



DECEMBER 2017

## Adrift on choppy seas: Is regional turmoil likely to result in conflict in Lebanon?

The regional contestation between Saudi Arabia and Iran is moving westwards. The events around Prime Minister Hariri's 'resignation' indicate that Lebanon has just moved from a precarious balancing act between domestic and regional interests, underpinned by distrustful compromise, to direct political confrontation. Whether this situation escalates, will depend on how key actors assess the costs and benefits of conflict in Lebanon. This brief examines such calculations in light of recent developments. It translates its findings into two scenarios about what may come to pass ahead of the Lebanese elections scheduled for May 2018. The more probable scenario is one of localised and targeted violence, domestic political fragmentation and possibly an economic downturn. However, if Hezbollah does not overplay its hand from its current position of strength, Lebanon's fragile stability might yet be preserved.

### 1 Introduction<sup>1</sup>

The perception among key domestic, regional and international actors that the costs of conflict in Lebanon would be prohibitive for all involved explains much

of the country's fragile resilience.<sup>2</sup> After all, large-scale conflict would inevitably result in state breakdown and this would have several knock-on effects such as making Lebanon's refugee problem unmanageable, enabling Hezbollah to capture the Lebanese state without, however, gaining full control, and recreating an array of militias infused with sectarianism.

As it stands, the fragile post-Ta'if peace has continued to prevail in Lebanon despite six years of civil war in neighbouring Syria, the influx of 1.5 million refugees, incidents of sectarian violence, and numerous domestic

<sup>1</sup> The authors thank Imad Salamey (Lebanese American University) and Mariska van Beijnum (Clingendael) for their review of the brief. Samar Batrawi (also Clingendael) helpfully analysed news coverage of Prime Minister Hariri's 'resignation' by Al-Manar (Hezbollah) and Al-Arabiya (Saudi Arabia) between 4 and 30 November 2017. The brief was made possible in part through the support of the 'Vereniging van Nederlandse Gemeenten' (VNG) [Association of Dutch municipalities]. The authors intend to produce an update of this brief after the Lebanese elections planned for May 2018.

<sup>2</sup> Gade, T., *Lebanon Poised at the Brink*, NUPI Working Paper 686, 2016.

political crises.<sup>3</sup> The election of Michel Aoun as president in late 2016 and the creation of a government of national unity have further stabilised the country. Although the fate of Lebanon's Syrian refugees and the nature of bilateral relations with Damascus remain domestic bones of contention, the country's balancing act between the political objectives of the Future Movement, the Free Patriotic Movement, Hezbollah and others, as well as Iranian and Saudi interests, has produced fairly stable governance. In part, this has happened by agreeing to disagree about unresolved and divisive issues such as the armament of Hezbollah and its military intervention in Syria.

However, the unexpected resignation of Prime Minister Saad Hariri in early November 2017 created a crisis that punctured Lebanon's hard-won stability. Transforming from a Saudi coup into a suspended threat and then a face-saving withdrawal, his 'resignation' has created major uncertainty about the country's political future.<sup>4</sup> It also raised the spectre of deeper instability and violence. A key question today is whether major domestic and/or foreign actors have lowered their assessment of the cost of potential conflict in Lebanon and, if so, what their cost/benefit analysis means concretely for the immediate future.

This policy brief assesses the question in three steps. To start with, it discusses what the basic geopolitical tensions of the region mean for Lebanon. Next, it outlines the key regional-local alliances that transmit such tensions into Lebanese politics. On this basis, it subsequently assesses the cost/benefit calculus of conflict of six key actors. Finally, it develops two short conflict scenarios for

Lebanon from the preceding parts, including indicators and triggers.

## 2 Geopolitical tensions in the Middle East and their meaning for Lebanon

The occupation of Iraq by US forces in 2003 essentially removed the country from the geopolitical equation of the Middle East.<sup>5</sup> This mattered because until then it had been a strong – albeit dictatorial – state that acted as a buffer between Iran, Turkey and Saudi Arabia. Instead, it became an early battlefield-by-proxy between a range of local Iraqi interests as well as Iranian, US, Turkish and Saudi objectives. The result is a permanently weak state that oscillates between emergent democracy and autocratic oligopoly.<sup>6</sup> The US invasion of Iraq – and the ensuing power vacuum – paradoxically also represents the starting point for the accelerated political instrumentalisation of sectarianisation throughout the Middle East.<sup>7</sup> In part, this happened as a function of the country's Shi'a and Kurds seeking to assert themselves on the basis of their hitherto suppressed ethnic-religious identities. It also happened as a result of foreign support for Iraq's plethora of Shi'a and Sunni militias, especially between 2003 and 2009 – a harbinger of what was to follow in Syria several years later.<sup>8</sup> Previously constrained to

3 The Ta'if agreement (1989) ended the Lebanese civil war. See: Knudsen, A. and M. Kerr (eds), *Lebanon after the Cedar Revolution*, London: Hurst & Company, 2012; Bahout, J., *Eye of the storm*, Carnegie Middle East, Online: <http://carnegie-mec.org/diwan/73439> (accessed 30 November 2017).

4 For an initial chronology: Atlas Assistance, *Saad Hariri submits his resignation*, Lebanon situation report, 8 November 2017; as to uncertainty, see: Young, M., *Fathers and sons*, Carnegie Diwan, online: <http://carnegie-mec.org/diwan/74883> (accessed 15 December 2017).

5 Van Veen, E. and N. Grinstead, *Iraqi imbroglio: the Islamic State and beyond: A brief analysis of the 2014 political-security crisis*, The Hague: Clingendael, 2014.

6 Van Veen, E., F. El Kamouni-Janssen and N. Grinstead, *A house divided: Political relations and coalition-building between Iraq's Shi'a*, The Hague: Clingendael, 2017.

7 Salloukh, B., 'The sectarianization of geopolitics in the Middle East', in: Hashemi, N. and D. Postel, *Sectarianization: Mapping the new politics of the Middle East*, London: Hurst & Company, 2017.

8 This period probably featured Shi'a v. Shi'a and Sunni v. Sunni fighting as much as Sunni v. Shi'a fighting, but what matters here was that mobilisation for violence frequently took place on the basis of sectarian appeals. See, for example: Makiya, K., *The Rope*, New York: Pantheon Books, 2013.

the region's periphery (Yemen, Afghanistan), sectarianism and its associated violent jihadism now blossomed at its core. However, at the time, the rise of sectarianism and violent jihad had only indirect repercussions for Lebanon. In contrast, US-sponsored UN Security Council resolution no. 1559 (2004), adopted in the wake of the occupation of Iraq, had more direct effects as it sought to 'punish' Syria for its support for Saddam Hussein. The combination of this resolution, the assassination of Rafik Hariri and the Cedar revolution necessitated Syria's withdrawal from Lebanon in 2005, which in turn set the scene for Hezbollah's ascent.<sup>9</sup>

The Arab Spring of 2011 broadened the emergent geopolitical competition between Turkey, Saudi Arabia and Iran across the region by shattering the existing regional order and by threatening the governments of their allies-cum-client states (especially Bahrain, Yemen and Syria). Turkey initially sought to harness the Islamist movements that represented the best organised elements of the protests on the basis of its 'Islamic democracy' and the Muslim Brotherhood credentials of its own Justice and Development Party (AK Parti),<sup>10</sup> while Iran saw an opportunity to increase its influence by proxy in Lebanon, Syria, Iraq and Yemen. Saudi Arabia on the other hand opted to respond with direct violence, ruthlessly suppressing the uprising in Bahrain in 2011 and invading Yemen in 2015.

Arguably, the gains of the geopolitical excursions of Turkey, Iran and Saudi Arabia have been limited, but their price has been high – especially in terms of human misery. Turkey's initial successes in Egypt and Tunisia suffered rapid setbacks. Its Syrian policy failure combined with its own domestic upheaval subsequently took it out of the regional competition. Iran has arguably made most gains. However, although substantial, its influence in Lebanon and Iraq also has limitations, while a smouldering, empty ruin

is all that is left of Syria. Moreover, Syria is presided over by a regime that is detested by a significant proportion of its population.<sup>11</sup> In turn, Saudi Arabia finds itself in an expensive quagmire in Yemen – where the recent death of former President Saleh cut off one of the remaining negotiable pathways to a face-saving exit. Saudi ostracism of Qatar has been ineffective but peaceful, in part because of the stability of the Qatari ruling family and the presence of the US Al Udeid air base. Finally, the Joint Comprehensive Plan of Action of mid-2015 increased the acuteness of the Saudi perception of an Iranian threat across the region as it brought Iran partially back in from the cold and was expected to give the Iranian economy a substantial boost.<sup>12</sup>

In short, geopolitical competition for influence between Turkey, Iran and Saudi Arabia across the Middle East, which had been long in the making, escalated substantially after 2011 and morphed into an Iranian-Saudi stand-off during 2014–2016. This contest is best seen through classic realist lenses, i.e. it takes place between two autocratic regimes<sup>13</sup> and is about state power and regional hegemony.<sup>14</sup> Sectarianism is a tool that is used for political purposes and, while it may have significant meaning for those who answer its call, it explains little in terms of the political interests that are at stake.<sup>15</sup> As far as the Middle East goes, both regional powers have mostly conducted their fight by proxy in weak states that lie

9 Salamey, I., *The government and politics of Lebanon*, Routledge: London, 2013; Knudsen and Kerr (2012), *op.cit.*

10 Mandaville, P., *Islam and politics*, 2<sup>nd</sup> edition, London: Routledge, 2014.

11 Lynch, M., *The Arab Uprisings*, New York: Public Affairs, 2012; Van Dam, N., *Destroying a nation: The civil war in Syria*, London: IB Taurus, 2017.

12 Such an economic boost has materialised to a much lesser degree than anticipated by the Iranian government, in part because US sanctions related to Iran's missile programme have remained in place.

13 The Iranian political system combines democratic with theocratic elements under the ideology of 'Wilayat-e Faqih'. Saudi Arabia is a hereditary monarchy on a tribal basis.

14 Marshall, T., *Prisoners of geography*, London: E&T Ltd, 2016; Hashemi (2017), *op.cit.*

15 For an analysis of the politics of sectarianism at work in Saudi Arabia, see: Al-Rasheed, M. (2011), 'Sectarianism as Counter-Revolution: Saudi Responses to the Arab Spring', *Studies in Ethnicity and Nationalism*, vol. 11, no. 3, pp. 513-526.

between them – Iraq after 2003, Lebanon after 2005 and Syria after 2011. Yet, their methods diverge substantially. Iran employs a mix of supporting affiliated political parties and paramilitary proxies, deploying Iranian Revolutionary Guard Corps (ICRG) advisers and providing resources (e.g. weapons/ financial support), while Saudi Arabia relies more on the export of Wahhabi ideology to mobilise others and on its petrodollars to finance armed groups or regimes of its liking. In a way, Iran pursues more of a hard security approach and Saudi Arabia a softer security approach (except in Yemen).<sup>16</sup> Turkey's initial approach can be situated somewhere between these two, depending on the country involved.

It would appear that the soft security approach has so far been the less effective of the two methods. The Saudis have in fact drawn this conclusion themselves by consolidating their regime and making their foreign policy much more muscular.<sup>17</sup> Its government has also eagerly canvassed the support of the US-administration under President Trump and informally established an anti-Iranian partnership of sorts with both the US and Israel, the latter currently being governed by the most nationalist/religious rightwing coalition it has seen since the Oslo Accords of 1993/95.

It is in this context that Lebanon enters the scene. Stuck in a quagmire in Yemen, losing influence in Iraq and losing the war in Syria, it is one of the few theatres in the Levant where the Saudis could regain their position. Although the details of Prime Minister Hariri's resignation remain unclear, it was widely perceived as a Saudi move that was too intrusive, endangering Lebanon's hard-won stability. Iran and Hezbollah helped this interpretation of events along by restraining

themselves in their public reactions.<sup>18</sup> The suspension and subsequent withdrawal of PM Hariri's resignation suggests that the Saudi move backfired. Nevertheless, the adoption by the Lebanese Cabinet of a new 'disassociation policy' of non-interference in Arab affairs (read: Syria) on 5 December 2017 does represent a minor rhetorical victory for Saudi Arabia.<sup>19</sup> A few clear security risks for Lebanon emerge from this broad assessment of regional developments:

- The Syrian civil war is not likely to come to an end soon, but the 1.5 million Syrian (largely Sunni) refugees in Lebanon are at risk of being forced to return to avoid upsetting the sectarian balance in Lebanon now that Saudi Arabia has upped the ante of the contest for control in Lebanon.<sup>20</sup> This could create internal violence in Lebanon itself.
- While Hezbollah dominates Lebanese politics, the country's banking system remains one of its weak spots. Saudi Arabia might use either its US anti-Iran partnership or its influence over the Lebanese economy to further exclude Hezbollah. It could most easily achieve this by reinforcing, or building on, the extraterritorial effects of the American 2015 'Hizballah International Financing Prevention Act'.<sup>21</sup>

16 Spyer, J., *Tehran is winning the war for control of the Middle East*, Foreign Policy, Online: <http://foreignpolicy.com/2017/11/21/tehran-is-winning-the-war-for-control-of-the-middle-east-saudi-arabia/> (accessed 30 November 2017).

17 Van den Berg, W., *Saudi Arabia's strategic stalemate – what next?*, The Hague: Clingendael, 2017.

18 This is based on extensive analysis of news coverage by Al-Manar (Hezbollah) and Al-Arabiya (Saudi Arabia) between 4 and 30 November that was conducted for this brief (in Arabic).

19 See: <https://www.dailystar.com.lb/News/Lebanon-News/2017/Dec-05/428945-ministers-gear-up-for-1st-cabinet-session-since-hariri-resignation.ashx> (accessed 8 December 2017). It is doubtful, though, whether this will change any facts on the ground.

20 Uzelac, A., *Unsafe places: Refugee politics in Lebanese government crisis*, Online: <https://www.clingendael.org/publication/unsafe-places-refugee-politics-lebanese-government-crisis> (accessed 30 November 2017).

21 Saudi economic leverage takes the form of remittances of Lebanese employees that work in the Gulf and sizeable deposits at the Lebanese central bank.

- If Israeli-Saudi-US anti-Iran rhetoric translates into more direct action against Iran, the latter might mobilise Hezbollah to retaliate against Saudi interests in Lebanon, or even against Israel itself. By making PM Hariri look like a vassal, Saudi Arabia may unintentionally have strengthened Hezbollah's position in Lebanese domestic politics.
- It is less likely – but not impossible – that Saudi Arabia will seek to nurture Lebanon's modest Salafi scene in a bid to regain political influence through militancy. That is, it might extend its patronage beyond the Future Movement at greater scale.<sup>22</sup> This could result in growing sectarianism and sectarian-infused radical violence akin to previous episodes in Sidon in 2015 (Sheikh Ahmad al-Assir) or Arsal in 2014/15 (Islamic State/Jabhat al-Nusra).

### 3 Transmitting geopolitics into Lebanese domestic politics

The agency of local political actors with significant foreign patrons has been extensively debated generally, but especially in places like post-2003 Iraq and post-2005 Lebanon. While there is no consistent answer across time and place to this debate, influential local political actors typically have a local constituency and leaders that operate in a particular normative context. Their ideology, finances, arms or media access may come from elsewhere, but legitimacy and culture are hard to import. For this reason, it is almost always incorrect to paint local political actors entirely as foreign proxies (where this is true, their political life is likely to be short). Hezbollah offers a good example. Since its entry into the Syrian civil war in 2013, it has become obvious that it is a military proxy of Iran

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22 The Future Movement has been suffering from fragmentation and disarray at both the domestic and regional level since at least 2005: International Crisis Group, *Lebanon's self-defeating survival strategies*, Brussels/Beirut: ICG, 2015; Young (2017), *op.cit.*

in the Syrian theatre. However, arguably it retains a significant degree of autonomy as a political actor in the Lebanese domestic political sphere and also as a military actor providing resistance against Israel.<sup>23</sup> In this brief, we treat national political actors both as proxies for regional powers and as agents representing the interests of local constituencies.

From this perspective, Lebanon's Future Movement is both a key Saudi ally and the main political party that represents the country's Sunni population. The Hariri family that leads it has close personal and business ties with Saudi Arabia and its members are in fact personally beholden to the Saudi royal family. The main strengths of the Future Movement are its popular base (c. 27% of Lebanese are Sunni Muslims)<sup>24</sup> and its economic/financial power.<sup>25</sup> Lebanon's two richest families – the Hariris and the Miqatis – are of Sunni origin. In 2017, their combined family wealth was estimated at US\$11 billion by Forbes Magazine.<sup>26</sup> The Future Movement's main problems are that Sunni economic wealth has not translated into political influence and that since 2008 it has no longer commanded a credible military deterrent capacity. The murder of Rafik Hariri, the father of current PM Saad Hariri, marked the start of the gradual decrease of the movement's influence on Lebanese politics. This decline mobilised the Future Movement's Christian allies – the Lebanese Forces and Kataeb – to rally more strongly against Hezbollah and its political supporters. For example, delegations of both parties visited Riyadh shortly before PM Hariri's resignation to share their concerns about

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23 International Crisis Group, *Hezbollah's Syria conundrum*, Brussels/Beirut: ICG, 2017.

24 It should be noted that population estimates in Lebanon are contentious and that there is no recent census. The source here is the CIA World Factbook (accessed 1 December 2017).

25 Daher, J., *The Political Economy of Lebanon's Party of God*, London: Pluto Press, 2016.

26 See: <https://www.forbesmiddleeast.com/en/list/the-worlds-richest-arabs-2017/> (accessed 1 December 2017).

the wide-ranging concessions that PM Hariri had been making to Hezbollah.<sup>27</sup>

Mirroring the decline of the Sunni Future Movement is that of Amal, which lost its position as Lebanon's dominant Shi'a party to Hezbollah in the 1990s, despite still providing the speaker of Parliament. In turn, Hezbollah is at the same time a political party, social movement and armed group that represents both the interests of Lebanon's long-downtrodden Shi'a population and acts as a close ally of Iran. Basing its legitimacy and possession of arms on the doctrine of national resistance against Israel, it used to be a highly regarded entity across the sectarian spectrum and across the Arab world.<sup>28</sup> However, its entry into the Syrian civil war on the basis of self-serving and anti-Sunni (takfiri) motives has had a negative effect on its reputation and thrown it back onto its core Shi'a base. Hezbollah's strongest ally is the Free Patriotic Movement of Michel Aoun, who currently serves as president. His role and that of Saad Hariri as prime minister were part of comprehensive Saudi/Iranian negotiations that helped establish a carefully constructed government of national unity in 2015. The 'resignation' of PM Hariri reflects the Saudi view that this carefully wrought compromise had started to produce too many benefits for Iran/Hezbollah, which they saw as a result partly of Hariri's weak leadership. It is illustrative that Iranian special envoy Ali Akbar Velayati complimented PM Hariri with his statesmanship just days before he was summoned to Riyadh to resign.

The Lebanese political scene can therefore be simplified as a permanent balancing act between a loose Saudi-friendly and -sponsored coalition of the Future Movement, Kataeb and the Lebanese Forces on the one hand, and a somewhat tighter Iran-friendly and -sponsored coalition of Hezbollah, Amal and the Free Patriotic Movement.<sup>29</sup>

#### 4 Estimating the perceived costs and benefits of conflict

It is by now clear that the Saudis have increased their level of political confrontation with Iran in Lebanon. So far this has created a lot of media attention and rhetoric, but only a minor political crisis, without violence. The question that will determine whether broader geopolitical developments – of which Saudi interests are a key part – will produce large-scale internal violence in Lebanon is how key parties to a potential conflict assess the costs and benefits thereof. What is the calculus of violence? Table 1 outlines the estimated cost/benefit calculus of six actors with the greatest capacity for initiating nationwide conflict in Lebanon. Two are domestic: Hezbollah and the Future Movement, while four are foreign: Iran, Saudi Arabia, Israel and the United States. Further assessment of smaller Lebanese political parties is needed. Here it is assumed that they would follow the main parties as per current alliances.

27 Interview of one of the authors with a high ranking Kataeb official in the autumn of 2017; also: <http://www.dailystar.com.lb/News/Lebanon-News/2017/Sep-28/420805-march-14-movement-to-make-comeback-through-saudi-arabia.ashx> (accessed 30 November 2017).

28 Hezbollah was Lebanon's sole militia to escape disarmament as stipulated by the 1989 Ta'if agreement that ended the Lebanese civil war, courtesy of the Syrian regime. See: ICG (2017), *op.cit.*

29 It is illustrative of the fluidity of Lebanese politics that the original March 8 (centred on Hezbollah) and March 14 (centred on the Future Movement) political coalitions that emerged out of the Cedar revolution against the Syrian occupation in 2005 have lost much of their meaning. For example, Michel Aoun's Free Patriotic Movement switched from the March 14 to the March 8 coalition, while Walid Jumblatt's Progress Socialist Party did the same a few years later. Both moves increased Hezbollah dominance of the Lebanese political scene in 2011/12.



**Table 1** Potential benefits and costs of selected conflict parties

	Potential benefits from conflict	Potential costs of conflict	Factors influencing cost/benefit calculus
<b>Hezbollah</b>	<ul style="list-style-type: none"> <li>– Full dominance of Lebanese cabinet</li> <li>– Capture of key economic institutions</li> <li>– Initiating forced refugee return</li> </ul>	<ul style="list-style-type: none"> <li>– Further sectarian branding and loss of legitimacy</li> <li>– Increase in Sunni/Salafi violence</li> <li>– Involved in three conflicts: Syria, Israel, domestic</li> </ul>	<ul style="list-style-type: none"> <li>– Continuation of the Syrian civil war (--)</li> <li>– Reduction of its bank access to finance social services (+)</li> <li>– Persistence of memories of civil war (---)</li> </ul>
<b>Iran</b>	<ul style="list-style-type: none"> <li>– Another Saudi defeat in a regional conflict theatre</li> <li>– Even stronger proxy presence on Israeli border</li> </ul>	<ul style="list-style-type: none"> <li>– Defeat of Hezbollah and weakened position vis-à-vis Israel</li> <li>– Undermining gains of the Syrian war</li> <li>– Nuclear sanctions are re-activated or new sanctions are introduced</li> </ul>	<ul style="list-style-type: none"> <li>– Continuation of the Syrian civil war (-)</li> <li>– Direct actions against its national security interests, e.g. rescinding the Joint Comprehensive Plan of Action (JCPOA) (+)</li> </ul>
<b>Future Movement</b>	<ul style="list-style-type: none"> <li>– Restoration of its political influence</li> </ul>	<ul style="list-style-type: none"> <li>– Loss of economic assets</li> <li>– Destruction of organisational infrastructure</li> <li>– Loss of its position as Sunni representative</li> </ul>	<ul style="list-style-type: none"> <li>– Poor capability to engage in violence (--)</li> <li>– Persistence of memories of civil war (---)</li> </ul>
<b>Saudi Arabia</b>	<ul style="list-style-type: none"> <li>– A much-needed Iranian defeat in a regional conflict theatre</li> </ul>	<ul style="list-style-type: none"> <li>– A swift humiliation of its local allies by force of arms</li> <li>– Loss of political foothold in Lebanon</li> </ul>	<ul style="list-style-type: none"> <li>– Continuation of the Syrian civil war (+)</li> <li>– Absence of a reliable and armed proxy (--)</li> <li>– Continuation of the Yemeni conflict (--)</li> <li>– More Yemeni missiles (+)</li> <li>– Perception of Iranian threat as existential (++)</li> </ul>
<b>Israel</b>	<ul style="list-style-type: none"> <li>– Destruction of armed capacity of Hezbollah</li> <li>– Reduction of threat from Syrian Golan</li> </ul>	<ul style="list-style-type: none"> <li>– Getting bogged down in a military quagmire</li> <li>– Involved in three conflicts: Palestine, Syria and Lebanon</li> </ul>	<ul style="list-style-type: none"> <li>– Continuation of the Syrian civil war (+)</li> <li>– Ability to destroy Hezbollah convoys at will (++)</li> <li>– Progress in the Middle East Peace Process (+)</li> </ul>
<b>United States</b>	<ul style="list-style-type: none"> <li>– Elimination or reduction of Hezbollah</li> <li>– Lebanon returns to the US orbit</li> </ul>	<ul style="list-style-type: none"> <li>– Hezbollah/Iranian retaliation against US forces in Iraq or Syria</li> <li>– Symbolic defeat of its Saudi ally</li> </ul>	<ul style="list-style-type: none"> <li>– US stake in political future of Syria (-)</li> <li>– More aggressive anti-Iran strategy (++)</li> <li>– More Iranian provocations (++)</li> </ul>

Sources: Literature as cited throughout the text, as well as in-depth interviews across the Lebanese political spectrum in the autumn of 2017. The signs in brackets (-) and (+) denote an 'if-then' construction. For example, if the Syrian civil war continues, it reduces the likelihood of conflict.

From Table 1 it is possible to draw a few provisional conclusions that can help identify the most likely scenarios in terms of how geopolitical developments in the region might stimulate internal violence in Lebanon:

- As long as the civil war in Syria continues, it is not appealing for Iran/Hezbollah to stimulate internal violence in Lebanon as it would open up another front and

require redeployments, but it is more attractive for Israel/Saudi Arabia/the US to do so. Yet, neither the Saudis nor the US has an armed, reliable proxy to engage in violence on their behalf while their own capabilities to intervene directly are limited. This leaves Israel to consider. On balance, it appears that there are few incentives for Israel to engage in large-scale conflict in the near future as

long as it can conduct airstrikes at will in Syria, its forces remain underprepared, and Russia's military presence in the area continues to act as deterrent.<sup>30</sup> Once a full regime victory or a political settlement in Syria comes closer, Iran/Hezbollah may be more tempted to harass Israel – with all its concomitant risks – but it remains unlikely that this would stimulate the next conflict after all the losses they will have just incurred.

- Even if the Saudis or the US assessed that internal violence in Lebanon would help to realise their strategic objective of reducing Iranian influence in the Levant, they would still have to overcome the fact that there is no effective local proxy they can support to win the fight for them. It would take a long time before either the Future Movement or its Christian allies were armed to the extent that they had a chance of defeating Hezbollah. In addition, Lebanon's Salafi scene is modest in nature, and without a unified political or organisational platform. Hence, the Saudi strategy of inciting violence via such groups is not a feasible proposition at the moment.<sup>31</sup> Instead, it is more likely the US and Saudis will move to further limit Hezbollah's international financial access and reduce its profit-making enterprises.<sup>32</sup>

- Memories of the Lebanese civil war among Lebanese political factions act as a powerful brake on their desire to re-engage in wide-scale violence. While the low level of elite rotation in Lebanon is problematic in governance terms – the country is essentially still ruled by the militia leaders from its 1979–89 civil war – it is advantageous in the sense that the elite still holds the memory of destructive violence without results.<sup>33</sup> The carnage in next-door Syria has reinforced this mindset.

In sum, while at the moment it seems unlikely that geopolitical developments in the Middle East will lead to wide-scale internal violence in Lebanon, it cannot be fully excluded. Should Lebanon's fragile stability descend into violence, two scenarios can be envisaged. These are reflected below: one of high intensity violence that is based on a shift in calculus on the part of Saudi Arabia, the US and/or Israel; and one of low intensity violence that continues the status quo with increasing resistance against Hezbollah. Their 'validity' is limited to May 2018, when the next elections in Lebanon are scheduled to take place.

## 5 Scenario one: Defending Saudi Arabia to the last Lebanese<sup>34</sup>

The driver of this scenario is a Saudi and/or Israeli desire to either contain/weaken or eliminate Hezbollah as an armed actor in Lebanon. In a Saudi-led elimination sub-scenario, either a gradual buildup of local Sunni/Christian militias is needed, or a large Saudi military deployment. An intervention like this would require an urgent request

30 ICG (2017), *op.cit.*; Sa'ar, G. and R. Tira, *Political and military contours of the next conflict with Hezbollah*, Tel Aviv: National Institute for Security Studies, Volume 20 No. 2, 2017; Young, M., *Is war between Hezbollah and Israel likely in the coming year?*, Beirut: Carnegie Middle East (Diwan), 2017; Murciano, G., *Israel vis-à-vis Iran in Syria: The perils of active containment*, Berlin: SWP, 2017.

31 Despite violent episodes like the siege of Sheikh Ahmad Asir's followers in Sidon in 2013, or the multiple bombings in Bir al-Abed and the Iranian embassy in Beirut claimed by the Abdallah Azzam brigades, Lebanese Salafi's have a weak popular base of a few percent of its Sunni population at most. See: Saouli, A., 'Lebanon's Salafi's: Opportunities and constraints in a divided society', in: Cavatorta, F. and F. Merone, *Salafism after the Arab Awakening: Contending with people's power*, London: Hurst & Co, 2016.

32 See: Levitt, M., *Hezbollah: The global footprint of Lebanon's party of God*, Hurst & Company: London, 2013.

33 This is a consistent finding across research interviews by the authors in 2015 and 2017 respectively. See also: Van Veen, E., *Elites, power and security: How the organization of security serves elite interests*, The Hague: Clingendael, 2015; or more recently: <http://www.aljazeera.com/indepth/opinion/lebanon-saudi-yemen-171112115648693.html> (accessed 30 November 2017).

34 Unattributed quote.



Low probability, high impact	
<b>Scenario indicators</b>	<b>Scenario triggers</b>
<ul style="list-style-type: none"> <li>- Saudi Arabia starts arming the Future Movement and its allies</li> <li>- A rapid increase in Saudi support for Lebanese Salafi groups, financial and otherwise</li> <li>- Sharply increased rhetoric on Al-Arabiya that justifies war</li> </ul>	<ul style="list-style-type: none"> <li>- Collapse of the current government of national unity</li> <li>- Forced return of Sunni refugees to Syria</li> <li>- More missiles from Yemen landing around Riyadh or other strategic targets</li> <li>- Hezbollah establishing security control over Beirut</li> </ul>
<i>Consequences</i>	
Large-scale violence, reputational damage to Saudi Arabia, might unite the Lebanese	

for help from the Future Movement or one of its allies (like the more militant Kataeb). Yet, this would only confer some legitimacy if the sitting government of national unity were to fragment first. Hence, monitoring PM Hariri's moves and his political future is important. It would also require Israeli assent. Both direct military support and direct military intervention can be initiated on pretexts such as the next direct attack on Saudi territory that could be ascribed to Hezbollah, a military operation by Hezbollah inside Lebanese territory against a Syrian opposition group, initiation of forced return of Syrian Sunni refugees to Syria, or a Hezbollah show of force in Beirut.<sup>35</sup>

A somewhat more likely variation might see Saudi Arabia only looking to weaken Hezbollah militarily through, for example, limited air-strikes at key targets. This is likely to serve more symbolic and reputational objectives than military ones given how the 2006 conflict demonstrated the limitations of Israeli airpower without accompanying ground offensive.<sup>36</sup> A Saudi aerial attack would probably not seriously reduce Hezbollah's military capacities without an effective local proxy to do the essential ground fighting. But it could strengthen the Saudi negotiation position for a new political settlement should the current government of national unity fragment, or if the 2018 electoral results are inconclusive/contested.

An Israeli-led elimination sub-scenario would take the form of a ground invasion by the Israeli Defense Forces (IDF) staged from northern Israel, potentially also including Syrian territory.<sup>37</sup> Although the speed of developments in Syria appears to have surprised Israel,<sup>38</sup> logically the IDF already has fully fledged plans developed for offensive action against Hezbollah. However, some of the current aggressive Israeli rhetoric probably serves political purposes rather than reflecting genuine fear of a military threat. This is because the Syrian civil war is far from over given the presence of significant Syrian opposition groups in Idlib, Kurdish forces in northern Syria, and the US-supported Syrian Democratic Forces in the east. Moreover, talk of Iranian missile factories being built in Syria sounds somewhat illogical as Iran has been providing Hezbollah with missiles without such factories for a long time and could presumably fly them into Hariri airport to start with. Finally, Israel retains full dominance in the southern Lebanese/Syrian theatre for now and, as long as this continues, it is unlikely to risk a major conflict because the political and human cost would be substantial.<sup>39</sup>

35 Saudi invasions of Yemen and Bahrain indicate that this scenario is unlikely, but possible.

36 Lambeth, B., *Israel's war against Hezbollah: Learning from Lebanon and getting it right in Gaza*, Santa Monica: Rand Corporation, 2011.

37 Israel has so far stayed out of the Syrian civil war except for regular airstrikes on presumed Hezbollah arms convoys in both Syria and Lebanon.

38 See: <https://www.al-monitor.com/pulse/originals/2017/11/israel-iran-syria-lebanon-hezbollah-idf-army-guerilla.html> (accessed 1 December 2017).

39 Sa'ar and Tira (2017), *op.cit.*; Murciano (2017), *op.cit.*

Medium probability, high impact	
Scenario indicators	Scenario triggers
<ul style="list-style-type: none"> <li>- Status of the emergent US-Saudi-Israeli alliance against Iran</li> <li>- Fate of the JCPOA. Its undoing might trigger accelerated Iranian deployment to Syria</li> <li>- Successful progress in the Middle East Peace Process that reduces Hezbollah's legitimacy and makes it more vulnerable</li> </ul>	<ul style="list-style-type: none"> <li>- Denial of Syrian air space access to Israeli warplanes</li> <li>- Construction of Iranian bases in southern Syria and/or regular Iranian military presence</li> <li>- Return of Hezbollah fighters from Syria</li> <li>- Hezbollah missile attacks on northern Israel</li> </ul>
<p><i>Consequences</i> Large-scale violence, protracted ground war, spill-over into Syria</p>	

Israel is likely to justify any such intervention as a legitimate response to a national security threat emanating from Syria or Lebanon. This is paradoxically more likely to happen if the Syrian civil war winds down, especially if Iranian/Hezbollah military capabilities are deployed to the south of Syria (the Golan area in particular). For example, emergent news of Iran constructing military facilities in the Damascus area will be cause for concern – irrespective of whether they are used by Iran-sponsored irregulars or Islamic Revolutionary Guard Corps (IRGC) forces.<sup>40</sup> The deployment of anti-aircraft weapons that could deny Israel access to Syrian air space – and protect Hezbollah supply lines – might be an even more serious trigger. Previous Israeli invasions (1978, 1982, 1993, 1996 and 2006) suggest that this scenario is entirely possible.

## 6 Scenario two: All ‘quiet’ on the western front

The driver of this scenario is a Saudi – and partially Lebanese – desire to limit further political ascendancy of Hezbollah without paying the costs of full-scale combat. Both the recent government ‘crisis’ around PM Hariri’s resignation and the Lebanese elections planned for 2018 offer(ed) opportunities to put pressure on Hezbollah and to rebalance political power in Lebanon in a way that is more favourable to Saudi

interests. The salience of these opportunities increases if it is assumed that Hezbollah will only get stronger once the Syrian war starts to wind down.<sup>41</sup>

This appreciation may lead to a series of hostile economic and political measures that aim to raise the pressure on Hezbollah. Economically, Saudi Arabia could harm or orchestrate the collapse of the Lebanese banking system through withdrawal of its substantial financial deposits and guarantees. This, however, is a risky strategy as it would also affect the Sunni community and its leadership. The same goes for cutting the flow of remittances from Lebanese workers in the Gulf. It is likely that either strategy would ultimately backfire by creating resentment across the Lebanese population. But a Saudi international advocacy campaign to close international financial markets to Hezbollah, including the Lebanese domestic banking system, has more potential if it links Hezbollah’s labelling as a terrorist group by the EU and the US with the imposition

40 See: <http://www.bbc.com/news/world-middle-east-41945189> (accessed 1 December 2017).

41 It is by no means certain that this perception is in fact correct given that Hezbollah is now widely perceived as, in effect, a Shi’a militia, has suffered around 1,500–2,000 casualties in Syria, will see a part of its fighting force tied up in Syria for some time, and has had to tap deep into the social capital of its core base to sustain both its ideological justification and its operations. See: ICG (2017), *op.cit.*

### Al-Manar and Al-Arabiya on PM Hariri

A comparison of the tone and frequency of reports by both TV channels highlights the following:

*Al-Manar* (Hezbollah) reporting initially registers shock and surprise. This is followed by a more alarmist tone that eventually changes to underlining the need for national unity and stability, accusing the Saudis, Israel and the US of working together and criticising Saudi actions in Yemen.

*Al-Arabiya* (Saudi Arabia) reporting is initially aggressive and subsequently oscillates between triumphalist and defensive. It denounces Iran/Hezbollah, typically by quoting others.

Since PM Hariri's resignation announcement, both news sites have been featuring multiple items a day, both in the form of brief updates and longer background or opinion pieces.

*Source:* Al-Manar news articles (via Google Advanced Search); Al-Arabiya articles (via LexisNexis). Search terms: Hariri, Hezbollah, Syria, Saudi Arabia, Yemen and Iran. Period: 4–30 November 2017

High probability, medium impact	
Scenario indicators	Scenario triggers
<ul style="list-style-type: none"> <li>- Saudi Arabia increases its support for the more militant allies of the Future Movement</li> <li>- An increase in Saudi support for Lebanese Salafi groups</li> <li>- Sharper rhetoric on Al-Arabiya that provides normative coverage for greater political interference</li> <li>- Threats to withdraw Saudi bank deposits or to make life more difficult for Lebanese workers in the Gulf</li> <li>- An international Saudi lobbying effort to sanction Hezbollah as a terrorist organisation</li> </ul>	<ul style="list-style-type: none"> <li>- A fudged compromise keeps PM Hariri in place but without significant concessions from Hezbollah</li> <li>- More talk of the forced return of Sunni refugees to Syria</li> <li>- An increasingly heated electoral season</li> <li>- Continued lack of progress and/or further Saudi setbacks in Yemen</li> </ul>
<p><i>Consequences</i> Localised and targeted violence, domestic political fragmentation, economic downturn?</p>	

of (more) sanctions.<sup>42</sup> This could create significant leverage without harming the general Lebanese economy.

Politically, an intensified partnership between the more militant elements of the loose coalition around the Future Movement and Saudi Arabia could produce a campaign of low level violence that consists of assassinations, suicide bombings, stoking sectarian tensions (e.g. Tripoli and Sidon are vulnerable in this regard) and stimulating Salafi or Christian militancy. The aim of pursuing such a disruptive campaign of localised violence would be to shake Hezbollah confidence and force it back to the negotiation table about, for example, the electoral law that was passed in June

42 The EU designated Hezbollah's armed wing a terrorist organisation in 2013. See, for example: Council decision (CFSP) 2017/1426 of 4 August 2017. The US designated the entire organisation as a Foreign Terrorist Organization in 1997. Saudi Minister for Gulf Affairs Thamer al-Sabhan already called for an international coalition to confront Hezbollah in October 2017, on twitter. See: <http://www.naharnet.com/stories/en/236443-al-sabhan-urges-international-anti-hizbullah-coalition>. (accessed 1 December 2017).

2017<sup>43</sup> or the composition of the government of national unity. In a way, it would mirror Hezbollah's own alleged behaviour in the period 2005–2008.<sup>44</sup>

The risk of this approach is that Iran and Hezbollah will respond in kind as they have significant experience with such ways of creating political pressure. A close look at coverage by Al-Manar of the 'resignation episode' (see box) suggests that for now Hezbollah seeks to preserve domestic calm – most likely to avoid a political crisis in Lebanon for the duration of its Syrian engagement – but this could change in the not-so-distant future. In any case, the net effect of such an approach would probably be a cycle of tit-for-tat violence with potential for escalation at every incident in the form of a shift to one of the scenarios outlined above, or simply in the form of ratcheting up rhetoric, capabilities and occurrences of violence among key conflict parties.

## 7 A short conclusion

The regional contestation between Saudi Arabia and Iran is moving westwards. Lebanon has just moved from a precarious balancing act between domestic and regional interests, underpinned by distrustful compromise, to direct political confrontation. As Saudi Arabia initiated this shift, any deepening of the political crisis or a turn towards violence will in large part depend on its assessment of the scope and existential nature of the perceived Iranian threat across the Levant to its vital national interests – as well as the costs related to trying to counter it. Factors of relevance in this regard are: the conclusion of any sort of political settlement in Yemen; the speed and quality with which

recently re-established Saudi-Iraqi relations develop; and resolution of the Saudi dispute with Qatar. Progress on any of these issues is likely to increase Saudi confidence irrespective of Iran's position in the region.

On the flipside, Iran's position in Iraq, Syria and Lebanon will also significantly influence which scenario unfolds, as will any Iranian adversarial moves in the Gulf proper (e.g. in Bahrain, Yemen or Saudi Arabia itself). Factors of relevance in this regard are whether Iran can move President Assad to countenance token concessions to Saudi interests, stop Hezbollah and its allies from initiating forced refugee returns from Lebanon to Syria and, perhaps, even facilitate compromise in Yemen. Any such goodwill gestures could take the edge off the Saudi sense of being the underdog in the regional contest for power.

As both scenarios are time-limited until the Lebanese elections planned for May 2018, an over-the-horizon possibility that needs consideration is Hezbollah and its allies achieving a significant electoral victory. This will almost certainly trigger the US to label Lebanon as being governed by 'terrorists' and trigger more sanctions. It will also facilitate Israeli military intervention and stimulate mobilisation of Sunni militant groups. The new Lebanese electoral law does not make this outcome overly likely, but the law is complex and untested.<sup>45</sup>

Although Lebanon has historically drifted on the ebb and flow of regional developments, it is not entirely an event-taker (as opposed to an event-maker). If Hezbollah does not overplay its hand from its current position of strength, Lebanon's fragile stability might yet be preserved.

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43 Some analysts are of the view that the new electoral law favours Lebanon's Shi'a. For example: <http://www.washingtoninstitute.org/policy-analysis/view/a-new-electoral-law-for-lebanon-continuity-or-change> (accessed 1 December 2017).

44 Van Veen (2015), *op.cit.*




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45 For a short analysis of the law: <https://en.annahar.com/article/594740-lebanons-new-election-law-explained> (accessed 11 December 2017).

### About the Clingendael Institute

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[www.clingendael.org/cru](http://www.clingendael.org/cru)  
[cru@clingendael.org](mailto:cru@clingendael.org)  
+31 70 324 53 84

 @clingendaelorg  
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 The Clingendael Institute

### About the authors

**Erwin van Veen** is a senior research fellow with Clingendael's Conflict Research Unit. A political scientist by training, Erwin applies this lens to relations between political order, security and justice in conflict-prone environments. Extensive travel in the Middle East also generated Erwin's lasting interest in the region's conflicts.

**Ana Uzelac** is a senior research fellow with Clingendael's Conflict Research Unit. Also a political scientist by training, Ana is an expert in human mobility and forced displacement with extensive time spent living and working in the Middle East as a humanitarian policy adviser.