Muslim Brotherhood (MB) and its political activities means violent mass protests by the group's supporters are very likely to continue

in the six-month outlook. Further protests involving fighting and the use of live fire by security forces are likely in central Cairo, Mansoura, Helwan and Suez City. Other towns and cities will also see protests, especially in the south and the Nile Delta. Furthermore, terrorist attacks against government and security buildings and officials, as well as the judiciary, are likely. These will probably involve shootings and small IEDs, with larger IEDs involving tens of kilograms of explosives being used to target senior government figures. We assess that Islamist groups in Egypt have the capability to conduct a spectacular attack against a government or tourist target in Cairo or elsewhere in Egypt involving multiple IEDs and gunmen. There is currently no indication they have the intent to do so, however.