



ANNUAL STRATEGIC REPORT

Globalization of Crises and
Complexity of Conflicts

2024 - 2025

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2024 – 2025

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عام الحرف
اليدوية 2025
The Year of Handicrafts

Traditional Weaving of Al Sadu

ACRONYMS AND ABBREVIATIONS

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EXECUTIVE SUMMARY

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PART 1 GLOBAL DEVELOPMENTS

In 2024, the global arena witnessed substantial shifts across multiple dimensions, marked by evolving institutional frameworks, intricate power dynamics, significant economic changes and the emergence of new threats in non-traditional security. The 2024 Annual Strategic Report (ASR) provides an in-depth analysis of these transformations, evaluating their implications and forecasting potential trends for 2025...

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THE ROAD AHEAD

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Acronym/Abbreviation	Definition
AEI	American Enterprise Institute
AI	Artificial intelligence
AIIB	Asian Infrastructure Investment Bank
AIP	Air-independent propulsion
ASR	Annual Strategic Report
AUKUS	A trilateral security pact between Australia, the UK and the United States
AUM	Assets under management
BCG	Boston Consulting Group
BRI	Belt and Road Initiative
BTK	Baku-Tbilisi-Kars
COP	Conference of the Parties
CPI	Corruption Perceptions Index
CPTPP	Comprehensive and Progressive Agreement for Trans-Pacific Partnership
CSIS	Center for Strategic and International Studies
DRC	Democratic Republic of Congo
EEG	Electroencephalogram
EF	Index of Economic Freedom
EGDI	United Nations e-Government Development Index
ESA	European Space Agency
EU	European Union
FATF	Financial Action Task Force
FDA	US Food and Drug Administration
FFEP	Fordow Fuel Enrichment Plant
GCC	Gulf Cooperation Council
GDP	Gross domestic product
GEA	General Entertainment Authority
GII	Global Innovation Index
GIS	Geographic information system
GPS	US Global Positioning System
HaN	Iraqi Harakat Hezbollah al-Nujaba
HLTF	High-Level Task Force
HTS	Hay'at Tahrir al-Sham
IAEA	International Atomic Energy Agency
IAIO	Artificial Intelligence Olympiad

ICAIRE	International Center for Research and Ethics in Artificial Intelligence
ICC	International Criminal Court
ICJ	International Court of Justice
IGAD	Intergovernmental Authority on Development
IMCTC	Islamic Military Counter Terrorism Coalition
IMEC	India-Middle East-Europe Economic Corridor
IMF	International Monetary Fund
INSTC	International North-South Transport Corridor
IRCAI	International Research Center for Artificial Intelligence
ISA	Iranian Space Agency
ITPP	Tailored Partnership Programme
JCPOA	Joint Comprehensive Plan of Action
KSRelief	King Salman Humanitarian Aid and Relief Center
LEO	Low earth orbit
LME	London Metal Exchange
LOX	Liquid oxygen conversion
MSP	Movement of Society for Peace
NAM	Non-Aligned Movement
NIR	Net international reserves
NPT	Nuclear Non-Proliferation of Nuclear Weapons
NSF	National Shield Forces
OPEC	Organization of the Petroleum Exporting Countries
PIF	Public Investment Fund
PKK	Kurdistan Workers' Party
RSF	Rapid Support Forces
RuAF	Russian Air Force
SAMI	Saudi Arabian Military Industries
SCO	Shanghai Cooperation Organization
SDAIA	Saudi Authority for Data and Artificial Intelligence
SDF	Syrian Democratic Forces
STC	Southern Transitional Council
STOL	Short takeoff and landing
TIKA	Turkish Cooperation and Coordination Agency
TITR	Trans-Caspian International Transport Route
UNRWA	United Nations Relief and Works Agency for Palestine Refugees
VPN	Virtual private network

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The Year of Handicrafts

The Ancient Art of Pottery



EXECUTIVE SUMMARY

The ongoing struggle for power and status among major global powers has reached an unprecedented level of complexity, marked by escalating geopolitical risks and the inability of any power to secure a decisive advantage. This stalemate is further compounded by the apparent ineffectiveness of the United Nations to address conflicts and the failure of international mediation efforts to yield meaningful outcomes. Adding to the uncertainty is leadership transitions, with new leaders taking the limelight at the regional and global levels. These dynamics significantly impacted events across the Middle East, East Asia, the Indo-Pacific, Africa, Central Asia, the Caucasus and the Global South.

The Middle East was the most volatile and transformative regional environment over the past year, with conflicts escalating and actors engaging in direct confrontations with one another that tested their capabilities, tools and resources. A key development was the success of one party in securing victories on multiple fronts, even advancing to establishing a new regional deterrence equation. However, a striking paradox persisted: while this party demonstrated its ability to outmaneuver state actors, it remained unable to fully resolve its conflicts with certain non-state actors.

The 2024 Annual Strategic Report (ASR) is organized into four main sections. The first examines developments in the international stage; the second focuses on changes/transformations within regional contexts; the third analyzes Saudi policy trends and the fourth explores key developments in Iran.

Global Developments

Resolving the escalating conflicts within the framework of the international system remained an elusive goal because of entrenched divisions that fueled and perpetuated disputes. Given this context, a key question arises: why have global actors and entities been unable to resolve these conflicts despite their extensive resources and tools? Several factors have contributed to this

impasse. One is the dilemma of international alliances, with many suffering from ideological clashes, conflicting objectives and skepticism over their effectiveness and the commitment of member states. Emerging alliances attempting to position themselves neutrally between opposing blocs further complicated the landscape. While these alliances contributed to polarization, there is a growing preference for diverse, flexible partnerships that allow countries greater freedom to navigate and achieve their national interests. The decline of liberal values globally and the intensification of clashes between competing political models have entrenched conflicts. Values and norms once associated with liberalism — freedom, democracy, security and peace — have waned as liberal societies grapple with the rise of populism, xenophobia and the persistence of double standards. These trends, coupled with human rights violations and civilian casualties, have deepened global divisions and undermined efforts to achieve peace. The global landscape is increasingly defined by a clash between democratic and authoritarian models, with no single country holding absolute power to dictate its preferred political vision. Power among global actors has reached a relative balance, where each has unique military strengths and deterrence capabilities.

This balance has created a stalemate, and international institutions have failed to uphold the UN Charter's goal of ensuring global peace and security. The renewed East-West rivalry — pitting the dominant United States against a rising China and resurgent Russia — has further paralyzed the international system, with veto powers wielded to safeguard national and allied interests. Calls to reform the UN have resurfaced as stagnant regional and global initiatives failed to lead to viable conflict resolutions. The rigidity of conflicting parties, who often set unreasonably high demands, coupled with major powers' direct or indirect involvement in these conflicts, has compounded the issue. Without a concerted effort by major powers to resolve or mitigate these conflicts, the future is poised to be marked by chaos, instability and the continued absence of security and peace.

The year 2025 is expected to continue the trend of global uncertainty amid intensifying competition, with the United States navigating its role as the dominant power in a shifting global order. As international transformations challenge the existing power structure and US leadership, the United States will aim to reaffirm the credibility of its established international system to address global crises. However, the return of Donald Trump, with his force-driven

and isolationist approach, may complicate matters further. His policies could undermine the legitimacy of international institutions and agreements, particularly through expanded trade restrictions targeting countries like China, potentially signaling the end of economic globalization. Trump is also likely to adopt aggressive approaches to resolve conflicts in Ukraine and the Middle East. Yet, given that global powers are now more prepared to counter his policies and personality, his return may coincide with a significantly altered international environment compared to his first term. This dynamic could define 2025 as a pivotal year shaped by Trump's influence but in a world markedly different from his first term in office.

In the context of international competition and the complexities of the US conflict with Beijing in the Indo-Pacific, the region as a whole, and the Taiwanese issue in particular, experienced a significant escalation. This was fueled by the bold, separatist tendencies of Taiwan's new US-backed President Lai Ching-te, who intensified challenges to the principle of "one China, two systems." His approach marked a sharp escalation compared to that of former President Tsai Ing-wen. China's Foreign Ministry reacted with anger and concern, stating, "Lai stubbornly adheres to the separatist position of Taiwan independence and is

a troublemaker through and through." Beijing interpreted his statements as a concrete plan for advancing Taiwan's independence under his leadership.

Both the United States and China adopted policies of mutual containment within the context of their competition for global leadership and Beijing's quest to alter the structure of the international system. US policies focused on complicating the Indo-Pacific conflict by empowering hardline separatists in Taiwan, pledging continued military support to the island, and urging Western and Eastern allies to grant Taipei access to international organizations. In response, China embraced strategies to counter US encirclement efforts, striving to assert itself as a regional hegemon and global power balancer. This included efforts to secure diplomatic supremacy worldwide, achieve breakthroughs in space exploration and increase its influence in Africa. Beijing also aligned itself with countries opposing the US veto on resolutions related to halting the Gaza war and strengthened its military and economic capabilities. Despite these opposing positions, both sides maintained a "cooperative competition" policy during Biden's term. However, as Trump's second term approaches, it is anticipated that economic tensions between Washington and Beijing will

intensify. The United States is expected to abandon cooperative competition in favor of confrontation against China. This shift is likely to have significant ramifications for the global economy and security, which remain volatile amid escalating regional and international conflicts.

The Russia-Ukraine war is expected to enter a new phase in 2025 with Trump's return to the US presidency. While Trump is unlikely to end the conflict immediately, his presidential campaign suggests a shift in US policy. Ukraine is projected to face further setbacks as Russia continues its expansion in eastern regions. Meanwhile, European leaders are anticipated to seek a unified front against Trump's policies to mitigate potential damage and maintain European political and military support for Ukraine to help it endure the conflict for as long as possible. The future of transatlantic relations will hinge on the final agreement between the United States and the European Union (EU) to reconcile conflicting economic interests and address security issues. This dynamic will influence the broader structure of the international system, particularly if China and Russia manage to develop a joint strategy that capitalizes on a decline in transatlantic relations to advance Russia's interests, potentially benefiting China indirectly.

The 2024 ASR highlights weak global economic growth prospects for the new year compared to the pre-pandemic period, particularly in major industrialized economies. Confidence in the Chinese economy's recovery remains low, suggesting modest global economic growth of around 3%, contingent on managing the escalating geopolitical risks in the Middle East and Europe, which could influence energy prices and growth rates. Artificial intelligence (AI) continues to demonstrate significant economic benefits, including a 10% growth in global retail sales, which has spurred rapidly increasing investment in the technology. AI also offers potential advantages in productivity, risk management, and the creation of new professions. However, these benefits are accompanied by economic, security and ethical challenges. Meanwhile, the US-EU trade conflict with China will persist and expand, particularly in critical domains such as renewable energy and semiconductors.

The report underscores in the first part, "Global Economic Developments in 2024," that the protectionist trend, demonstrated by the Trump administration's position on China may yield domestic benefits based on each party's calculations. However, the unrestricted expansion of protectionist policies risks causing economic losses for all conflicting parties, including those not

involved. This could threaten the future of commercial globalization unless tensions among the three major economic poles — representing nearly 60% of the global economy — ease. Additionally, criticism of Western economic theories and concepts continued to grow in 2024 due to the recurrence of global economic crises in recent years, coupled with the failure to predict or effectively address their repercussions. As a result, there are increasing calls, even from Western academics, for theoretical and practical revisions in economics. These include enhancing the integration of economics with social sciences, such as psychology and history, to better analyze complex and unpredictable human behavior and propose more realistic solutions to multifaceted global challenges.

Non-traditional security threats, such as disruptive technologies, have evolved at a faster pace than anticipated, exacerbating existing challenges for policymakers. Social media and digital communication applications have facilitated the spread of fake news and hate speech, leading to violent clashes and significantly impacting election campaigns. The X platform, which has become a major source of fake news — a role that Facebook held in the past — has highlighted the political challenges magnified by unregulated AI. The major powers are now engaged in an arms

race involving AI and cyberweapons, echoing the nuclear weapons race of the 1950s and 1960s. Brain chip technology, aimed at empowering the disabled, has made breakthroughs, but it remains in its early stages. Meanwhile, moon missions continue with the goal of finding water, alongside efforts to match the US private sector's advances in global internet coverage and other space-based projects. By 2025, the world is poised to witness both exciting advancements and complex challenges.

Finally, the religious landscape in the Islamic world, including fundamentalist movements and their activities, prompted some official religious institutions, such those in Saudi Arabia, to promote peace and dialogue between sects, rejecting excommunication and fanaticism among all Muslims, regardless of sect. It is likely that the Saudi institutions will continue their moderate, centrist approach, rejecting excommunication and engagement with extremist ideas. Meanwhile, other religious institutions faced challenges related to politics and society, particularly concerning personal status laws, as seen in Iraq and Morocco. The debate over such laws is expected to continue into 2025. Regarding Islamist groups, in Algeria, the Islamist movement lost in the presidential election, and this loss is likely to exacerbate internal divisions

among the movement's leaders. The Muslim Brotherhood's (MB) political and organizational crisis remains unresolved in Egypt, and there is little expectation of a resolution in the near future, given the deep-rooted nature of the crisis and the failure of all attempts to address it since 2014. On the other hand, the Islamist movement in Syria achieved ascendancy following the fall of the Baathist regime and it is expected to further its influence in the country and potentially affect its surroundings. Perhaps it will have an impact on the ideology and discourse related to the governance of other Islamist groups in the region in light of the victory of the Syrian revolution. But at the same time, the Islamic State in Iraq and Syria (ISIS) witnessed a noticeable decline, and it is expected that this decline will continue unless it exploits the current Syrian situation, particularly if a security vacuum deepens in the aftermath of the revolution. As for the far-right, it raised its head at the beginning of the year in Türkiye when some Turks attacked foreigners in general and Syrians in particular. However, this trend may fade significantly after the return of Syrian refugees to Syrian cities following the fall of the Assad regime. Far-right influence and manipulation were evident in biased laws targeting Muslims in India and France and the disinformation

campaign that led to violent attacks on the British Muslim community. In Egypt, growing hostility toward foreigners emerged within the context of the country's socioeconomic crisis, led by a new ultranationalist movement which aims to influence Egyptians and their established identity. The trajectory of this movement is anticipated to persist in its expansion unless it encounters tangible and pragmatic interventions across the domains of education, media and ideological frameworks that can be feasibly enacted.

Regional Developments

In this section, the 2024 ASR analyzes seven topics with important implications for regional and global peace and security, as well as for the policies of both major and minor countries. The first topic is "The War on Gaza: Complexities and Regional Implications." The Israeli assault on the strip continued and acquired greater complexity due to Israel's escalation. The Palestinian factions, led by Hamas, insisted on their demands, and they continued with their resistance despite the severe blows that they experienced, destroying most of their military and organizational capabilities. The war had serious regional repercussions, with the Houthi militia and Iraqi militias loyal to Iran entering the conflict. There was also an

escalation of military confrontations between Lebanese Hezbollah and Israel, especially after the assassinations of key Hezbollah leaders and Israel launching extensive attacks on the Lebanese front before a ceasefire agreement was reached. Furthermore, the confrontation between Iran and Israel escalated, taking on a direct form with successive Israeli attacks targeting Iran in its areas of influence and within its territories, weakening its deterrence capabilities. This situation unfolded amid the divergence of regional and global positions on the war and the absence of serious efforts to end it — which prolonged the crisis and unleashed catastrophic humanitarian consequences — undermining security and stability in the region. The two conflicting parties are expected to come to a truce or a permanent ceasefire due to several recent developments. Both Israel and Hamas have experienced significant losses over a 15-month period of conflict and become unable to continue the war. Moreover, the new US administration pledged to resolve the ongoing conflicts in the Middle East.

The second topic, "Syria and Lebanon: Shift in Power Dynamics After the Fall of the Assad Regime," examines the weakening of Lebanese Hezbollah's capabilities, the elimination of its military and political leaders and its eventual acceptance of withdrawing from the battle.

This withdrawal involved relocating to the north of the Litani River and separating from the Gaza front, even rushing to sign a ceasefire agreement with Israel. Additionally, the Syrian armed opposition's ability to challenge the Syrian regime led by former President Bashar al-Assad, after over five decades of Assad family rule, is reviewed, alongside Israel's expanding geopolitical influence in Syria. Israel's actions also led to the weakening of the resistance in Gaza, tightening the siege after the strip was largely destroyed and support fronts were effectively obliterated, thus shifting the equation in Israel's favor. The 2024 ASR further explores the repercussions of these geopolitical changes on the future of Iran's geopolitical project, as Syria serves as the main geopolitical link between Iran and Iraq on the one hand and Hezbollah on the other. However, it appeared that the Iranian government struggled to propose new strategies to mitigate the losses. Tehran's reactions indicated that the Iranian government underestimated the importance of these losses, as it assumed that Syria would descend into chaos and expected regional geopolitical developments to continue into 2025. The report also highlights the difficulty that Iran faces in returning to its lost spheres of influence in light of several challenges. These include widespread public dissatisfaction because

of the billions lost in Syria and Lebanon, the directions of the new Syrian administration, the Lebanese currents' desire to establish a new regional equation that serves state interests, the rush of Arab and Gulf states to fill the void in Syria, Israel's strong rejection of a return to the traditional regional order, Turkish support for the new Syrian equation, Trump's prospective positions and the positive European stance toward the new Syrian administration.

The third topic, "Positive Neutrality: Gulf States' Policies Amid Geopolitical Tensions," focuses on the Gulf states' collective efforts to mitigate the risks posed by the region's ongoing conflicts and limit their impact on regional security and stability. Saudi Arabia spearheaded efforts to mobilize Arab and Islamic countries to emphasize solutions that rely on the Arab Peace Initiative, align with international legitimacy and balance the interests of all concerned parties to foster a stable regional environment.

The Gulf states hosted Iranian officials to explore mutually beneficial security arrangements for the region and engaged with Türkiye to enhance relations with Arab and Gulf states while addressing disputes. Additionally, the Gulf Cooperation Council (GCC) announced its vision for regional security, which aims to ensure long-term

stability. Saudi Arabia actively communicated with regional and global actors, contributing to conflict resolution and supporting the formation of an international coalition to advance the two-state solution. Saudi Arabia rejected the normalization of relations with Israel before Palestinian statehood based on the June 1967 borders. Qatar also played a key mediating role in efforts to end the region's ongoing wars. Simultaneously, the Gulf states pursued diversification of geo-economic partnerships with major global players such as India and China and influential economic blocs like BRICS, emphasizing their growing role in the global economy. The arrival of the Trump administration in 2025 presents opportunities for the Gulf states to build on their achievements in regional and global affairs. Their demonstrated significance in global diplomacy and cooperation with key blocs — highlighted in our 2023 ASR — is expected to further elevate their importance in the United States' strategic calculus in the future. The fourth topic, "Türkiye's New Foreign Policy Amid Shifting Politics," examines Ankara's recalibration of its foreign policy to address domestic challenges while enhancing its regional and global influence. Türkiye demonstrated a significant shift in its approach to alliances, seeking to redefine its role in a world transitioning toward either a bilateral or

multipolar order. This included efforts to distance itself from the rigid bloc-based politics and establish a more versatile foreign policy framework. Ankara prioritized joining emerging alliances such as BRICS, moving away from its decades-long aspiration to join the EU. It also reassessed its relations with traditional Western partners, embracing a more mutually open stance as part of its new approach. Simultaneously, Türkiye strengthened ties with the Gulf states and other Arab countries, aiming to resolve disputes and foster partnerships. On the regional front, Ankara took a firm position against Israel's operations in Gaza, advocating for a two-state solution while also intensifying its strategic engagement with Africa and advancing the Turkish-Armenian normalization process through a fifth round of dialogue. These steps underscored Türkiye's intention to build adaptable partnerships in response to the transitional phase of the international system and its movement toward a new world order. Türkiye's diversification of foreign policy alternatives is expected to persist through 2025. US-Turkish relations may enter a new phase of cooperation, bolstered by President Trump's rapport with Turkish President Recep Tayyip Erdogan, who was one of the first leaders to congratulate Trump on his election victory. This could lead to strengthened

collaboration in defense and other strategic fields. However, Türkiye's vocal criticism of Israel's war on Gaza and its calls for a two-state solution could create friction with the Trump administration, especially if the latter fully aligns with Israeli policies.

The fifth topic, "Africa: Domestic Turmoil and Great Power Competition," examines the array of significant events and challenges that unfolded across the continent in 2024. The trend of military coups persisted, although attempts in Burkina Faso and the Democratic Republic of the Congo (DRC) were thwarted, underscoring the fragility of governance in parts of Africa. Protests erupted in Kenya, Uganda and Nigeria, fueled by public discontent over economic hardships and perceived government mismanagement. The ongoing war in Sudan, which began in April 2023, remained unresolved despite multiple international initiatives aimed at brokering peace. The failure of these efforts prolonged the humanitarian and political crisis, deepening instability in the region. Meanwhile, Ethiopia's ambition to secure access to open waters led to significant regional tensions. In January 2024, Ethiopia signed a bilateral memorandum of understanding with the Somaliland government, granting Ethiopia access to Berbera port in exchange for recognizing Somaliland as

an independent state. This agreement sparked widespread condemnation, with Somalia's Parliament decrying it as an attack on the country's sovereignty. The Somali government rallied international and regional actors, including the Arab League, which affirmed its commitment to the territorial unity of Somalia. Egypt also stepped in, holding bilateral consultations with Somalia that culminated in a joint security agreement in August 2024. As part of this agreement, Cairo delivered multiple shipments of weapons to Mogadishu.

US-Sino competition over Africa intensified significantly in 2024, with major developments underscoring the fierce rivalry. In September, China hosted the ninth session of the China-Africa Forum, which saw participation from 50 African nations. During the forum, President Xi Jinping unveiled a comprehensive economic and military action plan to be implemented over three years, signaling a strategic push to deepen China's influence across the continent. This move alarmed the United States, prompting it to back the revival of the Lobito Corridor in collaboration with the EU, Angola, the DRC and Zambia. This strategic railway links the cobalt and copper reserves of the DRC and Zambia to global markets through Lobito port on Angola's Atlantic coast, strengthening Western access to critical

resources. As Africa grapples with political instability, including unresolved conflicts and economic challenges, 2025 is likely to witness continued unrest. However, breakthroughs in some crises could emerge, driven by regional and international mediation efforts. US-Sino rivalry is expected to escalate further in 2025, especially with Trump returning to the White House. Known for his firm stance against China's global expansion, Trump's presidency is anticipated to intensify US initiatives aimed at countering Chinese influence in Africa and elsewhere.

The sixth topic, "Central Asia and the Caucasus: Collective Vision," focuses on the evolving strategies of these nations as they navigated complex geopolitical dynamics, particularly in the context of the Russia-Ukraine war. These countries continued to diversify their economic and security policies while maintaining a delicate balance in their relations with Russia and strengthening engagements with China, the EU and the United States. Efforts toward regional integration gained momentum, particularly through the development of the Middle Corridor as a critical trade route. Given the risks associated with the Northern Corridor, the Middle Corridor emerged as a vital alternative, fostering significant progress in energy and connectivity projects linking China, Central Asia

and Europe throughout 2024. In the Caucasus, Armenia's pivot toward the West, fueled by tensions with Russia and the Nagorno-Karabakh conflict, led to unprecedented changes in regional dynamics, signaling potential shifts in alliances and strategies. Looking ahead to 2025, Central Asian countries are expected to strengthen their cooperation with emerging powers such as China and India. The Middle Corridor will remain a strategic priority for China, Europe and Central Asian countries alike, likely attracting increased investments for further development.

The seventh topic, "The Ripple Effect of the Bangladesh Crisis on South Asia," examines the repercussions of the Bangladesh crisis on South Asia, highlighting how regional instability emerged after widespread protests forced Bangladeshi Prime Minister Sheikh Hasina to flee to India. These protests, stemming from over a decade of grievances against her rule, culminated in demonstrators storming her residence. While internal discontent played a role, the crisis was primarily fueled by external dynamics, as Bangladesh remains a focal point of international competition.

China, with its strategy of cooperating with the Bangladeshi state rather than any specific regime, minimized the impact of Hasina's fall on its

interests. Conversely, India intensified its efforts to strengthen its influence in Bangladesh, responding to China's growing presence. The United States, viewing Bangladesh as a strategic asset in its efforts to contain rival powers, pursued policies that sometimes conflicted with India's interests despite their traditional alliance. This divergence reflects a broader trend of allied nations, such as India, seeking greater independence from US influence to prioritize their regional objectives. The crisis underscores how South Asia has become a battleground for global leadership between international poles, particularly China and the United States. As President-elect Trump assumes office, his administration's policies toward the Indo-Pacific region will be pivotal. Balancing strategies to contain China while maintaining the interests of allies like India will be a central challenge. While South Asia is likely to see continued geopolitical competition in 2025, the region's crises are expected to remain less incendiary compared to other flashpoints, such as the Taiwan Strait, which represents a more direct confrontation between US and Chinese interests.

Saudi Arabia's 2024 Policy

This section reviews economic developments in Saudi Arabia, specifically its efforts to transition between oil

dependency and renewable energy resources. In line with its strategic goals, the 2025 Saudi budget reveals the kingdom's commitment to bold reforms aimed at diversifying its economy. Throughout 2024, Saudi Arabia strengthened its position in the renewable energy sector by forming key partnerships to enhance its capacity for clean energy production, supporting the country's broader vision of transitioning to sustainable energy. Additionally, the mining sector continued its growth trajectory, contributing to the kingdom's diversification strategy. Saudi Arabia's mining industry has rapidly become one of the most competitive in the world. The country raised its estimates of untapped mineral wealth from \$1.3 trillion to \$2.5 trillion (9.4 trillion riyals), with a focus on securing vital minerals like copper, nickel, lithium and iron ore. These resources are central to Saudi Arabia's ambition to become a global hub for electric car battery manufacturing and to develop a local car industry. As part of this initiative, the kingdom has set an ambitious target of producing 500,000 electric cars by 2030.

In 2024, Saudi Arabia's focus on technology, digitalization and AI led to substantial progress in these sectors, with the kingdom seeing significant strides in its digital economy. The size of the digital economy grew from 298 billion

riyals to 460 billion riyals, reflecting the nation's commitment to technological advancement. Approximately 370,000 young men and women are now employed within the Saudi digital economy, further demonstrating the kingdom's focus on youth employment and innovation. The AI market in Saudi Arabia is projected to surpass \$9 billion by 2030, as the kingdom sets its sights on becoming a leader in developing advanced technologies. Specifically, Saudi Arabia aims to enhance technologies in medicine, agriculture, environmental protection and industry, with the goal of positioning itself as a regional leader in biotechnology by 2030 and a global leader by 2040. Furthermore, the kingdom is focused on localizing the manufacture and design of electronic chips, striving to establish itself as a regional hub for semiconductors. By 2030, Saudi Arabia also aims to attract over 1 billion riyals in investment capital and funding for deep technology sectors.

In 2024, Saudi Arabia made notable progress in defense by continuing its relentless pursuit of enhancing the military efficiency and combat capabilities of its armed forces. This progress was evident through the localization of military manufacturing, an increase in military training, and the signing of numerous defense and military agreements. These efforts are part of the kingdom's



broader strategy to strengthen its military sector. Looking ahead, Saudi Arabia plans to increase the localization of its military industries to 20% by 2025, with the ambitious goal of reaching 50% by 2030.

In the sports sector, one of the most significant milestones of Vision 2030 was the announcement on December 11 by FIFA that Saudi Arabia had won the exclusive right to host the 2034 World Cup. This victory followed the kingdom's submission, which received a remarkable 419.8 out of 500 rating — the highest technical rating ever awarded by FIFA to a host's bid. This achievement marks the culmination of Saudi Arabia's concerted efforts across various sectors, including economic, social, technological, digital and cultural domains

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in recent years. The FIFA assessment underscores the kingdom's progress and serves as a powerful motivation for further national accomplishments in the coming decade. The 2034 World Cup represents a prime opportunity for Saudi Arabia to boost economic development, enhance the tourism sector and showcase its cultural heritage, presenting the kingdom as a global destination that celebrates diversity, innovation and excellence.

In the sphere of foreign policy and international relations, Saudi Arabia adopted a strategy centered on defending Islamic values and the principles of international law, aiming to establish balance in its global relations. A key example of this approach was the kingdom's steadfast position on the Palestinian cause, as clearly articulated by Crown Prince Mohammed bin Salman throughout the year. His statements, along with official declarations from the kingdom, expressed strong opposition to Israeli aggression in Gaza and Lebanon and condemned the Israeli crimes against the Palestinian people. This principled stance was not only reflected in words but also in tangible actions. Saudi Arabia led the establishment of the International Alliance to Implement the Two-State Solution, a diplomatic initiative that aimed to elevate the Palestinian cause on the global stage and further the

pursuit of a peaceful resolution to the Israeli-Palestinian conflict.

Saudi Arabia has consistently supported peaceful solutions and mediation efforts in Arab countries facing crises. The kingdom played a key role in mediating the Sudanese crisis, continuing its work to bring stability to Yemen, Lebanon and Libya, while also standing in solidarity with the Syrian people in their pursuit of peaceful change. In the face of escalating tensions, Saudi Arabia supported Syria's right to determine its own future during this critical period in its history.

When Israel launched attacks on Syria, the kingdom was vocal in condemning these Israeli violations and reaffirmed the importance of respecting Syria's sovereignty and territorial integrity. Saudi Arabia also emphasized that the Golan Heights remains occupied Arab Syrian land.

On the Red Sea front, a significant development occurred on December 3, 2024, when Crown Prince Mohammed bin Salman launched the National Red Sea Sustainability Strategy. This strategy is designed to protect the Red Sea ecosystem, enhance cooperative frameworks for its long-term sustainability, empower local communities, and support the transition toward a sustainable blue economy. These efforts align with the kingdom's broader goals

of economic diversification and are fully integrated with the goals outlined in Vision 2030, marking another key step in Saudi Arabia's environmental and economic development plans.

On the regional level, Saudi Arabia continued to fortify the GCC as the cornerstone of its policy, while also strengthening its relationships with Arab countries and neighboring regional powers, such as Iran, Türkiye and Ethiopia. On the global level, the kingdom played a pivotal role in hosting several international events, including the Extraordinary Arab and Islamic Summit in November 2024, which focused on the Palestinian cause, particularly the situations in Gaza and Lebanon. The latter part of the year saw visits from the French President and the UK Prime Minister to Saudi Arabia, with just a seven-day gap between their visits (December 2 to December 9, 2024), resulting in the signing of strategic partnerships and agreements across various sectors. Throughout the year, Saudi Arabia also continued to strengthen its diplomatic ties with China, the Indian subcontinent and Russia, while maintaining an influential presence in key international organizations and forums.

Finally, Rasanah's 2024 ASR emphasizes that with Trump's return to the US presidency, Saudi-US relations stand on the brink of a new era in 2025. Saudi

Arabia's spirit of responsibility toward the future of the Gulf, the Arab world and the Middle East extends beyond simply addressing current challenges. The kingdom holds the great ambition of reducing regional tensions and ending wars, positioning itself to play an unparalleled mediation role in resolving major regional conflicts. This could involve mediating between countries, including a historic agreement involving Iran, the Arab world, Israel, and possibly Türkiye, marking the end of regional hostilities. Central to this potential agreement would be recognizing a Palestinian state and returning to the principles of international law. Saudi Arabia's capacity to fulfill this transformative role transcends the political realm, drawing on its unique Islamic identity and the increasing appeal of its national model. Over recent years, Saudi Arabia has positioned itself as a key player in regional and global affairs, with internal developments leading to increased influence in the region and worldwide.

Iran Overview

The last section reviews in detail Iran's situation at all levels throughout 2024. It can be said that Iran's domestic political arena went through a delicate and critical phase in 2024 following the death of President Ebrahim Raisi and several officials in a helicopter crash. This

sudden departure of Raisi presented a favorable opportunity for the "reformists" to return to the political scene, especially after Masoud Pezeshkian won the second round of the presidential race, defeating the "hardliner" candidate Saeed Jalili. Pezeshkian made a number of domestic and international promises, but concerns persist regarding the fulfillment of these promises, particularly given his strong association with Supreme Leader Ali Khamenei and the "hardliners" within the Iranian establishment. However, the significant alignment between Supreme Leader Khamenei and President Pezeshkian, along with President Trump's return to the White House, and the potential for the reinstatement of maximum sanctions on Iran, may provide Pezeshkian with the opportunity to pursue a westward-facing policy. This could involve engaging in negotiations with the United States, aiming for an agreement that resolves the Iranian nuclear crisis and mitigates the impact of economic sanctions.

At the economic level, this section addresses three key topics: the actual performance of the Iranian economy in 2024, an analysis of the future economic challenges faced by the new president amid ongoing sanctions and the potential economic outlook in the event that the new US administration

tightens sanctions on Iran. This section concludes with several key points. Iran's economic performance in 2024 showed limited growth, primarily driven by an increase in Iranian oil exports, which grew by about 11%. This growth was attributed to the leniency in implementing oil sanctions on Tehran. However, this increase in oil exports did not translate into significant improvements in the country's general economic performance or the living conditions of ordinary Iranians. The challenges experienced in previous years persisted, with historical declines in the value of the local currency, the toman, against foreign currencies, especially the US dollar, which saw an increase of more than 60% over the course of the year. Additionally, liquidity and inflation levels remained high, above 30%, and there was a noticeable increase in the government's financial deficit and public debt. Looking ahead, the new Iranian government in 2025 and beyond is expected to face intensifying financial, economic and demographic challenges. These issues may force the government to implement austerity measures, particularly regarding the reduction of public spending and subsidies, which could lead to heightened living pressures and deepening existing crises. The situation could worsen if President Trump tightens economic sanctions on Iran, similar to his actions

during his first term. In response, the Iranian government will likely continue adapting to the current economic challenges by exploring various solutions, though its options are limited due to the geopolitical pressures and the weakening of the “Axis of Resistance,” following the fall of Assad. These events have undermined the “resistance economy” slogan promoted by Tehran, which has failed to lift the Iranian economy out of its slump over the past six years.

Militarily, Iran experienced one of its most devastating years in 2024 since the Khomeini-led revolution. Its military strength significantly deteriorated with the loss of many of its proxies in the region, leading the Iranian government to accept the changing realities on the ground, particularly on the border between Azerbaijan and Armenia. The country’s drone capabilities are now far behind global standards, and it was unable to secure the Su-35S 4+ generation fighter deal from Russia. Furthermore, Iran’s nuclear and military assets have become increasingly vulnerable, with minimal air defense capabilities following Israel’s precision strikes on Iranian targets. While Iran has announced an increase in its defense budget, its ability to procure military equipment remains constrained. Despite hopes of concluding an arms deal with China or obtaining licenses to produce Russian fighter jets

and tanks, the process is expected to be hindered by complex procedural hurdles. In light of the threats posed by Israel and the setbacks suffered by the “Axis of Resistance” in the final months of 2024, Iran may opt to strengthen its defense capabilities in 2025. Alternatively, it might pressure Russia to expedite the signing of the comprehensive strategic partnership agreement, particularly focusing on activating the defense aspect of this partnership to enhance its military position.

Socially, Iranian society in 2024 was marked by the emergence of the minority question, which stood out amid various ongoing social problems, particularly those related to the living and economic conditions in the country. The presidential elections served as a pivotal moment for the rise of the minority question, as it became a key factor influencing the election results. This led to the victory of President Masoud Pezeshkian, who prioritized the concerns of minorities in his campaign, distinguishing himself from his “conservative” rival. After the elections, the debate surrounding minorities shifted toward the president’s ability to fulfill his promises. These included providing more positions for minorities within state institutions and improving living conditions in their marginalized provinces. The issue of marginalization

and exclusion faced by minority communities remained central to the national conversation. Given the tensions between political movements and the possibility of renewed sanctions on Iran, which could exacerbate the country’s economic problems, the discussion on minority rights is expected to persist into 2025. The debate will likely continue to be a point of contention between President Pezeshkian, who represents the “reformist” camp, and the “conservative” movement that dominates the Iranian Parliament.

In regard to the comparison of Pezeshkian’s policy with Raisi’s toward supporting militias in escalation arenas, it can be said that Iran, with the fall of the Assad regime, lost its land corridor with its affiliated militias in the region. This change presents many challenges, making it increasingly difficult for Iran to continue supporting these militias, particularly Lebanese Hezbollah, which has also been subjected to recent Israeli strikes. Furthermore, the return of Iranian militias to Syria seems highly unlikely due to the intense hostility from the new Syrian leadership toward them. As for the Houthis in Yemen and militias in Iraq, despite the possibility of continued support, Western and international pressures — especially with Trump’s return — may compel Iran to limit its backing for these militias. On the

other hand, these developments could provide President Pezeshkian with an opportunity to amend the policies of the supreme leader and the “conservative” camp in general. The risks to the Iranian establishment, should it persist with its previous militia-support policies, are evident. These policies have cost Iran heavily in terms of financial and human investments and the subsequent geopolitical gains have diminished swiftly within a short time.

Gulf-Iran relations faced numerous tests in 2024, particularly due to the developments stemming from the Israeli war on the Gaza Strip, which escalated into a direct confrontation between Iran and Israel, raising fears of a regional war. However, the Iranian-Saudi agreement held firm and the Gulf states did not allow Iran to become a target through their territories. Instead, they played a crucial role in calming the conflict. Despite these successes, the risks remain, and the situation is likely to escalate further with Trump’s return to the White House. Consequently, Gulf-Iran relations are expected to face renewed challenges in 2025, marking a pivotal year in the trajectory of these relations. This period will serve as a test of both sides’ ability to sustain the positive trends established in 2024 — managing differences and coordinating positions regarding regional tensions. The

challenge will be to prevent a return to the previous era of tension and navigate major geopolitical challenges that could threaten regional stability.

A rapprochement between Iran and the Arab sphere was expected to take place in 2024, following the détente agreement between Saudi Arabia and Iran mediated by China in March 2023, which was finalized in 2024. In this context, Iran sought to improve relations with Egypt and Sudan. Regional developments played a crucial role in facilitating this rapprochement, particularly the Israeli war on Gaza along the Egyptian border and the conflict in Sudan between the Sudanese army and the Rapid Support Forces (RSF). The pace of rapprochement between Iran and Egypt quickened due to Cairo’s concern over Israel’s plan to displace Palestinians from Gaza to the Egyptian Sinai, and eventually from the West Bank to Jordan. This prompted Egypt to adopt a policy aimed at developing regional and international support for its vision of formulating a unified Arab and Islamic position to pressure Israel to halt the war. Furthermore, the Houthi involvement in the war — targeting Israeli commercial ships and vessels bound for Israeli ports in the Red Sea — forced shipping companies to reroute through the Cape of Good Hope. Given Iran’s growing rapprochement with

the countries in the region, Tehran may place pressure on the Houthis to stop their attacks in the Red Sea, aligning with Egypt’s efforts to achieve a cease-fire and prevent the war’s expansion. For its part, Iran recognizes the strategic importance of Egypt, especially in the context of the Palestinian cause. As a result, Iran worked to enhance cooperation and consultation with Egypt to both neutralize regional security threats and exploit the historical moment to improve relations. In addition to Egypt, Sudan-Iran relations were restored after a seven-year hiatus. The regional environment, particularly the calm between Iran and Saudi Arabia and the Sudanese conflict, played a significant role in the restoration of these relations. The Sudanese army’s need for military support in the face of international backing for the opposing forces further contributed to the renewal of ties. Given the pressures Iran faces, especially after the fall of its regional ally in Syria and the potential return of the maximum pressure policy under the Trump administration, it is expected that Iran will continue its policy of rapprochement with Arab countries in 2025. This strategy aims either to avoid returning to the tension-filled era with the Arab states or to search for new ground after losing its foothold in Syria.

On the nuclear front, which remains a point of tension with the West, Iran's nuclear policy over the past year has resulted in an increase in its stockpile of 60% enriched uranium, bringing the country closer than ever to the nuclear threshold. This development has provoked the United States and European powers and led the International Atomic Energy Agency (IAEA) to criticize Iran for failing to adhere to its commitments. While there are internal calls within Iran to revise its nuclear doctrine to confront the mounting challenges, the government does not appear enthusiastic about such a revision. This reluctance is largely driven by Israel's readiness to launch direct attacks on Iran's nuclear facilities, alongside the return of Trump to the White House. The possibility that Trump may continue his hardline policies — which could include the restoration of maximum sanctions and even cooperation with Israel to strike Iran's nuclear sites — further complicates the situation. In light of these threats, an alternative scenario appears to be emerging: a return to negotiations. Some indications of this shift have already begun to surface. In the meantime, Iran will likely adopt a strategy of strategic patience, seeking to buy time, similar to its approach during Trump's first term. The aim of this strategy would be to preserve Iran's gains without making significant

concessions, while simultaneously weakening the US strategy and reducing the hostility of Trump and his team.

Iran's relations with the two major powers in the Eastern bloc, Russia and China, have witnessed significant developments despite the shift in executive power from the dominance of the "conservatives" to the return of the "reformists" to the presidency.

Regarding Iran's relations with China, the year 2024 saw a notable increase in trade between the two countries, with China continuing to complete several key projects in Iran, including building railway lines, developing power stations, and expanding natural gas networks. Aware of the complexities surrounding Iran's conflicts with regional and Western countries, Beijing has been keen to maintain balanced relations with Iran, aiming to resolve disputes without disrupting its alliances and interests with other regional and Western powers.

As for its relations with Russia, the two countries have continued their pragmatic relations, particularly on the military front, driven by two main factors: the Western sanctions imposed on both countries and the ongoing Russia-Ukraine war. This has stirred significant concern among Western countries regarding the expanding defense partnership between Russia and Iran. However,

despite this cooperation, tensions have arisen, particularly after Russian President Vladimir Putin's support for Azerbaijan in its bid to implement the Zangezur Corridor. Tehran vehemently rejected Putin's position, citing the corridor's potentially dangerous impact on Iran's geopolitical situation and strategic interests. The proposed corridor would isolate Iran from Armenia, sever its land connection with Central Asia and the Caucasus and potentially strengthen Azerbaijani influence, which could fuel separatist tendencies among Iranian Azerbaijanis. Putin's support for the corridor was seen as a reaction to the "reformists'" growing tilt toward the West, which is viewed with concern by Russia. Given the regional and international developments, it is likely that Iran will continue to pivot eastward in 2025. This trend will persist unless an agreement is reached between Iran and the United States to settle the nuclear issue, or unless the West and Russia reach a settlement regarding Russia's war with Ukraine. Such a settlement would likely lead to a restoration of Russia's relations with Europe, which could result in the cooling of relations between Moscow and Tehran.

Iran's relations with Europe have remained stagnant since the US withdrawal from the Joint Comprehensive Plan of Action (JCPOA) and the imposition

of sanctions. Numerous terrorist plots allegedly sponsored by the IRGC have been exposed, leading to trials of its members. Tehran's policy toward the EU has largely centered on exchanging prisoners of Iranian dual nationality or EU nationality with Iranian state operatives incarcerated in European prisons. The year 2024 saw no exception to this pattern. By the year's end, an Italian journalist was arrested on charges considered flimsy by Europe, likely part of a larger Iranian effort to bargain for an Iranian government official convicted in Europe. She was released after weeks of incarceration following mounting international pressure. The EU's position has remained divided on Iran's non-compliance with its obligations to the IAEA and its breach of JCPOA limits on uranium enrichment and nuclear technology. In the midst of its nuclear pursuit, Iran's prospects for reversing its nuclear policy in 2025 seem limited, particularly after its military dispute with Israel and the collapse of the Assad regime. It is expected that the United States and the EU will adopt a more unified policy in the first year of Trump's second term in the White House.

With regard to the continuation of the conflict of interests between Iran and Türkiye, the year 2024 witnessed rapid developments that reconfigured the parameters of the geopolitical competition

between Iran and Türkiye in several strategic regions, most notably the Caucasus, Iraq and Syria, amid regional and international variables that directly affected the balance of power.

In the Caucasus region, Türkiye's role became evident through strategic partnerships and major projects such as the Zangezur Corridor, which strengthened Ankara's economic and geopolitical influence, in contrast to growing Iranian fears of a decline in its role in the energy market and vital transit corridors.

In Iraq, Türkiye bolstered its presence by signing strategic agreements, including the Development Road project and in the field of security cooperation, which posed a challenge to Iran's traditional influence. Iran sought to balance Türkiye's moves using political, economic and military tools. In Syria, the rivalry between the two countries witnessed a notable transformation after the fall of the Assad regime, which provided Ankara with new opportunities to strengthen its regional position, while Iran's role significantly declined, prompting efforts to restore influence through diplomatic moves and high-level visits. These transformations reflect the depth of the rivalry between the two regional powers and indicate their directions for 2025. Both countries are expected to continue managing this rivalry cautiously, focusing on diplomatic

tools and strategies that align with their interests in the face of a changing geopolitical reality.

In the context of Yemen, the report addresses the political stagnation that prevailed across the Yemeni scene throughout 2024, the reasons for which are rooted in the Houthi group's entry into the confrontation with Israel and the subsequent political and military events that negatively affected the peace process between the conflicting Yemeni parties. The Houthi military escalation against Israel did not change the equation of the war in Palestine and was seen as a Houthi attempt to gain the support of Yemeni, Arab and Islamic circles, as well as international parties opposed to Western policies, particularly Russia and China. In light of the significant decline in Iranian projects in the region and the fall of the Assad regime, it is likely that the Houthi group will take some internal measures during 2025 with Iranian support and coordination to strengthen its political position. This would aim to gain the greatest amount of support on the domestic front, especially in light of Israeli threats to launch attacks on the Houthis, as well as the possibility of being subjected to sanctions by the Trump administration.

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The Craft of Rosary

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PART 1

GLOBAL DEVELOPMENTS

In 2024, the global arena witnessed substantial shifts across multiple dimensions, marked by evolving institutional frameworks, intricate power dynamics, significant economic changes and the emergence of new threats in non-traditional security. The 2024 Annual Strategic Report (ASR) provides an in-depth analysis of these transformations, evaluating their implications and forecasting potential trends for 2025. This section of the report reviews key issues that defined the 2024 geopolitical landscape worldwide, including:

- Complexity of Conflict Resolution Within the International System
- Reassessing US Hegemony: Key Challenges and Strategic Considerations
- The Indo-Pacific Dispute: China's Complex Challenges
- Global Economic Developments in 2024
- The Russia-Ukraine Conflict: A War of Attrition
- Non-traditional Security Issues
- The Religious Landscape in the Islamic World

Complexity of Conflict Resolution Within the International System

International developments during 2024 indicate an expansion of chaos and conflicts, continuing the trajectory outlined in the 2023 ASR. The reality reveals a significant increase in the intensity of conflicts at a global level, whether internal or international. While intensive efforts have been undertaken by many parties to manage these conflicts in the hope of reaching settlements acceptable to all stakeholders, the forces of the international system have yet to resolve these conflicts. This inability threatens international peace and security, especially if these conflicts escalate to hazardous levels. The truth is that the responsibility for not resolving global conflicts lies with these international actors. However, despite the current international threats and the limitations they entail, the primary question remains: Why have international actors failed to resolve international conflicts despite the tools, mechanisms, and capabilities available to them — whether at the state level or via international organizations? This topic covers the developments that the international

system has been undergoing and the factors contributing to the failure to address international conflicts.

The 2024 ASR analyzes recent developments within the international system, pinpointing the root causes of its failures in conflict resolution. It examines the dilemmas faced by traditional alliances amid the rise of a diverse array of state orientations, the intensification of conflicts between global systems, and the decline of liberalism. The review highlights the convergence of power and the gradual narrowing of the power gap among international poles, as well as the inability of international institutions to maintain peace and security. Additionally, it addresses the stagnation of both regional and international initiatives aimed at conflict resolution. Finally, the 2024 ASR presents an overview and forecast for 2025, anticipating a world grappling with uncertainty and increased risks.

The Dilemma of Traditional Alliances Amid the Multiplicity of Diverging State Orientations

Alliances are manifestations of division among the major powers in the international system. They act as a

tool of international competition and serve as mechanisms for deterrence and protection. For example, smaller Eastern European countries have joined NATO to deter Russia from regaining influence in their immediate surroundings.⁽¹⁾

The world today is divided into groups of major alliances. The first group comprises Western alliances, represented by NATO, which includes the United States, Europe and their allies. Other alliances include the Quad Security Dialogue (the United States, India, Australia and Japan), the AUKUS alliance (United States, Australia and the UK), as well as the US-UK-Canadian-Australian-New Zealand military program, the security agreement between Australia, New Zealand and the United States, and the Five Eyes intelligence alliance. These alliances aim to uphold an international system based on US hegemony.

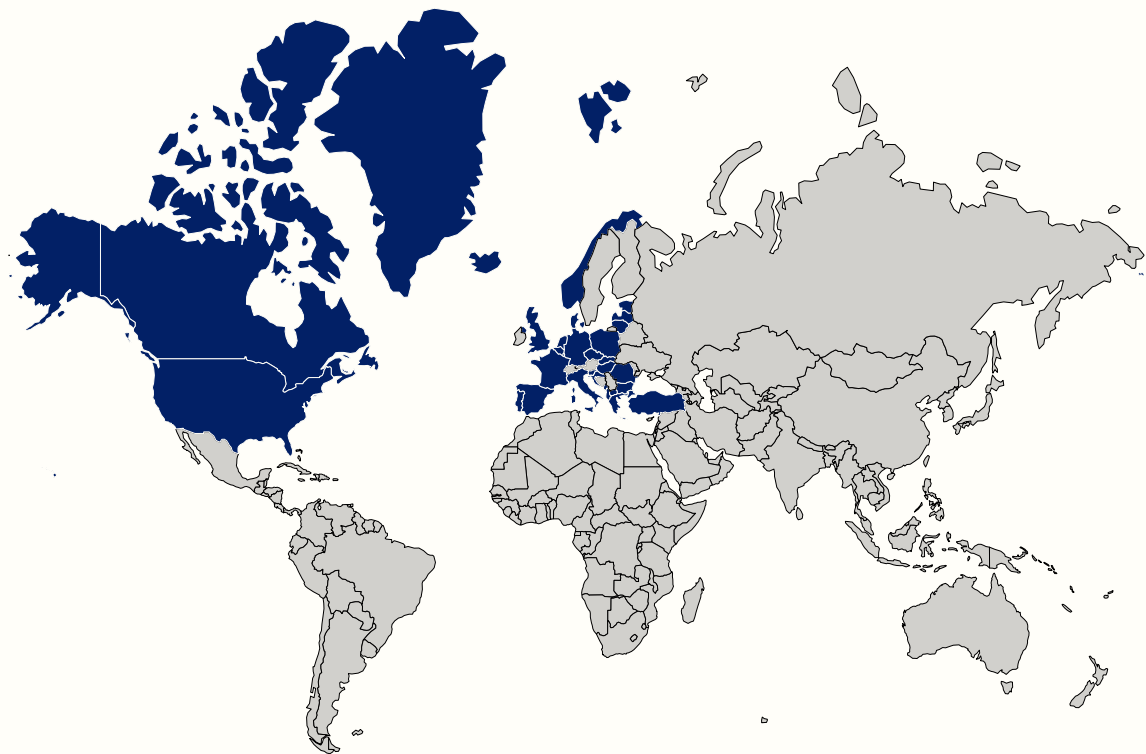
The second group includes the alliances of China, Russia and North Korea, represented by the Shanghai Cooperation Organization (SCO) comprising Uzbekistan, Pakistan, Russia, China, Tajikistan, Kyrgyzstan, Kazakhstan, India and Iran),⁽¹⁾ and the

(1) Three observer states (Afghanistan, Belarus, and Mongolia) and six dialogue partners (Armenia, Azerbaijan, Türkiye, Sri Lanka, Cambodia and Nepal) expressed interest in attaining full membership.

Collective Security Treaty Organization (CSTO), which includes Russia, Belarus, Kazakhstan, Tajikistan, Kyrgyzstan and Armenia. Additionally, distinctive bilateral partnerships have recently strengthened among Russia, China and North Korea. These alliances oppose the unipolar system dominated by the United States and seek to transform the global system into a multipolar one.

The third group consists of rising powers in the Global South, such as BRICS+, which includes Brazil, Russia, India, China, South Africa, Argentina, Egypt, Ethiopia, Iran and the UAE. This group plays a global role by maintaining equal distances from conflicting international parties or diverging from the approach of US hegemony. Some even believe that the BRICS countries aim to establish a parallel global system that challenges the global leadership of the United States.⁽²⁾

New alliances have also emerged outside competing alliances between global powers, such as the alliance of Arab and Islamic countries. The features of this bloc have begun to crystallize through successive meetings in Riyadh. The prominent powers in this bloc, led by Saudi Arabia, aim to



amplify the Islamic and Arab voice on the global stage. The atmosphere of openness and mutual interests among the actors in this bloc — such as Saudi Arabia and Iran on one hand,

and Saudi Arabia and Türkiye on the other — has enabled the formation of a unified position on the Palestinian issue. If Saudi Arabia continues this trajectory, it could lead to significant

value and weight for this group among the emerging global blocs.

Problems of Traditional Alliances

Traditional alliances face numerous challenges that may affect their role and future. For example, NATO is contending with differences over the effectiveness and credibility of its most significant ally. During the first Trump administration, European allies were urged to share the burden of their defense, with Washington expressing reluctance to bear most of the costs. However, the Democratic Party emphasizes the necessity of continuing and strengthening the alliance, as it is seen as a key pillar in maintaining the international system based on US hegemony. Consequently, Biden's administration sought to reform and strengthen existing alliances and partnerships while creating new ones.

Another issue lies in the commitment level of major powers to their allied countries. Many of these countries face direct regional confrontations with the opposing party targeted by the alliance — for instance, Europe confronting Russia. In such scenarios, neighboring countries bear the highest direct costs of conflict,

especially given the fluctuations in logistical and economic support from the United States, which depends on the internal calculations of the Democratic and Republican parties.⁽³⁾

NATO is also witnessing ongoing disagreements, including a significant dispute between France, the United States and the UK following the tripartite AUKUS agreement involving Australia, the United States and the UK. This agreement led to the UK concluding a nuclear submarine deal with Australia, which resulted in the cancellation of France's conventional submarine contract. Additionally, there are growing European calls for strengthening independence from the United States, as many European countries find it challenging to fully align with the United States in facing China and Russia due to their interconnected economic and strategic interests with these nations.⁽⁴⁾

Diverse Partnerships

Countries increasingly prefer forming diverse partnerships. For example, some of China's partners engage in broad security partnerships with the United States, while some of Russia's partners maintain cooperative relations with NATO. Similarly,

Washington's European allies continue to maintain strong ties with China, and Türkiye, a US ally, has tried to join the BRICS group.

Many emerging middle powers, such as Brazil, India, Indonesia, Saudi Arabia, South Africa and Türkiye, aim to establish themselves as independent forces characterized by realism and a focus on national and regional interests.⁽⁵⁾ For instance, Saudi Arabia is pursuing an eastward shift in its policies while maintaining positive relations with the West. It seeks to diversify its partnerships and engage with all international powers without tying its interests to any single global pole. Saudi Arabia strives to balance its relations with both Beijing and Washington, avoiding alignment with one at the expense of the other, thus supporting its new aspirations and Vision 2030.⁽⁶⁾

India provides an excellent example of successfully balancing conflicting alliances. It maintains strategic relations with both Russia and the United States while actively participating in multilateral platforms such as the G20, the SCO and the BRICS group to maximize its national interests.⁽⁷⁾

As such, the global trend is increasingly moving toward creating diverse

international partnerships and pursuing national interests in collaboration with all global powers.

The Intensification of Conflict and the Global Erosion of Liberal Values

The Western liberal system consists of the United States, Western Europe, and their allies in the East: Japan, South Korea, Australia and several emerging Asian powers. It is based on several foundations: economic openness, working through multilateral institutions, security cooperation and democratic solidarity. This system spread across the world after the end of the Cold War, as countries in East Asia, Eastern Europe and Latin America achieved democratic transitions. The goal of liberals was to promote the Western model and make the world more secure and stable by reducing wars, improving systems to prevent the spread of weapons of mass destruction and terrorism, and reducing human rights violations. However, liberals failed to sustain a model that achieves justice and equality, leading to the decline of the liberal system itself.

US liberal hegemony during the administrations of George H. W. Bush, Bill Clinton, George W. Bush and Barack Obama failed to achieve its goals. The United States fought seven different wars during this period and was unable to spread its democratic model to countries such as Iraq and Afghanistan.

Indicators of the Decline of the Liberal System

The American thinker John Ikenberry identified several indicators of the decline of the liberal system. These include the emergence of populist, nationalist and xenophobic tendencies within democratic systems. Additionally, the liberal system has lost its identity as a Western security group, evolving instead into a sprawling platform for trade and multilateral cooperation. The liberal world is no longer primarily an “Anglo-American” domain, with

non-Western countries increasingly joining the liberal system. Moreover, the social purpose of the liberal system has been undermined by growing economic insecurity and injustices across the Western industrialized world. According to Ikenberry, there are no viable alternatives to the liberal system, as neither China nor Russia offers an attractive model for the rest of the world.⁽⁸⁾

Professor of Political Science at the University of Chicago John Mearsheimer argues that US liberal hegemony during the administrations of George H. W. Bush, Bill Clinton, George W. Bush and Barack Obama failed to achieve its goals. The United States fought seven different wars during this period and was unable to spread its democratic model to countries such as Iraq and Afghanistan, leaving them in chaos, which eventually led to the emergence of the Islamic State of Iraq and Syria (ISIS). Liberal foreign policy, originally intended to foster cooperation and peace, thus became a tool for conflict and instability.⁽⁹⁾

The Russia-Ukraine war also highlighted the erosion of several liberal values. For instance, private property rights were violated when Western countries froze the assets of Russian

companies operating in various sectors as well as Russian bank accounts. Additionally, there was a boycott of Russian athletes and artists. This raises questions about how Western countries can appoint themselves as judges in a conflict in which they are active participants.⁽¹⁰⁾

The West has also been criticized for its double standards on many issues, including the United States' bias toward Israel. This bias is evident in the political and military support provided to Israel during its aggressive response to Hamas' attack on Israeli settlements on October 7, 2023.

In 2024, the Biden administration's policies further expanded the scope of the conflict under the pretext of "Israel's right to defend itself." This allowed Israeli forces to encroach on southern Lebanese territory, target Hamas and Hezbollah leaders and destroy Hezbollah's wireless communication devices (pagers).⁽¹¹⁾ The US bias toward Israel was also evident in its military escalation against Iran, beginning on April 1, 2024, with the targeting of the Iranian consulate in Damascus. Iran responded on April 12, 2024, by targeting sites within Israel, which led to further Israeli retaliation against a military base in Tehran. This

cycle of attacks continued, with the United States consistently and openly siding with and supporting Israel.

Currently, the Western world is dominated by what is called "liberal meritocratic capitalism," represented by the United States, Europe and their allies. This system is contrasted with "political capitalism," adopted by China, Russia, and some developing countries. While "political capitalism" is characterized by high economic growth, "liberal meritocratic capitalism" has produced an elite that enjoys diversity in terms of gender and ethnicity but has also deepened inequality under the guise of merit. Consequently, "political capitalism" may increasingly replace "liberal meritocratic capitalism" in many countries worldwide.⁽¹²⁾

Democracies Versus Dictatorships

Shortly after President Biden's inauguration, he spoke of a "battle between democracies and authoritarian regimes," asserting that authoritarian powers and illiberal democracies aim to undermine key aspects of the liberal international order.⁽¹³⁾ Biden warned that if China becomes the dominant global power, it will work to promote authoritarianism in allied countries.

The Russian invasion of Ukraine reinforced Biden's argument, as he cautioned that a world led by illiberal countries would be more violent. He emphasized that Ukraine represented the central front in a "larger battle for basic democratic principles." The Biden administration succeeded in forming an expanded democratic alliance across the Atlantic and in strengthening its bilateral alliances with countries such as Japan, Australia, India and Taiwan.⁽¹⁴⁾

The Convergence of Power and the Successive Shrinking of the Power Gap Between International Poles

Indicators of the convergence of power among international poles have increased, as no single country now possesses absolute power to impose its vision for resolving conflicts. This trend is evident through various indicators, including the global power ranking. The United States ranks first (0.0699), followed by Russia (0.0702) and China (0.0706).⁽¹⁵⁾

At the level of conventional forces, the three powers are in a state of relative convergence, with each army having certain advantages. The Russian army has the largest number of personnel (5.569 million), followed by China (3.865

million) and the United States (2.245 million).⁽¹⁶⁾

In terms of air power, the US military is superior, possessing 13,233 aircraft compared to Russia's 4,144 aircraft and China's 3,260 aircraft. However, Russia leads in ground forces, with 13,000 tanks (before the war in Ukraine), compared to 6,100 tanks for the United States and 3,205 tanks for China. Regarding naval forces, China and Russia are ahead, with 777 and 603 naval assets respectively, while the United States has 490. Nevertheless, the United States stands out with its 11 aircraft carriers, compared to one for Russia and two for China.⁽¹⁷⁾

On defense spending, data from the Stockholm International Peace Research Institute (2023) shows the United States as the largest spender globally, allocating \$916 billion, followed by NATO at \$1,341 billion. China spends \$296 billion, Russia \$109 billion, India \$83.6 billion and Japan \$50.2 billion.⁽¹⁸⁾

As for nuclear weapons, estimates indicate that the United States possesses approximately 3,708 nuclear warheads ready for use and maintains a reserve stockpile of 1,938 warheads.⁽¹⁹⁾ Russia has around 4,380 nuclear warheads, 1,112 in storage and 1,558 non-strategic warheads.⁽²⁰⁾ China's arsenal includes

approximately 440 nuclear warheads, with an estimated 60 additional warheads produced. A 2023 Pentagon report to Congress estimated that China's nuclear arsenal had reached 500 warheads and projected that it would grow to 1,000 by 2030.⁽²¹⁾

The military balance is further complicated by growing military cooperation between Russia and China, as both nations enhance each other's capabilities. They have conducted joint military maneuvers since 2012 in the Western Pacific to counterbalance US-South Korea exercises.⁽²²⁾

The nuclear deterrence policy remains a key factor. Russian officials have issued warnings against Western support for Ukraine, including supplying weapons and attempting to integrate Ukraine into NATO. Russian President Vladimir Putin announced in March 2023 that Moscow would be prepared to use nuclear weapons if its sovereignty or independence were threatened.⁽²³⁾ On May 6, 2024, he instructed the General Staff to prepare for tactical nuclear weapons maneuvers and ordered the transfer of such weapons to Belarus.⁽²⁴⁾ Additionally, Russian leaders reviewed their nuclear doctrine in response to Washington allowing Ukraine to use long-range missiles against Russia.

In parallel, South Korea has openly discussed using its nuclear arsenal if its sovereignty or existence is threatened. Russia's nuclear rhetoric has been a key factor in Ukraine's failure to join NATO, while North Korea's possession of nuclear weapons has ensured its security from external aggression.⁽²⁵⁾ Similarly, China views its nuclear arsenal as a tool for greater geopolitical influence and believes that a larger stockpile would compel Washington to treat Beijing with greater respect and caution.⁽²⁶⁾

The situation is further exacerbated by competition in military technologies, which has become a cornerstone of deterrence and national security. Countries are increasingly integrating technology into the military domain, and future military capabilities will be measured not by spending or the number of weapons and personnel but by technological advancements, efficiency, and defensive capabilities. Artificial intelligence (AI) technologies are expected to shape the future of warfare by introducing new patterns of conflict and extending the scope of wars to hybrid and multi-domain contexts.⁽²⁷⁾

The Failure of International Institutions to Maintain International Peace and Security

After the League of Nations failed to maintain world peace, the founding fathers of the UN emphasized in its charter that one of the primary purposes of the new organization was to maintain international peace and security. The five major powers monopolizing the right of veto in the Security Council was intended to ensure peace and security. However, the victorious allies of World War II became divided into two camps: the Eastern Soviet bloc and the Western US bloc. This division quickly escalated into a conflict that persisted until the collapse of the Soviet Union.

Recently, this conflict has been reignited between the United States — seeking to maintain its position as the sole global superpower, despite internal divisions and the decline of its globalization-based model — and China, which is rising rapidly to the apex of the international system, and Russia, which aims to restore the influence of the former Soviet Union. Both China and Russia share a rejection of US hegemony and seek to change the current international system, a goal reflected in ongoing international conflicts.⁽²⁸⁾

The United States views the continuation of the Russia-Ukraine war as an opportunity to weaken Moscow, while Russia sees it as a chance to enhance its global standing. Both sides reject the idea of retreat, as the war's outcome will represent a loss for the defeated and a gain for the victor in the broader context of international competition. Consequently, each party has used its veto power to protect its interests and those of its allies.

This dynamic has led to the Security Council's failure to adopt key resolutions. For example, a draft resolution condemning Russia's military operation in Ukraine was blocked by a Russian veto, while Russia failed to pass a draft resolution related to the humanitarian situation in Ukraine. Similarly, in Gaza, draft resolutions calling for a ceasefire were thwarted by the US veto, sometimes because the drafts did not criticize Operation Al-Aqsa Flood, or because they called for an immediate cessation of fighting. Examples also include the Russian draft resolution on October 13, 2023, the Emirati draft resolution on December 8, 2023, the Algerian draft resolution on February 20, 2024, a draft resolution recommending Palestine's full membership in the UN on April 18, 2024, and the Brazilian

draft resolution on October 16, 2024. Conversely, China and Russia used their veto power to block a US draft resolution calling for an immediate ceasefire in Gaza on March 22, 2024.

These events have prompted repeated calls for reforming the UN, particularly the Security Council. In this context, the UN secretary general presented a new peace plan in July 2023, based on proposals from the "Our Common Agenda" report issued on September 10, 2021, on the 75th anniversary of the UN's founding.⁽²⁹⁾ The report recommended 12 measures to enhance multilateral action, which were discussed at the UN Summit of the Future in September 2024. The outcomes were consolidated in a "Charter for the Future," reaffirming commitments to the core principles of the UN Charter, such as sovereignty, non-interference in internal affairs, peaceful dispute resolution, harnessing diplomacy for peace, developing mechanisms for managing conflicts and eliminating violence in all its forms.⁽³⁰⁾

In the same vein, Saudi Minister of Foreign Affairs Prince Faisal bin Farhan called for UN reform in his speech at the Future Summit, describing it as an urgent necessity. He cited the failure of international institutions to

address the Palestinian catastrophe, resolve the Middle East conflict and establish global peace. He stressed that these goals cannot be achieved amid contradictions and double standards.⁽³¹⁾

However, the reality is that these reforms will remain ineffective without political will from the permanent member states to grant the UN a renewed mandate to achieve its objectives, especially maintaining international peace and security.⁽³²⁾

The international institutions faced another test on November 12, 2024, when the International Criminal Court (ICC) issued two arrest warrants against Israeli Prime Minister

Benjamin Netanyahu and former Defense Minister Yoav Gallant for war crimes and crimes against humanity. The court held them responsible for directing deliberate attacks against civilians in Gaza. The pressing question is whether the ICC can withstand US-Israeli threats to impose sanctions on its members. Additionally, can any of the 124 member states of the ICC arrest Netanyahu if he enters their territory, especially in light of the European Union's (EU) pledge to implement the arrest warrants, the United States' categorical rejection of the ICC's decision, and Israel's demand for Washington to

impose sanctions on any country that complies with the court's ruling?⁽³³⁾

The Stagnation of Regional and International Initiatives in Conflict Resolution

For various reasons, international and regional initiatives to resolve conflicts have been marked by failure and stagnation. Regarding the Gaza crisis, numerous regional and international initiatives have been proposed to achieve a settlement. Almost all of them agreed on key points, such as a ceasefire between the parties, the provision of humanitarian aid, the withdrawal of Israeli forces, the release of prisoners and



Available in both languages

REPORT

Recent Developments in India-China Engagement: Efforts to Address Lingering Tensions

India and China have initiated a thaw in relations marked by the first in-person meeting between Indian Prime Minister Narendra Modi and Chinese President Xi Jinping on the sidelines of the BRICS summit in Russia after five years of escalated border tensions. Following this, India's External Affairs Minister S. Jaishankar met Chinese Foreign Minister Wang Yi on the sidelines of the recent G20 Summit in Brazil and discussed the developments on the border...




detainees, and plans to rebuild Gaza. Among the most notable were the Egyptian-Qatari-US initiative and the UK's five-point initiative, which included a proposal for senior Hamas leaders in Gaza to leave for another country.⁽³⁴⁾ The UAE also suggested establishing a temporary international mission to restore law and order and lay the groundwork for a qualified government to unify the West Bank and Gaza.⁽³⁵⁾ Additionally, China proposed a three-step initiative, beginning with a Middle East peace conference and culminating in full UN membership for Palestine and a commitment to the two-state solution.⁽³⁶⁾ While US President-elect Donald Trump promised to resolve crises in the Middle East, skepticism surrounds these promises, as they are perceived as electoral rhetoric difficult to implement, particularly given US bias toward Israel.

Initially, Qatari mediation, with Egyptian and US support, succeeded in brokering a temporary humanitarian truce on November 24, 2023. This truce lasted a week, during which 240 Palestinian detainees were released from Israeli prisons in exchange for over 100 hostages held by Gaza resistance forces, including about 80 Israelis.⁽³⁷⁾ Proposals for implementing past initiatives

varied in duration, from 90 days to two months or one month, and in stages. However, Israel opposed withdrawing its forces during the first stage,⁽³⁸⁾ while Hamas demanded guarantees for implementing subsequent stages of the agreement. Hamas emphasized that it could not release all the hostages in the initial stage due to concerns that Israel might resume military operations. Meanwhile, Netanyahu objected to ending the war as part of any ceasefire agreement, while a permanent ceasefire was one of Hamas' main demands.⁽³⁹⁾ Netanyahu later set conditions for the destruction of Hamas, its removal from the Palestinian political scene and the disarmament of factions in the Gaza Strip. In response, Hamas leader Yahya Sinwar asserted that the movement was determined to defeat the Israeli army and would not yield to "occupation conditions."⁽⁴⁰⁾

The primary reason for the failure of these initiatives lies in the inability of major powers to exert effective and binding pressure on both parties. Furthermore, US bias toward Israel played a significant role. On April 9, 2024, US Secretary of State Antony Blinken declared that Hamas must disarm and surrender to end the war. However, what is truly needed is for the United States to

adopt a neutral and effective role with integrity.⁽⁴¹⁾

Similarly, initiatives aimed at ending the Russia-Ukraine war have also failed to yield results. The African Initiative in May 2023 sought to establish an initial ceasefire and initiate negotiations, incorporating a series of "confidence-building measures."⁽⁴²⁾ However, the initiative collapsed due to preconditions from both sides. Ukraine refused to negotiate without Russia's withdrawal from all annexed territories, while Russia demanded Ukrainian recognition of its sovereignty over Crimea, which it annexed in 2014.

The Chinese peace plan in February 2023 included 12 points for achieving a comprehensive solution to the crisis, focusing on a ceasefire and initiating peace talks. However, Western powers accused China of siding with Russia, viewing China as a competitor to the United States and a threat to its global standing. The Arab proposal in April 2022, put forward by Egypt, Jordan, Iraq, Algeria, Sudan and the secretary-general of the Arab League, also failed to achieve progress, as the conflict remained unresolved due to the lack of a military resolution between the parties.⁽⁴³⁾ In June 2023, the Indonesian defense minister proposed a plan involving the

establishment of a demilitarized zone and UN-supervised referendums in disputed territories. However, this plan was rejected by European leaders, with EU foreign policy chief Josep Borrell stating that peace in Ukraine must be based on acceptable terms and should represent “just peace,” not a “peace of surrender.”⁽⁴⁴⁾

The failure of these initiatives can be attributed to the intransigence of the parties involved, who have set demands that are unacceptable to their adversaries. Additionally, major powers’ involvement in the conflict has further complicated resolution efforts, with Russia directly engaged and the United States indirectly supporting Ukraine.

Conclusion: Future of Risks and Uncertainty

There is no doubt that the international system is facing serious conflicts, and these conflicts will persist as long as their root causes remain and as long as the obstacles to resolving them endure. The real problem lies in the fact that the world is witnessing a significant struggle among major powers competing for leadership of the international system — powers that are ostensibly capable of resolving crises and

conflicts. This competition inevitably impacts the alliances to which each major power belongs, even though many middle power countries prefer to remain neutral. Indicators of this conflict are evident in the differing identities and models represented by the major powers, as well as in the distinctions between these powers and other identities, particularly those within the Islamic and developing world.

This conflict has been further fueled by the military balance of power, with each major player possessing its own tools of deterrence. As a result, the UN’s conflict resolution mechanisms have failed. In this context, the efforts of other countries to mediate and settle conflicts have largely proven ineffective.

Ultimately, conflicts are likely to continue in the foreseeable future, making it essential to work toward rationalizing and managing them. Notably, despite the intensity of the Cold War, none of the great powers resorted to using nuclear weapons. There was a degree of rationality and mutual understanding of security needs, as demonstrated during the Cuban Missile Crisis. Unless the major powers make concerted efforts to control

conflicts, the world is undoubtedly heading toward the possibility of a third world war, which would result in unprecedented destruction, devastation and the loss of thousands or even millions of lives, particularly if nuclear weapons are employed. Some major powers might resort to using such weapons in the event of significant aggression or a humiliating defeat.

The future of humanity, therefore, hinges on the ability of international actors within the global system to resolve or contain conflicts. It is imperative for the world to channel its efforts toward addressing emerging global challenges such as environmental risks, climate change and terrorism. To this end, the major powers must urgently take steps to convene an international conference to develop a roadmap for identifying and addressing international conflicts, preventing their escalation and working diligently toward their resolution. Additionally, other countries must hold the major powers accountable for their actions. Without such measures, the future will become increasingly uncertain, security and peace will remain elusive, hunger and poverty will rise and social unrest will prevail.

Reassessing US Hegemony: Key Challenges and Strategic Considerations

As the most influential and dominant power in the international system, the world is significantly affected by developments in the United States and the domestic and foreign policies it adopts. Therefore, this year's 2024 ASR 2024 will shed light on domestic developments in the United States. The United States witnessed an exciting election year, the repercussions of which extended beyond its borders, capturing global attention as an indicator of the extent of US influence on the global stage. In the ASR 2023, the focus was on US-China competition in the South China Sea, Washington's role in the Middle East, its relations with Iran against the backdrop of Israel's war on Gaza, and its position on Russia and transatlantic relations considering the conflict in Ukraine. These developments reflected Washington's efforts to maintain its global role and address the challenges to its international leadership. This year's report examines the significant developments in the US domestic arena, most notably the intense electoral competition between former and imminent President Donald Trump and current Vice President Kamala Harris.

Harris entered the race after President Joe Biden withdrew, culminating in Trump's stunning return to the White House. The electoral campaign's accompanying developments revealed profound internal divisions between the Democratic and Republican parties. These rifts were not limited to internal issues such as immigration, the economy, abortion and climate change but extended to differing views on external matters, including the Russia-Ukraine war, the war on Gaza, relations with China, transatlantic relations, and other global issues. These divergent perspectives, both on domestic and strategic international matters, sparked heated debate regarding its impact on US politics and power, as well as on the limits of its international influence and its ability to maintain hegemony over the international system.

The 2024 ASR examines the dimensions and implications of US partisan divisions on Washington's foreign policy, particularly in the context of efforts to enhance its global superiority and standing. It reviews the presidential elections and partisan divisions over domestic issues, the crisis of US democracy, and the disagreements regarding Washington's role in international affairs. It also analyzes the US response

to various international conflicts and challenges, the influence of Israel on US regional policies, and the expanding conflict in the Middle East and its impact on US policies toward the region. Finally, the 2024 ASR provides a forecast regarding the potential implications of a second Trump term for both US domestic and foreign policies.

The Presidential Elections and Party Disputes Over Internal Issues

The year 2024 was an election year par excellence, with preparations beginning early among the competitors. The Republican Party primaries concluded with Trump winning the party's nomination after successfully taking the lead among Republicans, surpassing his competitor, former US Ambassador to the United Nations Nikki Haley. This was despite notable divisions within the Republican Party regarding Trump, as well as disagreements with some of his policies, his personal and non-institutional approach, and the crises he created during his first term (2017–2021). These concerns were further compounded by the multiple judicial accusations he faced and apprehensions about the future of the United States under his leadership. Nevertheless, Trump's ability to secure his party's confidence, despite

these challenges, demonstrated his success in reshaping the Republican Party according to his vision and significantly altering its orientations.⁽⁴⁵⁾

As for the Democratic Party, Biden initially secured his party's nomination and began his election campaign. However, all indicators and polls pointed to a decline in his popularity compared to his competitor, Trump. After the first debate against Trump, Biden's weak performance and the visible impact of his age on his focus raised questions about his eligibility to continue in the electoral race. Under mounting pressure from the party and growing fears of Trump's resurgence, Biden withdrew from the race and endorsed the candidacy of his Vice President Kamala Harris. Harris quickly secured the Democratic Party's nomination, injecting significant momentum into the electoral competition. She appeared more energetic and, according to opinion polls, successfully narrowed the gap between herself and Trump in a short time. The presidential debate between Harris and Trump further boosted her popularity, as her performance stood in sharp contrast to Biden's earlier debate performance against Trump.⁽⁴⁶⁾

The candidates' election campaigns witnessed fierce competition that



escalated to the point of violence and incitement, raising concerns about the future of internal stability and US democracy. These concerns were fueled by Trump's threats and inflammatory rhetoric against the establishment and elites, including Republican elites who did not support him, as well as his right-wing populist rhetoric. This rhetoric was particularly concerning, as many still remember Trump's actions following the 2020 elections and his encouragement of supporters to storm the Capitol building. These positions became a key focus of Biden and Harris' attacks on Trump, accusing him of undermining

US democratic achievements and respect for the rule of law and threatening the country's international standing due to his isolationist tendencies.

The competition revealed a significant divergence in the candidates' views on critical domestic and foreign policy issues. On the domestic front, immigration emerged as a major issue, particularly as the Biden administration attempted to pass legislation to reform the immigration system. However, the Republicans obstructed the passage of this legislation, largely in response to Trump's demands and to deny Biden a political advantage on a cornerstone

policy issue in Trump's campaign. The crisis was further exacerbated by the actions of several states, most notably Texas, which defied federal law on immigration for partisan and electoral purposes. This dynamic heightened tensions between individual states and the federal government to an unprecedented level, preventing both parties from agreeing on a successful immigration policy free from partisan and electoral pressures.⁽⁴⁷⁾

Another contentious issue was abortion. Trump attempted to strike a balance between appealing to women voters and adhering to his party's strict stance on abortion, taking a middle-ground approach based on recommendations from his advisers. In contrast, the Democrats unequivocally supported a woman's right to access legal abortion services, with Harris emerging as a leading activist for reproductive rights. She strongly criticized Trump for boasting about his role in overturning the 1973 *Roe v. Wade* ruling while emphasizing that she and Biden were urging Congress to restore the previous status quo.

The economy was the most prominent issue in the race, as inflation rates and increasing financial burdens on citizens took center stage. Trump

campaigned to fix the economy through another round of tax cuts for businesses and individuals, aiming to stimulate growth and drive production, while Harris focused on reducing costs, enhancing economic opportunities for middle- and lower-class Americans, and lowering housing prices. Although internal economic indicators seemed to favor Harris, with statistics showing job growth in recent months, a decline in the unemployment rate to 4.1%, and a reduction in inflation, voters were deeply divided over who was better equipped to improve the economy. Ultimately, the balance tipped in Trump's favor, possibly due to economic struggles in certain areas, Trump's economic record during his first term, and his decisive stance on immigration. Additionally, his early start to the campaign in 2022, compared to Harris' sudden entry following Biden's withdrawal, gave him an advantage. Most significantly, Trump successfully marketed his conservative values agenda, which included rejecting the Democrats' calls for "homosexual rights" and opposing the promotion of such topics in schools, to his base of conservative voters.⁽⁴⁸⁾

The Political Model Crisis and Diverging Perspectives on Washington's International Role

Some believe that the crisis faced by the US political model comes from within the system, and the candidacy of Trump, who, along with some of his supporters, still believes that the results of the 2020 elections were stolen, has enough momentum to keep the discussion on this crisis alive. Trump continues to question US institutions and the integrity of the judiciary, considering his trial and convictions in a number of cases, and he casts doubt on the future of the United States under Democratic leadership.

The truth is that Trump, who has a distinctive political personality and is charismatic, wields influence among a significant segment of Americans who view him as a savior. This gives him the strength to challenge some of the rules of the system. At the same time, these characteristics have left behind a significant division among the elite, even within the Republican Party itself. This polarization has created an atmosphere of uncertainty and frustration, raising concerns about the risks facing the US political model.

On the one hand, a segment of Americans fears that Trump's election would pose challenges to US democracy as he

would settle scores with his political opponents, exert control over the judiciary, and appoint loyalists to sensitive positions regardless of their competence. On the other hand, the Republicans, led by Trump, warned that if Harris was elected, it would destroy US values, leading to waves of uncontrolled immigration.

According to a poll conducted by *The New York Times* in cooperation with Siena College in October 2024, about 76% of US citizens believe that “US democracy is currently under threat.” More than 60% of those surveyed said they believe that the US government largely benefits itself and the elite rather than serving the public. Additionally, about 60% of voters said that Trump has exacerbated partisan divisions, while only 37% said the same about Harris.⁽⁴⁹⁾

Naturally, the erosion of the political model from within threatens its ability to influence beyond US borders and undermines US leadership, which now faces increasing competition on the international stage, as well as an unprecedented era of turmoil, geopolitical rivalry, and conflict. This divergence in visions has also extended to foreign policy and its priorities, with the two parties presenting starkly different views on Washington’s international role.

Harris, following Biden’s lead, defends the strategy of strategic competition, which emphasizes greater engagement and leadership. Conversely, Trump advocates isolationism. These differing approaches are evident in their stances on major global issues. Regarding the Russian-Ukraine war, Harris supports Biden’s approach of backing Ukraine, leading a broad coalition to assist Kyiv and aiming to inflict a strategic defeat on Russia. In contrast, Trump pledges to end the war, claiming it would not have occurred during his presidency. He has criticized the financial support provided to Ukraine and praised his “very good relationship” with Putin, suggesting this relationship might enable him to resolve the conflict.

As for the transatlantic relationship, Trump and his running mate, JD Vance, have focused on reshaping Washington’s ties with European allies. During the Munich Security Conference in 2024, Harris and Vance sparked widespread controversy due to their differing positions on relations with European partners. Vance’s public statements echoed Trump’s views. Trump said that Washington would “encourage” Russia to attack NATO allies if they failed to sufficiently contribute to the Western military alliance.⁽⁵⁰⁾ These remarks drew

strong criticism from Biden and his vice president, who stated, “Trump’s admission that he intends to give Putin the green light for more war and violence, to continue his brutal assault on a free Ukraine, and to expand his aggression to include the people of Poland and the Baltic states, is appalling and dangerous.”⁽⁵¹⁾

This statement sparked a wave of anger among European officials, who are already concerned about the reliability of the United States as an ally under a second Trump administration. These concerns have been exacerbated by the decline in US support for Ukraine earlier this year, caused by disagreements between the two parties in Congress. This occurred at a critical time when the Ukrainian army was running out of missiles and essential equipment on the front lines, hindering their counter-offensive efforts, until Biden managed to convince the Republicans to reverse their position.

Regarding the conflict in the Middle East, the two parties may agree on supporting Israel in defending itself, but they differ in their positions on the suffering of the Palestinians. Harris has responded to the crisis from a humanitarian perspective, unlike Trump, who supports Israel almost unconditionally.

Regarding Iran, Trump has been highly critical of the Biden administration, accusing it of weakness in the face of Iran and even laxity that has allowed Tehran to threaten US interests. He focused his election campaign on his supposedly more effective approach during his first term toward Iran, contrasting it with Biden's approach, which, he claims, has allowed Iran to threaten Israel and US interests in the Middle East. The Biden administration, however, holds Trump responsible for the current situation, citing his unilateral withdrawal from the nuclear agreement in 2015.

Regarding China, although both candidates consider Beijing a strategic competitor, Harris follows Biden's policy of strategic competition aimed at controlling this rivalry to prevent it from escalating into a broader conflict. Trump, on the other hand, presents a more assertive position toward China, expressing his reluctance to provide support to Taiwan in the face of Chinese aggression and advocating a return to imposing tariffs to curb China's economic influence in the US market. Biden's coordinated policy, led by Harris, has faced skepticism from Trump and widespread criticism from the Republicans. Trump proposes a more conservative policy toward allies, particularly

European allies, and tends toward isolationism under his "America First" principle. He seeks to achieve peace through strength, which the Biden administration has criticized as an approach that would cause Washington to lose its international standing and provide its adversaries with an opportunity to effect profound change to the structure of the international system.⁽⁵²⁾

The US Response to Conflicts and Challenges on the International Stage

The conflict in the Middle East has received significant US attention. Washington has provided Israel with unlimited political, military and diplomatic support, with Biden boasting that his administration has provided Israel with more support than any other administration. In this context, Washington has worked to provide a protective shield to prevent Israel from facing international censure or responsibility, including blocking the passage of any Security Council resolution condemning Israel or calling for an end to the war.

Although the Biden administration tried to present itself as a mediator, its lack of desire or ability to pressure the Israeli prime minister highlighted the weakness of Washington's diplomatic role. This reluctance reflected Biden's

unwillingness to pressure Israel due to concerns about the potential impact on his party's chances in the presidential election. While Washington has focused its efforts on containing the conflict within the occupied territories and preventing it from spreading to the West Bank, its support for Israel's plan to change the status quo and eliminate Hamas has not prevented the conflict from escalating. Sanctions against settlers and pressure on Netanyahu's government have failed to change the Israeli government's extremist approach. Instead, attacks by Iran's allies have extended to US bases and soldiers in Iraq and Jordan. Moreover, Tehran linked the conflict to regional support fronts in Lebanon, Yemen, Iraq, and Syria.

Although the United States has conducted strikes on Iranian militias in Iraq, Syria and Yemen, its diplomatic efforts have averted a broader confrontation on Israel's northern front with Hezbollah. The conflict expanded to include an Israeli ground attack on Lebanon before Washington mediated a truce agreement to halt the fighting on this front.

Based on its vital interests and regional role, Washington has sought to contain Houthi attacks on ships in the Bab al-Mandab Strait and the Red Sea.

It formed Operation Prosperity Guardian with the UK to protect freedom of navigation in the Red Sea and launched military strikes, in cooperation with its partners, against Houthi targets. However, this alliance has not stopped the Houthis' military operations, and the conflict in the Red Sea continues to highlight the evolving threats and theaters of confrontation.

Nevertheless, the conflict has provided Washington with an opportunity to test its regional alliances and defense plans. The United States has coordinated regional defenses with Western countries and some Arab states while countering Iranian attacks on the occupied Palestinian territories. In April 2024, these efforts successfully countered such attacks. Amid escalating tensions and mutual threats between Iran and Israel, Washington deployed the THAAD air defense system, additional attack aircraft, aircraft carriers, and other military capabilities to protect Israel and prevent the conflict from expanding.

These developments suggest that instead of pivoting toward Asia as initially envisioned by the Biden administration, the United States has been compelled to make a strategic return to the Middle East.

On the Ukrainian front, Washington's efforts focused on inflicting a strategic defeat on Russia and rallying its Western allies behind Ukraine to confront the Russian attack. However, Washington's aid to Ukraine was disrupted due to disagreements between the two parties in Congress. After partisan deliberations, Washington approved a foreign aid package worth \$95 billion, including \$61 billion in military aid to Ukraine. Washington's bet was that this aid would help Ukraine slow the Russian advance. Although this aid failed to change the reality on the ground, it played a role in strengthening Kyiv's attacks on Russian territory, including entering the Russian Kursk region and attacking vital facilities and interests in the Crimean Peninsula and deep inside Russian territory, which created a new balance in the conflict. Washington's focus was on preventing Putin from achieving a decisive victory after he managed to control the areas he announced were annexed to Russia.⁽⁵³⁾

While the international arena is experiencing destructive turmoil and conflicts, there has been a decline, to some extent, in the ability and will of the United States to reduce global tensions. This international competition has affected the effectiveness of international

institutions in addressing conflicts, including the Security Council. Washington has also lacked diplomatic initiative in dealing with these tensions, failing to play a constructive role in the civil war in Sudan. Its diplomatic initiatives in Geneva to bring the parties to the crisis together failed, largely due to the Sudanese government's suspicions of Washington's biases in the conflict.

The United States now faces challenges in some of its areas of influence, such as the withdrawal of its forces from Niger and ongoing negotiations regarding the withdrawal of its forces from Iraq. On the contrary, Washington's policies have fueled tensions, such as its overt support for Taiwan's separatist efforts against China and the creation of alliances to encircle its opponents in their regional environments. This has heightened tensions, as seen in the disputes between China and the Philippines in the South China Sea and other areas.

Israel's Influence on Washington's Regional Approaches

The United States' role in the current conflict in the Middle East is pivotal, especially considering the United States' strict commitment to protecting Israel, regardless of the legitimacy of its current war against the Palestinians and its

disregard for international principles and values that Washington claims to uphold. Since the beginning of the conflict and throughout 2024, Israel has succeeded in obtaining unprecedented support from Washington, including the allocation of \$17 billion in aid and securing diplomatic backing in the Security Council to block any condemnation of Israel or calls to stop the war.

Washington reversed its regional strategy and redeployed military assets to the region, including aircraft carriers, nuclear submarines, and strategic assets. It also launched Operation Prosperity Guardian in the Red Sea and conducted direct strikes against militias in Iraq and Syria to defend and protect Israel. Additionally, the United States deployed forces and the THAAD defense system to protect Israel from Iranian attacks.

Although Washington has not abandoned diplomacy in its efforts to contain the conflict and prevent its expansion and has maintained adherence to the two-state solution on the surface, its initiatives have not yielded positive results. Biden's proposal at the end of May 2024 and the subsequent rounds of negotiations were unsuccessful, partly due to Israel's apparent intentions to enact a strategic shift within the

occupied territories and in the broader regional strategic environment. For its part, Hamas insisted that any settlement include a cessation of the war and an Israeli withdrawal from the Gaza Strip.

It can be argued that the United States approached this issue with the aim of regional reconfiguration to serve its interests. Supporting Israel, in part, weakens Iran's regional axis, reinforces Washington's influence and supports its aspirations for a regional framework that restores its influence and hegemony. This strategy also limits the influence of China and Russia and draws the Gulf states back toward Washington, countering their current policy of balancing ties between East and West.

However, the pressures on the Biden administration cannot be ignored. Biden has attempted to pressure the Israeli government to adjust its positions and ease the strain on his administration, which faces criticism over the genocide occurring in the Gaza Strip. Protests have erupted on US university campuses, and opposition movements to the Biden administration's policy have gained traction and were influential in the electoral competition. These developments, coupled with the erosion of Washington's image on the

global stage, have further complicated the situation.

It is also undeniable that the Zionist lobby in the United States played a prominent role in influencing Washington's policy regarding Israel, its approach to the war on Gaza, and its stance in the region. During the year 2024, the lobby supporting Israel did not limit itself to interfering in the presidential election and exploiting the contest. It also worked throughout the year to interfere in the congressional election, not only to exclude representatives who support Palestine but also to support representatives who back Israel. For example, AIPAC, through the United Democracy Project Committee, spent \$14.6 million to exclude Jamal Bowman, the Democratic Party primary candidate in New York's 16th Congressional District. It also spent \$8.6 million against Missouri Representative Cori Bush, the congressional candidate, due to her position in support of the Palestinian cause. In contrast, the "Pro-Israel Democratic Current" group spent \$1 million to support George Latimer, known for his pro-Israel stance, in winning the Democratic Party nomination.⁽⁵⁴⁾

While preparations for the US presidential election were underway, the candidates took ambiguous and often

indecisive positions. Biden appeared unwilling to exert any pressure on Netanyahu or his government. He backed down from halting certain arms imports to Israel and supported all the policies adopted by Netanyahu — from the invasion of Rafah to the occupation of the Philadelphi Corridor and the attacks on Lebanon — despite initially opposing these measures. However, it seems that even critical differences in views between the United States and Israel cannot affect the US commitment to Israel, even if Netanyahu's actions lead to a large-scale regional war.

It is worth noting that the Israeli government welcomed Trump's victory in the presidential election with great enthusiasm, given the strong relationship between Netanyahu and Trump. During his election campaign, Trump demonstrated unlimited support for Israel, particularly regarding its right to use force and eliminate Hamas. This aligns with Netanyahu's desire to continue the war and implement his government's extremist plans, including rebuilding settlement outposts in Gaza. Additionally, Trump's decisive positions on Iran may grant Israel greater leeway in addressing Iranian threats, including its nuclear program. Trump's return to power might also impose restrictions

on Iran's ability to attack Israel and potentially force a reevaluation of its position on the current conflict.

The Expansion of the Conflict and the Impact on US Influence in the Middle East

The United States faces a changing regional environment and unprecedented challenges in the Middle East. Since October 7, 2023, US forces have been subjected to more than 150 missile and drone attacks. The Houthis have also launched a systematic campaign to disrupt navigation in the Red Sea, along with undeclared Iranian hostilities, including cyberattacks. These assaults have directly harmed US interests and forces. In late January 2024, attacks by Iraqi militias on the Al-Tanf base in Jordan killed three US soldiers and injured dozens more. Days before this incident, two US Navy sailors were killed in the Gulf of Aden while intercepting a shipment of Iranian ballistic and cruise missile components.

These developments compelled the United States to strengthen its military assets and redirect its resources to the region to restore deterrence, alongside its diplomatic efforts to contain adversaries. In this context, Washington moved aircraft carriers toward the

Eastern Mediterranean, deployed more US soldiers and launched strikes against militias in Iraq, Syria and Yemen. The most prominent attacks included those conducted with its ally, the UK, against the Houthis, as well as the strikes targeting 85 sites in Iraq and Syria on February 2, 2024, carried out using B-1 bombers launched from the United States. Washington also activated a regional defense system to repel Iranian attacks on Israel in April 2024 and deployed the THAAD air defense system in October 2024 for the same purpose, following mutual escalation between the two sides. In parallel, Washington imposed additional sanctions on Iran and its proxies in the region and utilized diplomatic tools to pressure Iran to halt its military escalation through proxies targeting US bases and interests in the region.⁽⁵⁵⁾

Indeed, these coordinated US efforts succeeded in controlling the conflict, achieving Washington's priority of preventing its expansion and limiting threats and attacks. Although reciprocal strikes between Tehran and Tel Aviv heightened the level of confrontation between Tehran and Washington and increased the risk of a regional war on an unprecedented scale, the United States played a significant role in preventing the situation from spiraling out

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The Gaza War and the United States' Clout in the Middle East

Before Operation Al-Aqsa Flood on October 2023 ,7, the US assessment of the situation in the Middle East was that it was moving in a direction favorable to US interests. Even US President Joe Biden, when he embarked on his first trip to the region as president in 2022, praised the fact that it was the first time since 11/9 that a US leader had visited the region without the participation of US forces in combat missions. This was also confirmed by US National Security Adviser Jake Sullivan a few days before Operation Al-Aqsa Flood when he said that the Middle East was calmer today than it was two decades ago and praised the United States shift for focusing on priorities beyond the Middle East...



of control. Washington once again leveraged its deterrence capabilities and diplomatic pressure to contain this uncalculated escalation, which could have plunged the entire region into chaos.

However, Washington still faces significant risks as the war continues. It is engaged in confrontations with multiple parties, which are increasingly coordinating their operations. Meanwhile, Washington is involved in this confrontation for the first time without explicit and clear regional support, particularly in its confrontation with Iran and its proxies. This was evident in the lack of participation by regional countries in Operation Prosperity Guardian in the Red Sea and the Gulf states' moves to distance themselves from the confrontation between Iran and Israel. This demonstrated that some of Washington's regional allies are unwilling to participate in US-led joint missions.

US diplomacy is also struggling to convince its allies of its policies in the region. Now more than ever, Washington seems unable to propose initiatives for settlement or to restore stability. One of the most notable outcomes of the developments following the war in Gaza is that, instead of disrupting relations between Iran and Saudi Arabia, the war appears to have strengthened them. The

onslaught against Gaza has also unified the positions of major Arab powers, while China's influence and relations with the United States' regional allies followed an independent path, distinct from Washington. This confirms that the region's dynamics have shifted and highlighted the limits of Washington's influence.

Moreover, the repercussions of the conflict in the region extend to the United States' international standing, particularly in its confrontations with Russia and China. The United States may face difficulties waging wars simultaneously on multiple and distant fronts. Its adversaries are exploiting the United States' preoccupation with the region to expand their influence and exert additional pressure on Washington, including militarizing sea lanes, imposing restrictions on trade flows to the West and potentially raising oil prices if the conflict escalates.

Most importantly, Washington's image is being severely tarnished in this confrontation. Its blatant bias in favor of Israel and the double standards it has adopted in this crisis — compared to its stance on the Russia-Ukraine war — are undermining its credibility in defending an international system based on rules.

Conclusion: Trump 2.0 and the Future of US Leadership

Over the course of four years since 2021, the Biden administration has aimed to reaffirm the strength of the United States and its international leadership by focusing internally on reorganizing domestic affairs, restoring institutionalism, strengthening the appeal of the US political model and enhancing competitiveness. Externally, it has worked to strategically compete with adversaries, revitalize its network of alliances, strengthen partnerships against competing powers and defend the rules-based international system. By the end of the Biden administration, this strategy has borne some fruit in addressing certain challenges abroad, such as creating obstacles to Russia's geopolitical ambitions and impeding China's efforts to reshape the international system.

However, many indicators and changes in the global environment suggest that the world may have moved beyond the era of unipolarity, even if it has not yet settled into a new duality or multi-lateral framework. The international system remains in a deep transitional phase, marked by chaos, shifts in power and the resurgence of geopolitical competition. Trump's return to office adds further ambiguity and uncertainty

about the future of the international system and the extent to which the United States can maintain its global standing and leadership. His return, under the slogan "Make America Great Again," signals a confrontational, populist and right-wing foreign policy, seeking to achieve peace through force and potentially reversing the previous administration's approach. This shift may be seen as confusion in the US strategic approach to external challenges and the defense of its leadership and international standing. Some may interpret this as a symptom of the dilemma facing the current global liberal system, with Trump challenging its rules, principles and institutions.

Regardless, the coming period will test Trump's approach. In the near term, it is expected that Trump will pursue a self-described "corrective revolution" domestically, targeting the establishment and ruling elites in Washington, whom he describes as corrupt. His agenda will likely include dismantling the so-called deep state, fulfilling promises on issues such as immigration, imposing higher tariffs, abandoning green policies, granting greater mandates for oil exploration and increasing reliance on traditional energy sources. This agenda will be buoyed by the legitimacy

he gained through the election and the Republican dominance of Congress in both chambers. However, this could lead to the undermining of institutions and their established character, intensifying polarization at home, diminishing trust in institutions and the system, and exacerbating partisan fighting. US democracy — and perhaps the nation as a whole — could face a significant test.

On the international level, Trump is expected to continue his “America First” approach and isolationist tendencies, potentially reviving his trade war with China, and increasing pressure on the United States’ European allies. He is also likely to adopt a hardline stance toward Iran and its proxies in the Middle East, deepen ties with the Gulf states, provide greater support to Israel and perhaps withdraw support for Ukraine. However, the global landscape Trump will face in 2025 is vastly different from the one he left in early 2021. It is marked by a more aggressive posture from international powers, independent conflicts led by middle powers in their regions, and skeptical allies seeking a more pluralistic world order. Emerging formations, such as BRICS and the SCO, as well as alliances like the Gulf states’ collaboration with the Union EU, have gained influence. Major economic and

financial partnerships are also shifting dynamics, potentially complicating dealings with the United States and presenting challenges for US policymakers.

Thus, Trump’s preferred approach to international confrontation will be tested in a more chaotic and less compliant world, which could significantly impact the international system. US democracy will also face a real test as it seeks to correct its course. However, it is important to note that Trump, who advanced a similar right-wing populist agenda in 2017, encountered significant obstacles from within the establishment and from allied international powers. This scenario is likely to be repeated, with the United States and the world closely monitoring developments over the next four years.

The Indo-Pacific Dispute: China’s Complex Challenges

The 2023 ASR anticipated a continuation of oscillation between calculated escalation and appeasement in US-China relations under the framework of “cooperative competition.” This forecast largely materialized in 2024, marked by sustained tensions stemming from unresolved core issues such as international leadership, trade disputes, chip competition and

overlapping conflicts in key strategic sub-regions. Simultaneously, cooperation persisted as both powers sought to avoid uncalculated escalation, taking into account red lines and broader risks. Washington’s strategy factored in the interests of its European and Asian allies, while Beijing exercised caution over the impact of conflicts on its Belt and Road Initiative, particularly amid escalating international disputes in Europe and the Middle East. This 2024 ASR file analyzes the complexities of the US-Sino conflict in the Indo-Pacific region through four key dimensions. The first examines Beijing’s efforts to counter Taiwan’s increasing separatist tendencies. The second focuses on the reciprocal tactics employed by the United States and China within their ongoing strategic competition. The third explores regional perceptions of China in the strategic calculations of Washington’s allies. Lastly, the fourth identifies the outcomes and trends of this competition anticipated for 2025, particularly in light of Trump’s return to the US presidency.

Beijing’s Moves to Curtail Taiwan’s Growing Separatist Tendencies

The Taiwanese crisis has entered a heightened phase of escalation between

China and Taiwan since the inauguration of the new US-backed Taiwanese president in May 2024. This escalation surpasses the tensions witnessed during the tenure of former President Tsai Ing-wen, despite both leaders being members of the separatist-leaning Democratic Progressive Party. Current developments are marked by intensified political and military confrontations, signaling a significant shift in cross-strait relations.

Taiwan's Growing Separatist Tendencies

Lai Ching-te, through his positions and ideological approach, demonstrates a more pronounced separatist inclination compared to his predecessor Tsai Ing-wen. As a member of a more extreme faction within the Democratic Progressive Party, Lai has openly identified himself on multiple occasions as a “pragmatic worker for Taiwan independence.”⁽⁵⁶⁾ Beijing interpreted the Taiwanese electorate's decision to vote for him as a choice favoring conflict over peace. This separatist stance was evident from the day he assumed office, as reflected in his inauguration speech,⁽⁵⁷⁾ which contained bold assertions of independence. Lai emphasized the lack of a territorial unity basis between China

and Taiwan, rejected any shared identity with the communist values dominant in mainland China, and highlighted the island's embrace of Western democratic values over the past 75 years. According to Lai, the generations that once adhered to communist values in Taiwan have entirely disappeared, solidifying a vision of Taiwan's distinct identity.

The Taiwanese president escalated tensions further in his speech by rejecting the principle of “one China, two systems,” which traditionally frames the relationship between China and Taiwan by ensuring the island's autonomy under China's sovereignty. Instead, he proposed a two-state solution, calling on China to share security responsibilities in the Taiwan Strait as an equal state partner. He went as far as to describe China as an “external power”⁽⁵⁸⁾ seeking to interfere in Taiwan's affairs. Additionally, the president expressed his determination to enhance Taiwan's defense capabilities and strengthen military alliances with democracies to establish deterrence against potential Chinese efforts to annex the island by force. These declarations were complemented by concrete actions aimed at bolstering international recognition of Taiwan, including the 2021 submission of an official request to join the

Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).⁽⁵⁹⁾

China's Movements to Curb Lai

Lai's speech provoked strong reactions from Beijing, which labeled him a “stubborn separatist who will bring war and destruction to the island.”⁽⁶⁰⁾ Chinese authorities viewed his address as an actionable blueprint for achieving Taiwanese independence under his leadership. In response, Beijing significantly escalated its actions throughout 2024, conducting high-profile military maneuvers as punitive measures against Lai's separatist stance. Notably, the Joint Sword-2024 A and B exercises were carried out — first in May, immediately following Lai's inauguration speech, and then in October, just four days after Taiwan formally rejected China's claim to represent the island in international forums during National Day celebrations (see Map 1.1). These actions underscored Beijing's commitment to counter what it perceives as threats to territorial unity and sovereignty.⁽⁶¹⁾

The 2024 maneuvers marked a significant escalation compared to those conducted in 2022 and 2023, with a notably higher risk factor. Unlike previous exercises, China refrained from issuing

warnings to ships and aircraft to avoid the areas of operation,⁽⁶²⁾ heightening the potential for accidents or miscalculations that could have sparked a conflict. For the first time, these maneuvers sought to test the Chinese military's ability to seize control of Taipei, block escape routes for Taiwanese politicians, and prevent US support from reaching the island. This contrasted with earlier exercises, which primarily aimed to simulate Taiwan's complete encirclement and isolation from the international community.

The locations chosen for the 2024 maneuvers underscored their strategic significance, enabling China to assert control over key aspects of Taiwan's infrastructure. The northern region's proximity to command centers, the eastern region's major international shipping ports, and the southwestern region's concentration of container shipping facilities and energy import centers allowed China to showcase its ability to disrupt critical operations. Control of the western region, including the Taiwan Strait, further emphasized its strategic leverage. These maneuvers delivered powerful deterrent signals to Taipei, a direct warning to Lai, and a demonstration of China's military preparedness to act on its threats. They

also served as a cautionary statement to external powers, discouraging interference in the Taiwan Strait.

Beijing also made a rare move by hosting former Taiwanese President Ma Ying-jeou, leader of the Kuomintang party. This party opposes separatist movements and advocates for closer ties with Beijing under the One China principle. This gesture signals China's intention to potentially increase its influence within Taiwan and put pressure on Lai to strengthen relations with the Kuomintang party. Countries that participated in Lai's inauguration, including the United States, were labeled by Beijing as violators of the One China principle. In its response, Beijing used unusually harsh language, including terms like "treason," "shame," "smashing heads" and "shedding blood,"⁽⁶³⁾ indicating the possibility of China resorting to force against the Taiwanese government. These statements point to a new and potentially more dangerous escalation of security tensions in East Asia under Lai's leadership, with expectations that China will continue large-scale military activities around the island to showcase its strength and resolve the conflict in its favor.

Western intelligence estimates that the deadline for the Chinese military to

act on reclaiming Taiwan is 2027, based on a statement from the Chinese president instructing the army to evolve into a highly advanced military force with elevated readiness and combat capabilities by that year. This directive has been interpreted by Western intelligence as preparation for a potential invasion of Taiwan. Just days after the October 2024 maneuver, the Chinese president reiterated, for the second time, his call for the country's forces to be fully prepared for war.⁽⁶⁴⁾

Reciprocal Tactics as Part of US-Sino Strategic Competition

US-China strategic competition centers on international leadership and the power hierarchy within the global system. The United States is committed to maintaining unipolarity under its leadership, striving to preserve its sole hegemony through policies that encircle competing powers. In contrast, China aims to reshape the international system, seeking a new structure that would diminish the United States' sole global dominance. As a result, each country employs tactics and policies aimed at countering the other in pursuit of its respective goals.

US Tactics to Encircle China

These US tactics encompass three main aspects. The first is the United States' efforts to complicate the conflict with China in the Indo-Pacific to deter Beijing from pursuing its international ambitions. In 2024, this was achieved not only by supporting the continued rule of the Democratic Progressive Party in Taiwan but also by backing the hardline separatist wing in the Taiwanese presidency, alongside pledging to maintain military support for the island. Before US Secretary of State Antony Blinken visited Shanghai in April 2024, the Senate passed a law authorizing \$8 billion⁽⁶⁵⁾ in military aid to Taiwan and its allies in the Indo-Pacific. The law also called on Western and Eastern allies to push for Taiwan's participation in international organizations, not merely as an observer, thereby challenging the One China principle.

The second aspect focuses on igniting a trade war by imposing strict measures on specific and strategic Chinese imports to prevent their further penetration into US markets. The goal is to impact the US-Sino trade balance, with both Republicans and Democrats agreeing that China's growing global industrial influence threatens US economic dominance. This concern arises

not only from the risks of economic dependence on Chinese products but also from efforts to curb China's pursuit of global hegemony. The fear is that the world could fall under China's economic control in key industries that directly affect lifestyles across various regions, undermining the economic model established by the United States over many decades. This is particularly evident in the automobile sector, where China has already taken the lead, and its ongoing push to dominate the global electric vehicle market.

The Biden administration has implemented new restrictions on the sale of numerous strategic Chinese products to the US market, significantly raising tariffs by rates ranging from 25% to 100%. These tariffs will be gradually enforced during 2025 and 2026 (see Table 1.1).⁽⁶⁶⁾ Affected items include advanced electronic chips, components used in chip manufacturing, chip manufacturing machines, lithium batteries, key materials in the electric vehicle industry, critical minerals for specialized applications, solar cells, marine cranes and port cranes. For instance, lithium batteries now account for 72% of US imports of such batteries, with the majority being used for the manufacture of electric vehicles.

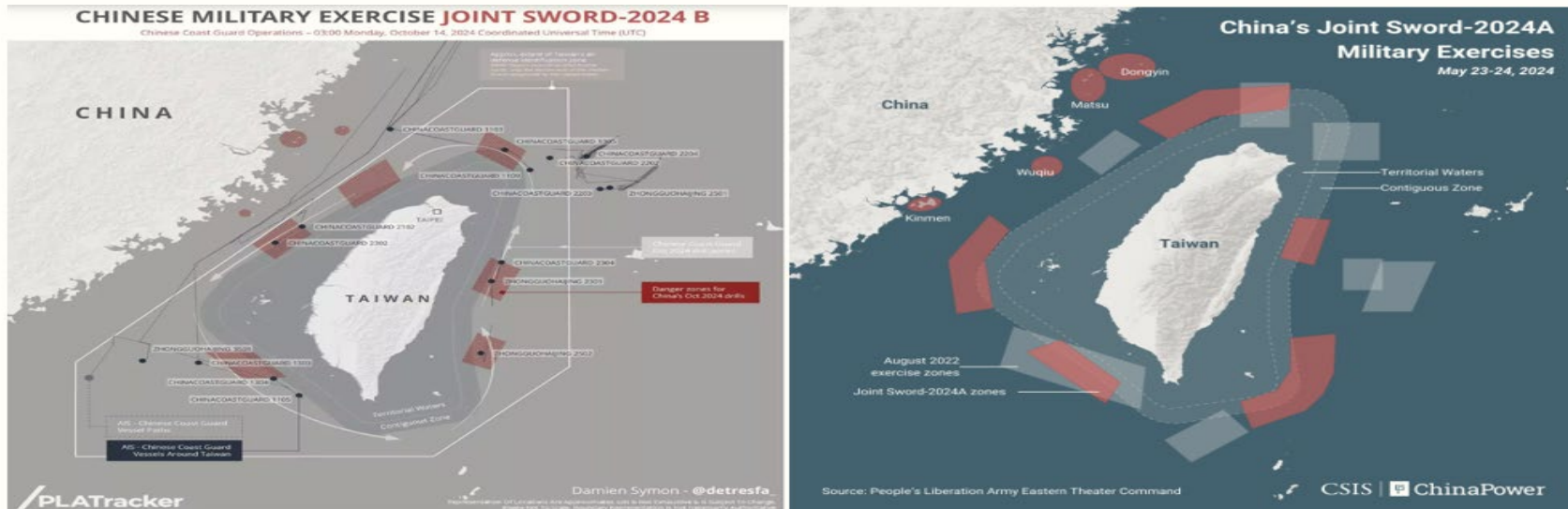
The third aspect involves US accusations that China is providing technological assistance to Russia for use in military industries and equipment necessary for the war with Ukraine, a claim that China has denied. However, the data indicates that the US escalation against China in 2024 was more calculated and less intense compared to previous years, primarily due to the United States' focus on the ongoing conflicts in the Middle East and Ukraine.

Chinese Tactics to Establish International Equilibrium

In response, China has implemented a range of diplomatic, political, military and economic policies and tactics to counter US encirclement strategies. These efforts aim to solidify its position as a regional hegemon and international balancer, while also expanding its global influence to establish a multipolar international system.

Continuing its strategy of undermining the United States in various global arenas, Beijing has aimed to secure diplomatic supremacy by expanding its global presence with the largest number of missions worldwide. It has pursued comprehensive strategic partnership agreements and framed international relations through the concept

Map 1.1: The Geographical Remit of Chinese Military Exercises Joint Sword-2024 A (May 2024) and Joint Sword-2024 B (October 2024)



Source: Center for Strategic and International Studies (CSIS), “Analyzing China’s Escalation After Taiwan President William Lai’s National Day Speech.” *ChinaPower*, accessed December 8, 2024, <https://chinapower.csis.org/china-taiwan-joint-sword-2024b-coast-guard/>.

of partnership. This approach enables China to achieve its foreign policy objectives without resorting to force, offering countries that engage with it greater flexibility compared to their relations with the West. It provides a level of openness to nations worldwide, especially in contrast to the United States, which refuses to engage with countries like Venezuela, Cuba and Syria. China takes a pragmatic, unconditional approach to international relations and has also proposed mediation initiatives to resolve conflicts, such as between Saudi Arabia and Iran. As a result,

China has surpassed the United States to become the leading global diplomatic power, according to the 2024 Global Diplomacy Index report.⁽⁶⁷⁾

China has also made a significant global leap in the space sector, achieving a historic milestone by successfully landing a spacecraft on the dark side of the moon, collecting soil samples and returning them to Earth. This makes China the first country in human history to reach this unexplored side of the moon. This achievement could help scientists address critical questions about the solar system’s history and origin,

the moon’s geological history, volcanic activity, weather forecasting, climate change and the potential locations of lunar mineral resources. The United States has expressed concern over this development, as it threatens to diminish its position as the leading global power in space exploration (for further details on the implications of China’s space breakthrough, refer to the discussion on the subject of non-conventional security in the 2024 ASR.)

In line with its broader objectives, China has ramped up efforts to assert its dominance over the strategic South and

East China Seas, which are vital for its oil imports and significant trade routes. Through a mix of persuasive and coercive tactics, China is seeking to bring these seas under its control, particularly targeting Asian nations allied with Washington that have ongoing territorial disputes with China.⁽¹⁾ This strategy aims to undermine these countries' advanced relations with the United States. By promoting the principle of "Asia for Asians," China seeks to resolve regional conflicts internally while limiting US influence and intervention. In this context, China criticized the United States for congratulating Lai on his victory in the Taiwanese presidential election, viewing this as a violation of the principle of unity. In response, China imposed sanctions on US defense companies and their executives, citing their involvement in arms sales to Taiwan, as part of its strategy to challenge US support for the island.

China has significantly strengthened its presence and influence on the African continent, with the volume of inter-trade reaching \$167 billion in 2024 — \$97 billion in Chinese exports and \$70 billion in African exports, primarily raw materials. China has become one of

Africa's largest trading partners and is on track to become the continent's top trading partner by 2030.⁽⁶⁸⁾ Additionally, China has surpassed the United States in bilateral lending operations to numerous African countries. During the China-Africa Cooperation Forum in 2024, China committed to providing \$50 billion in financial support to Africa over the next three years.⁽⁶⁹⁾ Furthermore, China has overtaken the United States as the foreign power with the most positive influence on African youth. This highlights the growing importance of Africa to China, as evidenced by the Chinese president's five visits to the continent since taking office. In contrast, US presidents Biden and Trump did not visit Africa during their terms, and US leaders have generally met with fewer African leaders at international events.

China supported countries calling for a ceasefire in Gaza, using its veto power to block US resolutions that would prolong the conflict. It criticized Israel's response to Operation Al-Aqsa Flood, viewing it as exceeding the limits of self-defense. China also backed draft resolutions advocating for an immediate ceasefire and a two-state solution. Additionally, it hosted representatives

from both Fatah and Hamas for reconciliation talks and engaged with Arab officials to coordinate efforts for a ceasefire. However, these actions were seen as limited, as China did not participate in certain initiatives, such as the Egyptian-Qatari efforts to end the war. This restraint might reflect concerns about the impact of its involvement on its relations with the United States regarding Indo-Pacific issues, or it could be a recognition that greater US involvement in the conflict might benefit Chinese interests. Additionally, China has economic and strategic ties with Israel, which it seeks to maintain.

China has also continued to bolster its military and economic power, understanding that without a formidable military, it would be vulnerable to threats and unable to pursue its regional and international ambitions. In such a scenario, it would be forced to adopt a defensive strategy instead of an offensive one. As a result, China persists in its efforts to narrow the power gap with the United States across various dimensions:

- **Annual military spending increases:** China's military spending rose by approximately 7.2%, reaching

(1) Such as Indonesia, Malaysia, Singapore, Vietnam, the Philippines, Brunei, Thailand, which are members of ASEAN, South Korea, Japan, India and then Australia.

\$232 billion by 2024,⁽⁷⁰⁾ making it the second-largest spender globally, after the United States. Although the gap remains significant, China's continuous annual increase in military expenditure is a cause for concern in Washington.

■ **Increasing nuclear warhead stockpiles:** China has been steadily expanding its nuclear warhead stockpile, surpassing 500 warheads. Washington projects that by 2030, China will possess around 1,000 nuclear warheads, many of which will be capable of reaching US territory.⁽⁷¹⁾

■ **Competition to Develop the Sixth Generation of Fighters:** In response to the United States' development of the B-21 Raider fighter, capable of establishing air dominance, China unveiled the advanced Baidi fighter in November 2024.⁽⁷²⁾ The Baidi fighter is said to be capable of supersonic atmospheric penetration, equipped with stealth capabilities, enhanced performance and a more powerful engine. Additionally, China unveiled the J-35 stealth fighter, claiming it to be comparable with the American F-35, highlighting China's ambitions to achieve global superiority in the field of advanced fighter jets.

■ **Expanding its network of military bases abroad:** As part of its efforts

Table 1.1: Chinese Products Subject to Tariffs From 2024-2026

Product	Current Tariff	New Suggested Tariff	In Force
Lithium-ion EV batteries	25%	7.5%	2024
Electric vehicles	100%	25%	2024
Medical face masks	25%	7.5%	2024
Electric vehicles lithium-ion EV batteries	25%	7.5%	2024
Solar cells	50%	25%	2024
Steel and aluminum products	25%	7.5%	2024
Syringes and needles	50%	0%	2024
Ship-to-shore cranes	25%	0%	2024
Critical minerals	25%	0%	2024
Semiconductors	50%	25%	2025
Lithium-ion non-EV batteries	25%	7.5%	2026
Rubber medical and surgical gloves	25%	7.5%	2026
Permanent magnet	25%	0%	2026
Natural graphite	25%	0%	2026

Data source: "FACT SHEET: President Biden Takes Action to Protect American Workers and Businesses From China's Unfair Trade Practices," *The White House*, May 14, 2024, accessed January 13, 2025, <https://2u.pw/cXLZMx5b>.

to consolidate influence and safeguard international interests, China is strengthening its military presence abroad. Domestically, it is enhancing

its military presence in the South China Sea by establishing new military headquarters and bases to protect vital sea routes for its economy and control East

Asian passages, through which trillions of dollars in trade pass. This is also part of its preparations to counter any potential Western military intervention related to Taiwan.⁽⁷³⁾ Furthermore, China aims to expand its international military presence, with existing bases in Djibouti and Cambodia, while seeking to establish additional bases in Sri Lanka, Equatorial Guinea, Pakistan, Cameroon and Mauritania.

The intense trade war with the United States has prompted China to activate several of its economic strategies in response to US policies. Beijing has implemented a variety of measures, including imposing tariffs on US imports in retaliation, or devaluing its currency to boost the competitiveness of its exports. For instance, in late 2024, China took steps in anticipation of potential additional tariffs given Trump's possible return to power. Furthermore, China has threatened to sell off US Treasury bonds, leveraging its position as the second-largest creditor of the United States behind Japan. This move could exert financial pressure on Washington and contribute to weakening the value of the US dollar globally. Additionally, China is pursuing long-term strategies to develop advanced technology domestically in an

effort to reduce its reliance on Western imports, particularly those from the United States (for a more detailed analysis of the trade war between the two countries, refer to the economic section within "Global Developments" in the 2024 ASR).

US-Sino Cooperative Competition

Despite the ongoing strategic competition between the United States and China, both countries have maintained a policy of cooperative competition. As part of this approach, Washington sent two high-level envoys to Beijing in an effort to maintain stability. These included the secretary of the treasury and the secretary of state in April 2024, followed by the national security advisor in late August 2024. The discussions covered a range of key issues, including the US position on the Taiwan crisis, US measures concerning Chinese exports, China's stance on the Russia-Ukraine conflict, and concerns raised by Western media about China allegedly supplying advanced technology to Russia for its war effort in Ukraine. In return, a Chinese trade delegation visited Washington in August 2024 to discuss the issue of Chinese exports. During this visit, the Chinese ambassador to Washington

emphasized that cooperation was the only viable path for bilateral relations. Following Trump's electoral victory, the Chinese president expressed his country's willingness to work with the new administration to enhance cooperation and resolve differences amid concerns that Trump might impose further trade restrictions on Chinese exports.

The cooperative competition policy between the United States and China in 2024 aimed to reduce tensions, manage conflict and prevent reckless escalation that could lead to war. The United States, aware of the growing influence of China on the international stage during President Biden's remaining time in office, seeks to avoid an irresponsible escalation that could harm US interests. Washington understands the potential consequences of such an escalation, both for its own position and for China's increasing capabilities, and is unwilling to become embroiled in a third international conflict, alongside the ongoing crises in Ukraine and the Middle East. In contrast, Beijing remains firm on its red lines, which includes the One China principle, its continued rise and the maintenance of its vision for the international order.

The Regional Assessment of China in the Strategic Calculations of Washington's Allies

Two clear indications that some Asian powers allied with Washington have reached an almost complete conviction about the necessity of rapprochement with neighboring China to enhance and protect their interests — especially in light of China's regional superiority and the decline of US hegemony globally — are as follows:

Settling the Sino-Indian Border Dispute

In October 2024, India and China reached an agreement to settle their longstanding border dispute, which had been a source of tension for decades. The border, the longest disputed border in the world, had led to armed clashes in recent years, further deteriorating relations between Beijing and New Delhi.

India has recognized the necessity of adopting a new diplomatic strategy to raise its profile on the global stage. This involves diversifying its international relationships and achieving greater independence in foreign policy, particularly in light of ongoing global transformations and China's emergence as a powerful international force with significant regional and global influence.

India is also keenly observing shifts in the foreign policies of many countries, particularly those once aligned with Washington, as they move to diversify their international options in response to Washington's actions that prioritize US interests. This transformation is also reflected in India's assessment of how many Asian nations are strengthening ties with China, recognizing that China is India's primary trading partner. As a result, India is eager to demonstrate its commitment to safeguarding its national interests, a stance that is likely to enhance the Indian government's popularity and status domestically.

The initial outcomes of the settlement between India and China were evident in October 2024, with a meeting between the Chinese president and Indian prime minister held on the sidelines of the BRICS summit. Both countries agreed to withdraw their forces from disputed areas, signaling their desire to reduce the potential for military escalation along their border. Both leaders also expressed a mutual interest in strengthening economic and investment relations. As a result, New Delhi is expected to ease and reconsider the trade restrictions it had imposed on Chinese exports. There is likely to be greater joint coordination in the context

of international conflicts, and China is anticipated to increase its investments in India, particularly in solar panels and electric batteries. However, India is unlikely to back down from its competitive stance with China concerning regional and international influence, and will continue its efforts to counter China's rising power. Despite these developments, the settlement is not expected to have a significant impact on US-India relations, which have strengthened in recent years, particularly with US support for India as a counterbalance to China. Geopolitical competition, especially China's growing naval presence in the Indo-Pacific and the strengthening of China-Pakistan ties, could also limit the extent to which relations between India and China evolve.

The Trilateral Sino-South Korean-Japanese Summit

In May 2024, the South Korean capital hosted a tripartite summit between China, South Korea and Japan, the first of its kind in about five years. The summit aimed to alleviate escalating tensions in a region that has become a global economic hub, and to maintain communication channels that preserve the strategic interests of the three nations. These countries are influential

economic powers that are central to the global economic system, and the summit was an effort to avoid polarization and the formation of international blocs. The final statement from the summit⁽⁷⁴⁾ emphasized the importance of common interests. Both South Korea and Japan particularly focused on the need to reduce tensions with China, which has been rising in prominence on the international stage. This reflects a clear desire from both countries to move away from the traditional policy of purely aligning with the United States, in order to better secure their own national interests.

It seems that both Japan and South Korea have come to recognize the importance of recalibrating their approaches toward China, given its growing influence in both regional and international systems. This shift in perspective might be influenced by their awareness of the significance of Chinese concerns regarding the increasing cooperation between the United States, Japan and South Korea. Beijing has repeatedly warned about the potential consequences this cooperation could have on the strategic interests of Asian countries, particularly as it is wary of US moves to challenge its dominant position in East Asia. Moreover, Japan

and South Korea likely understand the heightened Chinese frustration following the 2023 tripartite US-South Korea-Japan summit, where a new phase of defense cooperation was announced. At that summit, Beijing was criticized for its actions in the South China Sea, which were described as dangerous and aggressive. The statement also held China responsible for escalating tensions in the Taiwan Strait, citing Beijing's attempts to alter the status quo by force.

Tokyo and Seoul are increasingly aware of China's growing influence over global affairs, driven by its expanding global capabilities. With the second-largest economy in the world, following the United States, and the second-highest military spending, China is making strides to reduce the power gap between itself and the United States. This realization is prompting Japan and South Korea to reconsider their positions. Furthermore, both countries recognize China's significant leverage over North Korea, which poses an ongoing threat to them. Given that China is North Korea's most significant strategic ally, Beijing can influence North Korea's actions toward South Korea and Japan. By managing its relationship with Pyongyang, China can play a crucial role

in containing North Korea and easing tensions in the Korean Peninsula.

The above highlights the growing recognition among Washington's allies that China has emerged as a major player in the Indo-Pacific region and is steadily establishing itself as a regional hegemon with the ability to influence both regional and global affairs. This shift signals that these countries may be reconsidering their strategies toward China, suggesting the world is transitioning away from the era of unipolarity dominated by the United States and moving toward a multipolar or even bipolar world. More specifically, this reflects the decline of US hegemony on the global stage.

Conclusion: The Impact of Trump's Victory on US-Sino Competition in the Indo-Pacific in 2025

Based on developments in 2024, several conclusions and predictions can be drawn regarding trends in US-Sino competition for 2025. Notably, Washington has diversified its strategies to encircle China in the Indo-Pacific, aiming to complicate Beijing's path and deter its global ambitions. Alongside intensifying the trade war and reinforcing alliances with Asian powers, Washington has seen the rise of a more hardline,

separatist leadership in Taipei, which could weaken China and entangle it in a protracted and draining conflict. This approach to encircle China aims to limit its momentum toward international leadership. However, the United States has also acknowledged that provocations, such as high-profile visits to Taiwan by US officials, have not succeeded in drawing China into a direct conflict. At the same time, some of its Asian allies are reassessing their policies, prioritizing their economic and strategic interests with China over their alignment with Washington.

China, in response to US strategies, has pursued a dual role, acting as a regional hegemon and international balancer. In this context, China adopted assertive measures and achieved notable successes in 2024. It escalated its stance against Taiwan, staging military exercises that simulated seizing control and employing sharp rhetoric to signal growing impatience with Taipei. Beijing also claimed victories in its competition with Washington across various domains: it demonstrated diplomatic prowess on the global stage, achieved milestones in space exploration, emerged as the foreign power with the most positive influence in Africa, and aligned itself with calls for ending

the war in Gaza. Additionally, China has bolstered its material capabilities to advance its ambitions to achieve global military preeminence. Despite the mutual escalation in tactics, both the United States and China maintained a policy of cooperative competition in 2024, striving to avoid catastrophic escalation and keep their rivalry from spiraling out of control. This approach underscores their shared understanding of the severe consequences that an unrestrained conflict could bring.

Looking ahead to 2025, US-Sino rivalry is likely to intensify, particularly in the wake of Trump's return to the presidency. Trump's ideological approach, marked by an uncompromising and combative political outlook which propagates right-wing populism, suggests the potential for heightened tensions with Beijing. However, this escalation is expected to be measured, reflecting a calculated strategy aligned with his stated intention to address ongoing global conflicts. The anticipated intensification of the US-Sino conflict is supported by several considerations. First, Trump's administration is likely to adopt a tougher stance on issues where US and Chinese interests clash, including trade, technology, Taiwan and the Indo-Pacific. Second, his historical

emphasis on "America First" policies may lead to stronger efforts to counter China's global ambitions. Third, the geopolitical dynamics of 2024, marked by increased US encirclement strategies and China's assertive regional behavior, may set the stage for an escalated yet strategic confrontation under the Trump administration which is reinforced by the following considerations:

■ **The significance of China in Trump's doctrine:** According to Trump's perspective, China represents the most significant competitor to the United States in the quest for global leadership. He perceives China as a revisionist power determined to reshape the existing international order, equipped with the necessary tools and capabilities to challenge US dominance. This contrasts with his view of Russia, which, while sharing similar goals with China, lacks the means to compete internationally. Trump considers Russia less of a global competitor and more of a security threat to European allies.

■ **Trump's first-term approach to Beijing:** During his initial presidency, Trump adopted an aggressive stance toward China. This included launching a trade war targeting Chinese imports, accusing Beijing of espionage against the United States, and blaming it for the

spread of COVID-19, which he controversially labeled the “China virus.” His administration also imposed multiple rounds of sanctions on Chinese companies, reinforcing his confrontational approach.

■ **Economic confrontation through tariffs and investment restrictions:** Trump has pledged to significantly escalate economic measures against China, including imposing new tariffs of 60% or more on Chinese imports, a sharp increase from the previous rates of 10% to 25%. He has also proposed phasing out Chinese imports entirely, intensifying efforts to curb alleged Chinese espionage, and imposing stricter investment restrictions. These measures aim to ensure that US capital does not contribute to China’s rise, thereby reinforcing the United States’ position as the global industry leader.

■ **Trump’s hawkish administration:** Trump’s new administration is expected to include key figures known for their hardline stances on China. His nominees for treasury secretary, secretary of state and national security advisor are all aligned with his confrontational approach. Additionally, he is likely to appoint prominent anti-China hawks to pivotal roles such as Defense Secretary nominee Pete Hegseth,

Treasury Secretary nominee Scott Bessent, Secretary of State nominee Marco Rubio and National Security Adviser nominee Michael Waltz. It is also expected that Mike Pompeo, the former secretary of state, and Robert Lighthizer, who played a critical role in trade negotiations during Trump’s first term, will assume prominent roles in the new administration. Beijing views these individuals as adversaries, signaling that the upcoming administration will present significant challenges to China’s aspirations.

The likelihood of heightened economic conflict between Washington and Beijing is expected to grow during Trump’s second presidency. His administration is anticipated to diverge significantly from the Biden administration’s policy of cooperative competition with China, favoring instead a more confrontational stance. This shift could have profound implications for the global economy and security landscape, both of which are already under strain due to ongoing international conflicts. As a result, US-Sino relations are likely to enter a new phase of tension, with key contentious issues expected to include the following:

■ **Trade and chips:** Under Trump’s second presidency, tensions surrounding

the chip industry are anticipated to intensify significantly, marking a departure from the Biden administration’s cooperative competition approach. While the Biden administration undertook escalatory measures within a framework of maintaining communication, Trump’s administration is expected to adopt a more aggressive stance.

Given the strategic importance of chips for future international power, Trump is likely to implement tighter restrictions on Chinese technology companies, particularly in the chip and AI sectors. His administration may also target Chinese technological firms with severe sanctions, potentially crippling their operations. Moreover, Trump’s administration may pressure US allies who appear overly reliant on Chinese technology. This could include measures similar to those taken during the Biden administration, which pressured Japan and the Netherlands to join efforts to restrict the sale of critical chip-manufacturing equipment to China.

■ **The Taiwanese crisis:** The United States’ approach to Taiwan is expected to remain consistent, with little room for Trump to implement significant changes. While his campaign rhetoric included statements casting doubt on the extent of his commitment to

supporting Taipei — such as suggesting that Taiwan should “pay the price” for US protection — his administration will likely face constraints in altering long-standing US policy. Trump’s remarks may signal a transactional perspective on the US-Taiwan relationship, emphasizing cost-sharing or economic contributions. However, the strategic importance of Taiwan in counterbalancing China’s influence in the Indo-Pacific region makes it improbable for his administration to reduce support substantially. This support is expected to continue through military sales, diplomatic engagements and participation in regional alliances aimed at maintaining the status quo in the Taiwan Strait.

■ **Security in the Indo-Pacific:** Trump is expected to intensify security cooperation with allied Asian powers as part of efforts to contain China. This strategy will likely involve bolstering the US military and diplomatic presence in the Indo-Pacific region, which he views as a critical arena for shaping the future international order. Such moves are anticipated to significantly exacerbate geopolitical tensions in terms of US-Sino relations, as Trump perceives Beijing’s actions in the South China Sea as increasingly aggressive and necessitating a firm response.

■ **Disputes over global leadership:** In his second term, Trump is expected to significantly escalate his confrontational stance against China and other revisionist powers, driven by his “America First” slogan and his commitment to preserving US hegemony. His administration will likely continue to oppose efforts by China and other rising powers to reshape the global order, particularly those advocating for a multipolar system that would reduce US dominance. To assert US leadership, Trump is expected to maintain an obdurate stance on confronting China’s ambitions in the Indo-Pacific and beyond. This includes strengthening and activating military alliances that the United States has cultivated in the region, such as the Quad (comprising the United States, India, Japan and Australia) and AUKUS (the trilateral security pact between Australia, the UK, and the United States).

On the other hand, China has global pressure cards that pose challenges to Trump, perhaps limiting his negative momentum against China and forcing him to accept approaches and understandings to protect US interests. China’s pressure cards include its efforts to reduce the value of its currency in exchange for the rise in the price of the US dollar, which would boost Chinese

exports globally, and its ability to sell US Treasury bills, which would weaken the US dollar globally, as well as its ability to deal in kind by imposing restrictions on exports of raw materials that Washington needs for its strategic technologies, and exerting more pressure and escalation against Taipei. China also realizes that Trump may need it to talk to Russia in order to end the Russia-Ukraine war, and China can also exploit potential US-European disputes resulting from Trump’s policy, as China is not a middle power that can be easily besieged, but rather an international pole seeking to transfer power so that it becomes the first regional and global power by 2049, the centenary of the founding of the People’s Republic of China.

To conclude, it appears that the trend will lean toward increased US escalation against China, particularly since Trump sees himself as a pivotal figure in history following the Republican Party’s success in reclaiming the presidency and securing a majority in the Senate, which facilitates the implementation of his anti-China agenda. There is also widespread agreement among Republicans about the gravity of the Chinese threat to US global dominance, given the steady growth of China’s economy, which is now competing with the

US economy not just globally but also within the United States. This view is bolstered by a dominant US perspective that sees China as the next superpower poised to control the international system in the near future, hence, both Republicans and Democrats consider China as a significant challenger and threat to the United States' global standing.

The Russia-Ukraine Conflict: A War of Attrition

The 2023 ASR followed the developments of the Russia-Ukraine war and its repercussions on the parties to the conflict. It started with the failure of the Ukrainian counterattack, which was the most prominent event of that year, and its repercussions on the war by presenting an analysis of the military scene after two years of fighting and the cost of continuing the war for both parties to the conflict. It then moved on to the repercussions of NATO expansion on European stability, highlighting the danger of direct confrontation, the economic repercussions of the Russia-Ukraine war on Europe and Russian “soft” tools to destabilize Europe. The report also examined Germany's issuance of its first national security strategy, which revealed a new approach and an effort to rebuild hard power

that was the subject of internal debate. The report concluded with a presentation of the trajectories of the conflict in Ukraine and its effects, especially after the events of October 7 in Palestine, which were in their early stages, and the two parties sought to employ the conflict in ways that served their interests. The 2024 ASR continues to track the developments of the Russia-Ukraine war.

The 2024 ASR provides a nuanced analysis of the most salient developments in the Russia-Ukraine war, discussing Russian gains from the war in Ukraine following the Gaza war, fluctuations in Western aid to Ukraine and the impact of this on the ongoing conflict, the motives behind Ukraine's advancement into Russian territories (the Kursk region); and the impact of the US election on transatlantic relations. Finally, it concludes with an overview of the 2025 trends of the Russia-Ukraine war in light of international developments; mainly Trump returning to power and the engagement of North Korea in the conflict.

Russian Successes in Ukraine and the Impact of the Gaza War

Russia was shocked in 2022 by the failure of the “special military operation” to achieve its goals. Ukraine was able to repel the military attack in a way that surprised even its Western allies, and also took the initiative to regain some of the territories occupied by Russia, which bolstered Western support for the country. In 2023, Ukraine began preparing for a counterattack to regain control of all its territories, but Russia overcame the shock and was able to repel the counterattack, beginning a slow and gradual process of occupying more land in eastern Ukraine. This occurred after Moscow reviewed its military strategy and then focused its military operations on the eastern region while targeting infrastructure deep inside Ukraine. Russia was aided by many developments, perhaps the most important of which was the slowdown in Western military support for Ukraine after the failure of the counterattack and the rise of voices opposing such support within Europe and the United States. The Israeli war on Gaza also removed some of the burdens from Russia in its war on Ukraine; it opened a new front for the United States, which became preoccupied with the situation in the Middle East, especially after the expansion of

the confrontation to Hezbollah and then Iran.

On the ground, Russia is advancing continuously in eastern Ukraine, albeit slowly. After more than two and a half years since the outbreak of the war between Moscow and Kyiv, Ukraine is retreating from the battlefronts, especially on the eastern front in Donbas, where Russia announces almost daily the control of additional towns.⁽⁷⁵⁾ The Russian army began the year 2024 by seizing the city of Avdiivka in mid-February, marking its biggest victory since the capture of Bakhmut in May 2023.⁽⁷⁶⁾ In early May, Russian forces crossed the international border north of Kharkiv, the second-largest city in Ukraine. This Russian advance came at the end of a four-month period during which the United States did not supply Ukraine with weapons due to a stalemate in the US Congress.⁽⁷⁷⁾ The Russian army has achieved some qualitative leaps on the battlefield. According to data from the American Institute for the Study of War, about 200 square kilometers of territory was captured in eastern Ukraine in July, mostly in the Donetsk region. This was more than twice the advance made by Russian forces in May, when they captured 449 square kilometers (14.5 square kilometers per day)

at the start of the new Russian offensive in the Kharkiv region, which has since stalled.⁽⁷⁸⁾ In October, 478 square kilometers of Ukrainian territory was captured, a record since the first weeks of the war in March 2022.⁽⁷⁹⁾

Fluctuations in Western Support for Ukraine and Opportunities to Establish a New Equation in the Conflict

Western countries hesitated to support Ukraine at the end of 2023 and the beginning of 2024, particularly the United States, which provides the largest share of aid. This hesitation arose from domestic divisions over the feasibility of continued support considering the failure of the Ukrainian counterattack, economic crises faced by supporting countries, and the issue becoming a contentious electoral card during the US presidential election. During this period, Ukraine faced significant challenges, including shortages of ammunition, air defense missiles and trained forces, all amidst increasing losses on the battlefield. These challenges were reflected during military operations on the eastern front, prompting Ukrainian officials, most notably President Volodymyr Zelenskyy, to warn that his

country “will lose the war” if the US Congress failed to approve military aid.⁽⁸⁰⁾

Because of the new situation, Ukrainian forces were forced to withdraw from some areas to more defensible lines. Although European support continued, it was insufficient to compensate for the decline in US support. European governments faced similar pressures to those experienced by the US administration, particularly from left- and right-wing political factions. While Congress eventually approved the aid package after months of debate on April 20, 2024, the consequences of the delay persisted at various levels. Abundant cluster munitions from US stockpiles reached Ukraine less than a week after the Biden administration decided to send them, but other equipment, such as M1 Abrams tanks and certain air defense system missiles, took longer to arrive.⁽⁸¹⁾

Later, Western support for Ukraine saw a breakthrough. Alongside continued European support and the resumption of US aid, the leaders of the G7 countries reached an agreement in June to use the interest generated from frozen Russian assets in their financial institutions to guarantee a \$50 billion loan to Ukraine. The agreement

was officially concluded on October 26, 2024, with disbursements set to begin by the end of the year. This loan is guaranteed by future interest from frozen Russian assets amounting to 300 billion euros, which generate revenues of up to 3 billion euros annually.⁽⁸²⁾

The continuation of Western political, financial and military support — despite fluctuations — did not fully address some of Ukraine’s key demands, which remain largely unattainable due to the risk of escalating the conflict into a direct military confrontation between Russia and the United States, with the potential for world war. Such demands include Ukraine’s accession to NATO and the EU and the deployment of NATO forces in Ukraine. Similarly, the demand to lift the ban on using Western weapons to strike deep inside Russia was consistently rejected until Trump won the US election. Following Trump’s victory, the Biden administration allowed the Ukrainian army to strike deep into Russia with missiles, prompting many European countries to adopt similar policies. This shift was in response to Russia’s use of forces from North Korea in the war, which led Russia to amend its nuclear doctrine and deploy new hypersonic missiles, known as Oreshnik, to strike central Ukraine.

Motives and Impact of the Ukrainian Incursion Into Russia’s Kursk Region

Ukraine surprised its Western allies for the second time by launching an attack on the Russian Kursk region on August 6, during which it occupied parts of the province estimated at more than 1,000 square kilometers, including nearly 100 towns. More importantly, the Ukrainian army was able to establish control over the region, as Russian attempts to repel and then expel Ukrainian forces from its territory failed. Kyiv achieved many goals through this attack, which can be summarized as follows:

- The Ukrainian army dealt a strong symbolic blow to Putin as this was the first time since World War II that a foreign force had launched an attack on Russian territory and managed to retain it. This undermined the image of President Putin as the leader of a great power that he seeks to etch in the minds of the Russian people.
- The Russian army failed to anticipate the attack and the fragility of its defensive positions exposed its weaknesses and recurring strategic errors. The Ukrainian incursion delivered a significant blow to the Russian military, undermining its ability to achieve major military successes commensurate with its size. Conversely, the Ukrainian

army regained some confidence in its capabilities after suffering successive setbacks since the failure of its counter-offensive.

- By occupying Russian territory using Western weapons, Ukraine tested the credibility of Russia’s oft-repeated threats. The lack of a response matching Russia’s rhetoric about crossing “red lines” encouraged Western allies to permit the use of their weapons to strike deep into Russian territory. This escalation paved the way for further escalatory steps by Ukraine and its allies.
- The attack restored faith in Ukraine’s relationship with its Western backers, particularly after the failure of its counteroffensive to reclaim Russian-occupied territories in the east. This success encouraged Western powers to continue their financial and military support for Ukraine, enabling it to sustain its defense and exhaust Russia to push it toward the negotiating table.
- By occupying Russian territory, Kyiv gained a bargaining chip for any future negotiations to end the war. A “land-for-land” framework could provide a fair basis for a settlement, instead of Ukraine having to surrender parts of its sovereignty in exchange for Russia halting the war and ceasing further territorial expansion.

On the other hand, the attack failed to achieve one of its most important goals: relieving pressure on Ukrainian defenses and halting the advance of the Russian army in eastern Ukraine by forcing it to redeploy forces inland. Instead, Russian forces continued their offensive operations and maintained steady progress.

Additionally, holding the occupied parts of the Kursk region for an extended period could become a burden on the Ukrainian army. At some point, Ukraine might be forced to abandon these areas to reinforce other advances or support them with additional forces. This could lead to greater defensive vulnerabilities and, consequently, the loss of strategic sites in eastern Ukraine, especially given the significant power disparity favoring Russia and the uncertainty surrounding the future of Western support for Kyiv. This uncertainty is particularly pronounced with the arrival of Trump, who does not support the continuation of the war.

Transatlantic Relations After the US Presidential Election

The differences between US President Trump and European leaders mainly revolve around economic considerations, with Trump believing that

the United States is at a disadvantage. Washington bears a large financial burden within NATO, whose primary mission is the security of Europe, in exchange for a smaller financial contribution from European partners. As a result, European governments allocate the largest proportion of their budgets to economic sectors and a smaller proportion to defense, which contributes to the development of their economies. This, in turn, tips the scales in trade with the United States. Accordingly, Trump worked during his first term to change this equation by pushing European countries to contribute more to NATO and allocate a larger proportion of their budgets to the defense sector. He intends to continue along the same path. Regarding trade relations, he also appears intent on raising customs duties on European products to adjust the trade balance between the two parties.

Most European countries reject Trump's policies and had significant disagreements with him during his first term. Consequently, they are seeking to intensify proactive efforts to unify their policies in dealing with Trump. Indications of this were evident at the European Political Group summit held in Hungary on the eve of Trump's victory announcement, where French

President Emmanuel Macron said, "Europeans must not forever delegate their security to the Americans." European powers will work to minimize the negative repercussions of Trump's policies on them, whether in terms of trade relations or NATO funding. They have already demonstrated this approach in their dealings with Russia, which sought to use gas to undermine European support for Ukraine. European plans have proven effective in managing the energy issue by reducing consumption and seeking new alternatives.⁽⁸³⁾ This experience will likely encourage Europe to continue with its aim of strategic autonomy from the United States, especially in the context of security, even though this will be extremely difficult to achieve. Europe will also face direct harm from Trump's trade measures if tariffs are imposed on its goods exported to the United States, which are expected to range between 10% and 20%. Indirectly, Europe could be affected if tariffs as high as 60% are imposed on Chinese goods, as excluding China from the US market would redirect it toward European markets, making them vulnerable to oversupply caused by surplus Chinese manufacturing capacity.⁽⁸⁴⁾ There is also concern in Europe about the potential failure of a unified

collective strategy. Some European countries, such as Italy and Hungary, which perceive themselves as having a special relationship with Trump, may seek to strike unilateral deals, undermining the cohesion of the EU.⁽⁸⁵⁾

There is a strong conviction in Europe that Trump will follow through on his policies, however, the main concern is about the extent to which he will go to implement his policies. These policies are expected to have significant impacts on the structure of the international system, in which transatlantic relations constitute an important part. Transatlantic relations will likely experience turbulence if the United States enters a confrontation with China that would necessitate coordination with Europe, in this context, Europe may hesitate to respond to Trump's demands.

Conclusion: Trajectories of the Russia-Ukraine Conflict Considering International Developments

The trajectories of the Russia-Ukraine conflict depend on the direction that new developments may take on the military front, as well as international and regional circumstances. In addition, key factors include the extent to which Trump adheres to the positions he outlined during his election campaign

— particularly his stance on the Russia-Ukraine war, his economic relations with Europe, his position on NATO, and the repercussions of all these factors on Western support for Ukraine. Finally, Russian behavior and the new dimensions of the war, particularly after North Korea's involvement alongside Russia and the responses to this, will play a significant role in how the conflict evolves in 2025.

Ukraine's resilience depends largely on continued support from its Western allies. According to the Kiel Institute's Ukraine Support Tracker, estimates based on recent trends in aid allocation suggest that if Western donors maintain their current level of support, total aid in 2025 will reach just over 100 billion euros. However, without new US aid packages — particularly under Trump's presidency and a Republican-controlled Congress — and with the potential reduction of support from some European countries, the total aid to Ukraine could be halved, dropping to approximately 55 billion euros. This reduction could result in a substantial aid deficit for Ukraine starting in 2025.⁽⁸⁶⁾

The most pressing challenge for Ukraine is the shortage of weapons of various types, which European powers may be unable to fully replace if US

supplies decrease. This could disrupt any offensive plans by Ukraine, potentially halting its "victory plan" and forcing it to focus solely on defense, aiming to prevent further advances by the Russian army and maintaining control over the Kursk region for as long as possible.

While sanctions against Russia have not entirely succeeded, they have caused varying degrees of economic trouble for the parties involved, particularly Russia. If the new US president intensifies economic sanctions on Moscow to pressure it into ending the war, the effects on Russia are unlikely to be significant compared to the impact of declining Western support for Ukraine. The involvement of North Korea in the war brings additional complications. Although its participation is more symbolic and political than militarily decisive, it represents an escalation in the conflict and the repercussions could extend globally.

In the context of the battlefield, the entry of North Korean forces has prompted the United States and European powers to escalate against Russia by allowing Kyiv to strike Russian targets with Western weapons. Russia has responded by amending its nuclear doctrine and deploying new hypersonic missiles. At the global level, South Korea

has begun reconsidering its policy of not exporting weapons to countries engaged in war,⁽⁸⁷⁾ announcing the possibility of arming Ukraine with defensive weapons. This marks a departure from Seoul's longstanding policy and could influence Trump's approach to the war, especially if North Korean forces are deployed from Kursk to the frontlines in eastern Ukraine or Ukrainian forces escalate by striking major targets deep within Russia. Such developments could provoke stronger responses from Russia, potentially extending beyond Ukraine's borders.

Ukraine may survive the year 2025 by depending on the remaining US aid approved by the Biden administration and continued European support, which could even increase to compensate for reduced US assistance if Trump sticks to his electoral promise. However, in the medium and long term, other factors will shape the course of the war. Russia is likely to bet on the limitation of Western military and financial support for Ukraine, aiming to exhaust Kyiv by continuing its offensive until it secures control over the eastern region it seeks to annex, expels the Ukrainian army from Kursk, and further destroys Ukraine's infrastructure to force it into submission. The possibility of a broader

confrontation cannot be ruled out, particularly as European powers have allowed Kyiv to use Western weapons to strike deep into Russia. This has escalated the conflict to a new level, displaying characteristics similar to a world war, given that multiple countries are involved and the target is a major country that was once the second pole of the international system during the era of bipolarity.

Global Economic Developments in 2024

The 2023 ASR projected a deceleration in global inflation and interest rate increases, alongside a gradual improvement in economic growth — predictions that materialized over the subsequent year. Concurrently, the 2023 ASR highlighted escalating risks from geopolitical tensions, international conflicts and climate variability, emphasizing their adverse effects on global economic stability and the prices of certain raw materials and metals. It urged precautionary measures to mitigate these risks at both macroeconomic and personnel levels. Some of these risks materialized during the year, as reflected in the 2024 ASR. The 2024 ASR notes shifts in central banks' monetary policies to encourage investments and stimulate sluggish

growth, alongside a marked surge in the prices of gold and certain food items. Strategic rivalries among major powers weighed heavily on global trade, casting doubt on the continued trajectory of commercial globalization, particularly with the resurgence of protectionist policies. This competition extended into emerging domains like artificial AI, bringing both economic opportunities and challenges. Amid a series of global economic crises over the past five years, the report also documents the growing criticism of economics as a discipline. Experts have increasingly called for a reassessment of its frameworks and greater integration with other social sciences to better address complex global challenges.

The 2024 ASR examines the key developments in the global economy and the major issues of 2024, analyzing their future implications in four sections. The first section explores the most significant trends in the global economy for 2024/2025. The second delves into the growth of AI applications, highlighting their economic benefits and anticipated drawbacks, particularly concerning employment. The third focuses on the escalating trade war involving China, the United States and Europe, and its impact on these regions and the global

economy. The final section addresses the emerging critiques of economics, emphasizing the need for development in response to the repeated global economic crises of recent years. The report concludes with an overview of the most prominent future trends.

The Directions of the Global Economy

This section focuses on two key aspects. The first aspect examines the conditions and trends of global inflation, considering recent developments such as declining prices of major global commodities like oil, iron and essential agricultural crops critical to global food security, including wheat and corn, alongside record increases in others like cocoa and coffee, as well as precious commodities like gold and silver. The second aspect analyzes global growth trends in the context of shifts in interest rates and monetary policies in major economies, the rise of potential future risks worldwide, and the influence of geopolitical tensions, escalating protectionist policies and the waning wave of trade globalization, particularly under China's leadership.

Global Inflation Trends and Prices of Basic and Precious Commodities

Global inflation decelerated in 2024, particularly in major Western

economies, compared to the previous two years. The global inflation rate stood at 5.8% in 2024, while the United States, Germany and China recorded rates of 3%, 2.4% and 0.4% respectively. However, several emerging market economies continued to experience rising inflationary pressures, especially in regions like Africa, Central Asia, the Caucasus and South America, where inflation in some cases exceeded 25%.

The easing of global inflation in 2024 was primarily driven by rising interest rates and reduced demand. This was further supported by the diminishing effects of earlier shocks that had significantly fueled inflation over the past two years. These included supply chain disruptions during the COVID-19 pandemic, the surge in global demand following its resolution, and the impact of the Russia-Ukraine war on the prices of food, energy and essential raw materials.

In 2025, a relaxation in monetary tightening and reductions in interest rates are anticipated to sustain the downward trend in global inflation. The International Monetary Fund (IMF) projects global inflation to decrease to 4.3% in 2025, with rates of 2% in advanced economies, 2.7% in emerging Asian markets, and approximately

10.7% in the Middle East and Central Asia (see Map 1.2).

The prices of several key global food security crops declined over the year, including maize (-7%), soybeans (-24%), wheat (-12%), cotton (-15%), and sugar (-8%), driven by good harvests and favorable growing conditions.⁽⁸⁸⁾ In contrast, the prices of cocoa (137%), coffee (100%) and rice surged to record highs, influenced by climate change and trade restrictions between countries.

Gold emerged as the leading global precious commodity in 2024, with its price reaching record levels exceeding \$2,750 per ounce. This surge was driven by strong demand from central banks seeking a safe investment amid declining global interest rates and rising geopolitical tensions. The World Bank predicts that gold prices will stabilize next year after achieving these historic highs (see Table 1.2). However, it is essential to note that gold prices typically rise during periods of heightened geopolitical tensions, sudden global conflicts, crises, or when interest rates and the strength of the dollar decline. Conversely the new US President Trump is expected to focus on strengthening the economy and the US dollar, a trend likely to become evident in the first year of his presidency.

In 2024, natural gas prices increased by 27% compared to the previous year, while Brent crude prices declined by 5%. Brent crude experienced fluctuations, rising to \$92 per barrel early in the year amid escalating conflict in the Middle East, and later dropping to \$68 per barrel in September, marking its lowest level in three years due to slowing global growth, reduced oil consumption, and a production surplus within OPEC+ — OPEC+, consisting of OPEC (Organization of the Petroleum Exporting Countries) members plus other oil-producing countries (see Figure 1.1). Nonetheless, any escalation in global geopolitical tensions could drive oil and gas prices higher in the near future, particularly if stability is not achieved in Syria following the fall of Assad.

If energy prices continue to decline, coupled with weak global industrial activity and low demand for goods, global inflation levels are expected to decrease further in 2025. However, caution is warranted due to the growing risks that could trigger a return to high inflation, such as the escalation of regional conflicts, particularly in the Middle East and the Red Sea, prolonged monetary

tightening, and shifts toward protectionist trade and industrial policies. These developments, especially between the key players in international trade — the United States, China and Europe — raise concerns, particularly with Trump's return to the White House.

Global Economic Growth and Future Risks

Measuring economic growth performance is a key indicator of overall progress in economic development, reflecting the ability to meet growing human needs and improve living standards. The global economy experienced limited growth in 2024, still falling short of pre-pandemic levels. However, it saw the beginning of a shift in monetary policies in major Western economies, led by the US Federal Reserve, which moved toward reducing interest rates in response to more stable inflation. This shift aimed to stimulate modest growth in these economies (see Table 1.3) and encourage investment and employment after two years of high interest rates reaching 5.5%. The IMF projects a GDP growth rate of 3.2% for both 2024 and 2025, with advanced economies seeing a growth of only 1.8%, while emerging

and developing economies are expected to grow at a higher rate of 4.2%. Global growth estimates for the next five years are modest, averaging around 3.1%.

Despite the improvement in global growth compared to the pandemic years, concerns about the future persist across economic circles and institutions. In this regard, the World Economic Forum has identified a range of challenges and risks for the next decade,⁽¹⁾ categorized into short-term risks for 2024 and 2025. These include security, environmental and geopolitical risks such as misinformation, severe climate change, social biases, cyber breaches and armed conflicts. In the longer term, over the next 10 years,⁽⁶⁹⁾ environmental risks are expected to dominate, with key concerns including extreme climate fluctuations, ecosystem changes, loss of biodiversity, and the negative impacts of AI, (as detailed in Table 1.4).

Despite the positive progress in inflation seen in 2024 and anticipated for 2025, the global economy faces rising risks that could threaten its stability. These risks, including escalating geopolitical tensions in the Middle East

(1) The Global Economic Forum, a non-profit international organization that includes the world's largest companies. Its goal is to develop business and economic policies, and holds regular meetings at the Swiss resort of Davos. These meetings typically involve prominent leaders, influencers, and businesspeople from around the world to discuss policies, challenges and economic opportunities.

and Europe, shifts in trade and industrial policies and tightening global financial conditions, make economic growth increasingly fragile. If left unchecked, these factors could trigger a new crisis. To prevent this, countries must work together to resolve armed conflicts, implement measures for environmental sustainability, financial resilience and cybersecurity and remove barriers to smooth international trade. These efforts are crucial for restoring the economic growth levels seen before the COVID-19 pandemic and the Russia-Ukraine war.

Global growth prospects for 2025 are expected to remain weak, with an estimated growth rate of 3.2%. This subdued outlook is largely attributed to concerns about the Chinese economy, which is facing weak domestic consumption, declining exports, stagnation in the real estate market and rising tensions with the United States. Additionally, there is skepticism about the economic recovery of Japan, the EU — especially Germany — and Latin American countries. This pessimism stems from the growing rise in protectionist policies, higher costs and declining global commodity exports as a share of global GDP. There are also

concerns about the decline in commercial globalization, a trend long driven by China and its leadership.

AI Economic Opportunities and Challenges

With the rapid development of technology, AI has become a driving force for change in the global economy and labor market. This technological transformation represents both a challenge and an opportunity, requiring a deep understanding of its positive and negative effects on the future of the labor market in particular, and the economy in general.

Expanding Uses of AI

In the past two years, certain AI platforms,⁽¹⁾ such as the widely known ChatGPT, have gained rapid popularity, particularly in developing economies. Its use has surged in countries like India, Brazil, Russia and across the Middle East, including Morocco, Egypt and Saudi Arabia. Additionally, Western economies, notably the United States and European nations, have seen significant adoption. The primary users are young people aged 18 to 24, who are the most active in engaging with these technologies. The reasons for usage vary by country and culture, ranging from seeking answers to everyday questions or

understanding school assignments, to assisting in learning programming and technological skills.

AI aims to create new outputs by simulating or imitating human behavior across various sectors. This concept is embodied in Generative AI, a form of machine learning that allows AI platforms to produce new content such as images, videos, text and numbers, all based on the data they have been trained on.⁽⁹⁰⁾ The scope of its application is expanding into fields like education, diagnosis, healthcare and science.

The Positive Impact of AI on Employment and the Economy

Some experts consider AI to be the fifth industrial revolution, characterized by the integration of humans, machines and technology to advance the global economy. Within this framework, the potential positive impacts of AI on the economy and employment can be outlined as follows:

- **Boosting productivity:** AI can significantly enhance work efficiency by streamlining processes and reducing human error. In industries, for instance, it facilitates the automation of production lines, ensures higher quality standards and minimizes mistakes.

(1) The IMF defines AI as: one of the fields of computer science that focuses on building systems to simulate human behavior and detect machine intelligence. It encompasses several types of AI, such as Generative AI and others.

- **Stimulating economic growth:** Increased productivity directly translates into economic expansion, driving both local and global GDP growth. A specialized study estimates that AI could contribute to a 26% rise in the GDP of local economies by 2030, potentially adding around \$16 trillion to the global economy.⁽⁹¹⁾

- **Expanding employment opportunities in emerging sectors:** AI fosters the creation of new jobs, such as roles in programming, data analysis, cybersecurity and the maintenance of AI-related systems. Over time, it can also reshape the labor market by redirecting surplus labor into new sectors. A historical parallel can be drawn with the agricultural industry, where advancements like synthetic fertilizers reduced labor needs, eventually shifting workers to service and production sectors.

- **Enhancing financial and investment applications:** AI is revolutionizing financial systems by analyzing vast banking data to improve economic forecasts, monitor risks and predict market trends. It optimizes logistics, supply chains and distribution. In retail, AI has significantly enhanced customer experiences and personalized offerings, boosting global retail sales by over 10% in recent years.⁽⁹²⁾

- **Driving innovation across fields:** AI continues to pioneer applications in areas such as healthcare diagnostics, education, financial services and e-commerce.

In the healthcare industry, AI is projected to generate economic benefits of up to \$150 billion annually by 2026. This substantial gain is attributed to advancements in diagnostic accuracy and significant reductions in healthcare costs.

- **Advancing nuclear energy for power generation:** AI searches demand significantly more energy — about 10 times that of a standard Google search — prompting nuclear energy firms to develop small nuclear reactors capable of producing low-cost, sustainable electricity.⁽⁹³⁾ Companies like Google, Amazon and Microsoft have already signed agreements to source electricity from emerging firms specializing in this innovative energy sector.

- **Addressing future global and human challenges:** AI's rapid vertical growth and escalating financial investments are enabling solutions for pressing challenges. Investments in AI have surged from \$31 billion in 2015 to \$98 billion in 2023,⁽⁹⁴⁾ representing an impressive growth rate of 216%.

AI's Negative Impacts on the Economy

The rapid expansion of AI introduces several challenges with significant economic implications. These challenges extend beyond employment-related issues and encompass broader concerns, including public policy development, market dynamics, critical and creative thinking, the absence of robust ethical and regulatory frameworks and the potential for misuse. The key aspects of these challenges are elaborated upon below:

- **Job shortages in certain sectors:** AI-driven automation is expected to reduce employment opportunities in areas like manufacturing, transportation, distribution chains and other traditional industries. Predictions suggest that around 30% of existing jobs may either change significantly or disappear entirely due to intelligent automation in the coming decades, particularly in manufacturing, basic services and routine employment. However, professions requiring applied skills, like medicine and education, may see AI as a complement rather than a replacement.

- **Manipulation of policies, markets and public opinion:** AI systems can be manipulated by feeding biased or strategic inputs to influence markets for the benefit of particular entities,

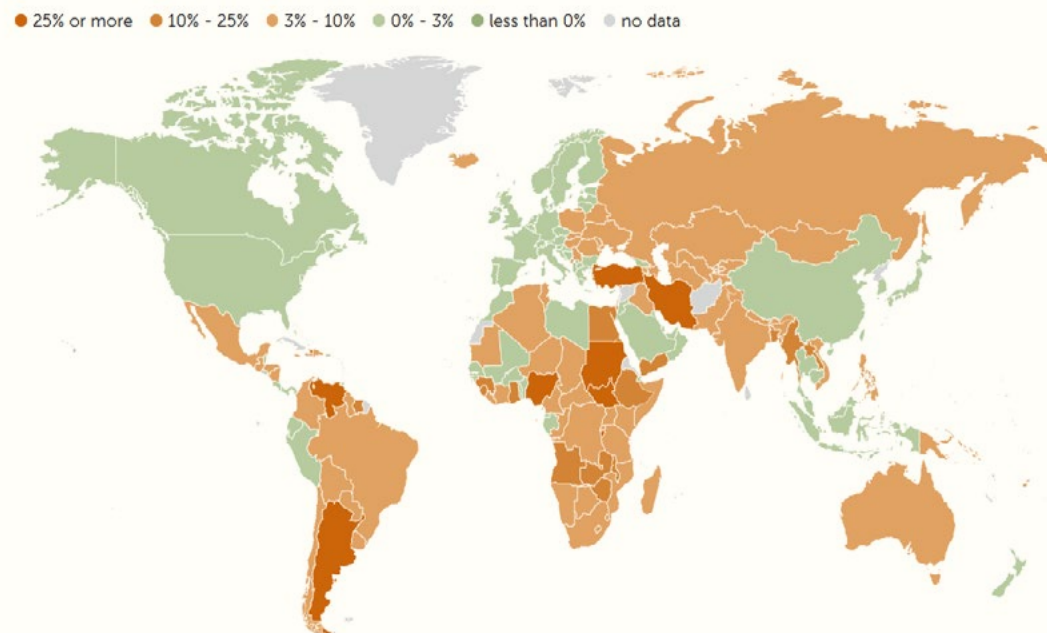
potentially causing financial instability or crises. Politically, AI has already been misused, as seen in a fabricated video depicting the Ukrainian president falsely surrendering to Russian forces, demonstrating its potential to spread disinformation.⁽⁹⁵⁾

- **Erosion of critical and creative thinking:** The overreliance on AI-generated results could diminish human capacity for critical and creative thinking. If AI becomes a primary decision-making tool rather than a supportive aid, this dependency might lead to reduced logical reasoning and analytical skills. Such a shift could negatively affect mental development, human productivity and long-term economic growth.

- **Electronic hallucination and inaccuracy:** AI systems sometime produce incorrect or nonsensical outputs, termed “electronic hallucination,” as they lack true comprehension of the information they generate. This risk is heightened if such outputs are used in critical applications, such as scientific research, without proper verification.

- **Bias and marginalization:** AI can amplify existing biases by relying on incomplete or inaccurate data, leading to skewed outputs that reinforce stereotypes or marginalize certain groups or perspectives. For instance, over 57%

Map 1.2: Expected Annual Inflation Rate Ranges* for Countries for the Year 2025 (From Zero–Above %25)



Source: “World Economic Outlook,” *IMF*, October 2024.
*Annual percentage change in average consumer prices

of the open learning resources used to train AI systems are in English (see Figure 2), with minimal representation of other languages, including Arabic. This linguistic imbalance could result in limited understanding or misrepresentation of non-English-speaking cultures, underscoring the need for more robust and diverse content development.

- **Lack of ethical and regulatory standards:** AI lacks comprehensive ethical, legal and security frameworks that ensure its responsible use and adherence to intellectual property rights. This absence impacts the stability of economic performance and raises concerns about misuse, particularly in military operations, which can lead to catastrophic

consequences. For instance, AI has been employed in military strategies, such as by Israeli forces during the war in Gaza, resulting in indiscriminate killings and the destruction of infrastructure.

Based on the foregoing, AI offers immense potential to transform economies and societies. Its advantages include enhancing productivity, creating new job opportunities, increasing wages in specialized professions and addressing global challenges while driving economic growth. These benefits underscore AI's ability to reshape industries and improve efficiency, making it a pivotal tool for the future. However, the rapid advancement of AI also

comes with significant risks. Automation threatens the survival of traditional professions, potentially displacing large segments of the workforce. Additionally, the absence of robust ethical and regulatory standards raises concerns about its misuse, particularly in areas such as security and intellectual property. AI's current limitations in replicating human creativity, critical thinking, emotional intelligence and interpersonal communication further emphasize its inability to fully replace human capabilities. Looking ahead, there is considerable uncertainty about the trajectory of AI. While it may continue to grow and innovate, its future progress could be

hindered if its risks outweigh its benefits, particularly those with ethical, security and creative implications. Nonetheless, AI represents a transformative opportunity to redefine skills and align jobs with the demands of future economies. To maximize its benefits and mitigate its risks, governments, institutions and individuals must proactively invest in education, training and policy development. These efforts will ensure that AI is leveraged responsibly, benefiting individuals and economies while fostering innovation and progress.

The Trade War Between the West and China and Its Implications

The combined economies of China, the United States and Europe account for roughly 60% of the global economy and around 45% of global trade. As competition intensifies between these major international powers to expand their influence, tensions have increasingly turned into conflicts. Among these, the rivalry between the West and China stands out, taking on multiple dimensions, including geopolitical and military struggles over areas of influence, ideological conflicts aimed at spreading different systems, models and cultures, and notably, economic competition for global dominance. The commercial

Table 1.2: Prices of Precious Commodities and Their Annual Changes (2024-2026) — Dollars per Ounce

Item	2024*	Annual Change	2025**	Annual Change	2026**	Annual Change
Gold	\$2,350	21%	\$2,325	-1.1%	\$2,250	-3.2%
Silver	\$28	19%	\$30	7.1%	\$31	3.3%
Platinum	\$1,000	3.5%	\$1,050	5%	\$1,100	4.8%

*Expected average for 2024: Note that the highest price during the year was \$2,780 per ounce and the lowest price was \$1,975 per ounce.

**Estimates.

Source: World Bank, October 2024.

Figure 1.1: OPEC Oil Barrel Prices in Dollars (2022-2024)

Source: Financial Times.

aspect of this competition will be the central focus of this discussion.

First, there is a brief overview of the nature of the trade war between the West and China, with an emphasis on its most prominent tools. Second, there is an examination of China's reactions and policies in response to the escalating economic conflict. Finally, there is an analysis of the economic effects of this trade war on both parties as well as on the global economy.

China and the West: The Escalation of the Trade War and the Tools Employed
The trade war between the West and China is a battle for control over commerce

and the protection of domestic economies. Both sides impose trade barriers or high customs duties on each other's exports. Western countries seek to limit the spread of low-cost Chinese goods and reduce their competitive impact in their local economies, particularly in strategic sectors. Meanwhile, China is focused on counteracting these measures and minimizing the economic losses it faces.

The trade war between the West and China is unfolding through various dimensions, including the imposition of high customs duties on Chinese exports of goods and technology to Europe (see

Table 4). These duties particularly target sectors like electric cars and their batteries, smartphones, renewable energy technology, and solar panels. Additionally, fees are being levied on Chinese consumer products sold online. Western countries are also working to limit China's access to critical resources such as rare metals, semiconductors, aircraft, and artificial intelligence technologies.⁽⁹⁶⁾ Moreover, there are efforts to impose restrictions on Chinese investment and competition in global markets.

In 2018, the trade conflict between the United States and China intensified, with the Trump administration imposing tariffs on Chinese aluminum and steel imports ranging from 10% to 25%. In response, China imposed tariffs ranging from 5% to 25% on \$34 billion⁽⁹⁷⁾ worth of US exports to China. Subsequently, the United States, under the Biden administration, restricted the export of technological products and semiconductors to China and imposed a 50% tariff on them. China is one of the largest trading partners of the United States, with their trade volume reaching \$690 billion in 2023, including nearly \$500 billion⁽⁹⁸⁾ in Chinese exports to the United States. This means that more than 70% of the bilateral trade volume is in China's favor, rendering it

Table 1.3: Estimates of Global Real GDP Growth for the Years 2024 and 2025

State	Estimated real GDP growth for 2024 (%)	Expected real GDP growth for 2025 (%)
The US	2.9	2.8
China	4.8	4.5
Japan	0.3	1.1
Germany	0.0	0.8
The UK	1.1	1.5
France	1.1	1.1
Italy	0.7	0.8
India	7	6.5
Brazil	3	2.2
Saudi Arabia	1.5	4.6
Türkiye	3	2.7
Egypt	2.7	4.1
Rising markets and emerging economies	4.2	4.2
Advanced economies	1.8	1.8
Average global GDP	3.2	3.2

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Source: "World Economic Outlook," *IMF*.

significantly impacted by the US tariffs on its exports to the US market.

The trade conflict then spread to European countries in what is known as

the "butterfly effect," particularly since 2021. The EU focused on reducing reliance on Chinese electric vehicles and clean energy items. As a result, the EU

decided in October 2024 to significantly increase customs duties on electric cars manufactured in China, reaching 45.3%. Notably, China is Europe's second-largest trading partner after the ASEAN countries, with trade volumes reaching \$856 billion in 2022 and \$739 billion in 2023.

China's Reactions and Potential Policies

- **Retaliation:** China occasionally responds in kind by imposing similar tariffs on US and European products, such as on European electric cars, or by reducing imports of certain US goods, like agricultural products.

- **Conservatism and a calculated approach:** In some cases, China adopts a conservative and calculated approach to the economic war, preferring to avoid broadening confrontations and targeting specific entities rather than employing blanket measures. For example, instead of directly responding to the EU, China has focused its measures on specific countries within the EU, such as France, which takes a firmer stance toward China.⁽⁹⁹⁾ China may also resort to threatening to impose tariffs on key exports to the West or leverage its vast dollar reserves from US Treasury bonds

Table 1.4: 10 Risks Facing the Global Economy Within 2-10 Years Ranked by Importance

Risks for the Next 2 Years	Risks for the Coming Decade
Misinformation and disinformation	Extreme climate changes
Extreme climate changes	Radical change in ecological systems
Social polarization	Lack of biodiversity and collapse of the ecosystem
Lack of cybersecurity	Decrease in natural resources
Armed conflict among nations	Misinformation and disinformation
Decrease in economic opportunities	Negative outcomes of AI
Inflation	Forced migration
Forced migration	Lack of cybersecurity
Economic recession	Social polarization
Pollution	Pollution

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Data source: “Global Risks Report 2024,” *World Economic Forum*, January 10, 2024, accessed January 13, 2025, <https://bit.ly/49y1xpC>.

as a potential tool for economic pressure on the United States.

- **Alternative policies:** China pursues alternative confrontational policies, promoting domestic production and investing in research and development in advanced technology and innovation. This aims to reduce its reliance on importing such products from the United

States and Europe. Chinese policies like “Made in China 2025” have been announced to aid this goal, alongside initiatives to enhance the efficiency and independence of China’s supply chains.⁽¹⁰⁰⁾

- **Strengthening economic alliances and new financial systems:** China is working to strengthen economic alliances and promote new financial

systems in cooperation with Russia. The country is also expanding the BRICS bloc and the SCO to pressure the United States and Europe. This includes efforts to create payment systems that compete with the US dollar-based global financial system and Belgium cooperative SWIFT, establish free trade zones, penetrate new markets, and boost commercial and investment engagement across Asia, the Caucasus and Africa.

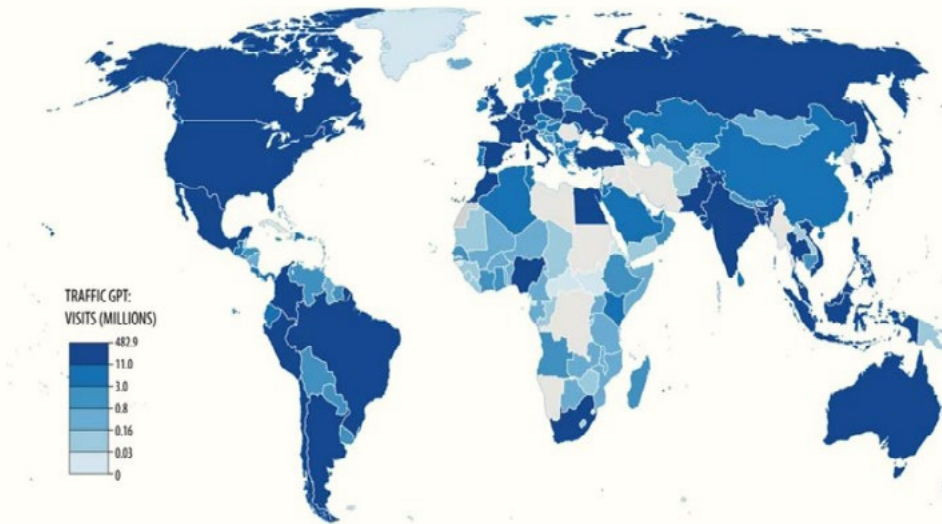
Future Economic Impacts of the Dispute Between the Two Sides

After congratulating Trump on his presidential victory, China promptly reminded the new US president of the risks associated with escalating the trade war for both parties and the world as a whole. The Chinese Foreign Ministry’s statement⁽¹⁰¹⁾ emphasized that, “There will be no winner in a trade war between China and the United States, which will not serve the world either.” In fact, the continuation of this conflict is expected to have various future economic impacts on China, the United States, Europe and the world, most of which are negative, as explained below.

China

The escalation of the economic war with the United States and Europe will

Map 1.3: Global Usage of ChatGPT Based on the Number of Visits in Millions up to March 2024



Source: World Bank.

impose serious challenges on China, the most significant of which are:

- Disruption of its supply chains, necessitating the relocation of some of its companies to Southeast Asian countries like Thailand and Vietnam or to Eastern European countries and Türkiye to bypass Western tariffs on Chinese exports.
- An increase in the cost of importing Western components if China decides to retaliate.

- The loss of job opportunities and the benefits of low-cost production within China.
- Higher production costs, leading to increased prices for finished products.
- Loss of market share for Chinese exports.
- These challenges may speed up China's development of domestic industries to replace imported Western goods, thereby increasing its influence in alternative markets.

The United States and Europe

For the United States and Europe, there are several benefits and challenges, the most significant of which are:

- The opportunity to support emerging industries and Western technology that face strong competition from Chinese exports, particularly in the automotive and solar energy sectors.
- The creation of new job opportunities and stimulation of growth.
- The acceleration of the Western goal to reduce dependence on China, diversify supply chains, and increase influence in Asian and European markets.
- On the downside, there is a high cost that Western economies will bear due to the escalation with China, especially the increase in inflationary pressures on the US and European economies, potentially leading to sustained inflation that may force central banks to raise interest rates again, negatively impacting investment and economic growth.
- Western economies will also suffer from the decline in their industrial exports to China due to reciprocal measures, particularly the United States, Germany and France.
- China's use of its holdings in US bonds as leverage to exert pressure and

destabilize the US economy,⁽¹⁾ considering that China is the second-largest buyer of US bonds and a major creditor after Japan.

Global Economic Impact

- The ongoing escalation of the trade conflict threatens the stability and growth of the global economy, considering that the combined economies of China, the United States and Europe account for nearly 60% of global GDP. These three regions are the driving forces of global economic growth and international trade.

- The conflict is also disrupting the smooth flow of international trade, as these three parties collectively account for nearly half of the global trade volume.

- The trade war is increasing production costs, which will likely lead to higher global prices at a time when the world is still reeling from the effects of the Russia-Ukraine war and geopolitical tensions in the Middle East, meaning that consumers will ultimately feel the impact.

- The ongoing tensions are reinforcing protectionist policies and strengthening economic blocs worldwide.

Given these developments, expectations for the near future suggest an

Positive Impacts	Negative Impacts
Contributing approximately \$16 trillion to the global economy by 2030	Changing the nature of 30% of jobs in routine tasks such as manufacturing and transportation
Increasing global retail sales by more than 10% in real terms	Market manipulation or causing financial disruptions
Investment in the field has grown to excess of \$98 billion	Misinformation and electronic hallucinations
Providing savings and expenditures worth up to \$150 billion annually by 2026	Reliance on predetermined outcomes and hindrance of cognitive skill development
Accelerating the use of small nuclear reactors to generate electricity for businesses	Unscientific bias
Developing financial, healthcare and educational applications	Lack of ethical standards and random destruction

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intensifying competition between the West and China to safeguard their domestic industries and maintain the competitiveness of their international trade. This will likely escalate the trade conflict between them. Under the administration of US President Trump, protectionist policies toward China could increase,

particularly in key industries such as alternative energy, renewable technology, semiconductors, rare metals and raw materials. However, both sides are aware of the risks associated with a complete and uncalculated escalation of the conflict, as it could destabilize their economies. As a result, there will likely be opportunities

(1) China holds approximately \$870 billion in US bonds and can exert pressure with this tool in several ways, including gradually stopping the purchase of US bonds. This action puts pressure on the US Treasury and could push it to raise interest rates to attract other investors. Another method of pressure is for China to sell US bonds in large quantities, which undermines international confidence in them, increases interest rates to entice buyers, and thus places additional financial pressure on the US government, negatively impacting the dollar's value in international currency markets. However, on the other hand, China understands the importance of using this weapon cautiously, as the dollar is part of its monetary reserves and foreign assets, and its depreciation affects the competitiveness of its exports.

for diplomatic solutions and economic negotiations, aiming to balance the pursuit of national interests and goals with the need to avoid long-term economic costs.

New Trends in Developing Economics in the Face of Mounting Challenges

Despite its heavy reliance on predictive numerical and mathematical models, economics has faced significant criticism for its failure to foresee major financial and economic crises in the last

two decades, such as the global financial crisis of 2008. It has also been criticized for not adequately addressing the severe economic consequences of these crises, including recession, inflation, inequality and rising poverty worldwide. Over the past five years, since 2020, the global economy has been severely impacted by major global events, notably the COVID-19 pandemic, the Russia-Ukraine war and tensions in the Middle East. These events have created deep financial and economic challenges that have

adversely affected both governments and populations. The repercussions of these events are still felt today, with many issues remaining unresolved, including the threat of a prolonged global recession, inflation, escalating levels of poverty, inequality, debt, unemployment and other ongoing economic difficulties.

Although economics has faced a long history of criticism and development over the past six decades,⁽¹⁾ there have been increasing calls in recent years from some economists for the adoption of

Figure 1.2: Languages of Open Learning Databases Used to Train AI Systems



Source: Organisation for Economic Co-operation and Development, (OECD.AI 2024).

(1) In the 1970s and 1980s, following the emergence of the stagflation crisis, criticism was directed at traditional Keynesian capitalism that focused on aggregate demand to stimulate economic growth. This led to the rise of the neoliberal school advocating for free trade, price liberalization, and reduced government intervention. Economic theories such as the aggregate supply theory emerged, and the monetarist school gained prominence to address the challenges of that time. In the 1990s, neoliberal capitalism spread globally in contrast to the decline of socialism following the fall of the Soviet Union. Neoliberal ideas expanded as both the IMF and the World Bank promoted the principles of globalization, trade liberalization and increased economic interconnectedness. Behavioral economics began to take shape, attempting to integrate psychological factors into economic models and decision-making. After the global financial crisis in 2008, criticism of the over-reliance on mathematical economic models grew, particularly as they failed to predict economic crises. Calls for focusing on sustainability and environmental preservation increased. Following the Middle East revolutions since late 2010, there was a growing emphasis on social justice issues and reducing inequality, prompting economic theorists to reconsider traditional methods and models, with a heightened focus on behavioral economics and the role of governments in combating poverty and reducing inequality.

new approaches in both theoretical and applied economics. New critical movements have emerged, advocating for a reevaluation of economic theories. These calls emphasize the importance of developing economics as a social science that deals with constantly evolving human behavior, which is difficult to predict, rather than treating it like a natural science such as physics, chemistry or mathematics, which is governed by fixed natural laws that yield predictable outcomes.

Recent trends in the development of science include a reevaluation of economic policies and a call for a more active government role in the economy to achieve necessary balances. There is also a growing focus on environmental issues, climate change, sustainability and the circular economy. Attention is being directed toward the welfare economy,⁽¹⁰²⁾ digitization and big data analysis. Additionally, there is a push to review the roles of major international financial institutions, particularly the IMF and the World Bank. Expanding the understanding of behavioral economics, increasing environmental awareness and emphasizing social aspects and sustainable growth are also highlighted, moving away from a sole focus on accumulating physical capital and excessive consumption of resources.

These shifts can be explained in more detail as follows:

Reevaluating Prevailing Economic Policies

This includes reconsidering neoliberal policies and globalization, as well as the exclusive focus on capital accumulation and market efficiency. There is a call to review the roles of the state in economic activity. Additionally, there is a push for greater attention to the welfare economy, with an emphasis on achieving social justice, reducing inequality, addressing the sharp disparity in wealth and income, and developing human capital alongside material capital.

An example of the theoretical revisions proposed by some economists comes from Angus Deaton, an American professor at Princeton University and Nobel Prize winner in economics. He stated, “We as a group did not predict the financial crisis, and worse, we may have contributed to it through an overly ambitious belief in the efficiency of markets.” He also expressed doubt about his previous claims, saying, “I also doubt what I and others have claimed in the past, that globalization was responsible for the great decline in global poverty over the past 30 years. I believe that the decline in poverty rates in India had

little to do with global trade and that the reduction in poverty rates in China could have occurred in rich countries with less harm to workers.”

In the same context, Joseph Stiglitz, a Nobel Prize-winning economist from Columbia University,⁽¹⁰³⁾ argues that the United States itself violated the economic principles it had followed for four decades when it intervened to save the US economy after the coronavirus pandemic. He describes this as “an obvious matter to compensate for forty years of failed neoliberal policies.”

Countering Western Dominance Over Specialization and Increasing Interest in History

In an article in Finance and Development, the IMF’s premier research journal, Jayati Ghosh, a professor of economics at the University of Massachusetts Amherst, accused North Atlantic universities — particularly in the United States and Europe — of positioning themselves as “guardians of the profession.” She claimed that these institutions monopolize the field and dominate economic ideas, promoting them through leading journals while excluding or marginalizing alternative viewpoints over the past decades. According to Ghosh, this approach

Table 1.5: Examples of the Trade War Between the United States, Europe and China

European and US Tariffs on Chinese Goods	Chinese Tariffs on Western Goods
US tariffs on Chinese aluminum and steel imports ranging from 10% to 25%	Chinese tariffs on \$34 billion worth of US exports ranging from 5% to 25%.
US tariffs on Chinese clothing and goods exports at 15%, valued at \$112 billion	Threat of tariffs on European meat and alcohol products
US tariffs on Chinese electric vehicles between 25% and 100%	Chinese tariffs on electric vehicle imports from Europe and the US ranging from 10% to 25%
US restrictions on the export of semiconductor chips to China and tariffs on semiconductors at 50%	Tariffs on US agricultural products like soybeans up to 25%
European tariffs on electric vehicles ranging from 17% to 38%	Threat of targeting French cosmetics products

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assumes that “real knowledge is created in the North and disseminated abroad.” She called for economic theories and analyses to account for history⁽¹⁰⁴⁾ in order to better understand current realities and predict the future.

It is notable that in October 2024, the Nobel Prize in economics was awarded to three Western researchers for their in-depth historical economic research focused on the study of income and

wealth inequality and economic stability between countries. This highlights a growing interest in economic history.

Increased Interest in Behavioral Economics

There has been an increasing call to develop behavioral economics by integrating psychology with economics, giving more consideration to the effects of human behavior on individual economic decisions. This approach offers

an alternative to traditional economic models that assume complete rationality in human behavior, an assumption that has proven unrealistic and resulted in inaccurate outcomes in the past, including the failure to predict future financial and economic crises.

Economic Digitization

There is increasing interest in integrating big data, machine learning and Generative AI into economic modeling to help governments enhance economic planning and resource management. This integration also aids major financial institutions in making better investment decisions and responding more accurately to market changes. Additionally, there is a rising trend to develop technical methods for collecting large-scale data from open sources like social media, with the goal of re-analyzing it to understand consumer behavior and preferences, thereby shaping more effective economic policies and accelerating responses to market shifts, all while addressing potential security challenges.⁽¹⁰⁵⁾

Reforming International Financial Institutions

Criticism has been directed at the Bretton Woods institutions, particularly the IMF and World Bank, urging them to

implement structural reforms, increase transparency, alleviate the pressures of major countries, ease lending conditions for developing countries and ensure fairer representation for these countries. On the 80th anniversary of their founding, a joint memorandum from American economist Mohamed el-Erian and former British Prime Minister Gordon Brown criticized the roles and structure of these institutions. They pointed out the lack of fairness in lending conditions, the disproportionate control held by a minority in decision-making and the failure of the institutions to predict financial shocks.⁽¹⁰⁶⁾

Sustainability and the Circular Economy

There is a call for the economy to meet people's needs without surpassing environmental limits, meaning it should not deplete natural resources, wealth and freshwater, nor should it contribute to air pollution or climate change. This approach aims to prevent long-term economic crises, such as famines or future conflicts stemming from resource scarcity and competition.

In conclusion, calls for the modernization of economics are a natural part of scientific development, and these trends do not diminish the significance

of economics, which remains one of the most practical social sciences aimed at improving human life. As the simplest definition of economics suggests, it is the science that seeks to manage limited resources to satisfy humans' unlimited needs. It aims to analyze reality and predict the future with the greatest possible accuracy and the least amount of error. To achieve this, its principles should be based on solid theoretical foundations, drawing from history and real-world experience. Additionally, economics should not be exploited to serve the interests of economically dominant global powers and outdated or inefficient ideas should be reconsidered. There should also be more integration between economics and other social sciences, particularly history, psychology and sociology, as economics addresses ever-changing human behavior, which is difficult to predict. This approach is gaining traction in economic circles and is expected to continue developing in the short to medium term, with the goal of improving the global economy and better managing future risks amid growing and interconnected challenges.

Conclusion: Fluctuating Economic Trends Amid Challenges

The stability of the global economy in the near future will largely depend on how effectively the growing geopolitical risks, particularly in the Middle East and Europe, are managed. While prospects for economic growth remain weak, they are somewhat better than in previous years, with expectations for further interest rate cuts in 2025 aimed at stimulating investment, employment and growth. This may lead to improvements in inflation levels, which could trend downward, unless geopolitical and environmental challenges, along with protectionist tendencies, worsen — especially with the return of Trump to the White House. An escalation of these challenges could negatively impact the prices of metals, raw materials and basic food sources.

AI is expected to continue its rapid development, with potential positive effects on productivity, economic growth, risk management and the creation of new professions. It will also reshape existing jobs and industries, presenting an opportunity to adjust skills in line with new economic needs. However, AI will also pose competition for some routine and traditional jobs and introduce

security, ethical and psychological challenges that must be addressed.

China is expected to further its efforts to strengthen its domestic alternative policies/approaches, intensifying the trade conflict between the West and China as both sides aim to protect their local industries and global trade interests. Fears of escalating the trade conflict and the decline of trade globalization, led by China in recent decades, are growing, especially in light of the Trump administration embracing a tougher stance toward China and Europe's push to protect its clean energy and renewable technology sectors. Nevertheless, the high costs of such conflicts may push all parties toward diplomatic solutions and economic negotiations to avoid long-term losses that would destabilize the global economy.

In the coming years, economics is expected to undergo reviews and development, integrating more with other social sciences like psychology and history. This will enhance its ability to offer realistic solutions to complex human challenges, predict volatile behavior and manage risks and issues impacting the global economy.

Non-traditional Security Issues

Developments in non-traditional security issues appear to have advanced since the publication of the 2023 ASR, as escalating competition between major powers during 2024 triggered conflicts extending to cyberspace and space exploration as well as resource-rich regions and those with reserves of traditional energy sources. The year 2024 witnessed the heralding of a new technological era, where disruption has become the norm — transforming how people communicate socially, addressing previously incurable and irreversible health conditions, shrinking the size of tools, computers and vehicles and even discovering water on the moon and mineral resources in space. Scientific and technological upheaval is poised to reshape social norms, economic practices and perceptions of external threats. The year 2024 will likely be remembered for the intensification of the chip war between the world's two superpowers, with the most destabilizing phenomenon being the excessive use of AI in devices and social media algorithms.

The 2024 ASR discusses the role of social media platforms in provoking chaos and hatred; the advancement in human chip brain implants; cybersecurity and

hacking and AI and its legal and moral challenges. Finally, it provides a forecast of the future trends of security threats in 2025.

The Role of Social Media Platforms in Fomenting Chaos and Spreading Hate

Misuse and polarization have intensified at the technological level, spanning both the vertical and horizontal axes of society and nation-states. Social media and messaging apps, which became part of our lives over a decade ago, have now emerged as troubling threats at the national and global levels, undermining fundamental norms of truth and freedom of expression.

Some governments have begun to take action. The UK House of Commons is set to summon Elon Musk, owner of X, along with senior executives from Meta and TikTok, as part of a parliamentary inquiry in early 2025. The inquiry will address “social media, misleading content, and harmful algorithms” that contributed to last summer's riots. UK members of Parliament are examining the role of disinformation and Generative AI, which was used to incite anti-Muslim protests following the killing of three schoolgirls in Southport. The inquiry also targets Silicon Valley's business models, which allegedly

“encourage the spread of misleading and harmful content.”⁽¹⁰⁷⁾ This follows disinformation-fueled violence in multiple cities across England and Wales, resulting in 741 arrests, including 32 for online incitement.⁽¹⁰⁸⁾ Musk has suggested that he and others may also be summoned in the United States to address concerns about platform censorship and threats to US citizens.⁽¹⁰⁹⁾

The case stems from a post by Musk during heightened tensions, where he shared misleading information on X, stating, “I don’t think anyone should go to the UK when they are releasing convicted pedophiles to jail people for social media posts.”⁽¹¹⁰⁾ While the British government has been releasing some prisoners early due to overcrowding, sex offenders have not been included. Musk also reignited controversy by reinstating banned extremists like Tommy Robinson and Andrew Tate and subsequently posting, “Civil war is inevitable.”⁽¹¹¹⁾ Earlier, Musk garnered public attention for engaging positively with Germany’s far-right party and provoking a response from the German Foreign Ministry. After Musk criticized funding for NGOs rescuing migrants in the Mediterranean, the ministry replied, “Yes. It’s called saving lives.”⁽¹¹²⁾ Musk, whose net worth is \$250 billion, has also faced

criticism for banning journalists critical of Israel on X. Under the UK’s Internet Safety Act, X and other social media platforms are required to remove content that could incite violence or racial hatred, placing Musk’s platform under increased scrutiny.

In this climate, restrictive policies targeting social media platforms are gaining traction. Notably, TikTok is engaged in an existential legal battle in the United States. Under federal law, the company is required to either divest its ownership or face a potential nationwide ban early next year. The case is likely to reach the US Supreme Court, as the platform confronts allegations of privacy violations and accusations of spying on users for the benefit of the Chinese government.⁽¹¹³⁾

In Latin America, Brazil’s Supreme Federal Court suspended X from operating in the country between August 30 and October 8, 2024, citing issues related to “freedom of expression, far-right accounts, and misinformation.”⁽¹¹⁴⁾ The platform, resumed service after complying with the court’s demands, which included blocking certain accounts, paying fines, and appointing a legal representative in Brazil. X had been accused of unfairly supporting Jair Bolsonaro, the far-right Brazilian leader

who has publicly praised Musk. Additionally, Brazil temporarily detained Meta officials for failing to retrieve fully encrypted WhatsApp messages.

On the Asian front, for nearly three years, X has complied with demands favoring the Indian government. Meanwhile, Türkiye, Pakistan and Egypt have temporarily blocked X for its failure to curb the spread of fake news and dissent and for not appointing legal representatives. In contrast, countries such as Russia, China, Iran, Myanmar, North Korea, Venezuela and Turkmenistan completely prevent their citizens from accessing this platform.

The platform has also drawn criticism from numerous lawmakers and the European Commission under Europe’s Digital Services Act. This legislation requires very large online platforms to assess and report on their efforts to address systemic risks, including illegal content, threats to electoral integrity and user safety concerns, which stem from the inherent design of their services.

Telegram CEO Pavel Durov, who, like Musk, wholly owns the platform, has also faced legal challenges. He was recently placed under arrest in France. Durov is facing charges for not cooperating in criminal investigations that

include cases of child sex trafficking, with a potential sentence of up to 10 years if convicted.

Telegram operates with two distinct streams of activity: open, unencrypted social networks, such as group chats and person-to-person messaging, and encrypted secret chats. The latter offers a space for illegal activities, including child exploitation, terrorism, drug trafficking and other criminal endeavors. Unlike Signal, Telegram's encryption methods do not undergo public scrutiny, raising concerns about the platform's role in facilitating criminal activities.

Countries are implementing various regulatory measures to safeguard their citizens, with a particular focus on protecting children, the most vulnerable demographic. Following extensive public discussions, the Australian Parliament became the first globally to ban social media use for children under 16, although the exact age limit has not yet been determined. The new legislation mandates that tech companies must take "reasonable steps" to prevent underage users from accessing their services, with potential fines nearing \$32 million for non-compliance.⁽¹¹⁵⁾

"Social media platforms now have a responsibility to prioritize the safety

of our children," said Australian Prime Minister Anthony Albanese. He added, "We recognize that social media can serve as a tool for bullies, a source of peer pressure, a contributor to anxiety, a haven for predators, and, most concerning, a vehicle for online exploitation."⁽¹¹⁶⁾

Therefore, with the inconsistent regulation of high-tech social media, there is a risk that a handful of billionaires could reshape reality by rapidly disseminating fake news, creating serious existential challenges. So far, social media has mainly facilitated election interference and xenophobic sentiments. With either a lack of oversight or limited moderation, these platforms could lead to full-scale conflicts between rival nations. Adding to the complexity for governments like the UK, Musk's controversial stance could strain relations with President Trump. In France, there is also a growing concern that the far right could strengthen its influence with the support of tech billionaires who enjoy massive, dedicated followings on these influential, adaptable and indispensable virtual platforms.

However, in 2025, the White House and the EU may find themselves at odds over social media regulation. Trump controls Truth Social, a rival platform to Musk's X. Amid ongoing trade wars

and broader geopolitical tensions; this could spark a digital clash of internet policies and values between the United States and the EU, with competing visions for regulation and control shaping the future of the digital landscape.

Advancements in Human Brain Chip Implants

Human-computer interaction technology is advancing through a specialized form of AI known as the human brain chip. While this technology holds great promise, it also brings significant risks, as it can potentially access and influence the human mind. Neuroscientists are now able to alter neural activity to encourage or modify specific behaviors. For instance, researchers have demonstrated that a brain chip can compel a laboratory animal to drink water not out of instinct or need, but by directly manipulating its neurons, showcasing the profound capabilities and ethical concerns surrounding this technology's future potential.

Neural privacy could soon become outdated, as advances in neuroscience and technology make it possible to decode thoughts, including subconscious ones — those that individuals may not even be aware of. New devices might also create a divide among people,

categorizing them based on their mental capacities and adaptability. An even more disturbing possibility is the direct transmission of biased or discriminatory content into people's brains, which could manipulate belief systems and alter perspectives, fundamentally transforming how individuals think, believe and interact with reality.

Mental health treatments could be revolutionized by implantable technology that addresses issues at the neural level. Advances in neuroscience suggest that mental illnesses might be diagnosed and treated through minimally invasive procedures. For example, a small device could be implanted in the brain through a routine procedure that only requires a small hole to be drilled — something a neurosurgeon performs regularly. This device could target specific regions of the brain, such as the areas associated with executive function or depression, to stimulate activity and alleviate mental health issues that medication often fails to address. The procedure would be quicker and less invasive than most cosmetic surgeries, such as a rhinoplasty, taking less than 30 minutes.⁽¹¹⁷⁾

Neural implant technology could offer groundbreaking treatments for a variety of mental health conditions,

including post-traumatic stress disorder, attention deficit hyperactivity disorder and obsessive-compulsive disorder. Beyond these, it may also play a crucial role in combating cognitive decline associated with Alzheimer's disease. Scientists are working to restore neural activity in existing brain circuits, a process that could potentially slow or even prevent the onset of Alzheimer's within the next decade. Electronic therapy offers a future where mental health interventions are targeted, precise and more effective, leveraging advanced neuroscience to address neurological and psychological challenges that traditional treatments struggle to resolve.

Many of these advancements could be seamlessly managed through human-computer interface technology. One notable development is the electrode-stent implant, which utilizes the brain's natural blood vessels⁽¹¹⁸⁾ — essentially its internal highways — to connect with a catheter through a small incision in the skin. Though still in the experimental phase, this technology is aimed at detecting motor control brain activity, enabling individuals to regain voluntary movement directly through their thoughts. Participants in these studies could potentially use their minds to send text messages,

illustrating the incredible promise of neurotechnology. Once refined and approved by regulatory authorities, such technology could revolutionize the lives of millions, offering new possibilities for mobility, communication, and overall quality of life.

Neurotechnology sets a high standard for non-invasive, wearable devices that offer user-friendly interaction. For instance, Meta's Control Labs introduced a wristband-like neurodevice six years ago, capable of reading thoughts and executing actions based on mental input. This innovative tool enables users to search for music or locate unread emails within smart glasses' inboxes, allowing the brain to communicate with external devices just as effortlessly as it interacts with the hand.⁽¹¹⁹⁾

The competition to leverage neurotechnology is rapidly advancing. Apple has recently pursued a patent for an earpiece featuring an electroencephalogram (EEG) to capture brain activity.⁽¹²⁰⁾ This device enables hands-free control of various functions, like checking and reading emails aloud while driving or jogging, using only brain-computer interface. Meanwhile, OpenPC is working to democratize brain-computer interaction by offering open-source biosensing and neuroscience tools. OpenPC aims

to integrate these technologies into consumer products ethically, ensuring user mental health⁽¹²¹⁾ and safety remain a priority. Their mind-reading headset combines next-generation biometrics, mixed reality, eye tracking and vision integration into a single wearable platform,⁽¹²²⁾ which has been in development for four years and continues to push technological boundaries.

At Illinois Tech, researchers are testing advanced implants containing 25 miniature stimulators, each about the size of a pencil eraser and equipped with 16 tiny electrodes thinner than human hair. These implants have shown remarkable success in providing artificial vision to blind patients, enabling them to walk independently with minimal surgical intervention.⁽¹²³⁾ While artificial vision does not replicate natural sight, it significantly enhances orientation and mobility for blind individuals. A major challenge remains customizing the electrodes for each patient to optimize performance. Notably, this technology became the first to receive US Food and Drug Administration (FDA) approval for implantation in the brain of a blind person,⁽¹²⁴⁾ marking a significant milestone in neurotechnology and assistive devices.

Neuralink, founded by Musk, has struggled to meet the ambitious expectations set by its founder. While the company secured approval from the FDA to proceed with implant tests in more patients, it remains tight-lipped about further developments and the specifics of these tests.⁽¹²⁵⁾

Research and development in human-computer interaction technology are not confined to the United States; European nations like Spain, Germany and France are actively investing in this technology, while China and Russia remain less transparent about their human-computer interaction projects. However, it is clear that major global powers will not leave such a crucial research area unregulated, particularly given the potential military applications of implant technologies. During the Trump era, US scientists noted that the FDA appeared more open to approving human testing of these implants, which could accelerate development with less stringent oversight. Therefore, addressing the ethical challenges of mind-reading and brain hacking requires the establishment of clear safeguards before the FDA grants commercial approval, ensuring that the technology is developed and deployed in a responsible and regulated manner.

The Global Space Race

Advances in science and technology have ushered in a new era of space exploration, with significant implications for Earth's population, both in terms of benefits and potential risks. Unlike in previous decades when government-funded agencies led space missions, private companies in the United States, China and the EU now dominate space travel and the exploitation of resources,⁽¹²⁶⁾ which may appear surprising at first glance. The current geopolitical landscape, marked by intense polarization, complicates the establishment of clear rules for the space economy and raises concerns about the militarization of space.

As private entities increasingly drive space endeavors, there is a pressing need for international agreements and cooperation to ensure ethical, sustainable and responsible exploration and exploitation of space resources.⁽¹²⁷⁾ Governments are increasingly entering the competitive realm of space exploration. In 2023, China's Chang'e-6 spacecraft achieved a milestone by landing on the dark side of the moon; while India became the fourth country to successfully land on the moon with its Chandrayaan-3 mission near the moon's south pole. However, not all missions

have been successful. Russia's Luna-25 probe crashed on the lunar surface just days before India's successful landing.⁽¹²⁸⁾ The failure was partly attributed to challenges in acquiring key technologies, as Airbus declined to sell a crucial navigation device for the mission due to international sanctions following Russia's invasion of Ukraine. This incident highlights the intersection of geopolitics and space exploration, where diplomatic tensions can directly influence technological capabilities and mission outcomes.

China's recent mission brought back samples from the moon's crust to study the universe's history. With the far side of the moon having a thicker and distinct crust, China aims to uncover water, early-universe traces and rare minerals. The concept of an economic corridor between the moon and Earth has also been proposed.⁽¹²⁹⁾

These soil samples are being analyzed by various institutes in China, which have pledged to share them with other space exploration entities, including the European Space Agency (ESA) and NASA.⁽¹³⁰⁾ Notably, it took the Chang'e-5 mission two and a half years to share its lunar samples for global research after its 2019 landing.

China is the third country, alongside the United States and Russia, to operate its own space station, Tiangong, which accommodates three astronauts on six-month rotations. The China National Space Administration, active since 2021, plans to add two more stations, doubling astronaut capacity. Despite its compact size, China's space base fully meets its needs, while its BeiDou system rivals the US Global Positioning System (GPS).

China plans to send a manned mission, including three astronauts, to the moon in 2029 as part of the 80th anniversary celebrations of the People's Republic of China. Ahead of this milestone, Beijing intends to launch Chang'e-7 in 2026 and Chang'e-8 thereafter, with plans to test 3D printing bricks using lunar soil as a step toward establishing a manned base.

The United States has largely shifted its focus from the moon to advancing knowledge and technology for studying Mars, asteroids and the universe's history. NASA is set to resume manned lunar missions in 2025, with China, ESA and Japan following suit.⁽¹³¹⁾ The discovery of water deposits on the moon could ignite renewed competition for space resources and military dominance.

If countries conducting lunar missions discover water on the moon's surface, a race will likely follow to determine its quantity, develop extraction methods under lunar gravity and separate hydrogen and oxygen for fuel and human use. Seismometers are already in place to study lunar quakes, volcanic activity and soil temperatures.

Given the strategic significance and immense financial costs, no space or celestial body base would be exclusively dedicated to civilian scientific research. Such dual-use facilities would inevitably focus on both mineral exploration and military capabilities.

The Artemis Accords, initiated in 2020, are bilateral agreements between the US government and various countries to establish outer space standards. Signatories include Saudi Arabia, the UAE and Bahrain.

The United States operates multiple ground stations for deep-space communications, while China has been promoting the International Lunar Research Station since 2023, with participants including Russia, Türkiye, Egypt and Pakistan. Beijing is also constructing the Espacio Legano station in Neuquén, Argentina, alongside two stations already located within its own territory.



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tition, the UN

Working Group on

Legal Issues, tasked with proposing principles for space resource exploitation by 2027, seems far from achieving its goals. This is compounded by renewed global competition in outer space and unprecedented political polarization since the Cold War's end. Alongside private entities involved in space missions, the field now includes dual-use technologies, while the Outer Space Treaty remains outdated and inadequate.

If the moon serves as a testing ground for Mars, it could also become a model for building weapons factories and establishing satellite jamming stations for conflicts on Earth. The United States, Russia, China and India have already demonstrated their ability to launch

satellites from Earth, and if any country attempts to do so from the moon, others are likely to follow.

Although the moon is roughly the size of the Asian continent and offers many attractive sites for resource exploitation, it will still require strict regulation. Defining the rules for both lunar habitation and the lunar economy is a significant challenge. Global competition and political polarization further complicate the work of the UN Working Group studying legal issues related to space resource exploitation, with the first proposed principles not expected until 2027. The unregulated space race presents unprecedented challenges to global security.

Strategic competition in space ranges from jamming GPS satellites to launching cyberattacks or using lasers to destroy space assets. A military base in space is an imminent reality, and it is only a matter of time. While the United States and China may be the leading contenders, others are likely to follow. A manned lunar base opens up new possibilities, with military applications that far outweigh the alleged peaceful civilian benefits. Given the strategic importance of the Starlink constellation for Ukraine in the Russia-Ukraine war, other space giants are preparing to launch their own

satellites to disrupt or extend competitors' internet capabilities.

Cyber-security and Hacking

Cybersecurity is one of the most challenging areas for protecting national and corporate interests despite its relative newness. In 2024, both state and non-state actors engaged in cyberattacks targeting governments, militaries, energy pipelines, hospitals, pharmaceuticals, banks, corporations, research institutions and individuals. The most spectacular attack this year involved the simultaneous explosion of pagers and walkie-talkies in the hands or pockets of hundreds of people deemed non-state actors. The perpetrator was a state actor. Whether legal or not, this tactic exposed and paralyzed a dangerous armed organization. The cybersecurity dilemma mirrors that of law enforcement: the public often only hears about the crime when the perpetrator wins, and successful hacks or intrusions are frequently covered up to preserve state prestige or corporate interests.

In 2024, cybersecurity faced unique and innovative challenges as state institutions struggled to develop regulations and laws to pursue perpetrators. Cybersecurity experts also worked to detect and thwart these threats. On September 27, the United States indicted three members

of Iran's Islamic Revolutionary Guard Corps (IRGC) for hacking into email accounts associated with Trump's 2024 presidential campaign.⁽¹³²⁾ They used phishing techniques on a small number of campaign staffers, gaining access to key servers.

In July, Fuad Shukr, a senior Hezbollah commander known as al-Hajj Mohsen, was targeted. The caller, who appeared to be someone Shukr trusted due to his rare phone number, led him to the exposed seventh floor of the building where he was staying. Once there, a missile struck him in retaliation for the killing of 12 children in the village of Majdal Shams in the Israeli-occupied Golan Heights.⁽¹³³⁾ Israel claimed the attack was part of the liquidation of Hezbollah's military leadership.

In July, a major global IT outage affected 8.5 million Microsoft Windows devices, causing widespread disruptions to airlines, banks, healthcare providers, retail payment terminals and ATMs worldwide. While not attributed to a hacker group, the outage revealed a vulnerability caused by a flawed update to CrowdStrike's cloud-based security software.

On November 22, 2023, a woman from southern Lebanon received a phone call from an official who asked in fluent Arabic if her family was home. Shortly after, a rocket attack struck her street in the

village of Beit Yahoun, killing five Hezbollah members.⁽¹³⁴⁾

Hezbollah, after observing the losses suffered by al-Qaeda due to smartphone use in the 2000s, switched to old-fashioned phones like the Nokia 3310, which had basic cellular communication and SMS. However, these older phones became vulnerable in 2023, prompting the militant group to switch en masse to pagers.

The IR-924 pagers that exploded are believed to have been linked to compromised servers, which installed a script that caused an overload, likely overheating the lithium battery and leading to the explosion.⁽¹³⁵⁾ The server's message overload may have resulted in an unusually high number of commands, contributing to the overheating.

MGM Resorts in Las Vegas was hit by one of the most damaging ransomware attacks in history, costing over \$100 million. The attack also disrupted other businesses on the Las Vegas Strip, including Aria, Mandalay Bay, New York-New York, and Bellagio.⁽¹³⁶⁾ The failure to secure cyberspace has damaged the reputation of the United States and its institutions.

In February 2022, Russian government hackers used stolen credentials to access a virtual private network (VPN) operated by satellite services company ViaSat,

which provided the Ukrainian military with internet access for battlefield communications. The hackers deployed malware called Acid Rain onto Viasat modems across Europe, crippling the network in an attack that remains a mystery in the field of satellite hacking. The Ukrainian military lost internet access just an hour before the Russian invasion.⁽¹³⁷⁾

Cybersecurity experts and investigators encounter a wide range of hackers. Some are seasoned programmers driven by power and money, with little to no social life. Others hack on behalf of their countries, such as Iran, North Korea or China. However, one group, like Russia, uses a combination of all these tactics. The Kremlin does not hold hackers accountable unless they target a national company or a business the country relies on. Interestingly, many of these tactics rely heavily on social engineering — using knowledge of language, dialect and culture to trick victims into lowering their guard. This was seen in the Las Vegas casino ransomware attack and the Viasat hack. Social outcasts, often active in online games and on the dark web, collaborate and recruit others for such efforts.

The threat in the cybersecurity domain has escalated to unprecedented levels, with the IMF warning about its potential impact on global financial stability.

Since 2020, the global financial sector has faced direct losses of approximately \$2.5 trillion due to cyber incidents.⁽¹³⁸⁾ As defense systems become more sophisticated, financial and military institutions' readiness to repel cyberattacks only seems to provoke hackers to launch more advanced and frequent attacks for various reasons. To effectively address these threats, there is a need for multilateral agreements akin to the Nuclear Non-Proliferation Treaty or the Geneva Convention on Human Rights. However, cooperation against cyber threats is limited,

national cybercrime legislation remains fragmented without common standards, and there is no cohesive cybersecurity framework in place.⁽¹³⁹⁾ While AI may offer some hope in improving cyberdefense capabilities, a global consensus on this issue is unlikely by 2025, the first year of Trump's presidency, which will be influenced by key figures in encryption.

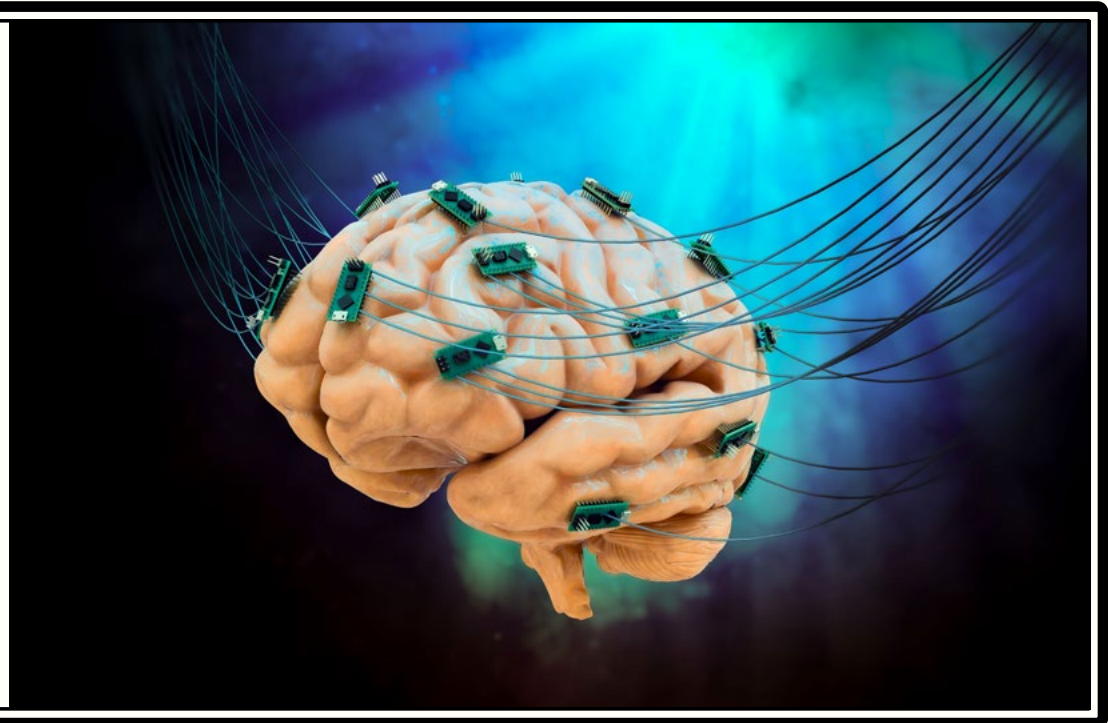
AI and Its Legal and Moral Challenges

AI has become a buzzword, often used without necessarily reflecting its true utility. The term generally refers to a

collection of computer-assisted processes and data analytics aimed at simulating human thought processes to perform tasks. This field is commonly referred to as machine learning, which involves algorithms that allow systems to improve their performance through experience and data analysis.

AI can be classified into seven types. Narrow AI is designed for specific tasks and is not capable of learning beyond its programmed actions. Generative AI is the most useful yet also the most feared form, as it can learn and simulate

Human-computer interaction technology is advancing through a specialized form of AI known as the human brain chip. While this technology holds great promise, it also brings significant risks, as it can potentially access and influence the human mind. Neuroscientists are now able to alter neural activity to encourage or modify specific behaviors.



thought processes. Superintelligence AI represents an advanced version of AI that would possess human-level knowledge and capabilities. Machine-Reactive AI responds to external stimuli in real time but lacks built-in memory. Limited-memory AI uses acquired knowledge to learn and improve performance for future tasks. Theory-of-mind AI is designed to give machines a level of cognitive understanding similar to human minds. Finally, Self-Aware AI is the most advanced form, capable of recognizing emotions, forming self-perceptions and exhibiting superintelligence.

Generative AI is currently receiving significant attention and funding. This type of AI involves training algorithms to identify patterns and make predictions from data without being explicitly programmed to do so, allowing the system to learn independently. The legal and ethical implications of using AI in homeland security, national defense or military applications stem from the concept of “deep learning.” Deep learning involves layers of analysis that function like neural networks, learning through trial and error at various levels. These systems are trained with known data using supervised learning algorithms, which evolve into self-learning capabilities⁽¹⁴⁰⁾ once the initial tasks

are completed. This field of science becomes concerning when applied to areas such as surveillance, classification and munitions delivery.

The uses of AI extend beyond the military and police, raising significant concerns about privacy and credibility. Programs like ChatGPT, along with deepfakes, have sparked alarm among countries and individuals due to their potentially devastating consequences. For instance, stealing someone’s identity to commit crimes, carry out theft or manipulate elections has become easier than ever, posing serious threats to security and trust.

A pressing ethical question arises regarding the use of open-source data, particularly before the widespread integration of AI into social media platforms. Social media users are continuously tracked and commercial and security entities rely on automated data analysis to predict or detect various phenomena, from consumer behavior to potential political unrest and extremist ideologies.⁽¹⁴¹⁾ For example, Mercury collects both open and secret information to forecast or detect significant events such as military activities, political crises and disease outbreaks.⁽¹⁴²⁾ EMBERS, another program, can process up to 2,000 messages⁽¹⁴³⁾ per second and

purchase open-source data, including from social media giants that generate millions of messages daily. Numerous smaller programs also scan social media platforms to gather data, such as facial images, physical attributes and activity, often utilizing facial recognition for surveillance purposes. Clear-View AI, a notable example, allows law enforcement agencies to upload a face image and match it against a database containing billions of images. The company allegedly harvested over 20 billion images from the internet and social media to build its global facial recognition database. This raises concerns about privacy, consent and the ethical implications of such widespread data collection, especially when AI-driven tools enable unprecedented access to personal information. Security organizations, including militaries in developed countries, are increasingly utilizing AI on satellite imagery to classify objects and identify threats and targets. Technologies such as image analysis, gait recognition, face and voice recognition, natural language processing and algorithmic search and query functions enable agencies to analyze data in sophisticated ways. These tools allow for the examination of the interconnections between an individual’s social life

and society, offering new methods⁽¹⁴⁴⁾ to track and identify individuals or groups of concern. Additionally, social media data is collected and analyzed to enhance surveillance and monitoring efforts.⁽¹⁴⁵⁾

Another legal and ethical issue surrounding machine learning is the use of data-driven models to make conclusions about political, ethnic, racial and religious communities. These models are also applied to map urban gangs, create city-wide alert systems and predict crime scenes. However, over-reliance on data to generalize the behavior and thinking of a community or group can lead to problematic outcomes. Tech companies and security agencies often defend such conclusions, claiming they are based on open-source, computer-generated algorithms, a phenomenon known as “tech-laundering.” While these systems may improve over time, the knowledge that we are being monitored can lead to defensive behavior, where people adjust their actions to avoid detection, thus undermining civil liberties and free thought. Open-source public data is already being used in coercive, non-consensual ways, as seen with facial recognition technologies, which are particularly popular among authoritarian regimes. Facial recognition AI

can be likened to plutonium due to its extreme danger and potential for abuse.⁽¹⁴⁶⁾

There has been little progress in international cooperation on the issue of AI in military decision-making since US President Joe Biden’s meeting with Chinese President Xi Jinping in 2023. Washington has pledged to ban the use of AI in autonomous weapons, such as drones, and in the control and deployment of nuclear warheads. However, China views this as an effort by the United States to freeze the situation due to its technological superiority. Meanwhile, Russian President Vladimir Putin has bet on microchip technology, stating over five years ago that whoever leads in this field will dominate the world.⁽¹⁴⁷⁾ Moscow aims to reap economic benefits from its advancements in information technology, projecting \$110 billion in gains by 2030.⁽¹⁴⁸⁾ Meanwhile, Ukraine has sparked an AI arms race on the battlefield, particularly in the development and use of unmanned aerial and ground vehicles.⁽¹⁴⁹⁾

The growing mistrust and divergence between China and the United States have fueled the rapid development of AI, with both nations allocating massive budgets to this field. This has also escalated competition in microchip technology. In response to the US ban on the

export of AI and microchips, China has filed a lawsuit against Nvidia, accusing the company of violating Chinese anti-monopoly laws.⁽¹⁵⁰⁾ As tensions rise, the military-military framework between the two nations faces a bleak future, particularly in the first year of Trump’s second term in the White House.⁽¹⁵¹⁾

Russia, unlike China, remains excluded from global strategic discussions, largely due to its invasion of Ukraine. In 2023, the United States rolled out a series of AI initiatives, highlighting the potential threats AI poses to human rights and democratic values. Along with 31 other countries, the United States also launched an initiative to establish safeguards around the military use of AI. This non-legally binding resolution urges signatories to conduct legal reviews and provide training to ensure military AI adheres to international law. It also calls for the cautious and transparent development of the technology, the avoidance of unintended biases and ongoing discussions about responsible AI deployment.⁽¹⁵²⁾

The rapid advancement of AI in replacing human involvement in both everyday and complex technological tasks calls for the establishment of a global civilian framework akin to the Nuclear

Non-Proliferation Treaty or the Geneva Conventions. The risks associated with the covert use of AI by non-state actors will persist as a reality until the international community acknowledges this phenomenon and classifies it as a global threat.

Conclusion: Security Threats in 2025

The threats related to non-traditional security issues are expected to intensify, exacerbated by the current laxity and division within the international community regarding the creation of laws that address these risks and establish limits on the use of modern technologies, which are now an integral part of human life. The year 2025 may further obscure the shift in social interaction from personal to virtual and holographic realms, with privacy potentially being lost almost entirely. It will likely require a global mass movement to reverse the widespread collection of metadata without explicit consent, especially in light of the use of AI technologies in social media. The ethical and legal dilemmas surrounding this issue are more complex than those posed by biological, chemical and nuclear weapons. With figures like Trump in power globally, rational decisions based on consensus seem increasingly unlikely. The

race to combat climate change through carbon-free policies seems to have faltered in favor of easier goals centered on more hydrocarbons. Global security, already threatened by weak arms control regimes, increasingly relies on faster, smarter and more stealthy weapons — not only on land and at sea but in space and even on the moon. As if the indiscriminate killing of Palestinians in Gaza, without distinction between civilians and militants, was not alarming enough, the use of AI to identify targets by the Israeli military signals future challenges. These challenges include legal and ethical nightmares alongside the security dilemmas of armed conflict, and the new technological arms race has already outpaced existing regulatory and ethical frameworks. The benefits of AI, algorithmic social media and space exploration are minuscule compared to the risks they pose, especially when considering the dangers posed by their convergence

The Religious Landscape in the Islamic World

The 2023 ASR reviewed the ideological dispute and the status of fundamentalist movements and extremist groups worldwide and forecasted their potential trends in 2024. This year, it discusses

the status of religious institutions in the Islamic world, exploring the Building Bridges Between Islamic Sects charter issued by the Muslim World League in Saudi Arabia and its influence on the philosophy of coexistence and the jurisprudence of modernization. It also examines the religious institution in Morocco and the debates over the Family Code, as well as the religious establishment in Iraq and its involvement in disputes concerning the Personal Status Law. Further, it analyzes Al-Azhar, the Ministry of Awqaf and the Dar al-Ifta in Egypt, particularly following recent changes in the leadership of the latter two entities. The 2024 ASR also sheds light on the Great Mosque of Algiers, now an official religious institution, and the political messages conveyed through its construction and inauguration. Finally, it discusses the religious institution in Iran and the challenge of selecting a new supreme leader, especially in the aftermath of Raisi's death. It provides an overview of the Sunni and Shiite religious institutions across the Islamic world, then it examines Islamist groups, beginning with Tunisia's Ennahda Movement and its role in the presidential elections. It also discusses the electoral defeat of the Movement of Society for Peace (MSP) in Algeria's

presidential election and the controversy surrounding the imposition of the veil on women in Libya, which reflects broader attempts to influence societal religiosity. This is in addition to analyzing the crisis within the Muslim Brotherhood in Egypt, particularly concerning the electoral engineering in the International Union of Muslim Scholars. The report also reviews violent and radical groups, including ISIS, the Mujahideen Youth Movement and the Taliban. Special attention is given to the Taliban's controversial legislation on promoting virtue, which has sparked significant international debate. It also examines the far-right and the crisis surrounding mosque imams in France, Islamophobic incidents in India, the events in Kayseri, Türkiye and the rise of neo-pharaonism in Egypt, which seeks to revive ultranationalism. Finally, it provides a holistic overview of our key findings and the future trends in the Muslim world's religious landscape in 2025.

Religious Establishments in the Islamic World — Between Traditionalism and Modernization

The year 2024 witnessed significant developments impacting religious institutions across the Islamic world, spanning

from the Atlantic Ocean to the Arabian Gulf. Many of these interactions are tied to both social and political dimensions. While some institutions have played a constructive role in fostering coexistence, elevating the status of the nation-state and combating violent and extremist ideologies, others have faced internal challenges stemming from diverse causes.

Saudi Arabia: The Muslim World League and the Document to Foster Unity

In March 2024, the Muslim World League convened the Global Conference for Building Bridges in Makkah, issuing a pivotal document titled “Building Bridges Between Islamic Schools of Thought and Sects.” Comprising 28 articles, the document emphasized tolerance and unity among all Islamic schools of thought and sects. The statement issued noted the formation of a joint coordinating committee named the Coordinating Committee Between Islamic Sects.⁽¹⁵³⁾ The first article highlighted a foundational principle: “Muslims are one community, worshipping one Lord, reciting one book, following one prophet, and united — no matter how far their homes are — by one Qibla.” It underscored the preservation

of the objectives of Sharia, including the sanctity of life, protection of the mind and safeguarding property, while introducing a sixth necessity: “preserving the homeland.” The document condemned excommunication (*takfir*) and reaffirmed support for key Muslim causes, particularly the Palestinian cause.⁽¹⁵⁴⁾ Through this initiative, the





conference sought to promote a religious discourse centered on “via media” and align with Saudi Vision 2030, and highlight the aspects of religious renewal in Saudi Arabia. Such features of the initiative advocate rejecting *takfir* and embracing inclusivity for all Muslims — regardless of their affiliations or confessions — provided they eschew

violence and excommunication. In July 2024, the Secretary-General of the Muslim World League Muhammad al-Issa visited the Al-Khoei Foundation in London, where both parties emphasized the importance of cooperation and lauded the Global Conference for Building Bridges.⁽¹⁵⁵⁾ On the political level, Saudi Arabia showcased harmony between

its religious and political institutions, reflecting a decisive political will to counter extremism and foster interconfessional peace among all those who pray toward the Qibla. In May 2024, the Saudi ambassador to Iraq visited Karbala and Najaf, meeting with Ayatollah Ishaq al-Fayadh, a leading marja in Najaf and the Shiite world. This visit, aimed at strengthening Saudi-Iraq relations, portrayed the kingdom as a unifying mother state for all Muslims. It reinforced a vision of coexistence that situates intellectual, religious and political differences within their appropriate contexts.⁽¹⁵⁶⁾

Morocco: The Dispute Over Amending the Family Code

In February of this year, in a letter to the prime minister, the King of Morocco, Mohammed VI, called for a review of the Family Code and the establishment of a body for this purpose within a maximum period of six months. This call sparked sharp disagreements within Moroccan society, particularly between Islamists and the traditionalist establishment on the one hand and secularists on the other. One of the most prominent issues that sparked a clash between these two movements is the demand to abolish Article 490 of the Penal Code, which

criminalizes sexual relations outside of marriage. It stipulates that “any sexual relationship between a man and a woman who are not married is a crime of corruption (which means adultery in Moroccan custom) and is punishable by imprisonment from one month to one year.” This article continues to provoke significant controversy between its opponents and supporters. Moroccan Minister of Justice Abdellatif Wahbi has appeared in multiple media outlets defending the abolition of this article, which would mean lifting the criminalization of sexual relations outside of marriage. However, he has quickly encountered positions that strongly reject the decriminalization of sexual relations outside of marriage.⁽¹⁵⁷⁾ The same controversy surrounds the issues of underage marriage and gender equality in inheritance.

After the committee tasked with drafting the Family Code completed its work, the king directed the Moroccan Supreme Scientific Council, the official religious body authorized to issue fatwas, to examine certain issues highlighted in the committee’s proposals. These directives emphasized adherence to the principles and rulings of Islam, instructing the council to issue a fatwa on the matters in question. According to

Article 41 of the Moroccan Constitution, the Supreme Scientific Council is the sole institution qualified to issue fatwas officially recognized by the state.⁽¹⁵⁸⁾

What stands out is the stance of Moroccan Islamists, spearheaded by former Prime Minister Abdelilah Benkirane. At a public conference, he declared that any tampering with the Family Code equates to tampering with Sharia (Islamic law). He called for a million-strong popular march to reject any articles in the proposed amendments that contradict Islam. Benkirane accused his opponents of being “criminals and murderers,” adding, “These are criminals who want to kill fetuses in their mothers’ wombs!” He also opposed the abolition of underage marriage, claiming it would lead to widespread spinsterhood.⁽¹⁵⁹⁾ While the Islamists’ position aligned with that of the traditionalist establishment in resisting changes to the Family Code, their methods and motives diverged. Unlike Benkirane’s threat of street demonstrations, the traditionalist establishment focused on preserving the inherited juristic and religious legacy, regardless of distinctions between fixed rulings, adaptable principles, overarching objectives (*maqasid*), and necessities dictated by societal constraints or inevitable modern state

changes.⁽¹⁶⁰⁾ On the other hand, the Islamists’ stance appeared largely pragmatic. While ostensibly aimed at upholding Sharia according to their interpretation, their position also seemed driven by the goal of mobilizing popular support and expanding their grassroots base, particularly after their electoral losses and in preparation for upcoming elections.

Iraq: Disagreements Over the Personal Status Law

Shortly after the developments in Morocco, a significant crisis erupted in Iraq between Shiite Islamists and traditionalists on one side and liberal and modernist movements on the other, sparked by a proposed amendment to the Personal Status Law. The Coordination Framework spearheaded efforts to introduce sweeping changes to the Draft Law to Amend Personal Status Law No. 188 of 1959. The Shiite factions sought to embed Jaafari jurisprudence for Shiites and Hanafi jurisprudence for Sunnis into the Personal Status Law. However, the draft faced widespread rejection and sharp criticism from activists and civil society, who argued that the proposed amendments would permit child marriage, undermine women’s rights and strip them of custody rights, among other concerns.

The insistence of the Coordination Framework on pursuing these amendments, despite the adequacy of the existing law and the absence of broad societal consultation to ensure consensus, stems from two key motivations: sectarian and political.

- **Sectarian motivation:** The competition among Shiite factions for influence over their sectarian bases is evident. Earlier this year, Muqtada al-Sadr initiated a sectarian contest by advocating for the recognition of the Day of Ghadir as an official holiday, which the Iraqi Parliament eventually approved. This move highlighted the intense rivalry among Shiite actors.

- **Political motivation:** The amendments reflect a broader struggle for grassroots support ahead of upcoming elections, particularly between the Coordination Framework and the Sadrist Movement. The Sadrists' recent successes, such as securing the official recognition of the Day of Ghadir as a holiday, and their growing influence in popular and hawza circles, have heightened the urgency for the Coordination Framework to push forward with this initiative. The bloc also appears to be seizing what it views as a favorable moment to expedite these changes, fearing

that such an opportunity may not arise again in the near future.

Iraqis are sharply divided over the constitutionality and legality of the proposed amendments to the Personal Status Law. Two main opinions have emerged: one supporting the amendments as constitutional and the other viewing them as fundamentally flawed. Supporters of the amendments base their stance on Article 41 of the Iraqi Constitution, which states: "Iraqis are free to adhere to their personal status according to their religions, confessions, beliefs, or choices, and this shall be regulated by law." They argue that this provision grants religious and confessional groups the right to follow their own beliefs in personal status matters. This perspective envisions the establishment of Sunni and Shiite jurisprudential codes through their respective religious endowments, existing alongside the current civil code. Judges would draw on these jurisprudential frames of reference when issuing rulings, such as in marriage contracts where couples could choose their preferred framework for resolving disputes. Proponents further assert that the Coordination Framework, representing the parliamentary majority, has the democratic right to legislate on matters it considers

appropriate in accordance with majority rule.

Opponents, primarily from the civil movement, reject the amendments due to their implications for society. They argue that adapting the law to confessional orientations institutionalizes divisions, entrenching confessionality within Iraq's legal framework. Critics also highlight the potential for the amendments to enable regressive practices, such as child marriage, which they view as incompatible with modern societal values. Additionally, they contend that shifting the judge's role to resemble that of a religious authority or notary public diminishes judicial independence and undermines constitutional provisions safeguarding the judiciary's authority. Opponents warn that these changes could undermine Iraq's identity as a civil state, jeopardizing efforts to maintain a unified, secular legal structure and disproportionately affecting women and other vulnerable groups. Opponents of the proposed amendments argue that the changes would undermine the judiciary's authority and compromise the principles of a civil state. They contend that the amendments would diminish the judge's role and prestige, effectively elevating marjas and marriage officiants

above the judiciary. This, they claim, contradicts constitutional provisions that safeguard the independence and integrity of the judicial authority. Furthermore, critics assert that the amendments would erode the foundational principles of the civil state, which the Iraqi Constitution was designed to uphold.⁽¹⁶¹⁾

Al-Azhar: The Debate Over Sufism and New Ambitions

In the middle of this year, a significant cabinet reshuffle took place in Egypt. Mukhtar Gomaa, who had served as the minister of endowments for 10 years, was dismissed from his post. He was replaced by Osama al-Azhari, an assistant professor of Hadith and Its Sciences at the Faculty of Fundamentals of Religion, Zagazig University. Azhari is closely associated with the school of thought of Sheikh Ali Gomaa, the former mufti of Egypt, and is considered one of his trusted disciples. Azhari previously served as a religious adviser to the Egyptian president and was also a member of the Egyptian Parliament. A media figure aligned with the Egyptian government reported that Azhari had

been groomed for this position over several years.⁽¹⁶²⁾

With Azhari assuming the role of minister of endowments, Sheikh Gomaa's school, or "group," has consolidated its influence over endowments and the issuing of fatwas, especially since the current Mufti Sheikh Shawqi Allam also belongs to the same school. However, following the conclusion of Allam's term and its non-renewal in August 2024, a new mufti was swiftly appointed. Dr. Nazir Ayyad, a professor of philosophy at Al-Azhar University and a close associate of Sheikh Ahmed el-Tayeb, the grand imam of Al-Azhar, took over this position.⁽¹⁾ Ayyad's appointment has sparked criticism due to his lack of specialization in jurisprudence and legal theory, areas that are traditionally essential for the role of the mufti. Instead, he is known for his expertise in doctrine and philosophy. Critics argue that the position of the mufti should be filled by someone well-versed in jurisprudence, legal theory and objectives, rather than someone with a background in philosophy and speculative theology.

An important question arises here about the post-Tayeb era: Who could assume the position of grand imam after him, and are these changes a prelude in this regard? Ayyad is a possible candidate for the position of grand imam after Tayeb, but he is not a member of the Council of Senior Scholars. Additionally, Azhari is also not part of the Council of Senior Scholars, and his young age (he is still an assistant professor) contrasts with the seniority typically required for the position of grand imam. If the law implemented after the January Revolution stipulated that the grand imam of Al-Azhar would be elected by members of the Council of Senior Scholars, the reality is far more intricate than this legal flexibility suggests. Many actors play a role in choosing the grand imam of Al-Azhar, including the presidency, security institutions, public opinion on the street and possibly some regional countries. These regional actors have influence and extensive relationships with various competing currents within Al-Azhar, as well as with the sovereign Egyptian state apparatus. In each case, it seems that various actors aim to lay

(1) The Official Gazette in issue No. 32, Supplement (A), published Presidential Decree No. 325 of 2024, signed by President Abdel Fattah el-Sisi. The decree appoints Nazir Ayyad as the mufti of the Arab Republic of Egypt for a term of four years, effective August 12, 2024. He will receive the salary and allowances stipulated for this position. The decision was made after referring to the Constitution, Law No. 103 of 1961 (which reorganizes Al-Azhar and its affiliated entities), the amendments to the Civil Service Law under Law No. 81 of 2016, and upon the recommendation of the grand imam of Al-Azhar.

the groundwork for the post-Tayeb era by evaluating Ayyad's ability in issuing fatwas and Azhari's role in overseeing endowments. Although Azhari seems more aligned with the state's institutions, its interests and some regional dynamics, this assessment does not resolve the issue of approval within the Council of Senior Scholars. As a result, significant changes may be needed in the law governing the council and its powers, and possibly even in the constitutional articles related to Al-Azhar and the Council of Senior Scholars, as was previously proposed. However, the problem lies with the current state of the Council of Senior Scholars. It lacks a full complement of members, and most of the existing members are elderly. Therefore, passing legislation to amend the powers of the council or to introduce new members aligned with the state's interests remains a likely and plausible outcome.

At the level of the Egyptian Sufi community, Egypt experienced a significant controversy in 2024, centered around moral accusations against Sheikh Salah al-Tijani. He had presented himself as the sheikh of the Tijaniyya order, but the order ultimately disowned him, claiming that his dismissal was necessary to maintain the group's unity. The

leadership of the order issued an official statement accusing Tijani of misconduct and formally disavowing him before the judiciary could conduct an official investigation into the matter.⁽¹⁶³⁾ The controversy erupted when an Egyptian girl accused Tijani of both online and physical harassment. Soon after, other women also came forward with similar accusations against him. In his defense, Tijani asserted that the girl was like his daughter, claiming that his interactions with her did not constitute harassment, as his aim was to guide disciples at the mosque on the path of truth. He then accused the father of the girl who made the allegations of supporting the Muslim Brotherhood.⁽¹⁶⁴⁾ This incident sheds light on the deeper issues within Sufism in Egypt, exposing internal problems within Sufi gatherings.

Algeria: The Great Mosque and Political Messages

In February of this year, the Algerian president inaugurated the Great Mosque of Algiers, also known as Djamâ El-Djazair. This mosque serves as the cornerstone of an Algerian religious institution akin to Al-Azhar, Al-Zaytuna and Kairouan, following a tradition inherited across the Maghreb countries (Maliki, Ash'ari, Sufi Junaidi). Algeria

aimed to strengthen its religious authority and reference to counter "imported" religious models, or what some refer to as the non-inherited approach.

The Great Mosque is the largest in Africa and the third largest in the world, following the Two Holy Mosques in Saudi Arabia. Covering an area of over 200,000 square meters, its architectural design adheres to advanced anti-seismic standards. The mosque houses the National Higher School of Islamic Sciences, where students pursuing graduate studies in Islamic disciplines are trained. Additionally, it contains the House of the Qur'an, which accommodates 1,500 students. The project's cost totaled \$1 billion.⁽¹⁶⁵⁾ Notably, a large number of scholars from across the Islamic world attended the inauguration, alongside members of the Muslim Brotherhood and individuals close to the Muslim Brotherhood, represented by the International Union of Muslim Scholars. These scholars praised Algeria, its leadership, the president, and the nation as a whole.⁽¹⁶⁶⁾ On a broader geopolitical level, constructing the mosque aimed to convey political messages, primarily targeting France first, and then neighboring countries. There is an ongoing competition over establishing a dominant religious reference and

model across the Maghreb region, with the goal of consolidating Algeria's religious influence and authority throughout the Arab world.

The Qom Hawza: The Next Supreme Leader Crisis

The Qom Hawza has entered the dispute over the name of the next supreme leader, and seminarians have not ruled out the possibility that Mojtaba Khomeini will assume the position. Hawza cleric Sadegh Mohammadi⁽¹⁾ criticized Mousavi Jazayeri, a member of the Assembly of Experts, for claiming that the identity of the future supreme leader is a confidential matter and should not be revealed to the public, as doing so could endanger his life. Mohammadi argued, "This raises doubts among the people."⁽¹⁶⁷⁾ People will suspect that there is a particular individual behind the scenes being groomed for the position of the future supreme leader. I tell him that you have brought the Assembly of Experts into suspicion." In response, Jazayeri denied his statement, saying, "What you have said is fundamentally incorrect. The issue of the future supreme leader is not secret. Rather, the supreme leader will be presented to the Assembly of Experts at the appropriate time, and

the supreme leader will be determined by the consensus of the majority of the members of the Assembly of Experts."⁽¹⁶⁸⁾

Although Mohammadi entrusted the issue of selecting the supreme leader to the constitutional institutions, he contradicted Jazayeri's statement. He then laid the groundwork for Mojtaba, the son of the current supreme leader, to potentially assume the position of supreme leader. Mohammadi pointed out that the qualities of the supreme leader are outlined in the Constitution (specifically in Article 109). The leader is the one who possesses the necessary academic qualifications to establish justice and piety, the correct political and social vision, ingenuity, courage and administrative skills, along with the full and sufficient power to lead. According to Mohammadi, Mojtaba meets these criteria as he is a Muslim jurist who has been studying jurisprudence and legal theory in the Qom Hawza for years. Hence, for Mohammadi he is a viable candidate for the position, and his exclusion from consideration would be unjustified.

Such statements are a prelude to Mojtaba potentially succeeding his father, or they may reflect different viewpoints within the corridors of the hawza and

the government. Another possibility is that the hawza seeks to play a role in selecting the supreme leader and, therefore, is signaling that a decision regarding Mojtaba must not be settled without its consultation. It is important to note that Mohammadi does not represent all seminarians but rather a specific group of them. There are other silent marjas who do not openly reject Mojtaba's leadership but remain discreet, and there are others who remain indifferent and do not concern themselves with who occupies the leadership position. In addition, there is another layer of meaning in Mohammadi's statements. He highlights Mojtaba's studies and teaching experience in the Qom Hawza, implying his strong jurisprudential qualifications and close ties to the hawza's scholars. This sets Mojtaba apart from other members of the ruling elite, who typically avoid the hawza due to political commitments and responsibilities within state institutions. Therefore, this signals to seminarians that Mojtaba is both a legitimate seminarian and qualified from a jurisprudential perspective, making him a suitable candidate should he be chosen.

(1) A prominent seminary professor and vice president of the General Assembly of Seminary Teachers.

Islamist Movements: Attempts at Revival and Engagement

The Ennahda Movement and Tunisia's Presidential Election

Tunisia's presidential election took place in October 2024, with President Kais Saied securing over 90% of the vote in the first round — a result his supporters described as a “landslide victory” due to his popularity having quadrupled since 2019. However, opponents questioned the legitimacy of the election outcomes, alleging manipulation through intimidation, the dismantling of civil society and political arrests without trials.⁽¹⁶⁹⁾ The Ennahda Movement appeared to sense the threat of its diminishing influence. In response to the election results, its leaders began advocating for dialogue and democracy.⁽¹⁷⁰⁾ The movement allowed its members to either participate in the electoral vote or abstain without mandating participation or a boycott, according to senior figures within the group. Regardless, the election outcomes highlight the Ennahda Movement's weakening popular support and ongoing internal struggles. The movement has experienced a phase of decline due to leadership setbacks, internal divisions, and a poor record in governance, which has led to

its exclusion from the political alternatives that citizens are now considering for future elections. Consequently, the movement is attempting to regain influence and support by adopting a discourse centered on social and political grievances, positioning itself as a voice against perceived injustices.

The MSP and the Algerian Presidential Election

Algerian Islamists were divided in their stance on the presidential elections. The National Construction Movement, the second-largest Islamist party in the country, endorsed President Abdelmadjid Tebboune, praising his commitment to “the continued protection of national constants and the project of building a new Algeria,” as stated in an official party statement. Conversely, the MSP, Algeria's largest opposition party, fielded its leader Abdelaali Hassani Cherif as a candidate under the slogan “An Opportunity for Change.” This marked the first time the MSP put forward a candidate in a presidential race since its late leader Mahfoud Nahnah took part in the November 1995 elections.⁽¹⁷¹⁾ However, Cherif failed to secure significant support, garnering only 30% of the vote, which resulted in a deep internal crisis within the movement. Abderrazak



Makri, the former MSP leader, accused the current leadership of blocking his participation in the election campaign, attributing this to pressure from President Tebboune. Makri addressed his absence in a detailed post titled “Clarification,” confirming his exclusion from supporting his party's candidate. He speculated that his active presence threatened the leadership and the movement's “new directions.” These “new directions” referred to statements from MSP leaders suggesting a potential return to government participation, 12 years after the party's departure from power following the political upheavals of the so called “Arab Spring,” which ultimately did not result in the regime's downfall.⁽¹⁷²⁾

Libya and the Crisis of Imposing the Veil

In November 2024, Libyan Minister of Interior Imad Trablesi, representing the Tripoli/West government, announced that “the morality police patrols would return to work starting next month — December.” He emphasized that these patrols would stop young men and women from sporting hairstyles and clothing that did not adhere to the cultural norms of Libyan society. His directives included mandating that women wear the hijab, prohibiting travel without a male guardian except in specific cases, and barring the mixing of men and women in cafes and public spaces. He stated unequivocally: “Those seeking personal freedom should go to Europe.” Furthermore, he asserted that female officers would enforce gender segregation in public spaces, cafes and prevent any breaches of these rules, adding that anyone violating the decisions would face arrest. He also threatened to conduct raids in homes to uncover and address any involvement in what he termed as immoral acts.⁽¹⁷³⁾ Although these statements came amid Libya’s ongoing security, political and economic challenges, they reflect the beliefs of the minister of interior and the orientation of the entire government. At the

heart of their concerns is Libya’s urgent need for stability, a peaceful constitutional transition, and the establishment of a culture of coexistence and unity while rejecting the militia presence to pave the way for a state based on law and governance.

Consequently, some view these statements as a strategic move aimed at securing electoral support ahead of the municipal elections, framing them as an electoral tactic rather than genuine policy intent. Others see Trablesi’s remarks as an honest expression of his vision and that of the government, given his background as leader of the notorious Public Security Agency militia, which has been accused of committing crimes against refugees and migrants, including torture and enforced disappearances.⁽¹⁷⁴⁾ Amnesty International has condemned these measures, warning that they would likely reinforce discrimination against girls and women, undermining their rights to freedom of expression, religion and beliefs.⁽¹⁷⁵⁾ Trablesi’s comments also offend the true spirit of Islam by suggesting that those seeking personal freedom should move to the West. This echoes statements from critics who claim Islam curtails freedom and enforces societal control without public consent, as neither the

public nor an elected Parliament approved these policies that are now set to be enforced.

The Muslim Brotherhood and the International Union of Muslim Scholars: Shunning Politics and Electoral Engineering

The crisis within the Muslim Brotherhood in Egypt has persisted for years, marked by internal fragmentation reflected in the formation of distinct factions. The most significant factions include the Turkish wing led by Mahmoud Hussein, and the London wing led by Salah Abdel Haq, who succeeded Ibrahim Mounir. Both factions claim legitimacy as representatives of the group and its Shura Council, a division that has shaped their differing perspectives on political events and the group’s future. On August 24, 2024, media outlets reported an initiative by Helmy el-Gazzar, one of the Muslim Brotherhood’s leaders in exile. Gazzar proposed that the group would refrain from pursuing power and cease political activities for 15 years in exchange for the release of detained members.⁽¹⁷⁶⁾ However, this initiative was met with sharp opposition from the other faction led by Hussein who asserted that the group’s decisions must come through its official

institutions, particularly the General Shura Council.⁽¹⁷⁷⁾ The clash over this initiative highlights the profound internal conflict within the Muslim Brotherhood, driven by personal ambitions and struggles over control of the group's resources and leadership. Both factions vie for authority under the banner of the Shura Council, each aiming to consolidate their influence and secure the group's financial and logistical support.

A surprising and unexpected development occurred when the Egyptian state, through the Criminal Court and following an official request from the Public Prosecution, decided on November 24, 2024, to remove 716 individuals from the terrorist list. This group includes prominent figures and leaders from the Muslim Brotherhood such as Sheikh Youssef al-Qaradawi and businessman Youssef Nada.

In a statement issued just hours before the announcement of the names, the Public Prosecution declared, "Security investigations have proven that 716 people have stopped illegal activities against the state and its institutions, and therefore the relevant judicial authorities decided to remove their names from the terrorist list." The head of the Human Rights Committee in the House of Representatives viewed this decision

as a chance to reconcile with individuals who "were deceived and engaged in crimes that did not involve bloodshed."⁽¹⁷⁸⁾ However, the decision sparked debate in both official and semi-official media, as it was seen as a significant presidential directive to revise and review the people on the terrorist list. The Public Prosecution's statement referred to "presidential directives to review the position of those included on the list of terrorist entities and terrorists."⁽¹⁷⁹⁾ Critics raised concerns about this move, arguing that such interventions compromise the independence of the judiciary, which is traditionally expected to remain separate from the executive authority.

There are numerous analyses about this sudden decision, as multiple scenarios are at play. The first scenario signifies an attempt to mend the social and political fabric within Egypt amidst significant regional changes since October 7, 2024. Egypt faces various security challenges, including threats on its eastern border due to a permanent Israeli presence in the Philadelphi Corridor. Some Egyptian strategists view this as a breach of the peace agreement by one party. Additionally, the Egyptian state perceives dangers in its south from Sudan, where the RSF pose a national security threat. Ethiopia also presents

a risk due to the Renaissance Dam, with no agreement reached despite the construction being fully completed. Moreover, the situation in Libya remains unstable, with two rival governments competing for legitimacy amidst international and regional divisions. There are also ongoing conflicts in Syria, Iraq and Yemen. Given these circumstances, some believe that the Egyptian leadership aimed to stabilize the internal situation and prepare the nation to confront these regional challenges — a strategy suggested by the head of the National Security Committee in the Egyptian Parliament. Another perspective is that the Egyptian regime is seeking to open the internal political arena, even if only partially, to strengthen ties with the United States under a potential Trump presidency. This could help secure unconditional aid and reinforce regional cooperation. Economically, this decision may be tied to Egypt's financial difficulties, seeking support from regional and international players to alleviate the challenges posed by its economic crisis. This comes after Egypt faced conditions imposed by the International Monetary Fund, which resulted in inflation spikes and a significant increase in prices that affected Egyptian citizens' daily lives. Regarding the Muslim

Brotherhood itself, it has been weakened by sustained blows since 2013. These include the arrest of influential leaders, the deaths of prominent figures like Essam el-Erian, and a loss of strategic coherence. The group's internal fragmentation into factions located in London, Istanbul and Egypt has further diminished its administrative structure and ability to coordinate nationwide efforts. Most of its connections and operational strength have been diminished, leaving only ineffective remnants scattered across the country. This disintegration has left the group unable to conduct internal reviews, negotiate meaningfully with the regime, or strategize effectively, ultimately rendering it incapable of regaining its influence or power across Egypt.

The internal struggles of the Muslim Brotherhood appear to extend beyond the group itself, as the International Union of Muslim Scholars (a scholarly body closely associated with the Muslim Brotherhood) is now embroiled in its own leadership crisis. This discord became evident during the elections for the union's president, which were marred by allegations of personal rivalries and procedural irregularities.

The union has faced persistent challenges since the passing of its prominent

figure, Sheikh Youssef al-Qaradawi, and the subsequent resignation — or dismissal — of Sheikh Ahmed al-Raysuni.⁽¹⁸⁰⁾

Hamas Following the Assassination of Its Leaders — Demise or Renewal?

Hamas suffered significant blows with the assassination of most of its leaders inside and outside Palestine, starting with Saleh al-Arouri, followed by Ismail Haniyeh, and culminating in the killing of Yahya Sinwar, the movement's leader and primary decision-maker on the ground. Notably, Hamas has lacked prominent ideologues since the deaths of Ahmed Yassin and Abdel Aziz al-Rantisi. Most of its current leaders are activists or military figures who adhere to the movement's founding principles, inspired by figures such as Hassan al-Banna, Izz al-Din al-Qassam, Abdullah Azzam and Yassin. However, political realities have compelled the group to adopt some pragmatic stances, such as expressing support for democracy and the modern state. These declarations, however, largely remained superficial media statements, failing to penetrate the movement's educational frameworks or the ideological views of members. When Sinwar consolidated control over Gaza and the movement as a whole, theorizing was effectively

sidelined, and authority shifted entirely to the military wing. This wing, known for its close ties with Iran and the IRGC, became deeply entangled in the events of October 7. Hamas was either drawn into or actively involved in an operation with significant Iranian influence. In the speech announcing the operation, Mohammed Deif declared that it was aimed at the liberation of Al-Aqsa Mosque. The movement maintained its hardline stance despite the civilian suffering in Gaza and the rise of extremism within the Israeli right, which seized the moment to eliminate longstanding opposition with Western and US backing. Theories within Hamas that once advocated for moderation and a sustained resistance — focusing more on maintaining the Palestinian issue's relevance in the Arab and international spheres rather than the outright eradication of Israel — were jeopardized after the October 7 decision. This decision, attributed to Sinwar and Deif, was reportedly made unilaterally without consulting key leaders overseas. It focused solely on initiating an offensive strategy, neglecting to develop a contingency plan for Israel's potential retaliatory actions, including a full-scale reoccupation of Gaza.

From this, two significant crises emerge. The first is a crisis of theory and thought that has plagued Hamas for years, coming to a head with the decision of October 7 and its repercussions. The lack of a coherent theoretical framework or influential theorists has had far-reaching consequences. This deficiency not only hampers negotiations and efforts to mitigate the damage caused by the unilateral decision made by Sinwar and his close circle but also threatens the movement's long-term viability. Without intellectual leadership or a clear ideological foundation, the movement faces a precarious future, unable to adapt or recover effectively from its current predicament.

The second crisis pertains to the very survival of the movement and its ability to self-assess and evolve. Hamas has been severely weakened in Gaza following the elimination of its top military and civilian leaders. Public criticism has intensified due to its failure to manage civilian affairs, including the equitable distribution of aid, alleviation of suffering and provision of basic necessities like food and medicine. Many view the movement as directly responsible for their suffering, attributing it to its decision to engage in an unequal war. Meanwhile, Israel has drastically changed its

approach, seeking to exclude Hamas entirely from governing Gaza post-conflict. By suppressing the emergence of new public leaders and banning public events or military displays, Israel has abandoned the rules of engagement and mutual deterrence that previously defined their interactions, treating Hamas as a terrorist organization comparable to ISIS.

Hezbollah: Revisions and Theorization

Hezbollah, one of the largest contemporary Shiite political Islamist groups and a key non-state actor, experienced significant challenges in 2024 due to a succession of blows that dismantled its leadership structure. The assassination of senior leaders such as Fuad Shukur, Hassan Nasrallah and Hashem Safieddine left the party in a vulnerable state, grappling with what can be described as a genuine leadership crisis. Safieddine, once considered the strongest contender to succeed Nasrallah, was assassinated just hours after Nasrallah's own death. This sudden loss forced the party to appoint Naim Qassem as secretary-general despite his limited charisma and less significant jurisprudential and religious stature compared to Nasrallah and Safieddine. The crisis is compounded by the cultural and religious

expectations surrounding Hezbollah's leadership. The party's leadership tradition necessitates a "turbaned" figure, specifically a "sayyid" with a black turban, to maintain legitimacy among the Shiite masses and the party's support base. This figure serves as a crucial intermediary between Iran's leadership and Hezbollah's followers in Lebanon, symbolizing the ideological and political connection to the Iranian supreme leader. With the deaths of both Nasrallah and Safieddine, Hezbollah finds itself struggling to identify a leader capable of fulfilling these roles, exposing deep vulnerabilities in its leadership structure at a critical time.

On Wednesday, November 20, 2023, Qassem, the new secretary-general of Hezbollah who succeeded Nasrallah, delivered a speech outlining the party's stance on key issues amidst ongoing tensions. He issued a direct threat to target Tel Aviv in response to any attack on Beirut and addressed the party's reservations regarding the US-proposed ceasefire. These reservations centered on two points: ensuring a comprehensive ceasefire and safeguarding Lebanon's unity and sovereignty. Regarding the post-war phase, Qassem emphasized Hezbollah's commitment to operating within the framework of the Taif

Agreement. He stated, “We will build together in cooperation with the state and the countries that will assist in reconstruction, and we will contribute to electing a president in a constitutional manner. Our political steps will remain under the Taif Agreement, and we will actively participate in the political arena to build and protect.”⁽¹⁸¹⁾ Some observers viewed Qassem’s speech as a retreat from Hezbollah’s policies regarding its political rivals within Lebanon and its dominant influence over Lebanese state decisions. Others viewed it as a reflection of pragmatism resulting from successive defeats that weakened the party’s leadership and core capabilities. The party lost key theorists and top-level military and spiritual figures, which undermined its ability to wage the battle in the decisive manner observers had anticipated and that Hezbollah had repeatedly threatened.

It soon became apparent that Qassem’s speech signaled an impending major agreement to end the war between Hezbollah and Israel. On November 27, 2023, a ceasefire agreement came into effect, one that was perceived as unfair to Hezbollah. This agreement followed earlier assurances from the party’s leadership, including Nasrallah, that Hezbollah would not stop

fighting until Israel ceased its aggression against Gaza. However, the course of events, marked by Israel’s assassination of senior Hezbollah leaders — especially religious figures like Nasrallah and Safieddine — and the significant damage to Hezbollah’s infrastructure, ultimately forced the party to accept the ceasefire. Despite Hezbollah framing this outcome as a victory for its supporters, the reality was that the party suffered an unprecedented blow since its founding. Most notably, the extent of intelligence penetration within Hezbollah’s ranks led to the assassination of the secretary-general and his successor in secret underground tunnels.⁽¹⁸²⁾

Consequently, it appears that Hezbollah’s future will face significant challenges following the deaths of Nasrallah and Safieddine, the growing influence of the Iranian leadership, and the death of Ebrahim Raisi. Given Hezbollah’s direct ties to Iran and the supreme leader, the question arises whether the party can regroup, reorganize its ranks, and cultivate a charismatic leadership figure in the mold of Nasrallah and Safieddine. This prospect seems unlikely in the medium term, at least, due to the severe blow the party has suffered. There has been a significant erosion of confidence among fighters and supporters

in the leadership’s competence and reliability, a trust that had been carefully built since 2006 and sustained until just before Nasrallah’s death. Furthermore, Hezbollah continues to experience the ongoing attrition of its members across Lebanon, Syria, Iraq and Yemen.

Violent Groups and Radical Movements

ISIS and Attempts at Revival

Despite enduring significant setbacks, including the deaths of key leaders, founders and ideologues, as well as the dismantling of its leadership structure, ISIS remains determined to regain prominence and rebuild its strength. The group continues to seek opportunities for revival, recruit new members and establish operational footholds. In 2024, ISIS demonstrated its resilience through a series of attacks across multiple regions and countries, showcasing its ability to organize, plan and execute large-scale operations. Notably, ISIS carried out the Kerman bombings in Iran, targeting a large gathering commemorating Qassem Soleimani’s assassination, which resulted in the deaths of over 100 people.⁽¹⁸³⁾ In retaliation, Iran conducted a missile strike on the Syrian city of Idlib, claiming it targeted the planners and perpetrators responsible

for the Kerman attack. Additionally, ISIS took credit for bombings in Türkiye, Russia and Oman.⁽¹⁸⁴⁾ The situation in Syria⁽¹⁸⁵⁾ toward the end of the year highlighted the resurgence of jihadist groups that had previously capitalized on Syria's prolonged instability. These groups reemerged across the Syrian landscape, often composed of factions that had long been integral to ISIS. Furthermore, the proliferation of uncoordinated “lone wolf” attacks, carried out independently rather than orchestrated by the group's central leadership, also pointed to the group's ongoing and dispersed efforts to make a comeback, raising concerns about the growing scale of ISIS activity and influence.

Somalia's al-Shabaab and the Concerns of Neighboring Countries

In August 2024, al-Shabaab carried out a deadly attack on the Beach View Hotel located on Lido Beach, near the entrance to the heavily fortified Villa Somalia complex, which includes key government buildings such as the presidency, the prime minister's offices and various ministries. The explosion resulted in the tragic loss of at least 37 civilian lives and left 212 others injured.⁽¹⁸⁶⁾ This attack underscored the Somali government's struggles to assert control and stability, despite

ongoing efforts to dismantle the group. Several factors contribute to al-Shabaab's persistence and expansion, despite the challenges it faces. These include the weak capacity of the Somali government, widespread financial and administrative corruption, and deep-rooted tribal dynamics. The competition for influence among Somali clans has resulted in some clans forming alliances with al-Shabaab, a development that the government has struggled to address.⁽¹⁸⁷⁾

The Taliban and the Law on the Promotion of Virtue and Prevention of Vice

Sheikh Hibatullah Akhundzada, the leader of the Taliban, has officially approved the Promotion of Virtue and Prevention of Vice law, a new legal framework aimed at enforcing strict social and moral codes across Afghanistan. Drafted by the Ministry of Promotion of Virtue and Prevention of Vice and issued by the Ministry of Justice, the law grants extensive powers to this ministry to implement its provisions nationwide. The introduction of the law has drawn sharp international condemnation, with the United Nations and European foreign ministers criticizing it for restricting women's rights in Afghan society, describing it as a step toward deeper oppression of women.

Sheikh Khalid al-Hanafi, the minister of the Promotion of Virtue and Prevention of Vice, emphasized that this legislation is the first to be signed directly by the Taliban's leader and is based entirely on Hanafi jurisprudence. He asserted that no criticism of the law could imply that the Taliban did not adhere to Islamic principles. Afghan government spokesman Zabihullah Mujahid stated that the law “was written based on Islamic rulings, and anyone who criticizes it means that he is objecting to religion. There is a basic point that it will not be implemented by force and we will engage with the people gently, and no one has the right to object to it, whoever he is.” The new law consists of three chapters that outline the role of the *muhtasib*, detailing his powers and responsibilities in dealing with detainees and prisoners. A fourth chapter addresses various provisions concerning the law's implementation. Article 13 of the law stipulates that “a woman must cover her entire body in the presence of men who are not members of her family,” and her face “for fear of temptation.”⁽¹⁸⁸⁾ The assertion that “a woman's voice is an *awrah*” has provoked significant reactions from civil society groups and women's rights advocates.

It does not appear that the Taliban will reconsider approving or implementing

the law, as they understand that their legitimacy stems from their adherence to Sharia, particularly the traditionalist heritage interpretation of the Hanafi school in its subsidiary issues and the Maturidi school in its foundational tenets, a Deobandi approach that has been a defining feature for years. The movement's leadership does not seek popular legitimacy because they genuinely believe in these laws and frame their political worldview based on them, using them to shape their perceptions and relationships. Additionally, support from Russia and China has provided the Taliban with the leverage to reject US and European pressures. The movement also recognizes that the US military will not return to Afghanistan after departing without achieving its primary objectives, especially with the Taliban having retained their organizational and intellectual structure almost entirely. Instead, the West will settle for sanctions, which the Taliban can sometimes bypass or adapt to. Furthermore, the Afghan population, particularly in rural and smaller towns, largely supports the Taliban's legislation, as it aligns with longstanding cultural and customary beliefs that have been part of their social fabric for generations.

The Far-right and Its Uncalculated Rise

The term far right first emerged in Europe after the French Revolution and initially referred to traditionalists who upheld conservative views on established forms of government. In contrast, the left became associated with progressives who advocated for popular sovereignty and the authority of the people. In economic terms, the right generally supports a free market system with minimal government intervention, favoring lower taxes and a strong capital-driven economy. On the other hand, the left supports greater government intervention in the economy, imposing higher taxes on the wealthy to finance public services and infrastructure, ensuring funding for sectors like education, healthcare and social services. Over time, terms like far right and far left developed more distinct connotations. The far right came to be associated with an extreme form of nationalism, hostility toward Jews, Muslims and minorities and a belief system rooted in some Christian traditions. In contrast, the far left is characterized by a commitment to revolutionary ideals and, in some cases, support for revolutionary violence.⁽¹⁸⁹⁾ In 2024, several significant issues have emerged, often driven by the right and far right or supported by governments seeking to align with right-wing interests. These

issues can be outlined in the following key points:

France and the Crackdown on Imams

In February 2024, the French interior minister introduced a new administrative framework for the selection of mosque imams, setting forth a series of criteria. These include the ability to speak French, completion of training courses on secularism and selection through local mosques and institutions. This decision is part of an ongoing initiative aimed at curbing the recruitment of foreign imams and halting the practice of receiving funding for their services from foreign states. Historically, countries like Türkiye, Algeria, Morocco and Egypt had frequently sent imams to France, both permanently and for specific occasions such as Ramadan. The new system led to the dismissal of over 300 mosque imams, with approximately half of them being Turkish nationals. The French government justified these measures as a necessary step to prevent separatist ideologies and extremist influences from taking root within local mosques.⁽¹⁹⁰⁾

India and Suspending Funding of Islamic Madrasas

The central government in India has decided to withdraw funding for over 7,700 Islamic schools in Uttar Pradesh. This

decision has left a group of imams in a financial crisis, as their salaries have been suspended for two years by the Waqf Authority.⁽¹⁹¹⁾ These imams have accused the government of orchestrating this suspension. In response to these developments, Amnesty International issued a report condemning the Indian government for what it described as a systematic targeting of Muslim properties across the country. The report also criticized the Indian authorities for operating with impunity while pursuing a de facto policy of discrimination against Muslims. Amnesty International called on the government to “immediately stop pursuing this policy of using demolition campaigns as a pretext to target Muslims.”⁽¹⁹²⁾

Türkiye: Hostility Toward Syrians and the Kayseri Incidents

The wave of xenophobic intolerance in Türkiye persisted, extending even to foreign tourists, in addition to residents and refugees, particularly targeting Arabs. In June 2024, violent incidents erupted in southern Türkiye and the Kayseri province, where Turkish citizens attacked Syrians. The conflict began after a video went viral showing a Syrian refugee with a mental illness attacking a Turkish girl, as per the official Turkish statement. This incident sparked widespread

attacks on Syrian homes and properties in the province, with the violence spreading to other areas.⁽¹⁹³⁾ The attacks included acts of burning shops and residences, assaulting Syrians and storming homes. The Turkish government indirectly contributed to these tensions by reinforcing a distinction between Syrians and Turks. One notable measure was differentiating the license plates of Syrian vehicles from Turkish ones, which made it easier for ultranationalists to identify and target Syrians.⁽¹⁹⁴⁾ President Recep Tayyip Erdogan addressed the situation by asserting that inciting xenophobia would not serve any purpose. He also politically exploited the incident by attributing the “painful” events to the rhetoric of the political opposition.⁽¹⁹⁵⁾ Meanwhile, Interior Minister Ali Yerlikaya announced the detention of 474 individuals in connection with the provocations, noting that 285 of those detained had prior criminal records. Defense Minister Yaşar Güler warned that any attempts to disturb public order would be thwarted through the coordinated efforts of state institutions.⁽¹⁹⁶⁾ The incident seems to have unsettled Türkiye’s security establishment due to its brutality and the extensive media coverage it garnered. Additionally, it has damaged Türkiye’s global reputation and posed a significant threat to Türkiye’s tourism.

Neo-pharaonism: Attempts at Reviving Ultranationalism in Egypt

An ultranationalist, independent and fanatical movement has begun to emerge in Egypt, spreading animosity against religious, cultural and identity-based others. Commonly known as “neo-pharaonism” it seeks to solidify its influence through populist social media discourse while leveraging Egyptian nationalism and the legacy of the Pharaonic civilization.

Kemet, an ancient term for Egypt, means “black land,” referencing the fertile silt deposited by the Nile’s annual flooding. Although the movement appears to be a new development, it has roots that extend beyond recent times and is evolving into a social and cultural phenomenon that demands deeper examination. The movement has gained prominence, particularly following the influx of significant numbers of Syrians, Sudanese, Yemenis and others into Egypt. This coincides with an ongoing economic crisis that affects a large segment of Egyptians, notably those from the lower, poor and middle classes. The neo-pharaonic movement has seized upon this situation as an opportunity to blame foreign “guest” residents for exacerbating the economic difficulties. One key characteristic of this movement

is its combative stance against Arabs and Islamic culture, sometimes even Islam itself. It frames Islam as an imported religion that undermined “Egyptian civilization” and eroded “the Egyptian character.” In doing so, the movement positions itself as a protector of the Egyptian people’s rights and identity, standing against the failed rule of Islamists, opposing Arabs whom it views as a “foreign occupants,” and even singling out Islam as a deviation from the beliefs of the ancient Egyptians. The flaws in this approach and the disregard for historical facts are evident. When Muslims conquered Egypt, it was under Roman occupation, and the Egyptian population was suffering under Roman oppression. The vast majority of Egyptians remained Christian and were safe under Muslim leadership until the fifth century AH, when most Egyptians began to convert to Islam voluntarily and in large numbers. Nevertheless, with the rise of this extremist movement, the targeting of foreigners and attributing economic and social crises to them has become a regular occurrence on social media. In some cases, this rhetoric spills over into real-life interactions, where individuals influenced by this discourse harass foreigners in streets and public areas, reflecting the growing social tensions and

animosity fostered by the movement’s narrative.

The trend views the Egyptian identity as solely rooted in its ancient Pharaonic heritage, rejecting any Arab or Islamic influences. While discussions about identity have been present since the early 19th century, this perspective has recently gained prominence with unprecedented intensity, aggression and hostility. It is now not only directed at external and regional influences but also at Egyptians who believe their Egyptian identity can coexist with their Arab and Islamic identities.⁽¹⁹⁷⁾ As a result, this ultranationalist discourse has earned the nickname “the makers of hatred,” reflecting their aggressive stance against refugees, immigrants and foreign residents in Egypt. Their actions include social media campaigns, public harassment and a broader effort to ostracize and marginalize these groups, framing them as threats to Egypt’s national character and identity.⁽¹⁹⁸⁾

Some analysts suggest that certain groups are leveraging neo-pharaonism to deflect attention from pressing internal issues related to politics and the economy. There are also concerns that the movement poses a threat to Egypt’s national security, potentially undermining its social, religious and cultural cohesion.

Despite its emphasis on ancient Egyptian identity, the movement often displays a flawed and superficial understanding of ancient Egyptian history. Its rhetoric, characterized by supremacy and political animosity,⁽¹⁹⁹⁾ sometimes includes efforts to intimidate foreign expatriates and residents. Official Egyptian institutions refer to these individuals as “guests,” while the movement labels them as “refugees,” using this terminology to diminish their status and attribute societal and economic challenges to their presence. This dynamic has led some expatriates to leave Egypt, even though many had established themselves with investments and businesses across various sectors.⁽²⁰⁰⁾

Conclusion: Intellectual and Ideological Developments

Religious institutions are actively working to counter extremism and sectarian fanaticism, particularly from sub-state groups and organizations. The Saudi religious establishment, in particular, has championed a discourse of moderation and centrism. It has issued and endorsed significant initiatives aimed at rejecting takfiri ideologies, fostering brotherhood among different Islamic confessions and promoting coexistence among diverse communities. This commitment to unity is evident through official engagements,

such as the Saudi ambassador's visits to Najaf in Iraq, where he met with high-ranking figures like Sheikh al-Fayadh, the most senior marja in Najaf after Grand Ayatollah Sistani. The Saudi strategy focuses on building religious unity, encouraging coexistence and rejecting extremism, with a strong emphasis on dialogue and mutual understanding among confessions and believers. Meanwhile, other religious institutions have faced challenges, such as internal conflicts, regional political instability or domestic issues that demand their attention. In Egypt, a new phase is beginning with the appointment of a new minister of awqaf and a new grand imam, signaling a transition from the leadership of Tayeb. These appointments seem to be part of strategic preparations for the post-Tayeb era, outlining the direction the Egyptian state might pursue. The current minister of awqaf is considered a frontrunner as Tayeb's successor, due to his close ties with the state leadership, connections with key regional figures, and mentorship from Gomaa, a former mufti of Egypt.

In Morocco and Iraq, a dispute emerged over controversial amendments to family law, with the amendments being delayed due to the societal tensions that accompanied these discussions. In Algeria, the

Great Mosque was inaugurated as a comprehensive national religious institution, comparable to Al-Azhar, Al-Zaytouna and Kairouan. Its leadership aims to challenge other regional institutions, fostering competition through interactions with France and neighboring countries as part of a broader struggle for religious influence and regional leadership in the Maghreb. In Iran, a concealed religious dispute is unfolding over the succession of the next supreme leader, following speculation about Khamenei being succeeded by his son Mojtaba. This uncertainty stems from the leadership vacuum left by the death of Raisi. As a result, the position of supreme leader remains highly unstable in the post-Khamenei era. Internal forces, including the army, the IRGC and the marja-e taqlid, could clash or diverge in their views. Meanwhile, external regional and international actors will closely observe the succession process, secretly seeking to shape the post-Khamenei landscape.

At the level of Islamist groups, the MSP suffered a defeat in the presidential election in Algeria amid significant internal conflict and disagreements among its senior leaders. In Tunisia, the Ennahda Movement failed to make a strong impact in the presidential elections. In Egypt, the Muslim Brotherhood attempted to

present an initiative aimed at withdrawing from political activity in exchange for the release of political detainees. However, internal divisions within the group's branches prevented consensus, and the government showed little interest in the proposal. Nevertheless, the Egyptian government unilaterally removed several names from the terrorist list, including some prominent Muslim Brotherhood leaders. This action sparked debate: some viewed it as an effort to initiate a new relationship with the group, while others saw it as a strategic maneuver to test internal group dynamics, contain internal factions or apply pressure on regional and international actors amid Egypt's ongoing economic challenges.

With regard to violent groups, ISIS remains active in various operations, but these do not reflect a reorganization or a solidified leadership structure. Instead, they suggest a decrease in viable military confrontation strategies, limited resources and difficulties in recruitment efforts. It is unlikely that ISIS will regain its former strength and territorial control, as seen before its defeat in its last stronghold in Syria in 2019. However, the group continues to execute attacks in major cities through lone-wolf operatives, a tactic it adopted to mitigate pressure following the deaths of its key founding leaders

and the pursuit of its fleeing members. The organization could potentially re-emerge as a significant threat if conflict escalates between the Syrian regime and armed factions, resulting in instability beyond the control of local actors. Meanwhile, the Taliban movement in Afghanistan has implemented the law of enjoining good and forbidding evil, sparking global outrage and criticism for violating women's rights. The Taliban's leadership remains steadfast in upholding the law as an expression of Sharia principles, viewing any opposition as resistance to

Islamic teachings rather than just the movement's policies. The enforcement of this law underscores the Taliban's commitment to their stance, even as they seek diplomatic engagement with countries like China and Russia to evade Western sanctions.

Regarding the far-right, France and India have implemented restrictions on mosque imams, while Türkiye is working to address racism following the Kayseri incidents. In Egypt, efforts are being made to ease tensions with refugees — referred to as “guests”— as part of a

broader initiative to address the rise of neo-pharaonism, even if only superficially. This movement aims to reshape Egyptian identity by promoting a populist, ultranationalist discourse that seeks to sever ties with the Arab and Islamic cultural foundations of Egypt.

Although neo-pharaonism is a relatively small and recent movement, internal factors and regional dynamics have contributed to its growth among young Egyptians, particularly those born at the beginning of this century.

Notes

- (1) جريدة الشرق الأوسط، ملامح التحالفات في القرن الحادي والعشرين، (15 يوليو 2024)، تاريخ الاطلاع: 15 نوفمبر 2024، <https://shorturl.at/5fPsm>
- (2) أوبوكر الدسوقي، ظاهرة التحالفات الدولية... الغايات والتحديات، مجلة السياسة الدولية، (القاهرة: مؤسسة الأهرام، العدد 236، أبريل 2024م)، ص 90.
- (3) رنا أبو عمرة، التحالفات الأمريكية.. تحولات عميقة غير مكتملة لنسق عالمي مأزوم، (القاهرة: مؤسسة الأهرام، مجلة السياسة الدولية، العدد 236، أبريل 2024م)، ص 118.
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RASANAH ISSUES IRAN'S SECURITY AND INTELLIGENCE CIRCLES

Dr. Saad Mohammed bin Nami

The International Institute for Iranian Studies (Rasanah) has issued the English edition of the book entitled Iran's Security and Intelligence Circles authored originally in Arabic by Iranian affairs researcher Dr. Saad Mohammed bin Nami. The 137-page book examines both the historical and modern security systems in Iran. The first chapter is entitled "Iranian Security Circles" and analyzes the country's revolutionary institutions and security agencies with their different classifications. Iran's revolutionary institutions include the Council of the Islamic Revolution — the first revolutionary institution established prior to Khomeini's return from exile in France to Iran as the Shiite cleric had chosen its members on December 24, 1978.





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PART 2

REGIONAL DEVELOPMENTS

The year 2024 witnessed significant developments across various regions. In the Middle East, the intensification of the geopolitical conflict, driven by Israeli and Iranian efforts to establish new dynamics of confrontation and deterrence, brought the region back into the global spotlight. Amid this conflict, the Gulf states sought to pursue neutral policies against the backdrop of escalating regional and international crises. Meanwhile, Türkiye recalibrated its strategies to secure regional and international gains, while the Central Asian countries collectively worked to enhance their foreign relations in response to global transformations. In Africa, instability persisted as internal crises collided with external pressures. Similarly, South Asia faced growing turbulence, with the escalating crises in Bangladesh presenting an emblematic case of regional volatility. This part explores the most significant developments and interactions across various regions, including the following:

- **The War on Gaza: Complexities and Regional Implications**
- **Syria and Lebanon: Shift in Power Dynamics After the Fall of the Assad Regime**
- **Positive Neutrality: Gulf States' Policies Amid Geopolitical Tensions**
- **Türkiye's New Foreign Policy Amid Shifting Politics**
- **Africa: Domestic Turmoil and Great Power Competition**
- **Central Asia and the Caucasus: Collective Vision**
- **The Ripple Effect of the Bangladesh Crisis on South Asia**

The War on Gaza: Complexities and Regional Implications

The 2023 ASR anticipated escalating challenges and heightened complexity in the Middle East, particularly regarding the Palestinian front, with a potential spillover to Lebanon. This prediction was tied to Israeli Prime Minister Benjamin Netanyahu's ambitions, Tel Aviv's rejection of regional and international calls to halt the destructive war in Gaza, and ongoing escalations by Iran-aligned regional proxies against Israel. By 2024, these scenarios were realized as the Gaza war intensified, further complicating the situation in the region. The conflict deepened fears of a broader regional war due to the hardline policies of Israel's far-right government, which, despite intense internal pressure and disagreements, sought to maintain power by continuing the war and expanding its fronts. Hamas, on the other hand, despite the loss of key leaders, persisted in leading the Palestinian resistance, holding firm to its demands and refusing to make concessions.

The outbreak of the Gaza war led to the growing involvement of the Houthis group in targeting international navi-

gation and Israeli cities with ballistic missiles. The military confrontation between Lebanese Hezbollah and Israel also intensified significantly before the ceasefire agreement. This escalation reached a critical phase after the assassination of key Hezbollah leaders, including its secretary-general and his successor, and the Israeli army's extensive attacks on the Lebanese front aimed at repelling the group's forces from the border. Adding to the complexity, Iran-aligned Iraqi proxies entered the conflict, targeting Israel. The region also saw an escalating confrontation between Iran and Israel, marked by an imbalance of deterrence in Israel's favor. This dynamic stemmed from Israel's successive strikes on Iranian targets both within Tehran's sphere of influence and inside its territory, which contrasted with Iran's delayed and ineffectual responses. Meanwhile, the protracted Gaza war, now in its second year, has further complicated the crisis. The international community's failure to adopt a unified and effective stance has exacerbated an unprecedented humanitarian disaster and posed a severe threat to security and stability in the region.

The 2024 ASR focuses on five key topics. The first examines the Israeli government's strategic calculations regarding the war in Gaza, while the second analyzes the factors influencing the Palestinian resistance factions' approach to the conflict. The third delves into the escalation of armed militias in regions affected by Iranian expansion. The fourth explores shifts in the deterrence equation between Iran and Israel, while the fifth reviews the stances of Arab, regional and international actors toward the war. Finally, the file concludes with projections for 2025.

Israel's Calculations

A range of factors shaped the Israeli government's calculations regarding its war on Gaza. These included the publicly stated objectives of the war and the political dynamics within the ruling right-wing coalition led by Netanyahu. The Israeli prime minister, who has faced significant crises and a barrage of criticism since taking office, has been embroiled in conflicts with the opposition, some members of his own government and key figures within the security establishment.

From the outset of the war, the Israeli government outlined its primary objectives: securing the release of the hostages, dismantling Hamas and ending its governance of Gaza, neutralizing the strip as a security threat to Israel, and ensuring the safe return of residents to northern Israeli areas — an objective later added in response to increased Hezbollah attacks in the north.⁽¹⁾ These objectives were tied to complex strategic considerations, including Israel’s long-term position and influence in the Middle East, shifts in deterrence dynamics and the balance of power with its adversaries across multiple fronts and Israeli political dynamics marked by sharp divisions and disputes. The key considerations influencing these calculations were the following:

Restoring the Force of Deterrence

The Israeli government viewed the comprehensive war on Gaza as an opportunity to project strength and recalibrate its deterrence strategy, which Operation Al-Aqsa Flood had significantly weakened. It sought to achieve this by deploying overwhelming military force against its adversaries, including Palestinian resistance factions led by Hamas, as



well as groups associated with the so-called Shiite Crescent or Iran-backed Axis of Resistance. The aim was to inflict maximum damage on these

groups and their support bases to increase the cost of their involvement in the conflict and deter future attacks on Israel. This approach aligned with an ambitious objective of reshaping the Middle East’s strategic landscape to advance Israeli security and geopolitical interests.

Rendering Meaningless the Principle of “Unity of Arenas” Leading to the Emergence of Separate Fronts

Israel aimed to avoid overstressing its military resources across multiple fronts in the future by intensifying pressure and launching intense strikes — both retaliatory and preemptive — against groups involved in the ongoing confrontation. This strategy was evident in the unprecedented military escalation accompanying the war on Gaza, which extended to the West Bank, targeting potential resistance strongholds and Palestinian civilians, and Lebanon, Syria and Yemen, where Israel launched numerous strikes against its adversaries. A central objective of these actions was to compartmentalize the various conflict fronts. Israel achieved partial success in this regard by pressuring Hezbollah into agreeing to separate the Lebanese front from the Gaza conflict through a ceasefire.

Undermining Opportunities for a Two-state Solution

The Israeli government used the Gaza war to advance its agenda of undermining opportunities for a two-state solution and eliminating the Palestinian issue altogether. This agenda included several significant measures: the Knesset's approval of a law⁽²⁾ rejecting the establishment of a Palestinian state and banning UNRWA activities,⁽³⁾ accelerating settlement expansion in the occupied West Bank to unprecedented levels and announcing plans to impose Israeli sovereignty over the territory.⁽⁴⁾ Additionally, there were plans to reestablish settlements in the Gaza Strip and continue the forced displacement of Gaza's residents to create a military buffer zone in the north and reduce the enclave's size. This was exemplified by the initiation of the so-called Generals' Plan.

Enabling the Ruling Right-wing Coalition to Tighten Its Grip on Power

The Israeli government's ruling coalition viewed the prolongation of the war as a means to prevent its collapse, allowing Netanyahu to remain in power and avoid prosecution for alleged negligence leading to the October 7 events as well as to evade charges of corrup-

tion and abuse of power. Therefore, the coalition saw an opportunity in the ongoing and escalating conflict to restore its legitimacy, bolster its popularity and navigate severe internal challenges, including growing public protests and deepening divisions among its members. These internal rifts were highlighted by the resignations of ministers Benny Gantz and Gadi Eisenkot in protest against Netanyahu's war management and heightened tensions between Netanyahu and Defense Minister Yoav Gallant, which culminated in Gallant's dismissal. Disputes included disagreements over the military service law and the recruitment of Haredi Jews, the prioritization of returning the hostages and the necessity of forming an official inquiry into the October 7 events.⁽⁵⁾ The crisis was further exacerbated by a breakdown in trust between political leaders and security officials, exemplified by leaks of classified documents from the Prime Minister's Office.

Setbacks Endured by the Palestinian Factions: The Assassination of Sinwar

Following Operation Al-Aqsa Flood and for more than a year, resistance factions in the Gaza Strip, primarily led by Hamas, faced intense military pres-

sure from Israeli occupation forces. This led to the destruction of much of their military infrastructure and capabilities, though it did not result in their complete collapse or elimination. The organizational structure of Hamas was further weakened by the assassination of key leaders, both in Gaza and beyond. In January 2024, Israel targeted and killed Saleh al-Arouri, the deputy head of the Hamas Political Bureau, along with two leaders of the al-Qasam Brigades and four other members, in an airstrike on the southern suburbs of Beirut.

In mid-July 2024, Hamas military wing commander Mohammed Deif was targeted in an airstrike in Khan Yunis. His assassination was only confirmed by the Israeli army on August 1, although Hamas refrained from officially acknowledging it. Prior to this, on July 31, 2024, Ismail Haniyeh, the Hamas Political Bureau chief, was killed in a missile strike on his residence in Tehran, where he had attended the inauguration of the Iranian president. These assassinations led to further complications and stagnation in negotiations for a prisoner release deal, highlighting Israel's efforts to escalate the conflict and prolong the war.

On October 17, 2024, the Israeli occupation army announced the assassination of Yahya Sinwar, the leader of Hamas in the Gaza Strip, who had assumed the leadership of the group's Political Bureau on August 6, 2024, following the assassination of Haniyeh. This assassination, after a year of constant pursuance,⁽⁶⁾ marked a significant loss for Hamas in terms of both organization and morale. Nevertheless, contrary to Israeli expectations, which viewed Sinwar's death as a major achievement and a fatal blow to the resistance, his assassination did not result in any concessions from Hamas regarding the release of Israeli hostages. Nor did it weaken Hamas' resolve to continue fighting or lead to its disintegration, as its resilience and continuity have proven to be independent of its leaders, as evidenced by its experiences with the assassination of key figures, beginning with founder Sheikh Ahmed Yassin and extending to numerous other political and military leaders.

On the humanitarian front, the majority of Gaza's population, who form the popular base of Hamas, faced immense pressure due to ongoing and brutal Israeli attacks across the strip.

These assaults have resulted in tens of thousands of deaths, injuries and widespread destruction of residential buildings, schools, hospitals, places of worship, cultural sites and infrastructure. The blockade, coupled with starvation and hindrances to humanitarian aid, exacerbated the suffering, pushing the Gaza Strip into an acute and unprecedented humanitarian crisis. These dire conditions influenced the Palestinian resistance fac-



tions, led by Hamas, to approach the war with several key strategic factors in mind.

Resilience and the Continuation of the Confrontation

The Palestinian resistance factions continued their military actions, despite the high cost, viewing it as the only means to prevent Israeli occupation forces from achieving their objectives in the war, or at least to delay those objectives. By prolonging the conflict, they aimed



to exhaust Israel and increase internal pressure on the Israeli government, potentially pushing it to halt the war.

Reliance on the “Unity of Arenas” Principle

Despite facing significant challenges, such as intense Israeli military pressure on Lebanese Hezbollah, which led it to abandon its insistence on linking the calming of the Lebanese front to the conclusion of the Gaza war, as well as the Israeli occupation forces’ heightened repression in the West Bank that prevented a widespread uprising and the

limited impact of attacks by the Houthi group and Iraqi militias on Israel, the Palestinian resistance in Gaza continued to uphold the principle of “unity of arenas.” This strategy had a relatively significant impact in countering the vast power disparity between the resistance and the Israeli occupation army. In this context, the resistance sought to maintain the relevance of this principle by repeatedly calling on all parties involved in the conflict to intensify their attacks on Israel, while also urging a rise

in resistance activities in the occupied West Bank.

Hostages as a Bargaining Chip to Achieve War Goals

The Palestinian resistance factions, led by Hamas, faced significant pressure after the substantial human and material losses in the Gaza Strip. However, abandoning their demands or making major concessions to Israel would have placed them in a highly difficult position, exposing them to criticism from both supporters and adversaries. Consequently, Hamas and its allies maintained their

demands, which included stopping the aggression, withdrawing Israeli forces, facilitating a fair prisoner exchange, returning displaced people, lifting the siege and allowing enough humanitarian aid. Initially, Hamas accepted a ceasefire proposal from US President Joe Biden on May 31, 2024, presented as an Israeli initiative, which involved a phased approach, including a six-week ceasefire, the withdrawal of Israeli forces from Gaza's populated areas and the release of hundreds of Palestinian prisoners in return for the release of certain Israeli hostages, including women, the old and injured.⁽⁷⁾ However, after Israel backed out of the proposal, Hamas refused to entertain any other initiatives that did not fulfill its demands, particularly the permanent cessation of the war.⁽⁸⁾

Escalation of Iran-backed Militias

With the onset of the Israeli war on the Gaza Strip following Operation Al-Aqsa Flood, Iranian spheres of influence, including Lebanon, Syria, Iraq and Yemen, experienced an unprecedented escalation. This was due to the involvement of armed militias operating in these countries in the Israeli conflict, which significantly heightened the intensity of the confrontation and raised concerns

about the potential for it to evolve into a full-scale regional war.

Lebanon

From the initial days of the Israeli aggression against Gaza, Hezbollah opened a limited military front against Israel, targeting its northern areas adjacent to the border with Lebanon. Hezbollah made it clear from the outset that it was not aiming for a full-scale confrontation but was focusing on a limited campaign of attrition to support the resistance in Gaza. It emphasized that the campaign would not cease until Israel ended its war on the strip. This resulted in material and human losses in the northern Israeli areas near the border, leading to the evacuation of residents. In response, Israel bombed Lebanese border areas, causing widespread destruction and displacing over 100,000 people.⁽⁹⁾ On July 30, 2024, the escalation intensified when Israel launched an airstrike on the southern suburbs of Beirut, leading to the assassination of Fuad Shukr, a prominent Hezbollah military commander. On August 25, Hezbollah retaliated by launching more than 320 Katyusha rockets at Israeli military sites.⁽¹⁰⁾

The Israeli cyberattack on Hezbollah on September 17, 2024, marked a signifi-

cant turning point in the conflict, severely disrupting the group's operations and internal communications. The explosion of thousands of pagers used by Hezbollah members resulted in the deaths of dozens, including key leaders, and injured over 2,800 people across Lebanon. The following day, the group's other wireless communication devices exploded, killing at least 25 individuals and injuring more than 450 others. Between September 20 and September 26, Israel intensified its assault with violent airstrikes on Lebanese territory, killing a large number of Hezbollah's top military leaders.⁽¹¹⁾ These attacks highlighted severe security and intelligence lapses within the group's organizational structure.

On September 27, 2024, Israel dealt a devastating blow to Hezbollah when Israeli aircraft bombed the southern suburbs of Beirut, targeting the group's command center and resulting in the assassination of Hezbollah Secretary-General Hassan Nasrallah and other senior leaders. In the days that followed, Israel also assassinated Hashem Safieddine, who was a potential successor to Nasrallah. Naim Qassem then assumed leadership of the group, reaffirming the continuation of Nasrallah's approach and remaining committed to the war

plan.⁽¹²⁾ Concurrently, Israel escalated its airstrikes on Lebanese territory, and on October 1, it launched a ground offensive in Southern Lebanon aimed at removing Hezbollah forces from the northern Israeli border, transforming the escalating conflict into an open war.

Apparently, Israel viewed the escalation on the Lebanese front as an opportunity to enhance its deterrent force and alter the rules of engagement, allowing it to disengage from the Gaza Strip front by weakening Hezbollah's military capabilities, which had grown significantly since 2006. Despite Israel's significant success in achieving this goal by launching severe and unprecedented strikes against the group's organizational structure, missile arsenal and infrastructure, Hezbollah managed to withstand these blows. The group reorganized its forces and continued the confrontation, with its fighters successfully resisting Israeli forces attempting to penetrate Southern Lebanon. Hezbollah also maintained its missile attacks on various Israeli military sites and cities, including targeting the home of Netanyahu in Caesarea with a drone. Additional-

ly, on November 24, 2024, Hezbollah launched intensive attacks deep into Israeli territory.

On November 26, 2024, a ceasefire agreement was announced between Hezbollah and Israel, mediated by the United States. The agreement, which took effect the following day, stipulated that Hezbollah would withdraw to the north of the Litani River, while the Israeli army would withdraw from Southern Lebanon within 60 days, with the Lebanese army assuming control of the area. The United States and France were to join the tripartite mechanism, established after the 2006 war, to oversee the ceasefire's implementation. Israel was granted the right to attack Lebanon if Hezbollah violated the terms of the agreement. Hezbollah appeared to accept the agreement due to the intense military pressure it faced, compounded by significant losses in Lebanon from Israeli airstrikes, as well as increasing criticism from Lebanese political parties accusing the group of bringing destruction to the country. Israel, on the other hand, accepted the agreement as it provided an opportunity to disengage from both the Lebanese and Gaza fronts, allowing for a much-needed

rest of its reserve forces, which had been depleted for over a year, and to refocus on escalating pressure on Hamas and addressing the Iranian threat.

Yemen

In response to the war in Gaza, the Houthi group intensified its attacks on ships linked to Israel or heading to its ports. Additionally, the group attempted to target US warships and destroyers in the Red Sea and the Bab al-Mandab Strait, effectively militarizing this crucial shipping route and disrupting international trade. In retaliation, the United States and the UK launched multiple strikes against Houthi positions. The Houthis also directed a series of missile and drone attacks on Israel. The latter responded by carrying out an airstrike on July 20, 2024, targeting Houthi militia sites and oil facilities at the port of Hodeidah. On September 29, Israel bombed the ports of Hodeidah and Ras Issa, along with power stations, in retaliation for the ongoing missile strikes from the Houthi group.

In general, this escalation is part of the broader geopolitical conflict between Iran, its allies and Israel. Iran aims to strategically exhaust or weaken Isra-

el over the long term by surrounding it with a hostile military perimeter formed by armed groups loyal to Iran in Lebanon, Syria, Iraq and Yemen. Conversely, Israel seeks to dismantle this perimeter, end its prolonged state of exhaustion and restore its deterrent power against the so-called Axis of Resistance.

Syria

In the aftermath of the Israeli war on Gaza, some militias linked to Iran launched limited missile attacks toward the occupied Golan Heights and Israeli territories. In response, Israel significantly escalated its attacks on Syrian territory, marking an unprecedented surge in military action. From October 2023 to October 2024, Israel carried out over 147 attacks, targeting Hezbollah deployment sites within Syria, military barracks under the Syrian regime's control as well as weapons depots and deployment positions of Iranian militias.⁽¹³⁾

The most prominent of these attacks included the bombing of the Iranian consulate building in the Syrian capital, Damascus, on April 1, 2024, which resulted in the deaths of IRGC leaders, including Mohammad Reza Zahedi, a senior commander of the Quds Force. Another significant attack occurred on September 10, when Israel targeted the Scientific

Research Center in Masyaf, in the Hama countryside, which Israel linked to the IRGC and its use in the development of missiles for Hezbollah. This attack included an Israeli special forces operation, involving an airdrop to seize documents from the center before destroying it. Additionally, on November 21, 2024, an attack on the city of Palmyra resulted in the deaths of dozens of members of Syrian armed groups loyal to Iran, the Iraqi Harakat Hezbollah al-Nujaba (HaN) and Lebanese Hezbollah.⁽¹⁴⁾

As the confrontation between Israel and Hezbollah intensified, Israel significantly escalated its attacks on Syrian territory to prevent weapons from reaching Hezbollah via the Bekaa Valley and to support its military operations in Southern Lebanon. In this context, Israel bombed weapons depots in Syria belonging to Hezbollah and conducted several targeted assassinations in the Mezzeh area in Damascus, primarily targeting Hezbollah leaders, including the armament official and the money transfer official.⁽¹⁵⁾ On the other hand, pro-Iran armed groups operating in Syria increased their targeting of US forces stationed in the region, using drones and missiles in retaliation for US support for Israel. This prompted the US military to

carry out several airstrikes against these groups, notably in February 2024. The US strikes targeted more than 85 sites linked to the IRGC in Syria and Iraq, including nine targets in Syria on February 11, 2024.⁽¹⁶⁾

Iraq

Pro-Iran armed groups intensified their missile strikes against US bases in both Iraq and Syria, citing US support for Israel in its ongoing conflict in Gaza as their justification. In response, US forces conducted multiple airstrikes targeting these groups. Simultaneously, Iraqi armed groups stepped up their use of missiles and drones to attack Israel. While these actions largely resulted in limited damage, they led to threats from Israel to retaliate against targets within Iraqi territory.

The Shift in Iran-Israel Deterrence Dynamics

The recent escalation across regions of Iranian influence marks a significant shift in the Iran-Israel deterrence dynamic, pushing their conflict into an unprecedented phase of direct confrontation. A turning point occurred when Israel bombed the Iranian consulate in Damascus, prompting Iran to launch its first direct military

attack on Israel on April 13, 2024, under Operation True Promise. While Israel claimed to have intercepted 99% of the incoming missiles, drones and shells, Iran countered by asserting that half of its missiles reached their targets.⁽¹⁷⁾ Days later, on April 19, Israel retaliated by striking an IRGC air base in Isfahan. However, Iran denied the attack took place, and Israel refrained from officially claiming responsibility.

In a significant escalation, Israel assassinated Haniyeh on July 31 in a missile strike targeting his guesthouse in Tehran. The assassination occurred shortly after Haniyeh attended the inauguration of Iranian President Masoud Pezeshkian, exposing vulnerabilities within Iran's internal security and highlighting the extent of Israeli intelligence penetration into Iran and its IRGC. The incident shocked and embarrassed Iran's leadership.⁽¹⁸⁾ On October 1, Iran retaliated by launching hundreds of ballistic missiles at Israeli cities and sites in Operation True Promise 2, claiming it was in response to the assassinations of Hezbollah leader Nasrallah, Hamas leader Haniyeh, and IRGC Commander Abbas Nilfroushan. Israeli sources reported

limited damage from the attack.⁽¹⁹⁾ On October 26, Israel retaliated with airstrikes targeting Iran's air defense systems, military facilities and ballistic missile production plants, declaring that the raids successfully achieved their objectives. However, Iran downplayed the impact, stating that the strikes caused limited damage to certain sites. These exchanges highlighted key aspects of the Iran-Israel strategic rivalry and the evolving balance of deterrence between the two sides, which can be summarized as follows:

- The conflict has shifted to a pattern of direct confrontation, moving away from the indirect deterrence previously observed. Israel had typically targeted Iranian influence in Syria, Lebanon and Iraq, while Iran responded through strikes carried out by allied armed militias.
- The two sides have surpassed the gray zone of conflict, leaving behind the shadow wars characterized by secrecy and plausible deniability. This shift has elevated the confrontation to an overt and more intense level, reducing the space for low-level mutual deterrence that avoids full-scale war.
- The rules of engagement have been redefined, establishing new boundar-

ies for mutual deterrence. Israel has sought to restore its damaged deterrence following Operation Al-Aqsa Flood, asserting that no red lines exist in dealing with Iran or its allies. Conversely, Iran has abandoned its previous strategy of containment and strategic patience, especially in response to attacks on targets linked to its sovereignty.

Overall, these developments have shifted the deterrence equation between Iran and Israel in favor of the latter. Iran's responses and strikes have been characterized by limited impact and delays, in contrast to the intensity and relative successes of Israeli attacks, which have bolstered Israel's strategic deterrence. This dynamic has weakened Iran's standing as a regional power and leader of the so-called Axis of Resistance. The exchange of strikes has forced Iran into a difficult position with two unfavorable options: either engaging in an open war with Israel, which could escalate into a broader conflict involving the United States and its allies, or stepping back and making significant concessions that could undermine its regional influence and strategic role.

Regional and International Responses to the War on Gaza

Positions on the Gaza war have been varied and fragmented, contributing to the prolongation of the crisis. Arab and Islamic countries, along with other countries, have called for an end to the conflict and strongly criticized Israel for its violations and alleged crimes. In contrast, the United States and some of its allies have supported Israel, hindering efforts to resolve the conflict, which has led to devastating humanitarian consequences.

Arab and Regional Positions

Saudi Arabia has condemned the Israeli aggression, calling for its cessation and the delivery of humanitarian aid to the Gaza Strip. The kingdom has reaffirmed its firm stance against the genocide of Palestinians and warned against the ongoing escalation and expansion of the conflict, which it views as a threat to regional security and stability. Additionally, Saudi Arabia has made the establishment of a Palestinian state a prerequisite for advancing normalization efforts with Israel.

On September 26, 2024, Saudi Arabia unveiled an initiative to form a global alliance aimed at advancing a two-state solution as the framework

for resolving the conflict in occupied Palestine. The initiative, designed to de-escalate tensions and foster regional stability, gained significant traction, with 90 countries joining the effort. It was seen as a countermeasure to Israel's attempts to impose a unilateral resolution and a reaffirmation of the international and Arab consensus on the Palestinian issue and the two-state solution. The

initiative also sought to balance US bias toward Israel by rallying international support for a more equitable approach.⁽²⁰⁾

Since the outbreak of the war, Saudi Arabia has worked to unify the Arab and Islamic stance on the crisis. In November 2023, it hosted an Extraordinary Arab and Islamic Summit in Riyadh, followed by a second summit on November 11, 2024. The latter

Position Papers

Israel's Strike Against the Iranian Embassy in Damascus: A New Chapter in the Israel-Iran Confrontation on Syrian Territory

In a significant turn of events within the context of Israeli military actions aimed at Iranian facilities in Syria, on Monday, April 1, 2024, Israel conducted a strike targeting a structure neighboring the Iranian embassy situated in the Mezzeh district of Damascus, the capital of Syria. This attack resulted in the deaths of a considerable number of key Iranian figures. Consequently, there arises a multitude of questions regarding the specifics of the targeting, its potential ramifications, and the potential courses of action for Iran in response to this development.

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summit called on the UN Security Council to adopt a binding resolution for a ceasefire in Gaza and Lebanon, and to prohibit the export or transfer of weapons to Israel. It also condemned Israel's actions in Gaza as genocide and emphasized that peace would not be possible until Israel withdrew to the June 4, 1967 borders.⁽²¹⁾

Egypt's stance emphasized the urgent need to end the war on Gaza and ease regional tensions. It rejected any plan to displace Palestinians and undermine their cause, supported South Africa's legal action against Israel at the International Court of Justice (ICJ) over violations in Gaza, opposed Israel's control of the Rafah crossing, and refused to cooperate with Israel in its management. Egypt also engaged in mediation efforts alongside Qatar and the United States to bring about calm in Gaza. Jordan's position aligned closely with Egypt's, calling for an end to the war, a reduction in regional escalation and the rejection of any attempts to force Palestinian refugees into Egypt or Jordan. Qatar also rejected the Israeli war on Gaza and initially joined Egyptian and US efforts to mediate a ceasefire. However, it suspended its participation, citing a lack of cooperation from both Israel and Hamas

in reaching a ceasefire agreement. Later, Qatar resumed its involvement in mediation efforts.

Türkiye took a firm stance against Israel's aggression in Gaza, actively pressuring Israel to halt the war. It suspended planned bilateral energy cooperation projects and ceased trade with Israel. Türkiye also supported South Africa's lawsuit against Israel at the ICJ and called for the formation of an Islamic alliance to counter what it described as Israel's growing expansionist threat.⁽²²⁾ Additionally, Türkiye launched an international initiative to stop the supply of weapons to Israel.⁽²³⁾

International Positions

The US position was marked by strong bias toward Israel, which fueled the continuation of the war. The United States provided Israel with extensive financial, military and logistical support, while also shielding it from attacks by regional adversaries. Politically, the United States obstructed multiple attempts at the UN Security Council to pass resolutions calling for an immediate ceasefire or condemning Israel, and even justified Israel's actions. It also sought to block decisions from the ICJ and the ICC against Israel. At the same time, the United States

called for a reduction in Palestinian civilian casualties, provision of humanitarian aid for Gaza and made efforts to prevent the conflict from escalating into a regional war. This contradictory approach exposed the double standards in US foreign policy, highlighting the tension between its advocacy for democracy and human rights and its support for Israel's actions in Gaza. This stance raised moral concerns and signaled a setback in the values of the global system, which is based on Western liberal principles.

The European position, while initially marked by strong bias toward Israel, shifted to more moderate stances as the crisis progressed. However, it remained ineffectual due to divisions among European countries regarding how to respond to the developments. The European response was limited to symbolic political calls for a ceasefire, with some countries taking modest action to pressure Israel. For example, Spain and France called for halting arms exports to Israel, and countries like Ireland, Spain, Norway and Slovenia recognized Palestine as a state.

Russia and China adopted a relatively balanced position, advocating for a UN resolution to call for a permanent cease-

fire between Israel and the Palestinian resistance, rather than a temporary pause for humanitarian aid. Both countries also refused to single out Hamas for condemnation without addressing the violent actions of Israel, which they believed were putting civilian lives in Gaza at risk.

Other positive international positions emerged, such as South Africa's decision to close the Israeli embassy and its leadership of an international legal initiative to pressure Israel for its violations by filing a lawsuit against it at the ICJ. Additionally, Colombia severed its diplomatic relations with Israel⁽²⁴⁾ and halted coal exports to the country in response to the ongoing war against the Palestinian people.

As for the positions of international organizations, the UN Security Council's response to the crisis was marked by its inability to take decisive action, as it failed to issue a binding resolution to stop the war due to the US veto. However, the ICJ took a more positive stance. In January 2024, based on a lawsuit filed by South Africa, the court issued a decision ordering Israel to implement temporary measures to prevent acts of genocide against Palestinians in the Gaza Strip, and to take immediate and effective

action to address the dire living conditions of Palestinians.⁽²⁵⁾ In March, the court issued another decision adding additional measures, including ensuring the unhindered provision of basic services and humanitarian aid. It also demanded that Israel ensure its military forces do not commit acts violating the rights of Palestinians in Gaza. In May, the court ordered Israel to immediately cease its military operations in Rafah, to open the Rafah crossing to allow humanitarian aid and facilitate the access of any investigation or fact-finding committee related to the genocide charges.

The ICC also took a strong stance on the conflict, investigating lawsuits filed by human rights organizations and associations to prosecute Israel on charges of war crimes and genocide in the Gaza Strip. On November 21, 2024, the ICC issued an arrest warrant for Netanyahu and Gallant for their responsibility in war crimes and crimes against humanity in Gaza.⁽²⁶⁾ This move marked an important step toward ending the impunity of Israeli leaders for the occupation's crimes against Palestinians, placing Israel in a difficult legal and political predicament and contributing to its increasing international isolation.

Conclusion: The Future of the War on Gaza in 2025

The war on Gaza, spanning over more than a year, has led to several outcomes that will impact the future course of the conflict. Israel has succeeded in significantly weakening Hamas and the resistance factions by destroying much of their military infrastructure, assassinating several of their leaders and causing extensive damage in the Gaza Strip. Furthermore, Israel inflicted heavy losses on Lebanese Hezbollah, forcing the group to accept a truce and withdraw from the conflict, which undermined the principle of the "unity of the arenas." Additionally, Israel dealt severe blows to Iran, weakening its position as a regional power and leader of the so-called Axis of Resistance.

However, Israel was unable to turn these tactical successes into strategic achievements, as it failed to completely eliminate Hamas as both a military and political entity, nor did it fully dismantle Hezbollah or disarm it. Additionally, the prolonged duration of the war caused significant human and economic losses for Israel, worsened internal divisions and increased its international isolation. On the other hand, the war contributed to heightening global awareness of the

Palestinian cause, sparking international discussions about the necessity of establishing a Palestinian state and finding a political solution to this complex crisis, which remains a major source of instability in the region.

In light of the previous inconclusive results, it appears increasingly probable that the Gaza war may come to a close in 2025. This expectation stems from a series of developments indicating that neither party in the conflict can secure further territorial or strategic gains from the war. The new US administration's recent commitment to prioritizing the resolution of conflicts in the Middle East introduces a ray of hope; however, it is essential to underscore that any ceasefire achieved is unlikely to endure for long. The fundamental challenges lie in the inability of both Israel and Hamas to meet each other's conditions, thus rendering the pursuit of a lasting peace a daunting endeavor — especially considering Israel's entrenched positions. The people of the region are aware of the humanitarian crisis afflicting the Palestinian people and fervently hope that the US administration will adopt a more balanced approach, one that addresses the complex realities on the ground and

seeks to alleviate the suffering borne from this protracted conflict.

However, on the other hand, the conflict may move toward a period of calm due to several factors, the most significant of which include the increasing internal pressure on the Israeli government to end the war to avoid further military and economic exhaustion. Additionally, the success of the agreement on the Lebanese front could pave the way for a similar agreement in the Gaza Strip. There is also the possibility of rising US popular rejection of the continuation of the war, along with the chance that the new US administration under Trump may recognize the dangers of prolonging the conflict and its expansion, which could draw the United States into a direct war in the region and negatively impact its broader military strategy against other rivals, particularly in East Asia and Eastern Europe. These factors might lead the United States to seek an end to the war through an agreement which heavily favors Israel, allowing for the resumption of the normalization process, integrating Israel into the regional system and refocusing on economic priorities that are central to the new US administration.

Syria and Lebanon: Shift in Power Dynamics After the Fall of the Assad Regime

The 2023 ASR anticipated heightened regional tensions in 2024, driven by Israeli Prime Minister Benjamin Netanyahu's geopolitical ambitions and the involvement of Iran-backed militias in conflicts across Lebanon, Syria, Iraq and Yemen. These forecasts materialized in 2024, contributing to escalations in the Middle East, particularly in the Syrian and Lebanese arenas, where significant shifts occurred. The rules of engagement between Israel and Hezbollah changed dramatically, enabling Israel to eliminate much of Hezbollah's military and political leadership and destroy a large portion of its infrastructure, forcing the group to withdraw and accept a separation of fronts. Meanwhile, Syrian opposition factions, led by Hayat Tahrir al-Sham (HTS), toppled the pro-Iran Syrian regime on December 8, 2024, ending over five decades of Baathist rule and seizing control of Syria. The 2024 ASR examines these developments under three main themes: the overthrow of the Assad regime and the losers in this outcome, the withdrawal of Hezbollah to the south of the Litani

River and anticipated transformations in Syria and Lebanon in 2025.

Assad's Overthrow: Winners and Losers

Within a span of just two weeks, opposition factions led by HTS, under the leadership of Ahmed al-Sharaa, successfully toppled the regime of former President Bashar al-Assad and seized control of Damascus and the Presidential Palace following Assad's flight to Russia on December 8, 2024. The new administration swiftly implemented measures to restore security and stability in the country. These included forming a caretaker administration, dismantling armed factions by integrating them into the Ministry of Defense, establishing a unified national army to centralize weaponry under state control, opening settlement centers for former regime affiliates in the Interior Ministry and army and releasing detainees from Sednaya prison, a site notorious for horrific torture that drew global condemnation. Additionally, the administration launched a comprehensive security campaign to track down remnants of the former regime and hold them accountable. Externally, the new leadership declared the start of a fresh era of non-hostility and cooperation with all



nations. It prioritized strengthening ties with Gulf and Arab states, beginning with a visit to Saudi Arabia. Syria subsequently became a hub for Arab and international delegations, with the new administration aiming for formal recognition and legitimacy.

The overthrow of the Assad regime marks a significant loss for Iran and its allied militias in Iraq, Lebanon, Yemen and the Palestinian factions. This event

has effectively removed Syria from Iran's geopolitical orbit, resulting in the collapse of its so-called Shiite geopolitical theory and the Shiite Crescent. Syria, which served as the critical backbone of the Iranian strategy, had functioned as the central mediator connecting various elements of Tehran's regional project. With Assad's fall, Iran has lost a vital military supply route to its loyal militias in Syria and Lebanon, as well as a dependable ally of more than four decades. This disruption undermines Iran's broader defense strategy, which depended on Syria as a buffer state and a frontline in its efforts to encircle and challenge Israel. Additionally, Iran is now deprived of a strategic foothold in the Mediterranean and any prospects of securing a future energy corridor to Europe through Syria. Financially, the political change in Damascus represents a blow to Iran's investments, estimated at \$30 billion to \$50 billion, though Tehran denies these figures. This includes debts ranging from \$20 billion to \$30 billion⁽²⁷⁾ owed by the Assad government and significant military expenditures to arm its loyal militias to maintain control over Syria. Furthermore, Iran stands to lose all long-term contracts it had secured under the Assad regime across various sectors.

Hezbollah's Withdrawal From the South of the Litani River

During the first half of 2024, Israel and Hezbollah adhered to their traditional rules of engagement, but a strategic Israeli shift later in the year targeted the broader “Axis of Resistance” and pressured Hezbollah into accepting a ceasefire.⁽²⁸⁾ This culminated in the implementation of UN Security Council Resolution 1701 from 2006, which mandated the withdrawal of Hezbollah’s weapons and fighters from south of the Litani River, the deployment of the Lebanese army and UNIFIL forces in the area and Israel’s withdrawal from Lebanese territories.⁽²⁹⁾ The Israeli strategy against Hezbollah unfolded in three key steps. First, Israel disrupted Hezbollah’s operational capabilities by detonating booby-trapped communication devices, such as pagers and walkie-talkies, in September 2024. These devices had been covertly supplied by Israeli-affiliated companies or manipulated through intermediaries, including a Taiwanese firm deceived into cooperation with a Mossad-linked entity in Hungary.⁽³⁰⁾ This operation, revealed by Israeli intelligence on December 22, 2024, effectively severed communication between Hezbollah’s fighters and

leadership, undermining their field operations. The second step exploited Hezbollah’s resulting disarray, as Israel launched targeted bombings that eliminated key figures, including Hezbollah Secretary-General Nasrallah, his potential successor Safieddine, and numerous military leaders. These losses further destabilized the group. The final step involved systematically targeting

Hezbollah’s military infrastructure and capabilities, leaving the organization significantly weakened.

The weakening of Hezbollah and the destruction of its power represent a significant loss for Iran, as the group has long been the backbone of the so-called Axis of Resistance and a key military asset for Tehran in the region. Iran has provided the group with billions of dollars



in financial and military aid since its formation more than 40 years ago, helping it evolve from a local armed group into a powerful military force with an extensive arsenal of weapons and missiles. Hezbollah has become one of Iran's main defensive shields and the spearhead of its geopolitical ambitions, playing a central role in regional conflicts spanning Syria, Yemen, Iraq and Lebanon.

As Hezbollah's influence diminishes in Lebanon, and its logistical and military capabilities decline, a new political equation is emerging in the country, one where Iranian influence is reduced. The group now faces escalating internal crises, with growing public debate in Lebanon about its role in furthering Iran's agenda at the expense of Lebanon's interests. There is increasing scrutiny of the group's longstanding involvement in Syria, particularly its support for the Assad regime, which has led to the loss of thousands of young Lebanese Shiites. Additionally, international pressure is mounting to disarm Hezbollah and reintegrate it purely as a political party within Lebanon's new political framework, with hopes of electing a new Lebanese president on the horizon.

The Future of Syria and Lebanon, Scenarios for 2025

The future trajectory of transformations in Syria and Lebanon in 2025 hinges on several key variables, most notably the ability of the new Syrian administration, led by Sharaa, to prioritize the interests of the state over those of HTS. Another crucial variable is the willingness of political factions in Lebanon to establish a new equation that serves the country's interests, particularly in light of Hezbollah's weakened position. If Syria embraces state-centric governance and Lebanon moves beyond party politics, it could lead to the stabilization of Syria's new administration and the election of a new Lebanese president. However, significant challenges remain that could destabilize these equations and provoke chaos. One such challenge is the potential for some armed opposition groups allied with Sharaa to demand a shift toward prioritizing the HTS agenda, especially in response to external threats such as Israeli geopolitical expansion. A more concerning scenario could arise if Sharaa's own allies oppose his state-centric approach, particularly on sensitive internal issues such as women's rights, the veil and human

rights. Furthermore, tensions could escalate regarding Israel's growing ambitions, exemplified by its occupation of strategic sites like Mount Hermon⁽¹⁾ and parts of the Golan Heights and the collapse of the 1974 disengagement agreement with Syria. These developments could precipitate a scenario of chaos, compounded by the administration's internal challenges, including security, economic and political instability.

Iran and its armed militias in various regions are among the most prominent parties waiting for chaos in Syria to restore the so-called Axis of Resistance. Historical experience indicates that Iran has been expanding its geopolitical influence in the midst of chaos since the fall of the Iraqi regime over two decades ago, especially after suffering major losses in Syria and Lebanon. The Iranian establishment bases its existence on a geopolitical project that it is not expected to abandon. This is reflected by post-Assad official statements. Iranian officials expect that stability will not be achieved in Syria following Assad's departure. Iran sees opportunities in the instability, particularly with Israel's expanding geopolitical ambitions, which could create openings for Iran to reassert its influ-

(1) The area of the buffer zone controlled by Israel is approximately 235 square kilometers, which is about 60% of the Gaza Strip's area.

ence. Iran also has various entry points into Syria, including the presence of ISIS in certain towns, where it has historical experience working with terrorist organizations. Additionally, Shiite groups that may be harmed by the new Syrian administration's policies and armed militias on Syria's borders with Iraq and Lebanon could provide opportunities for Iran to intervene. Another key factor is the Kurdish issue, which is a challenge for the new Syrian administration, given Iran's longstanding ties with the Syrian Democratic Forces (SDF) and Kurdish groups in northern Aleppo, where Iranian militias had been active.⁽³¹⁾

That being said, Iran faces numerous challenges in attempting to restore its influence in Syria, Lebanon and other regions. Internally, the Iranian establishment is concerned about a potential popular uprising due to widespread discontent over the massive losses incurred through failed external projects, representing funds that could have been allocated for desperately needed national development. This discontent is compounded by rising inflation and the economic difficulties affecting various social segments that were once economically stable but are now suffering due to inflation and the government's

economic policies. Regionally, Iran must contend with the new Syrian administration's shift toward the Arab world, with Saudi, Turkish and Qatari support, and a new equation created by Israel focused on national security and resisting Iranian encirclement. Internationally, challenges are posed by the return of President Trump and his maximum pressure strategy against Iran, as well as US and European support for the Israeli stance, especially in light of Iran's support for Russia in its war with Ukraine. Unless chaos ensues, Iran's chances of regaining its lost spheres of influence in 2025 are slim. As a result, the Iranian establishment may focus on stabilizing the internal front to avoid mass protests which the West can capitalize on and may shift toward a policy of engaging with the West to settle the nuclear agreement, potentially easing external pressures, especially during Trump's second term.

Positive Neutrality: Gulf States' Policies Amid Geopolitical Tensions

The 2023 ASR predicted that the momentum of collective Gulf action would persist, aiming to mitigate ongoing regional and international conflicts through innovative and constructive approaches. These approaches prioritize the search for common ground and

mutually satisfactory agreements to achieve settlements that ensure regional and international security and stability. These approaches truly aligned with Gulf policies and efforts observed in 2024. Despite the rapid escalation in the pace of global and regional events, the Gulf states demonstrated a strong resolve to ensure the success of their initiatives and to assert a degree of influence over the course of regional and international developments. They have continued their relentless efforts to navigate the successive crises affecting the Middle East and the wider world by crafting innovative solutions and launching proactive initiatives aimed at mitigating emerging risks and securing a prominent position in the future geopolitical landscape. The outcomes of the Gaza crisis have tested the Gulf states' ability to withstand the ramifications of the crisis and address its broader implications. In response to the solutions proposed by regional and international actors, the Gulf states are pursuing a path that seeks to guide the region toward greater coexistence and development, as opposed to the entrenched exclusionary conflicts that have plagued the region for decades. Such conflicts have not only failed to deliver any tan-

gible results but have also plunged the region into a state of persistent tension and chaos. This is compounded by the succession and acceleration of global crises, from the COVID-19 pandemic to the Russia-Ukraine war and its aftermath, culminating in regional conflicts — the Israeli war on Gaza and Lebanon, and extending to Syria, Iraq and even Iran. Amid this turbulent landscape, the Gulf states consistently find themselves at the epicenter of regional and international dynamics — a position dictated by their strategic geographical location, their Islamic identity and critical role in global energy markets.

The 2024 ASR delves into the future trajectory of the Gulf states' positive efforts in addressing ongoing crises through three main themes. The first theme examines the Gulf states' endeavors to neutralize confrontations by seeking constructive commonalities. The second theme highlights the Gulf's pivotal role in efforts to end the region's ongoing wars, focusing on peace-building initiatives. The third theme explores the strengthening of the development pathway, with an emphasis on diversifying geo-economic options to enhance the Gulf states' capacities for regional and international influence. Lastly, a

conclusion is provided with a forecast of policy trends regarding positive neutrality in 2025.

The Gulf States: Avoiding Confrontation and Finding Common Ground

For four decades, the region has endured — and continues to endure — a state of acute polarization driven by conflict among regional players, such as Israel and Iran, with both seeking to maximize their strategic gains without regard for the suffering of the people or the resulting economic and social harm. The Palestinian issue has consistently been at the center of this dynamic. On one side is Israel, which does not seek to end the conflict in light of sustained Western support in the form of arms, financing and diplomatic backing. On the other side is Iran, which maneuvers for status and influence by proclaiming its support for the Palestinian cause. Throughout 2024, the situation has reached a point of significant exposure, with the persistent failure of decades-old policies manifesting in a complete inability to establish calm or foster peaceful coexistence in the region.

Israel has been unable to impose its will on the region or achieve com-

prehensive peace without addressing the root cause of the conflict: the Palestinian issue. This failure has led to a regression, with the situation returning to the cycle of conflict, exemplified by the quagmire of the Gaza crisis. Conversely, countries that exploit the Palestinian issue, including Iran, have failed to support Gaza effectively when needed. For example, the decision not to retaliate for the killing of Hamas Political Bureau Chief Haniyeh in Tehran and the prioritization of personal interests, reveal the opportunism and hypocrisy of those exploiting the Palestinian cause. In fact, such behavior and actions further embolden Israel to pursue its maximalist agenda for regional dominance. Moreover, it enables Israel to continue advancing its objective of eliminating the Palestinian people through killing, displacement and embracing a scorched-earth policy.

The Gulf states, bound by geographical, religious and Arab ties to the Palestinian issue, cannot ignore their responsibilities toward the region and its central cause. Consequently, they, particularly Saudi Arabia, remain committed to

exploring viable solutions to crises that have hindered regional development and security. This sense of duty underscores their efforts to mitigate the burdens that these challenges impose on the region.

The Conundrum of Normalization and Saudi Arabia's Conditions for Settling Regional Crises

Although the Abraham Accords, signed in September 2020, extended to include some Gulf states, namely the UAE and Bahrain, nearly four years later, Israel has not aligned its policies with this reconciliation process. Instead, it has pursued what it considers a strategy for achieving peace without making significant concessions on the Palestinian issue. The outcomes of these accords have not persuaded countries such as Saudi Arabia to abandon principles they have consistently upheld as just. Saudi Arabia has continued to champion these principles within the Arab and Islamic framework, particularly the Arab Peace Initiative, which is grounded in international legitimacy and seeks to balance the interests of all concerned



parties, thereby fostering a stable regional environment.

The devastating events in Gaza, the spread of destruction to Syria and Lebanon and Israel's reliance on militarization as a solution to its problems have demonstrated a missed opportunity to build

upon initiatives that could have maximized gains and resulted in regional peace instead of the turmoil currently witnessed. Regional countries hold cautious hope that the United States, under the leadership of President Trump, will honor his electoral promises, including his

commitment to ending wars, notably the ongoing conflicts in the Middle East.

Dialogue With Iran to Ease Tensions and Avert Problems

Reflecting on the outcomes of the Saudi-Iranian reconciliation one year after its implementation, Iranian Ambassador to Saudi Arabia Alireza Enayati characterized bilateral relations as “very positive,” noting that “both sides have accomplished much of what the leaders recommended.” However, he added, “We are not saying that we have been able to achieve everything that meets our ambitions during the past period.” Regarding the trajectory of the renewed relationship, he remarked, “We are at the beginning of the road, but the journey of a thousand miles begins with walking one mile,” emphasizing that “the two brotherly and neighboring countries have taken bold steps in a short period since the reconciliation announcement, including exchanging ambassadors and opening diplomatic missions.”⁽³²⁾

The visit of Iranian Foreign Minister Abbas Araghchi to the kingdom and the Gulf states, following the Israeli escalation against Hamas and Hezbollah, included in-depth discussions on coordinating neutral positions that do not

compromise the interests of either the Gulf states or Iran. Iran acknowledges that it cannot count on Gulf support in confrontations with Israel due to differing stances on regional issues. However, it seems that Iran has started to approach its relations with the Gulf states more seriously, recognizing the Gulf’s extensive ties with international actors, particularly Washington, and is striving to align its positions to mitigate the ramifications of the dangerous developments unfolding in the region.

This meeting was preceded by another high-level meeting between Iranian and Gulf officials in which Saudi Foreign Minister Prince Faisal bin Farhan met with Iranian President Masoud Pezeshkian in the Qatari capital, Doha. Pezeshkian conveyed to Prince Faisal his “satisfaction with the growing relations between Iran and Saudi Arabia,” emphasizing “Iran’s commitment to expanding cooperation with Saudi Arabia in all fields.” During the same meeting, Pezeshkian stated that his country views Islamic nations, including Saudi Arabia, as brothers, stressing the importance of overcoming differences of opinion.⁽³³⁾ The meetings continued with the visit of the Saudi chief of staff to Tehran, accompanied by a military delegation, where

they met with their Iranian counterparts. Later, the Iranian vice president attended the Extraordinary Arab and Islamic Summit in the kingdom, where discussions focused on Israeli escalation and the future of the Palestinian issue.

Strengthening Relations With Türkiye
Relations between the Gulf states and Türkiye have been escalating since 2024, following years of strained relations. Several rounds of negotiations have been initiated between the two sides in an effort to sign a free trade agreement, which, according to some, could create one of the largest free trade zones in the world.⁽³⁴⁾

Many observers anticipate that this agreement will be signed soon, given the accelerating relations between Türkiye and the Gulf states. This reflects the efforts made by both sides to overcome political differences and enhance cooperation based on mutual interests, trust and sustainability. Such progress is expected to positively impact the handling of controversial regional issues, bringing viewpoints closer and unifying common visions.

The signs of growth in this relationship began when the Gulf states quickly provided generous humanitarian aid following the devastating earthquake

in Türkiye in 2023. This included the kingdom providing a financial deposit of \$5 billion to the Turkish Central Bank to support the Turkish economy during those difficult times.⁽³⁵⁾ These initiatives positively impacted the Turkish leadership, despite the previous diplomatic froideur due to disagreements over certain issues. Subsequently, both Saudi Arabia and the UAE invested in the development of these relations, expanding them to include defense investments and strategic partnerships.

The kingdom signed an executive plan agreement for defense cooperation with Türkiye, aimed at fostering collaboration between the two countries' defense ministries in areas such as military capabilities, defense industries, research and development and the production and development of defense military industries. The agreement also focuses on the exchange of expertise and the transfer and localization of defense-related technologies. Additionally, the Saudi Ministry of Defense signed two acquisition contracts with the Turkish defense company Baykar to purchase several drones.⁽³⁶⁾ Meanwhile, Turkish President Recep Tayyip Erdogan signed numerous strategic agreements and memoranda of understanding during his visit

to the UAE in 2023,⁽³⁷⁾ with a total value estimated at \$50.7 billion. Türkiye and Qatar also expanded their cooperation with eight agreements signed in November 2024, during the visit of the emir of Qatar to Türkiye for the 10th meeting of the Turkish-Qatari Supreme Strategic Committee, held in Ankara. These agreements covered various sectors, aiming to further enhance bilateral relations.⁽³⁸⁾

The Turkish president's visit to the kingdom to attend the Extraordinary Arab and Islamic Summit highlights Türkiye's strong interest in current regional issues and its recognition of the kingdom's leadership in efforts to resolve the longstanding crises in Palestine, Lebanon and other countries in the region. The growing mutual dependence between the Gulf states and Türkiye in strategic projects is creating a strong alignment of interests and recalculating political approaches that, in the past, were marked by diverging orientations. This cooperation may serve as a key lever in finding solutions to regional problems, most notably the Syrian issue, where both sides are seeking to reach understandings that could help reduce the intensity of polarization in the Middle East.

A Growing Gulf Role in Conflict Resolution

The Gulf Vision for Regional Cooperation

In March 2024, the secretary-general of the Gulf Cooperation Council (GCC) unveiled the Gulf states' vision for the future of regional security, which is focused on achieving security, stability and peace in the region, alongside fostering coexistence in line with the principles of international peace and security based on international resolutions. While outlining the objectives of the vision, the secretary-general highlighted several key axes, including the security and stability, economic and development and environment and climate change axes. These axes aim to address various challenges and threats, most notably security concerns, interference in the internal affairs of the GCC and neighboring countries, geopolitical shifts at the international level, and economic, cultural and social challenges.

This vision is being presented in light of the current and future challenges facing the countries of the region, with the Gulf countries aiming to capitalize on positive opportunities to contribute to international efforts and mitigate or avoid potential negative shocks. This vi-

sion is guided by the goal of creating a future of coexistence, strengthening both regional and international roles, using dialogue as a bridge for communication and understanding, and expanding cooperation with global partners. It is based on the belief that lasting peace requires joint efforts and genuine, sincere will.⁽³⁹⁾ The key features of this vision include the following:⁽⁴⁰⁾

- Coordinating positions between the GCC countries on regional and international issues is a crucial pillar of cooperation and integration among the member states. It plays a fundamental role in shaping their unified foreign policy, which has allowed the GCC to adopt common positions on key challenges faced by both the region and the world, particularly in the context of regional security concerns.

- These common positions are grounded in the core principles of the GCC's system, as well as the norms of international law that govern inter-state relations. They emphasize the principle of non-interference in the internal affairs of countries, mutual respect for sovereignty, political independence, territorial integrity and natural resources. Additionally, they advocate for resolving disputes through negotiation, diplomacy and dialogue

while rejecting the use or threat of force to safeguard regional security and stability.

- The vision also builds upon the basic framework of the GCC and the Joint Defense Agreement, emphasizing the indivisibility of the security of GCC countries, particularly in light of the instability currently affecting both the region and the wider world. This principle is closely tied to the idea of a shared destiny among the member states.

- Political, military and security integration within the GCC has played a significant role in establishing security, stability and economic prosperity. As a result, the GCC has become a trusted partner in global political, security and economic affairs. Furthermore, it has evolved into an international hub for thought, culture, science, sports and the arts. This model of cooperation is what the GCC aspires to realize both within the region and globally.

The Arab Peace Initiative and Saudi Arabia's Fundamental Role

The speech delivered by the Saudi crown prince during the opening of the first year of the ninth session of the Saudi Shura Council emphasized the kingdom's unwavering stance on the Palestinian issue, stating:

“The Palestinian issue is at the forefront of our country's attention, and we renew the Kingdom's rejection and strong condemnation of the crimes of the Israeli occupation authority against the Palestinian people, ignoring international and humanitarian law in a new and bitter chapter of suffering. The Kingdom will not cease its tireless work towards the establishment of an independent Palestinian state with East Jerusalem as its capital, and we affirm that the Kingdom will not establish diplomatic relations with Israel without that. We thank all the countries that recognized the Palestinian state as an embodiment of international legitimacy, and we urge other countries to take similar steps.”⁽⁴¹⁾

The GCC meeting held in Kuwait in early December 2024 praised the kingdom's efforts to implement the two-state solution, recognizing its efforts through engaging with both regional and international actors to resolve conflicts. The meeting also acknowledged the kingdom's role in forming an international coalition to support the two-state solution, emphasizing the importance of rejecting normalization before the establishment of a Palestinian state based on the June 1967 borders. The normaliza-

tion process, as viewed by the kingdom and the Gulf states in general, is seen as a means to end the opportunism and polarization currently affecting the region, with the goal of building a region where its people share equal responsibility and benefit from its future.

Israeli intransigence in dealing with peace opportunities continues to play a destructive role in the region by fueling the activities of opportunistic countries and armed groups that operate outside the legitimacy of their respective nations, thereby jeopardizing regional security. Iran, for its part, has consistently opposed and encouraged Palestinian factions to reject the Arab Peace Initiative, contributing to the prolongation of the issue. Notably, the president of Iran, while speaking at the United Nations,

claimed that Iran was ready to lay down arms and engage in dialogue, provided Israel was willing to do the same.⁽⁴²⁾ His statement reinforces the notion that both Iran and Israel are key factors in the region's instability. The Arab Peace Initiative remains the only consistent proposal on the table, representing a Saudi-Gulf-Arab perspective that seeks to end the exploitation of the Palestinian issue by all parties in the region, including the Palestinian factions themselves.

The new Saudi initiative, which aims to form an international alliance to recognize the Palestinian state, seeks to eliminate the pretexts used by countries that are working to obstruct solutions. It extends the foundations of the Arab Peace Initiative by mobilizing a pressing and growing international effort to im-

pose a new reality. This initiative aims to leave no room for countries obstructing peace efforts through their intransigence and procrastination to further their own interests.

Qatari Mediation Between Israel and Hamas

The Qatari role in the Gaza crisis, despite the failure to reach a solution that would end the war between Israel and Hamas, was an important mediation channel aimed at easing tensions. Qatar faced significant pressure from both Israel and Hamas, as well as from the United States, which sought to pressure Hamas into accepting proposals that were seen as favoring Israel.⁽⁴³⁾ Hamas, however, insisted on an Israeli military withdrawal from the Gaza Strip in return for the release of Israeli hostages as preconditions for any peace agreement.

Enhancing Geoeconomic Status: A Catalyst for Development

The Gulf states consider economic diversification essential to counter the global economic slowdown affecting energy consumption. Fluctuations in oil and gas prices remain a significant concern, prompting the Gulf states to capitalize on favorable oil and gas prices to create investment opportunities that acceler-



ate their economic diversification efforts. This strategy is central to development plans like Saudi Vision 2030, which seeks to reduce dependence on oil. Simultaneously, forging new partnerships enhances the political influence and global standing of the Gulf states, helping to balance international positions on pressing regional issues.

Saudi-Indian Strategic Partnership Council

One of the most notable Gulf strategic initiatives in 2024 is the establishment of a strategic partnership council between Saudi Arabia and India, led by the Saudi crown prince and Indian Prime Minister Narendra Modi. This partnership aims to strengthen cooperation across various sectors, with bilateral trade reaching \$53 billion in 2023. The Saudi foreign minister highlighted that the formation of this high-level council has paved the way for a new era of collaboration, emphasizing the importance of coordination on matters of mutual interest, particularly regarding international peace, security and economic development. The minister expressed confidence that deepening cooperation would benefit both countries, with Saudi Arabia being India's largest trading partner in the Middle East.⁽⁴⁴⁾

Investment in Future Energy

In 2024, Saudi Arabia made a strategic investment move in the mining sector to strengthen its future positioning in global mining markets. The Saudi minister of industry and mineral resources played an active role in visiting South American countries, including Argentina, Chile and Brazil, which are home to the “mining triangle” containing the largest lithium reserves in the world.⁽⁴⁵⁾ The kingdom aims to compete with major manufacturing nations for lithium, a critical mineral used in clean technologies like electric car batteries, laptops and smartphones. Additionally, the Saudi minister visited the United States to explore partnerships to enhance the kingdom's capabilities in clean energy technologies, with minerals such as lithium as a key component.⁽⁴⁶⁾

Bolstering Partnerships With Major Groups and Powers

The UAE's accession to the BRICS group marked a significant shift in the Gulf's relations with major countries that are enhancing their economic, political and military influence. The UAE's participation in the BRICS summit in Kazan, Russia, reflected considerable momentum,⁽⁴⁷⁾ building on the high-level visit made by UAE President His Highness

Sheikh Mohammed bin Zayed to Moscow, where he met with Russian President Vladimir Putin. The meeting reinforced the strategic partnership signed in 2018 and underscored the growing momentum in Russia's relationship with the Gulf region.⁽⁴⁸⁾ Meanwhile, Saudi Arabia is still weighing its options regarding joining BRICS, considering that remaining outside the group may align with broader strategic objectives. This is given that the kingdom's strong bilateral ties with key BRICS countries are not significantly impacted by its non-membership in the bloc.

Strategic Cooperation With China and Competing Trade Corridors

On the sidelines of the G20 meeting in September 2023 in New Delhi, the economic project known as the India-Middle East-Europe Economic Corridor (IMEC) was announced. This project consists of a sea-based route linking India and the Arabian Gulf, alongside a northern road connecting Saudi Arabia and the UAE to Europe via Jordan and Israel. While some view this initiative as a competitor to China's Belt and Road Initiative (BRI), it is important to note that the scale and capabilities of the BRI are significantly broader and larger, surpassing those of the IMEC project.⁽⁴⁹⁾

The Gulf states, including Saudi Arabia and the UAE, are part of China's BRI and maintain close economic and technical interactions with Beijing. These countries view their involvement in the IMEC project not as a challenge to the BRI but as an opportunity to enhance regional and commercial connectivity. This corridor is seen as part of their broader strategy for economic diversification, increasing independence in their options and positioning the region at the center of global logistics projects. Such initiatives align with the goals of Saudi Arabia's Vision 2030 plan and help foster mutual interests among countries, thereby reducing competition and conflict within the region.

Despite the geopolitical competition between the United States and China in the region, the Gulf states, which maintain significant economic relations with China, are focused on ensuring that the objectives of their projects and partnerships do not conflict with their other allies. Negotiations are ongoing between China and the Gulf states to finalize a free trade agreement, potentially by the end of the year,⁽⁵⁰⁾ pending assurances that Chinese goods will not negatively impact local industries.⁽⁵¹⁾ This illustrates the Gulf states' ability to maintain a balance of interests with various partners, with-

out aligning themselves with competing geopolitical axes. As mentioned earlier, the kingdom's careful consideration of joining the BRICS group reflects this approach of diversifying and balancing relationships with strategic international partners.

Conclusion: The Gulf's Positive Neutrality in 2025

Over the past year, the Gulf states have positioned themselves in the midst of regional conflicts, not as participants, but as key actors in defusing tensions where both regional and international interests converge and diverge. Through a balanced approach, the Gulf states have gained significant international trust, demonstrated an ability to propose solutions, and seized the initiative from countries that have long held the region hostage to their ambitions and failure to adhere to international conventions. The recent Extraordinary Arab and Islamic Summit in Riyadh emphasized the Gulf states' leadership, particularly Saudi Arabia, in uniting nations that seek justice and peace. The summit underscored the responsibility of the international community to address Israeli encroachments and confront the root causes of chaos in the Middle East, warning of the potential

consequences of failing to manage the region's instability, which could lead to broader global turmoil. Additionally, the Gulf states' economic partnerships reflect the strategic alignment of their interests with influential countries. They are seizing opportunities, such as those in the mining and clean energy sectors, to bolster their political influence, diversify their economies and reduce dependency on a single commodity, ensuring the long-term strength and resilience of their economies.

With the arrival of a new US leadership, the Gulf states will undoubtedly aim to engage positively with the new administration, recognizing the opportunities that may arise from such a significant relationship. At the same time, the Gulf states' achievements over the past years — including their active involvement in international affairs both politically and economically, as well as their cooperation with key global blocs — will undoubtedly enhance their importance in US strategic calculations.

However, the Gulf states must anticipate several challenges as they navigate the arrival of the new US administration, which is clearly determined to address regional conflicts. This comes at a time when the Gulf states have made significant strides, including Saudi Arabia's

reconciliation with Iran and efforts to engage with the Syrian government, culminating in Syria's return to the Arab League. These developments create a new dynamic that contrasts with the approach taken by the previous Trump administration. Consequently, it is essential for the Gulf states to develop strategies that align with their regional goals and interests in order to effectively manage this evolving situation and avoid external pressures that may not align with their objectives.

Türkiye's New Foreign Policy Amid Shifting Politics

The 2023 ASR anticipated that the internal challenges facing the Turkish government amid its efforts to elevate the country's status among regional and global powers would emphasize the need for new strategies. The report predicted that Ankara would need to adopt a different strategy to address domestic issues while simultaneously positioning itself as a pivotal player on both the regional and international level. This forecast proved accurate as Ankara, by 2024, demonstrated a notable shift in its approach to regional and global alliances, distancing itself from rigid bloc-based politics and aiming to redefine its role in a potentially bipolar or multipo-

lar world. This shift involved pursuing emerging alliances, reassessing ties with traditional Western partners and deepening relations with both regional and global powers.

Türkiye's evolving policy reflects its aspiration to secure a more competitive position with regard to the West, or at least to establish flexible partnerships during the current transitional phase of the international system as it shifts toward a new world order. Against this backdrop, this ASR file reviews six key developments: Türkiye's bid to join BRICS; rapprochement with the West; efforts to bolster partnerships with Arab countries, response to Israel's war on Gaza, its strategy to expand influence in Africa and the outcomes of the fifth round of Turkish-Armenian negotiations. Finally, it concludes with a forecast of Türkiye's policy trends in 2025.

Türkiye's Determination to Join BRICS: A Pivot to the East?

Türkiye's aspiration to join the BRICS group reflects a potential pivot toward emerging global powers and a broadening of its foreign policy objectives. While Turkish President Recep Tayyip Erdogan has voiced Türkiye's interest in joining the bloc since 2018, BRICS

stands as a highly appealing alliance for Ankara, encompassing nearly 45% of the global population, 35% of international trade, 40% of global oil production, and a significant portion of global GDP. However, September 3, 2024, marked a crucial moment in Türkiye's pursuit of BRICS membership, as Ankara officially submitted its application to join the bloc on that day.

Türkiye's intention to join BRICS was evident in June 2024, during a meeting between Turkish Foreign Minister Hakan Fidan and Russian President Vladimir Putin. Fidan described the discussion with Putin as proceeding "fantastically well" and conveyed Türkiye's gratitude to Moscow for its strong backing of Ankara's aspirations.⁽⁵²⁾ The Kremlin affirmed this support, stating, "We welcome Türkiye's interest in the work of BRICS" and will "undoubtedly, we will fully support this aspiration."⁽⁵³⁾ By September 2024, Ankara solidified its position by officially confirming its application for BRICS membership.⁽⁵⁴⁾

Türkiye's interest in joining BRICS reflects its strategic assessment that the global order is transitioning

from Western-dominated institutions to more inclusive frameworks like BRICS. Membership in the bloc would grant Türkiye access to alternative financial mechanisms, such as the Asian Infrastructure Investment Bank, hence, reducing its reliance on Western-centric systems like the IMF and the World Bank. Additionally, Ankara seeks to balance its relations between the US-European bloc and the alliance led by China and Russia. This balance aspires to position Türkiye as an independent and mediating power amidst the competition between Eastern and Western powers, advocating a “third way.” By signaling its readiness to cooperate with Eastern powers, Ankara aims to leverage this stance to pressure EU during negotiations over Türkiye’s EU candidacy. Moreover, Ankara seeks to secure waivers from US sanctions against Russia, enabling continued cooperation with Russian companies despite Washington’s economic policies.⁽⁵⁵⁾

Domestic factors play a significant role in Türkiye’s bid to join BRICS, underscoring its broader geopolitical strategy. The ongoing

war in Gaza has exacerbated tensions between the West and the Global South, fueling a surge in anti-US sentiment within Türkiye. This growing public discontent has manifested in nationwide protests, including demonstrations near the US military base at Incirlik⁽⁵⁶⁾ and an attack on US sailors in Izmir.⁽⁵⁷⁾ While Türkiye’s BRICS aspirations may seem focused on economic cooperation, they are intricately linked to these geopolitical and domestic dynamics. Ankara’s approach reflects its ambition to leverage its unique geopolitical position and navigate an increasingly polarized global landscape. Although Türkiye has yet to achieve membership in BRICS, its bid signals a calculated effort to balance its Western ties with stronger engagement in Eastern alliances. This strategy does not indicate a complete pivot away from the West but rather demonstrates Türkiye’s intent to maintain flexibility and diversify its alliances to optimize its strategic influence.

Rapprochement With the West

While Türkiye’s interest in Eastern alliances has grown, it has not forsaken its ties with the West. As a

NATO member, Türkiye continues to play a fundamental role in the alliance due to its strategic position as a bridge between Europe and Asia. This dual alignment was evident in Ankara’s recent approval of Sweden’s NATO membership after months of hesitation, showcasing Türkiye’s readiness to cooperate with Western allies when it suits its national interests.

Türkiye has adopted a more assertive stance toward its Western allies, transitioning from a primarily cooperative approach to one that prioritizes reciprocity and the safeguarding of Turkish sovereignty. This shift is most apparent in Ankara’s firm stance on its security concerns, particularly opposition to Western support for Kurdish groups in Syria, which Türkiye designates as terrorist organizations. Simultaneously, Türkiye’s growing defense industry — marked by the production of indigenous drones and fighter jets — underscores its aim to minimize reliance on Western arms suppliers. However, Ankara continues to pursue selective cooperation, such as its ongoing efforts to acquire F-16 fighter jets from the United States.⁽⁵⁸⁾

Expanding Engagement With Arab Countries

Türkiye's outreach to Arab countries has emerged as a significant aspect of its evolving foreign policy in 2024. Ankara has been recalibrating its diplomatic approach to strengthen relations with countries such as Saudi Arabia, the UAE and Egypt after years of tensions. Relations with Saudi Arabia and the UAE have seen notable normalization, underscored by high-level visits, economic agreements, and defense cooperation. Türkiye has sought to position itself as a strategic partner to these countries, capitalizing on its advanced defense industry, economic capacity and cultural connections. This growing collaboration coincides with Gulf states' efforts to diversify their alliances and lessen their dependence on Western powers.

Türkiye has significantly strengthened its ties with Gulf states, particularly the UAE and Saudi Arabia, reflecting a strategic realignment in the Middle East. This shift is driven by shared economic priorities, mutual regional interests and the need to adapt alliances to evolving global geopolitical dynamics. Economic collaboration has become a cornerstone of Türkiye-Gulf relations, with trade and investment seeing a sharp increase since



normalization efforts began in 2021. Relations with Saudi Arabia have entered a new era of cooperation, underpinned by shared strategic objectives and economic goals. Bilateral trade surpassed pre-rivalry levels in 2023, with ambitions to reach \$10 billion annually.⁽⁵⁹⁾ During Erdogan's visit to Saudi Arabia in July 2023, the two countries signed agreements worth billions of dollars across various sectors, including energy, construction, tourism and defense. Additionally, Saudi Arabia's Public Investment Fund has prioritized investments in Türkiye, focusing on renewable energy and infrastructure projects, aligning with Ri-

yadh's Vision 2030 strategy for economic diversification.

Saudi Arabia and Türkiye are exploring cooperation in the defense sector, with Saudi Arabia showing interest in Türkiye's advanced drone technology and military-industrial expertise.⁽⁶⁰⁾ As part of Saudi Arabia's Vision 2030, the kingdom aims to diversify its economy beyond oil and seeks opportunities in non-oil industries. Türkiye, grappling with economic challenges and eager for foreign investment, views Saudi Arabia as a crucial strategic partner. Both countries aim to strengthen regional partnerships, which also address shared

concerns about potential instability in light of the war in Gaza. This normalization aligns with broader efforts across the Middle East to reduce tensions, evident in initiatives such as Saudi Arabia's reconciliation with Iran and Türkiye's improved relations with Egypt and the Gulf states. The fall of Syrian President Bashar al-Assad's regime on December 8, 2024, could further alter the landscape by reducing or eliminating Iranian militias' presence in Syria, thus paving the way for new areas of cooperation between Riyadh and Ankara.

The UAE has committed to investing over \$50 billion in Türkiye, focusing on key sectors like energy, transportation, and defense.⁽⁶¹⁾ This partnership is strengthened by agreements such as the Comprehensive Economic Partnership Agreement signed in 2023, which aims to boost bilateral trade to \$25 billion within five years.⁽⁶²⁾ Defense cooperation also plays a crucial role, exemplified by the joint production of Bayraktar drones. Qatar remains Türkiye's closest Gulf ally, with a longstanding relationship built on defense and economic cooperation, including military bases and substantial financial support. However, the UAE's rapidly expanding investments in Türki-

ye have the potential to surpass Qatar's economic influence.

The Gulf states are actively seeking to diversify alliances as the United States scales back its presence in the Middle East. Türkiye's pragmatic approach to regional politics, combined with its robust defense industry capabilities, has positioned it as an attractive partner. In addition, enhancing relations with Türkiye serves the Gulf states' aim of fostering regional stability.

Türkiye's renewed emphasis on economic stability, highlighted by the appointment of a pro-investment finance minister with close ties to the Gulf, has strengthened confidence on both sides. Both Türkiye and the Gulf states seem committed to capitalizing on their shared economic and strategic interests to create a more resilient regional structure. This approach aims to decrease reliance on Western powers while fostering deeper intra-regional cooperation. Türkiye-Gulf relations are increasingly shaped by a pragmatic, economically driven partnership, even though full political alignment may take time.

In September 2024, Turkish Foreign Minister Fidan participated in the 162nd session of the Arab League Council of Foreign Ministers held in Cairo. This

participation highlights Türkiye's strategic efforts to mend and solidify ties with its Arab neighbors after years of strained relations. It marked the first attendance of a Turkish foreign minister at the 22-nation Arab League summit in 13 years. Ankara sees this engagement as a crucial step toward institutionalizing regional relationships, fostering deeper cooperation, and exploring opportunities for mutual economic and strategic interests.⁽⁶³⁾

In the same vein, Türkiye is working to mend its relationship with Egypt after a decade of estrangement resulting from geopolitical tensions since 2013. Recent high-level meetings reflect a willingness on both sides to move past political differences and focus on shared interests, such as energy cooperation in the Eastern Mediterranean and on regional stability. The reconciliation, which began with renewed dialogue and an exchange of ambassadors in 2022, gained significant momentum with Erdogan's visit to Cairo in February 2024. Following this visit, a crucial turning point was reached with Egyptian President Abdel Fattah el-Sisi's visit to Ankara in September 2024. This visit culminated in a comprehensive 36-point declaration that outlined strategic cooperation in trade,

security, energy, and ensuring regional stability.⁽⁶⁴⁾

Although some areas remain sensitive, such as competition in Libya and the Eastern Mediterranean, the two countries have transitioned from rivalry to collaboration. Their shared interest in achieving security in Gaza, Sudan and the Horn of Africa, highlights the necessity of their partnership. Economic cooperation is also a key focus, with efforts aimed at increasing bilateral trade to \$15 billion, further solidifying their expanding relationship.⁽⁶⁵⁾

Türkiye's Response to Israel's War on Gaza

Israel's war on Gaza has placed Türkiye in a challenging position, requiring a delicate balance between supporting the Palestinian cause and maintaining relations with Israel. As an Islamic country, Türkiye strongly advocates for Palestinian rights, with Erdogan openly criticizing Israel's policies in Gaza.

Türkiye has strongly condemned the civilian casualties in Gaza and called for an immediate ceasefire, reaffirming its consistent stance on the conflict. Amid the ongoing situation, Türkiye's position on Israel has escalated significantly. Erdogan announced intentions to sever ties with Israel, following a trade embar-

go implemented in May 2024 in response to the war.⁽⁶⁶⁾ These actions highlight Türkiye's vehement criticism of Israel's military operations in Gaza, which Erdogan has denounced as targeting civilians and committing serious humanitarian violations.

Despite Erdogan's threats to sever diplomatic ties with Israel, the situation remains uncertain. The Turkish embassy in Tel Aviv is still fully operational, and Israel has not received any formal confirmation of a severance in diplomatic ties. This ambiguity may suggest Turkish political maneuvering or a policy that would be implemented in a gradual manner. Domestically, Erdogan faces pressure from rising far-right factions and widespread public support for the Palestinian cause, both of which may drive him to adopt a more confrontational stance against Israel. On the international front, Türkiye's decision holds the risk of straining ties with crucial allies, notably the United States, which could have far-reaching effects on Türkiye's broader foreign policy landscape.

Türkiye's position on Gaza reflects its broader strategy of establishing itself as a mediator and a representative voice for the Muslim world, while carefully safeguarding its economic and security

interests in the region. This approach is a clear example of the nuanced and balanced foreign policy Erdogan has pursued.

Enhancing the Turkish Strategy Toward Africa

Türkiye's engagement with Africa has become a key focus of its foreign policy in recent years, marked by a dynamic and multifaceted approach. Ankara has expanded its influence on the continent through the establishment of more diplomatic missions, robust trade partnerships, and substantial development aid initiatives. Türkiye's strategy in Africa also includes economic collaboration, cultural exchange and security cooperation. Turkish companies have taken on significant infrastructure projects across various African nations, while Türkiye has become a major arms supplier for the continent. Additionally, institutions like the Turkish Maarif Foundation and the Turkish Cooperation and Coordination Agency (TIKA) have been instrumental in fostering cultural and educational connections and strengthening ties across multiple African regions.

Turkish Foreign Minister Fidan participated in a two-day Africa-Türkiye partnership conference held in Djibouti

in November 2024,⁽⁶⁷⁾ highlighting Türkiye's commitment to strengthening ties with the African continent. Türkiye maintains particularly close relations with countries in the Horn of Africa, a region of significant commercial, strategic, and security importance. Geographically situated between the Red Sea and the Indian Ocean, the Horn of Africa offers a crucial strategic advantage. Unlike Western countries that impose sanctions on African regimes that were the outcome of coups, Türkiye has positioned itself as a vital partner for Sahel countries. For instance, in October 2024, Türkiye signed a cooperation agreement with Niger to develop the strategic mining sector.⁽⁶⁸⁾ The Turkish General Directorate of Mineral Research and Exploration will begin operations on three gold deposits, with production anticipated by the year-end. This development follows a prior agreement in the summer of 2024 in Niamey, aimed at tapping into Niger's oil and gas potential.⁽⁶⁹⁾

In Somalia, Türkiye showcased its energy exploration capabilities by deploying an exploration vessel off the Somali coast in October 2024.⁽⁷⁰⁾ The Turkish state oil company secured exploration rights across three maritime zones totaling 15,000 square kilometers. Soma-

lia, strategically located in the Horn of Africa, has become a key testing ground for Türkiye's broader cooperation on the continent. Over the past two decades, Turkish companies have been actively constructing vital infrastructure projects, including airports, hospitals, stadiums, schools and railways in the region. An important symbol of Türkiye's engagement with Africa is Turkish Airlines, which now connects over 60 destinations across the continent. In the defense sector, Türkiye has become the fourth-largest arms supplier to sub-Saharan Africa, focusing on drones, helicopters, and armored vehicles.⁽⁷¹⁾ Türkiye has signed cooperation agreements with 25 African nations to cement these partnerships. This military collaboration gained prominence during the visit of Senegal's new President, Bassirou Diomaye Faye, to Ankara in October 2024. In a meeting with Erdogan, Faye emphasized West Africa's ongoing security challenges and stressed the necessity of bolstering defense cooperation.⁽⁷²⁾

Amid these African challenges, Türkiye aims to establish itself as a mediator, as exemplified by its role to mediate between Ethiopia and Somalia. Despite their ongoing disputes since January 1, 2024, both countries agreed on July 1,

2024, to engage in indirect negotiations facilitated by Türkiye. The choice of Ankara to take on this mediating role is noteworthy, especially given the presence of various regional and global powers and established regional organizations active in the region. This mediation effort was explicitly sought by Ethiopian Prime Minister Abiy Ahmed, who formally requested Ankara's involvement. The Ethiopian request was relayed by Mulatu Teshome, the former Ethiopian president and a former ambassador to Türkiye, to Erdogan in May 2024.⁽⁷³⁾

Their preference for Türkiye is based on the fact that Ankara supports a federal Somalia and is one of Addis Ababa's main investment partners — its second largest after China, hosting 200 Turkish companies. The Türkiye-Ethiopia partnership has deepened in the aftermath of the Tigray war in the country from 2020 to 2022, a conflict that saw support from Türkiye to the Ethiopian National Defense Force with TB2 drones. Against this backdrop, Ethiopia's mediation request seems justified and strategic, particularly as it would gain Somalia's trust,

with which Türkiye has maintained friendship for over 15 years.

Through engagement with Türkiye, Ethiopia aims to enhance its economic interests beyond the region, given Ankara's globally recognized standing. As for Türkiye, its proactive engagement with Africa is driven by a desire to diversify its global partnerships, capitalize on the evolving African markets and establish influence beyond its immediate neighborhood.

Fifth Round of Turkish-Armenian Negotiations

The ongoing Turkish-Armenian normalization process marks a significant effort to address one of the region's most deep-rooted conflicts. In the fifth round of negotiations held in July 2024, facilitated by special envoys, discussions centered on reopening the border and restoring diplomatic ties.⁽⁷⁴⁾ This round of talks took place at the Alikan-Margara border crossing and signifies another milestone in the gradual improvement of bilateral relations.

Key representatives, including Türkiye's Ambassador Serdar Kılıç and Deputy Speaker of the Arme-

nian Parliament Ruben Rubinyan reaffirmed earlier agreements while exploring new initiatives to improve cross-border connectivity. A major focus of the discussions was the development of border infrastructure, with both sides agreeing to examine the technical requirements for reopening the Akyaka-Akhurik railway line — a crucial step for facilitating trade and travel. The talks also addressed simplifying visa procedures for diplomatic and official passport holders and fostering easier engagements between citizens of both nations. Both parties maintained their commitment to a normalization process without preconditions, recognizing its potential to contribute to regional stability. Nevertheless, Armenia clarified that relations with Türkiye would only improve following the signing of a treaty with Azerbaijan, a stance that represents a departure from its previous commitment to continue negotiations unconditionally, according to Turkish official sources.⁽⁷⁵⁾

These efforts are situated within a broader historical context of reconciliation attempts, such as the 2009 Zurich Protocols, as well as recent

gestures of goodwill, such as Armenian support during the 2023 Türkiye earthquake. The current regional dynamics, notably influenced by the 2020 Nagorno-Karabakh conflict, have reignited efforts for cooperation. These initiatives are supported by influential regional actors like Azerbaijan and Russia, both of which see improved Türkiye-Armenia relations as crucial for fostering regional stability, economic integration, and long-term peace.

These talks offer potential benefits beyond bilateral ties, contributing to broader stabilization efforts in the South Caucasus. Türkiye's willingness to engage with Armenia is a strategic move aimed at securing its borders and fostering regional cooperation. In addition, this initiative aligns with Ankara's objectives to promote economic integration in the South Caucasus while seeking to reduce the influence of external powers, particularly Russia, in the region.

This process encounters substantial challenges, such as the deep-rooted historical grievances and the intricate dynamics of the Nagorno-Karabakh conflict. Never-

theless, Türkiye's efforts to normalize relations with Armenia reflect its commitment to resolving longstanding regional issues through diplomatic engagement.

Conclusion: Turkish Policy Trajectories and Outcomes for 2025

Türkiye's shifting strategy in regional and global alliances highlights a pragmatic and multifaceted approach to foreign policy. Ankara is positioning itself as a versatile and independent international player by pursuing BRICS membership, redefining its ties with Western nations, bolstering relationships with Arab countries, deepening engagement with Africa, and fostering regional cooperation initiatives.

This strategic adjustment reflects Türkiye's awareness of the transforming global landscape and its aim to maximize strategic autonomy. In light of ongoing challenges, Ankara's capacity to balance competing interests and navigate intricate geopolitical dynamics will be essential in defining its global influence. The power vacuum resulting from the US retreat or pivot toward Asia further reshapes international dynamics, prompting Turkish policymakers to feel less bound by a US-led, Western-dominated agenda.

Turkish reactions to the new Trump administration reflect a blend of optimism and caution, shaped by Ankara's strategic priorities and its past interactions with Trump during his first term. Erdogan was one of the first leaders to congratulate Trump on his election victory. On a positive note, Turkish officials anticipate a potential improvement in defense relations in 2025, with the possibility of addressing longstanding is-



ssues such as US sanctions on Türkiye's purchase of the Russian S-400 missile system and its exclusion from the F-35 program. Erdogan highlighted Trump's understanding of Türkiye's position, referencing Trump's acknowledgment of the unfair imposition of sanctions on Türkiye. Therefore, there is an expectation that these defense-related disputes will be revisited under Trump's new administration.

Biden's approval of the sale of F-16 fighter jets to Türkiye represents a positive development for NATO and bilateral relations, potentially paving the way for greater defense cooperation under Trump, who has shown interest in strengthening military ties with Türkiye. Ankara's strategic role in mediating conflicts, such as the war between Russia and Ukraine, is central to its relationship with the United States. Trump's interest in resolving the Ukraine conflict could align with Türkiye's position as a mediator for both Kyiv and Moscow, which may foster deeper cooperation. However, from a Russian standpoint, it remains uncertain whether Ankara can evolve beyond a technical mediator — such as facilitating grain deals — into a more influential player. Türkiye has provided substantial military support to

Ukraine and notably facilitated the release of Azov fighters, actions that challenge its legitimacy as a key mediator in the conflict.

Türkiye's stance on Gaza and its rebuke of Israel's military actions in the region could create friction with the Trump administration, particularly if Trump aligns more closely with Israeli policies. Erdogan has condemned Israeli actions in Gaza as acts of "genocide" and remains a vocal supporter of the Palestinian cause.⁽⁷⁶⁾ Türkiye's expectations are based on the historically friendly relationship between Erdogan and Trump during the latter's first term, which may open avenues for renewed personal diplomacy between Ankara and Washington. Erdogan's invitation for Trump to visit Türkiye in November 2024 underscores his commitment to robust diplomatic engagement. While Türkiye aims to foster practical cooperation, challenges persist. US support for Kurdish groups in Syria and differing approaches to regional conflicts could strain relations, even as there may be areas of agreement. The current power vacuum in Syria presents Türkiye with a great opportunity to collaborate with the United States and other regional and international actors to help stabilize the country and region.

Africa: Domestic Turmoil and Great Power Competition

The 2023 ASR anticipated that Africa would face numerous risks and threats, citing internal political instability, the inability of state institutions to resolve both domestic and inter-state conflicts, and the influence of external powers. This analysis unfolds through four key themes: coup attempts and popular protests across Africa, regional and international efforts to end the war in Sudan, Ethiopia's pursuit of access to open waters and the resulting regional responses, and the intensifying Sino-US rivalry on the continent. Lastly, the file provides a conclusion and a forecast of Africa's trajectory for 2025.

Coup Attempts and Popular Protests Across Africa

The ASR for 2023 noted that West African countries experienced two military coups that toppled elected governments — those of Mohamed Bazoum in Niger and Ali Bongo in Gabon. In 2024, the wave of coups and military takeovers persisted, with attempted coups thwarted in countries such as the Democratic Republic of Congo (DRC) and Burkina Faso. Meanwhile, massive protests and unrest erupted in Kenya, Uganda and Nigeria, driven by econom-

ic and livelihood crises sweeping these nations. This section delves into these coup attempts and the political unrest across several African countries, followed by an analysis of the outcomes and potential scenarios for 2025.

The Coup Attempt in DRC

DRC witnessed significant political turmoil following a coup attempt on May 19, 2024 that targeted the government of President Felix Tshisekedi. The perpetrators attacked the residence of the Minister of Economy Vital Kamerhe in Kinshasa, killing two security personnel and injuring others. Following violent clashes, Congolese security forces foiled the coup, eliminating its mastermind, Christian Malanga, along with five accomplices. Malanga, a Congolese citizen residing in the United States, was a former military commander in the Congolese army. After running unsuccessfully in the 2011 parliamentary elections, he was briefly detained under former President Joseph Kabila. In the United States, Malanga established the United Congolese Party in 2010 and later formed a government-in-exile in Belgium in 2017, called the New Zairean Government in Exile, advocating for the restoration of Zaire.⁽⁷⁷⁾ It is worth noting that DRC, which gained independence

from Belgium in 1960, was renamed the Republic of Zaire in 1971 by President Mobutu Sese Seko. The country reverted to its current name in 1997 after Mobutu's fall from power.

The coup attempt in DRC occurred against the backdrop of ongoing political crises and turmoil. These challenges began with Tshisekedi's re-election in December 2023, an outcome rejected by the opposition, which demanded a rerun amid allegations of widespread electoral fraud. Further exacerbating tensions, Tshisekedi delayed forming a new government and postponed parliamentary elections initially scheduled for May 18, 2024 — just one day before the failed coup attempt.

The ruling coalition led by President Tshisekedi faced a severe political crisis over the presidency of the National Assembly, delaying internal elections to choose a new speaker for the assembly. Disputes over the issue escalated to the point where Tshisekedi threatened to dissolve the assembly and call for early parliamentary elections. The crisis was finally resolved on May 22, 2024 — just three days after the failed coup attempt — when deputies elected Vital Kamerhe, whose residence had been violently attacked during the coup. Kamerhe's

close relationship with Tshisekedi and his election as speaker of the National Assembly, where the ruling party holds an overwhelming majority, helped expedite the formation of a new government in DRC, five months after the presidential elections.

In September 2024, approximately four months after the failed coup attempt, a military court in Kinshasa sentenced 37 defendants to death in connection with the case. Among those convicted were three Americans, a Briton, a Belgian and a Canadian, all charged with attempting to overthrow the president.⁽⁷⁸⁾

The Coup Attempt in Burkina Faso

Since Captain Ibrahim Traoré's military coup against Burkina Faso's president in September 2022, the capital Ouagadougou has witnessed five failed coup attempts, including two in 2024. On January 14, 2024, the government announced it had foiled a coup involving a network of military personnel, civilians, and expelled army officers. Later, on September 23, the transitional government led by Traoré revealed the thwarting of another coup attempt involving officers, soldiers and prominent figures based in neighboring countries such as Côte d'Ivoire, Ghana and

Nigeria. Among the accused was former President Paul-Henri Damiba, ousted in September 2022.

Traoré, who took power in 2022, initially pledged to fast-track Burkina Faso's transition to democracy by organizing presidential elections within a two-year period. However, in June 2024, he announced an extension of this transition to five years, attributing the delay to ongoing security issues in the northeastern regions. In these areas, the army is engaged in a struggle against two armed groups linked to al-Qaeda and ISIS, which control approximately 40% of the country. Traoré has faced significant criticism for the prolonged delay, with accusations that he is leveraging the security situation to strengthen his hold on power.

Burkina Faso's authorities have accused Western intelligence agencies of orchestrating a conspiracy in the country, allegedly supporting terrorist groups to carry out operations targeting civilians and infrastructure. They even suggested that the Barsalogo massacre on August 24, 2024 — carried out by the al-Qaeda-linked Group for the Support of Islam and Muslims and resulting in approximately 300 fatalities — was part of this plan.⁽⁷⁹⁾

France is widely seen as a target of blame, with relations between Paris and Burkina Faso deteriorating significantly since the coup led by Traoré in September 2022. Shortly after taking power, Traoré terminated a military agreement with France, which led to the withdrawal of French forces from Burkina Faso. In the wake of this departure, Burkina Faso sought support from Russia, and Traoré has repeatedly stated that Russia is his country's true partner.

Protests in Kenya, Uganda and Nigeria

Amid deteriorating economic conditions, rising prices, unemployment and falling living standards, widespread protests erupted in several African countries, notably Kenya, Uganda and Nigeria, with young people taking a leading role. In June 2024, massive protests swept through various cities in Kenya in response to a proposed draft law that would have significantly increased taxes beyond the population's economic capacity. The protests escalated into violent clashes between demonstrators and police units, resulting in numerous fatalities, acts of sabotage, and the storming of public institutions, including the Kenyan Parliament in Nairobi.

The protests were driven by a new generation of young Kenyans, who represent nearly 70% of the country's 54-million population and are under the age of 34. This demographic, grappling with high unemployment and widespread poverty, played a crucial role in President William Ruto's victory in the 2022 presidential elections. However, their optimism has faded as the promises Ruto made to create 1 million new jobs over two years remain unfulfilled, leaving many feeling disillusioned.⁽⁸⁰⁾

As a result of the prolonged demonstrations, Ruto was compelled to abandon a proposed tax increase bill and dismiss most of his cabinet. However, despite this concession, the protests persisted and shifted their focus from opposing the tax hike to demanding Ruto's resignation altogether.

Although the government managed to weather the wave of protests, Ruto's popularity took a hit. Ruto, often seen by the West as a prominent representative of Africa on the global stage, had recently emerged as a vocal supporter of Western policies in various international forums. This alignment led to the United States designating Kenya as the first major non-NATO ally in sub-Saharan Africa, potentially paving the way for increased

support from Western nations. Additionally, the World Bank and the IMF expressed optimism about Kenya's economic future.⁽⁸¹⁾

Amid calls for Ruto's resignation and domestic criticism, Western nations face the risk of losing one of their key allies in Africa. Ruto's leadership is seen as crucial in maintaining Western influence on the continent, especially as efforts intensify to counter the expanding presence and influence of Russia and China in Africa.

Despite Western support for Ruto, many Kenyans accuse his government of corruption and question the support provided by international institutions like the World Bank and the IMF, as well as the United States. Critics argue that this support continues even as Kenya grapples with widespread poverty, high unemployment, and inadequate infrastructure.

Not long after the protests in Kenya, Ugandans organized a wave of protests on July 23, 2024, led by young activists through social media platforms. The protests were aimed at denouncing widespread government and parliamentary corruption, worsening economic conditions, inflation and human rights

violations under President Yoweri Museveni's leadership.

Museveni attempted to preempt the protests by warning demonstrators not to “play with fire.”⁽⁸²⁾ In response, the police clamped down on the protests with extreme force, arresting dozens on charges related to public order offenses.

Nigeria, already grappling with longstanding economic challenges, saw a sharp increase in food prices in 2024 following President Bola Ahmed Tinubu's decision to lift certain subsidies on petrol and electricity. Security issues, including attacks by armed bandits, forced many farmers to abandon their fields, exacerbating the food crisis. In response to these dire conditions, tens of thousands of Nigerians nationwide protested for 10 days, denouncing the high cost of living and demanding the government's resignation. In reaction, the Nigerian government charged 10 protesters with plotting war and inciting the army to rebel and overthrow Tinubu's administration.

The Implications and Forecasts Related to African Coups and Protests

The repeated military coups present a significant threat to security and stability, particularly in Burkina Faso, as they undermine the transitional government's efforts to strengthen security and reclaim territory controlled by armed groups, which is estimated to cover over 40% of the country. Weakening the army and involving it in a cycle of coups could result in a fragile security landscape and potentially allow armed groups to expand their influence. The ongoing coup attempts, along with security and political unrest across various African countries, also risk the prospects of a peaceful transfer of power and the establishment of governments capable of addressing the needs and aspirations of the African people.

The popular protests in Kenya, Uganda and Nigeria share a common theme: calls for improved living conditions amid significant economic challenges, widespread corruption and high unemployment rates. These issues raise concerns about the potential for esca-

lating political instability across the continent. While some African nations have managed to leverage political and economic experiences to achieve meaningful transformations and development, the persistence of military coups threatens to deter investment. Such instability discourages both foreign and domestic investors, as the lack of security and political stability creates an uncertain business environment.

The recent developments highlight the rise of a politically aware and active African youth. This new generation, disillusioned with traditional political parties and depending on their own methods to voice their ideas, is increasingly holding governments accountable and spearheading protests against authoritarian regimes. Such dynamics suggest that Africa could enter a cycle of protests and revolutions. Meanwhile, coup leaders are often seen appealing to local populations by using anti-Western rhetoric. However, it becomes evident that post-coup governments eventually shift alliances, excluding some Western powers and seeking support and protection from other

nations to maintain their hold on power.

Regional and Global Initiatives to End the Infighting in Sudan

Since the Sudanese war began on April 15, 2023, between the Sudanese army and the RSF, various regional and international initiatives have been introduced to end the conflict. However, these efforts have failed to resolve the crisis, which has resulted in thousands of deaths, millions of displaced individuals, and widespread destruction of infrastructure and essential services. The following outlines the key initiatives, the reasons behind their failure, and assesses the prospects for future efforts to bring an end to the war.

Proposed Initiatives to End the War in Sudan

Three weeks after the Sudanese war between the army and the RSF began on May 6, 2023, Saudi Arabia and the United States launched an initiative known as the Jeddah Negotiating Platform to end the conflict. This effort involved three rounds of indirect negotiations throughout 2023, which resulted in several key agreements between the warring parties. These agreements emphasized Sudan's sovereignty and unity, the

protection of civilians' essential needs, the clear distinction between combatants and non-combatants, the commitment not to use civilians as human shields, and the voluntary, safe evacuation of civilians from conflict areas. Additionally, the parties agreed to safeguard private and public infrastructure, including medical, water, and electricity facilities, while not repurposing them for military use.⁽⁸³⁾ The agreements also included provisions for arresting prison fugitives, refining the media messaging on both sides, curbing inflammatory discourse and addressing individuals who incited violence.⁽⁸⁴⁾

Although the negotiations led to agreements that seemed acceptable to both the Sudanese army and the RSF, these understandings were ultimately not implemented on the ground. The army demanded that the RSF fully withdraw from urban areas, villages, citizens' residences and public and private spaces, while also lifting city blockades and allowing roads to be accessible for humanitarian aid. In contrast, the RSF viewed their presence⁽⁸⁶⁾ in the aforesaid places as a crucial leverage point to force the army into concessions. They refused the army's conditions but proposed a compromise: agreeing to vacate civilian

homes in exchange for the establishment of checkpoints on roads and near critical sites like hospitals and utilities. The army, however, opposed this arrangement, arguing that such checkpoints would pose a security risk to civilians.⁽⁸⁵⁾

In another effort to end the conflict in Sudan, the Intergovernmental Authority on Development (IGAD) proposed multiple dialogue initiatives but was unable to facilitate a direct meeting between Sudanese army commander Abdel Fattah al-Burhan and RSF leader Mohamed Hamdan Dagalo (Hemedti) On January 18, 2024, Burhan refused to attend the IGAD summit hosted by Uganda, protesting IGAD's decision to invite Hemedti to the discussions addressing the Sudanese crisis.

The Sudanese Ministry of Foreign Affairs accused IGAD of attempting to legitimize the RSF by inviting them to a summit reserved exclusively for the heads of state or the governments of IGAD member countries, despite the RSF's alleged violations against the Sudanese people.⁽⁸⁶⁾

Between November 2023 and January 2024, secret negotiations took place in Manama, Bahrain, involving representatives of the Sudanese army and the RSFs.

The Sudanese army was led by Lieutenant General Shams el Din al-Kabashi, while Abdel Rahim Dagalo, brother and RSF deputy commander, represented the RSF. The resulting Manama agreement outlined 21 key articles, notably emphasizing Sudan's territorial unity, addressing longstanding issues since Sudan's independence in 1956, establishing a civilian and democratic government chosen through free and fair elections, implementing a federal system granting regional self-governance rights, and forming a unified, professional national army free from political or ideological affiliations. The agreement also called for a comprehensive national dialogue, ensuring the participation of all stakeholders, both civilian and military, while excluding only the dissolved National Congress Party and its affiliated Islamist factions.⁽⁸⁷⁾

Amid the ongoing Sudanese conflict, efforts to find a resolution continued as US Secretary of State Antony Blinken spearheaded an initiative to restart negotiations in Geneva, Switzerland, on August 14, 2024. This round aimed to achieve a ceasefire and facilitate the delivery of humanitarian aid, with observers from the United Nations, the African Union, Egypt and the UAE present.



However, the Sudanese army boycotted these talks for two main reasons. Firstly, the army insisted on adhering to the Jeddah platform agreements, requiring that prior commitments be met before joining any new initiatives. Secondly, despite assurances from US envoy Tom Perriello that the Jeddah agreements would be honored in Geneva, the army rejected Perriello's insistence that it should represent the Sudanese military establishment rather than the transi-

tional government. The Sudanese army, which opposes any future inclusion of the RSF, views them as a rebel militia responsible for numerous atrocities against civilians. The army's reluctance to engage with the RSF stems from a fear that such interactions would strengthen their political influence, positioning them as a dominant force in Sudan's future political landscape.

The Sudanese army's refusal to join the Geneva negotiations, despite US

pressure, was driven by its belief of having a stronger military standing. This confidence comes from recent successes in reclaiming territories in the capital, Khartoum, and Sennar province, which had previously been controlled by the RSF.

Interpretations of the Failure of Proposed Initiatives

The significations arising from the failure of all the initiatives are as follows:

- One or both parties to the war still insist on their ability to resolve the crisis militarily and not at the negotiating table.

- Despite the belief that the Jeddah platform is the closest to resolving the Sudanese crisis due to its success in getting the army and the RSF to sign several previous truces and agreements regarding securing civilians and the flow of humanitarian aid, and the army's announcement more than once that the Jeddah platform is the only platform for negotiating with the RSF, its provisions have not been implemented due to the lack of forces on the ground to separate the two warring parties and monitor any breach by either party.

- There are no political forces or parties working to bring the views of the

army and the RSF closer together, and most of them either support one of the parties to the conflict or their patriotism is questioned with accusations of implementing foreign agendas. The presence of regional and international parties supporting both the army and the RSF with weapons leads to an insistence on resolving the conflict militarily.

- Regional and international interventions play a major role in the continuation of the war in Sudan, making it difficult for any initiative to succeed unless it meets the minimum goals of the countries involved in the war. Additionally, the multiplicity of initiatives may hinder resolution, as a single unified platform, with the commitment of all regional and international powers committed to ending the war, is needed.

Repercussions of the Failure of the Proposed Initiatives to End the War

In light of the failure of all regional and international initiatives to stop the war in Sudan, a number of trajectories emerge. The first is the imposition of a solution from the outside, whether through an international power such as the United States, or the withdrawal of regional and international parties from supporting the parties to the war.

This would result in one or both parties reaching a state of exhaustion, leading to a willingness to negotiate an end to the war. The second is that the army and the RSF fail to achieve a decisive victory over each other, and the situation continues into 2025. In this scenario, the suffering of the Sudanese people would intensify, and more infrastructure would be destroyed. This remains the most likely possibility due to the adherence of both parties to a military solution, their unwavering stances, and the emergence of other pressing global issues, such as the war in Gaza, the collapse of the regime in Syria, and the strategic orientations of the new US administration.

The third revolves around the Sudanese army continuing its advance on all fronts, successfully liberating more cities and provinces. This would force the RSF to consider one of two options: either retreat to their stronghold areas in the Darfur region, effectively moving the battles to western Sudan, or agree to the Sudanese army's condition of withdrawing from citizens; homes, government institutions, and foreign embassies in exchange for negotiations. In this situation, we might see a return to the Jeddah platform, which facilitated the largest

number of negotiation rounds between the army and the RSF. The agreements reached on the Jeddah platform were not implemented because of the condition the army had set.

The fourth and final trajectory centers on the possibility of the RSF successfully taking control of North Darfur state and its capital, El Fasher, thereby achieving dominance over all five Darfur states. In this case, they might pull back forces from other Sudanese states to establish a government resembling the Libyan model or even attempt to separate Darfur from Sudan entirely. However, this scenario faces significant obstacles. The primary challenge lies in the presence of joint forces composed of various armed groups in Darfur, which are currently fighting alongside the Sudanese army on multiple fronts. These forces strongly defend El Fasher and have successfully repelled numerous attempts to capture the city. Additionally, longstanding Arab and non-Arab ethnic groups in the Darfur region, who have lived there for centuries, oppose the idea of Sudan's fragmentation and fear the implications of secession for their future in the region. A withdrawal by the RSF to Darfur would also provide an opportunity for the Suda-

nese army and its Darfur allies to tighten their hold over the RSF.

Ethiopian Efforts to Access the Open Sea

Landlocked Ethiopia presents a significant challenge for Prime Minister Abiy Ahmed's government, as Addis Ababa aims to bypass border constraints by securing agreements that grant it free access to the sea for both economic and geopolitical advantages. To this end, on January 1, 2024, Ethiopia signed a bilateral memorandum of understanding with the Somaliland government, allowing it a crucial outlet to the Red Sea coast. The agreement grants Ethiopia access to the port of Berbera on the southern coast of the Gulf of Aden, a strategic entry point into the Red Sea. In exchange, Ethiopia officially recognizes Somaliland's independence from Somalia — a recognition that no other nation or international body has extended since the region's secession from Somalia's central authority in 1991. Additionally, the memorandum includes provisions for Somaliland to receive a stake in Ethiopian Airlines.

Significance and Motives

This agreement emerged as Abiy Ahmed's government grapples with

internal challenges and a civil conflict that has significantly impacted domestic stability and Ethiopia's already fragile economy. Beyond realizing the longstanding aspiration of accessing open waters, the agreement aims to establish direct access to global markets for Ethiopia and address longstanding developmental obstacles, particularly as one of Africa's most densely populated nations. It also reflects Ethiopia's strategy to navigate ongoing regional shifts in what is increasingly referred to as the "port war" in the Red Sea region. For instance, following Djibouti's 2019 decision to exclude Dubai Ports World from managing its port — which handles over 90% of Ethiopia's trade — the Emirati company signed a 2022 agreement making Ethiopia a strategic partner in the Port of Berbera in Somaliland with a 19% stake. This move aimed to draw Ethiopia away from its reliance on Djibouti's government-controlled port.⁽⁸⁸⁾

Ethiopia may have seen the regional instability triggered by the Israeli war on Gaza and the preoccupation of regional powers with this conflict, including heightened tensions in the Red Sea, as an opportune moment to impose a new reality by securing its physical presence on the Red Sea coast. This move could

potentially reshape the dynamics of international and regional influence in the area.

This agreement is seen as a significant strategic step for Ethiopia, granting it an unprecedented advantage of access to open waters, which brings with it military, economic and geopolitical benefits in one of the most fraught and strategically vital regions in global and regional politics. Through this move, Ethiopia aims to diversify its geopolitical and economic strategies to capitalize on opportunities that facilitate the growing trade activity in the Horn of Africa. It seeks to create new markets for its expanding national goods and products while leveraging its physical presence along the Gulf of Aden and the Bab al-Mandab Strait to reshape strategic balances in East Africa and the Horn of Africa in its favor, undermining the influence of competing powers.

Reactions to the Agreement

The Ethiopian move sparked widespread reactions. The Somali Parliament viewed the Ethiopian memorandum as an infringement on Somalia's sovereignty and an attempt to encroach upon its territory. In response, it sought to rally international and regional powers to denounce Ethiopia's actions. This

included urging the United Nations, the Arab League, the Organization of Islamic Cooperation, the IGAD bloc, and the European Union to convene emergency meetings to address what it deemed Ethiopian violations that could have far-reaching consequences for the region as a whole.⁽⁸⁹⁾

Somalia's appeal received an immediate response from the Arab League, which issued a statement on January 3 reaffirming the unity of Somali territory and rejecting any deliberate violations or aggression by Ethiopian authorities. The Arab League regarded such actions as a disruption to peace efforts and an undermining of internal Somali reconciliation initiatives between the central government and other federal regions. It also viewed the move as an endorsement of separatist tendencies that threaten both national and regional security and stability.⁽⁹⁰⁾ However, on the African regional level, the Somali-Ethiopian crisis exposed the fragility and weakness of the African framework in all its forms and organizational structures, including the African Union and the IGAD bloc.⁽⁹¹⁾

At the level of regional powers, the Egyptian position stood out for its firm and intense emphasis on the unity and integrity of Somali territories, aligning

with other states such as Türkiye, Saudi Arabia, Sudan, Djibouti, Eritrea, and Somalia. In contrast, the UAE did not practically oppose the agreement. However, what set the Egyptian and Turkish positions apart was their practical actions to defend their threatened interests. Following the announcement of the Ethiopian agreement, Türkiye and Somalia signed a 10 year defense cooperation agreement, enabling the Turkish military to protect Somalia's coastline and granting Ankara rights to exploit 30% of the resources along the longest coastline in Africa. This agreement encompassed defense and economic collaboration, anti-piracy measures, prevention of foreign interference and illegal fishing and the training, equipping and building of Somali naval forces.⁽⁹²⁾

Egypt, for its part, opened a diplomatic channel with Somalia, engaging in bilateral consultations at the summit level in both Cairo and Mogadishu. These negotiations culminated in the signing of a joint security agreement in August 2024, under which Egypt dispatched several aircraft loaded with weapons to Somalia's capital, Mogadishu. Additionally, Egypt hosted a tripartite summit in Asmara in



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LANDLOCKED ETHIOPIA AND THE STRATEGIC IMPLICATIONS OF ATTEMPTING TO REACH OPEN WATER

Ethiopia seized an opportunity amidst ongoing developments by striking a bilateral memorandum of understanding (MoU) with authorities in the Somaliland region on January 2024 .1. This agreement grants Ethiopia access to the port of Berbera, situated on the southern coast of the Gulf of Aden at the entrance to the Red Sea. In return, Somaliland's governing bodies received stakes in Ethiopian Airlines, alongside official recognition of the region's independence from Somalia and acknowledgment of its sovereignty. This agreement has stirred considerable debate and raised questions about its implications and strategic impact on the Horn of Africa region. This study aims to explore the effects of this understanding on Ethiopia's regional standing, as well as the interests of other influential powers.



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October 2024, bringing together Somalia and Eritrea. This move underscored Egypt's intent to safeguard its regional interests and counter Ethiopia's attempts to expand its influence in ways that could undermine Cairo's interests and clout.

Regional and Global Implications

Ethiopia's efforts to bolster its geopolitical position and achieve strategic gains came at the expense of Somalia's sovereignty, disrupting the status quo in the Horn of Africa. This move intensified regional competition as key players are striving to solidify their influence in the area. Such dynamics risk exacerbating insecurity and instability in a region already grappling with protracted internal crises and cross-border conflicts fueled by overlapping demographics and the failure of states to achieve national integration.

If implemented, the agreement is likely to bolster the Somaliland government's position and support its separatist aspirations, marking a step toward reshaping the political and geopolitical map of this sensitive region. Against the backdrop of tensions in Sudan and the Houthi attacks on Red Sea shipping routes, developments in

Africa have gained prominence. With Egypt and Türkiye actively seeking to protect their interests in a region where the balance of power is shifting in favor of the US-Israeli project — potentially involving Ethiopia and the Somaliland government — further regional and international tensions and clashes seem increasingly plausible.

Sino-US Competition in Africa

The global competition for influence in Africa has escalated following France's withdrawal from several African countries over the past two years. Both China and the United States are striving to fill the resulting power vacuum and secure a foothold in the resource-rich continent, which also commands significant influence through its large voting bloc in international organizations. China has ramped up its efforts to expand its presence, particularly in the economic domain, by deepening ties with numerous African nations. Meanwhile, the United States has intensified its initiatives to strengthen relations with Africa, aiming to counter China's growing political clout and ensure access to vital resources. A key example of this is the United States' push to establish a corridor linking DCR and Zambia via the port of Lobito in Angola. Below are

the key manifestations of intensifying Sino-US competition:

Chinese Efforts to Bolster Influence in Africa

Since 2000, China and Africa have strengthened their ties through the Forum on China-Africa Cooperation, held every three years. Their collaboration has expanded significantly across areas such as trade, investment and infrastructure development, prompting concerns among Western countries, particularly the United States, about China's growing influence posing a challenge to its long-term interests in Africa. In September 2024, China hosted the ninth session of this forum, which saw participation from representatives of 50 African countries. Under the theme "Joining Hands to Advance Modernization and Build a High-Level China-Africa Community With a Shared Future," the forum highlighted China's commitment to deepening cooperation and diversifying partnerships with African nations as part of its strategy to secure an advantageous position in the ongoing geopolitical rivalry with the United States and Western powers.

During the forum, Chinese President Xi Jinping introduced the 2025-2027 Action Plan, a comprehensive three-year

initiative focused on 10 key partnership areas. This includes strengthening trade, developing African industrial chains, promoting education and cultural exchange, ensuring common security, supporting development cooperation, improving healthcare, enhancing rural development and social welfare, advancing green development and bolstering continental integration. The Chinese president pledged around \$50 billion in funding to support the implementation of this initiative, reflecting China's commitment to deepening its strategic engagement with Africa.⁽⁹³⁾

In addition to economic and development agreements, China provided a significant military and security aid package of \$150 million to support African nations in strengthening their armed forces. This aid includes the training of 6,000 soldiers, 1,000 police officers, and hosting 500 African military commanders on visits to China. Additionally, China implemented mine clearance programs to aid local safety initiatives.⁽⁹⁴⁾ China's efforts to expand its military presence in Africa began in 2023, when it deployed a naval fleet led by the destroyer *Nanning* to Nigeria. This deployment aimed to foster cooperation with Nigeria to ad-

dress security challenges in the Gulf of Guinea.⁽⁹⁵⁾

These military and security partnerships between China and Africa are likely to heighten concerns in Western countries, particularly the United States. Such alliances would potentially undermine US efforts to establish a dominant military presence on the African continent. Furthermore, Washington may be wary that this growing Chinese influence could inspire some African nations to emulate the experiences of Niger, Burkina Faso, and Mali — where local rebellions led to the expulsion of Western forces — thereby challenging and possibly diminishing US influence in Africa altogether.

The international competition over Africa presents African leaders with a strategic opportunity to secure significant advantages from China, ensuring that Africa does not become merely a secondary beneficiary of this partnership. These advantages include signing agreements for financial aid and loans, securing continued support from China in the United Nations Security Council, and addressing trade imbalances by negotiating agreements that allow African countries to export agricultural products and natural resources to China.

Additionally, African leaders are pushing China to fulfill commitments made during the 2021 summit, where China pledged to purchase \$300 billion worth of African goods and products. They are also encouraging Chinese companies to establish manufacturing centers within African countries, thereby fostering industrial development and enhancing local production capabilities.

The US Lobito Corridor in West Africa

In an effort to counter China's expanding influence in Africa and secure access to critical resources and minerals, the United States announced its support for reviving the Lobito Corridor in September 2023. This initiative, in collaboration with the European Union, Angola, Congo, Zambia and various African financial institutions, is funded by a \$250 million investment from the US International Development Finance Corporation. The Lobito Corridor is a vital railway link that connects the cobalt and copper resources of Congo and Zambia to US and European markets through the Atlantic port of Lobito in Angola (see Map 2.1). While the project is anticipated to be fully operational by 2029, the United States has already begun leveraging the corridor. By late August 2024, the first shipment of cop-



per from DRC successfully reached the United States through this strategic route.

The significance of reviving the Lobito Corridor for the United States, a project originally built by the British in the early 20th century and rendered inactive due to Angola's civil war in the 1970s, lies in its strategic advantages.

- It offers the shortest route for the United States and its allies to access vital and scarce minerals in Africa, including cobalt, copper, aluminum, manganese, and lithium.

- The corridor also connects three African nations that are rich in essential re-

sources. Angola has substantial reserves of oil and critical minerals, while DRC is a leading global producer of cobalt, responsible for around 75% of worldwide cobalt production.⁽⁹⁶⁾ Additionally, both DRC and Zambia rank among the top 10 copper-producing countries in the world.⁽⁹⁷⁾

- The revival of the Lobito Corridor is also seen as a strategic initiative to counter the BRI, which was launched in 2013. Under this initiative, 52 African countries signed memoranda of understanding with China to join it.⁽⁹⁸⁾

- The Lobito Corridor offers a faster and more cost-effective route for trans-

porting important minerals like lithium, copper and cobalt. This new route bypasses the traditional pathway that passes through Tanzania in the Indian Ocean.

- The growing demand for critical minerals has heightened the competition between the United States and China, driving both countries to increase their investments in the infrastructure necessary to transport these resources.

China, having already invested billions of dollars in infrastructure projects across Africa, will not remain passive while the United States capitalizes on the Lobito Corridor. In response, during the China-Africa forum hosted by Beijing in September 2024, the Chinese president signed an agreement with the presidents of Tanzania and Zambia to revive the 1,860-kilometer TAZARA railway,⁽⁹⁹⁾ which connects Zambia and Tanzania. This project is expected to intensify competition in Africa and could potentially evolve into a battleground for major powers.

Impacts of Sino-US Competition in Africa

China is actively working to fill the void left by the diminishing Western presence in Africa. Over the past few years, it has invested heavily in various Afri-

can countries across multiple sectors, including infrastructure development, mineral extraction, trade and industrial exchange. These investments have enabled China to surpass US and European contributions and become Africa's largest economic partner. Despite China's dominant presence on the continent, the United States is determined to regain a foothold in Africa through the strategic development of the Lobito Corridor. The United States views this project as a crucial initiative to challenge China's growing influence and secure access to vital minerals like lithium, copper and cobalt, which are essential to key US industries.

Conclusion and the Trajectory of Developments in 2025

The ongoing developments highlight the persistent structural and systemic challenges facing African nations. Successive governments have struggled to establish an effective, efficient and sustainable model that would create strong states capable of resisting external interference and safeguarding national security. Governance has often been hindered by an imbalance of power, widespread corruption, military takeovers, and the misuse of national resources. Additionally, political pater-

nalism and a heavy reliance on foreign support have left citizens disillusioned about their future. These issues have contributed to frequent coup attempts and protests throughout 2024. Consequently, the future remains uncertain and fraught with potential frustration in many African countries and regions.

Another significant issue is the influence of external factors on the continuation of unrest and instability in Africa. The continent has become a central battleground in the competition between global powers due to its vast wealth, re-

sources, and valuable minerals. These resources enhance the influence of any pole that can establish control and dominance over the continent, particularly amid ongoing conflicts. Such control strengthens a power's position in the global hierarchy, aligning with its ambitions to alter the international system. It also fosters strategic alliances at both regional and international levels, shaping a power's influence among various populations and contributing to a lasting and impactful presence that remains significant on the world stage.

Map 2.1: The Lobito Corridor



Source: "U.S., EU Unveil Next Steps in the Expansion of Angola's Lobito Corridor Railway," *China Global South Project*, September 11, 2023, accessed January 16, 2025, <https://bit.ly/3EaiPNy>.

In light of the developments that unfolded on the African continent during 2024, coupled with the ongoing structural challenges faced by many African nations, the intense regional and international competition for influence, resources and wealth and the fierce battle for global leadership, it is likely that instability will persist into 2025. This may include continued violence, protests and military coups. Such outcomes are fueled by economic and political crises, the failure of governments to address the aspirations of their citizens, and the determination of some regimes — those that have experienced coup attempts or political unrest — not to resolve issues through constructive dialogue but rather through force and repressive measures.

The threat to the sovereignty of some African nations is growing, with various groups increasingly demanding the right to self-determination. The situation is further complicated by international powers that are taking advantage of Africa's fragility to intervene and settle scores, often transforming the continent into a battleground for their own interests. These powers continue to pursue am-

bitions of strengthening their influence in strategic regions, including the Horn of Africa, and establishing a presence in the heart of the continent. Their objective is to exploit Africa's resources, plunder its wealth and rare minerals and secure economic gains without prioritizing development or promoting stability. Instead, this competition thrives on conflict, using it as a means to achieve geopolitical and economic objectives — a trend that is expected to persist through 2025. Consequently, Africa's future remains uncertain, with the ongoing interplay of internal weaknesses and external interference posing significant risks and challenges.

The slogan "America First," raised by US President Donald Trump, signals that the relationship between Washington and Beijing will be marked by conflict and competition in Africa — a region that was not a priority during Trump's first term. However, given China's growing influence on the continent and its significant investments, particularly in critical minerals and energy infrastructure, Trump may now prioritize Africa in his foreign policy agenda. This is particularly true given that the Unit-

ed States sees the Lobito Corridor as a crucial strategic asset to compete with China and reduce its influence in Africa. Therefore, Trump is anticipated to continue funding this project, driven by the United States' reliance on minerals like lithium, copper and cobalt, which are critical to key US industries.

Central Asia and the Caucasus: Collective Vision

The 2023 ASR anticipated Central Asia and the Caucasus, an important region in global power rivalries and competition given its strategic location, coupled with vast energy resources, has continued to implement a collective approach toward evolving geopolitical dynamics and the ongoing Russia-Ukraine war. The countries in this region have maintained strong ties with all global powers to ensure the achievement and protection of their regional and international interests. They have also adopted collective measures to diversify their economic and strategic relations with major stakeholders, including China, Russia, the EU and the United States. Following the sanctions on Russia as a result of its war on Ukraine, European shippers and transport operators increasingly shifted away from the

Northern Corridor, resulting in a 40% decrease in shipments between China and the EU along that route. This shift has significantly boosted the Middle Corridor as a key alternative, with international financial institutions now placing greater emphasis on its development. There have been significant efforts to enhance the Middle Corridor in 2024 through strengthening its role in facilitating trade between Asia and Europe — a trend that is expected to continue in the coming years as well.

As for 2024, the ASR addresses the major geopolitical developments in the region in 2024, focusing on the region's attempts to diversify its partnerships as well as strategies to strengthen regional integration for trade and connectivity. It also explores key developments in energy, trade, and security cooperation. Finally, it analyzes the shift in Armenia's foreign policy amid tensions with Russia and the developments concerning the Zangezur Corridor. Finally, it provides a conclusion and a forecast of development in 2025.

Diversifying Regional and International Alliances to Safeguard National Interests

In 2024, Central Asian countries continued to diversify their economic and trade

partnerships with Russia, China and the United States, as well as with some European countries, as part of their plan of avoiding reliance on a single alternative.

Kazakhstan, for instance, took several measures to transform into a regional hub for global investments by forging partnerships in the energy, infrastructure, technology, and trade sectors. In April 2024, Kazakhstan and Russia signed an agreement to construct power plants.⁽¹⁰⁰⁾ Kazakhstan also signed several agreements with the United States, France and Germany in energy, nuclear power, green hydrogen, and infrastructure development. In November 2024, the country signed investment agreements with China worth \$2.5 billion covering sectors like mining, metallurgy, renewable energy, and automobiles.⁽¹⁰¹⁾ Kazakhstan also explored new partnerships and struck significant deals with countries across the Middle East, South Asia and Southeast Asia, focusing on investments in agriculture, digital infrastructure, and trade.

Building on the trend of regional integration and connectivity and diversified partnerships, Kyrgyzstan also made significant strides in strengthening its economic and strategic ties with neighboring countries and global

powers. In June 2024, Kyrgyzstan, China and Uzbekistan signed an agreement to launch a railway project connecting the three nations, reinforcing the BRI.⁽¹⁰²⁾ Kyrgyzstan also signed over 40 agreements with China at the China-Eurasia EXPO, worth \$1.5 billion, covering energy, logistics, trade, and mining.⁽¹⁰³⁾ The same month, Kyrgyzstan and the EU signed the Enhanced Partnership and Cooperation Agreement aimed at increasing cooperation in trade, investment, education and connectivity.⁽¹⁰⁴⁾ In November 2024, Kyrgyzstan signed new agreements to strengthen the strategic partnership with Türkiye, covering sectors such as security, energy, healthcare and culture.⁽¹⁰⁵⁾

Tajikistan also signed some key agreements with China, including energy cooperation deals during President Xi Jinping's visit and also took initiatives to enhance engagement with the EU.⁽¹⁰⁶⁾ Uzbekistan also strengthened ties with China through a strategic partnership to boost trade and enhance cooperation in renewable energy and education, while also partnering with the EU in regard to critical raw materials for the sake of transitioning to a green economy. In addition, Turkmenistan advanced energy cooperation with the

EU and Türkiye, including agreements on the Trans-Caspian Gas Pipeline and gas supplies to Europe, aligning with diversification goals. Turkmenistan and China strengthened ties through high-level visits, focusing on BRI cooperation.

Central Asian countries are prioritizing strategic partnerships in energy, trade and infrastructure to diversify economies and enhance connectivity. Kazakhstan, Uzbekistan and Turkmenistan are advancing renewable energy projects, green transitions and critical resource corridors, reducing dependence on Russia and China. These efforts include Kazakhstan's multi-billion-dollar deals with global powers and Turkmenistan's push for the Trans-Caspian Gas Pipeline to Europe. While pursuing regional integration, they balance competition among global powers, vying for wider influence that remains critical to keep the momentum in their economic growth.

Central Asian countries, recognizing the need for regional integration, adopted the Central Asia 2040 strategy at their sixth consultative meeting, emphasizing the need for strengthening regional security, economic growth, transport connectivity and a compre-

hensive water policy. Intra-regional trade has steadily increased, bolstered by key agreements on industrial, and logistical cooperation. In 2024, Kazakhstan hosted the Shanghai Cooperation Organization (SCO) meeting in Astana which reflected its commitment in advancing multilateralism and regional integration. The Astana Declaration 2024 following the meeting of the Council of Heads of Member States of the SCO reaffirmed the commitment to fostering a just, multipolar world order that upholds sovereignty, equality and the development plans of all nations. The leaders called for inclusive UN reforms, condemned unilateralism, promoted peaceful conflict resolution, and prioritized sustainable development and security in the region which reflects the collective interest in using organizations like the SCO for asserting Global South aspirations.⁽¹⁰⁷⁾

Expanding Trade via the Middle Corridor to Strengthen Economic Connections

The Middle Corridor has gained strategic importance driving a surge in infrastructure investments as global supply chains shift away from the Northern Corridor due to sanctions on Russia (see Map 2.2). Amid fears of supply chain dis-

ruptions via high-risk areas like Iran, Afghanistan and Russia, the Middle Corridor has emerged as a practical solution to connect China to Europe. The EU has committed 10 billion euros for logistical projects in Central Asia, with plans to upgrade transport infrastructure in Kazakhstan and beyond.⁽¹⁰⁸⁾

China's formal integration into the Middle Corridor is expected to enhance trade links between China and Europe. Beijing's strategy underscores its pivot to overland trade routes, reducing reliance on maritime chokepoints and the Northern Corridor.⁽¹⁰⁹⁾ In July 2024, Kazakhstan ratified agreements with China to further advance the development of the Middle Corridor, focusing on the enhancement of both road and rail infrastructure. Kazakhstan and Azerbaijan have become critical logistical hubs, supported by infrastructure upgrades like rail modernization, port expansions and the Baku-Tbilisi-Kars (BTK) railway. The Middle Corridor, spanning rail and sea routes, offers a cost-effective and efficient alternative to traditional routes, benefiting Central Asia, Azerbaijan and Türkiye. In July 2024, Kazakh President Kassym-Jomart Tokayev ratified agreements with China to invest \$3.7 billion in developing the corridor's logistical infra-

structure, including establishing a container hub at Kazakhstan's port of Aktau to boost trade and transit capabilities.⁽¹¹⁰⁾ The modernized Georgian segment of the BTK railway resumed freight operations in May 2024, increasing its annual capacity from 1 million tons to 5 million tons.⁽¹¹¹⁾ Azerbaijan and Georgia are also establishing a joint venture to optimize the railway's operations. China-backed projects like Georgia's Anaklia deep-sea port will likely further enhance the corridor's efficiency.

Cargo volume along the Trans-Caspian International Transport Route (TITR) surged 70% in 2024, with container shipments tripling.⁽¹¹²⁾ The Middle Corridor is expanding, with increased container trains from China and plans for enhanced coordination among participating countries. There have been reports that Central Asia is now facing a warehouse space shortage due to rising trade via the Middle Corridor.⁽¹¹³⁾ According to reports, the tariffs in the Middle Corridor rival or exceed those in major global transit hubs. The World Bank has identified key areas, particularly infrastructure and trade facilitation upgrades, to enhance connectivity across Central Asia, the Caucasus and Eastern Europe.⁽¹¹⁴⁾

The Middle Corridor aligns with sustainability goals, boosts regional connectivity, and strengthens Central Asia's role in Eurasian trade and economic integration. Its strategic importance continues to grow, offering an alternative to traditional routes that now face geopolitical and economic risks due to supply chain disruptions and Western sanctions.

Advancement of the Fourth Phase of the China-Central Asia Gas Pipeline

Currently, Turkmenistan is China's largest supplier of natural gas, followed by Russia, and China, in recent years, has actively sought to strengthen the energy partnership with Turkmenistan. The construction of Line-D of the Central Asia-China gas pipeline has been delayed a few times primarily due to price disputes between participating countries. In February 2024, Tajikistan's Energy Minister Daler Juma said that Construction of the Central Asia-China gas pipeline's Line-D in Tajikistan was delayed due to pricing disagreements among participating countries, despite Tajikistan's resolution of all issues related to its section of the pipeline.⁽¹¹⁵⁾ The 966-kilometer pipeline will deliver 25 bcm to 30 bcm of gas annually and attract over \$3 billion in Chinese investment to Tajikistan.

The project provides a direct route for Central Asian countries whose economies are largely dependent on energy exports. This partly aligns with their domestic economic reforms aimed at securing robust energy partnerships and diversifying their exports as well as providing access to a vast market to increase their revenues. For Beijing, the project strengthens its energy security and geopolitical influence, aligning with its BRI. The pipeline's ongoing expansion, particularly with the addition of Line-D, aims to boost capacity to 85 bcm annually, with Turkmenistan being China's largest gas supplier. In October 2024, reports indicated that Kazakhstan was in talks with China to increase natural gas exports. The plan would require significant investment, with construction expected to take two to three years.⁽¹¹⁶⁾ Uzbekistan's gas exports to China doubled in September 2024, reaching \$97.4 million.⁽¹¹⁷⁾ The Line-D expansion underscores a strategic synergy, where Central Asian countries leverage and increase energy exports while China cements its energy security and geopolitical influence through its BRI.

The Line-D project underscores the growing energy interdependence be-

tween Central Asia and China. In the coming years, Central Asia’s energy exports to Beijing are projected to increase, taking into consideration the enhanced capacity and economic integration efforts that could also pave the way for economic dependence on Beijing for countries like Turkmenistan.

Central Asia’s Growing Relations With Ascendant India

Central Asian countries have continued to deepen their ties with India, particularly in defense, trade, investment

and energy. They have also engaged with India on intelligence and counter-terrorism issues and both have several converging interests in Afghanistan. Countries like Kazakhstan have embarked on new economic reform agendas that aim to liberalize entrepreneurship and attract private investors, paving the way for more engagement with countries like India.

Several agreements to enhance trade with India were signed in 2024. In September 2024, India’s Finance Minister

Nirmala Sitharaman visited Uzbekistan to attend the Asian Infrastructure Investment Bank (AIIB) Annual Meeting in Samarkand and signed a Bilateral Investment Treaty aimed at enhancing trade and investments across diverse sectors. In November, Indian Rare Earths Limited and Kazakhstan’s UKTMP JSC signed an agreement for titanium slag production in India.⁽¹¹⁸⁾

Central Asian countries have over the years bolstered their defense ties with India through joint military exercises, focusing on counterterrorism, tactical training, and enhancing interoperability — which continued in 2024. India and Kazakhstan held the annual joint military exercise KAZIND-2024 from September 30 to October 13, 2024 in Uttarakhand. The fifth India-Uzbekistan joint military Exercise Dustlik was held in Termez, in April 2024. Uzbekistan focused on enhancing bilateral defense ties through joint tactical drills, multi-domain operations and specialized combat training. The India-Kyrgyzstan Joint Special Forces Exercise Khanjar took place in Himachal Pradesh, focusing on enhanc-

Map 2.2: The Three Routes Linking China and Europe — Distance and Duration





ing counter-terrorism and combat skills.⁽¹¹⁹⁾

Central Asia's relations with India are increasingly shaped by regional geopolitical and geoeconomic dynamics. Central Asia remains a critical region for India due to its strategic location making it pivotal for India's connectivity ambitions, especially amid conflicts and tensions in its traditional trade routes. Moreover, Central Asian countries and India have opted for a similar approach in addressing global geopolitical changes and balancing ties with Russia and the West. Central Asia's abundant energy resources and India's rising energy needs create strong synergies for sustainable partnerships. Also, Kazakhstan's economic reforms and Uzbekistan's measures to increase foreign investment along with regional attempts to enhance trade partnerships and cooperation, especially in technology, healthcare, trade and education position India as an important stakeholder. Moreover, deepening defense and counter-terrorism cooperation aligns with their mutual concerns and shared interests, particularly concerning regional stability.

Armenia's Pivot to the West Amid Growing Tensions With Azerbaijan and Russia

Armenia's westward turn driven by frustration over Russia's inaction in the Nagorno-Karabakh conflict has reshaped South Caucasus geopolitics as Armenia now seeks closer ties with the West. In June 2024, Armenia's Prime Minister Nikol Pashinyan announced the country's withdrawal from the Collective Security Treaty Organization (CSTO), accusing it of siding with Azerbaijan during the Nagorno-Karabakh conflict. Pashinyan expressed his interest in EU membership and the European Parliament has supported this pivot, endorsing closer ties with Armenia.⁽¹²⁰⁾ The EU has initiated visa liberalization talks with Armenia, signaling deeper engagement and support, including non-lethal military aid.

Following severed ties with Russia, Armenia has moved closer to NATO to deepen collaboration. The two sides finalized a new Individually Tailored Partnership Programme (ITPP) focusing on defense modernization and strategic reforms.⁽¹²¹⁾ NATO Secretary General Jens Stoltenberg emphasized Armenia's potential for expanded cooperation during his South Caucasus tour. Russia has crit-

icized NATO's growing influence in the region and Russian Foreign Ministry Spokeswoman Maria Zakharova stated in July 2024 that Armenia's tilt toward NATO caused "regret and concern," warning of potential destabilization in the South Caucasus.⁽¹²²⁾

Armenia's energy security is largely reliant on Russian gas, which supplies over 85% of its needs, making it vulnerable to risks in light of strategic distancing from Russia. Despite efforts to diversify energy sources, including boosting nuclear and solar capacity, Armenia faces challenges due to limited alternatives and complex regional politics. The government has moved toward market liberalization to enhance self-sufficiency and expand electricity exports.

Armenia has also sought to reduce its reliance on Russian arms. Recent acquisitions include Indian rocket and air defense systems, along with French radars and planned Mistral air defense systems, following setbacks in Nagorno-Karabakh. In February 2024, Armenia signed a contract with French arms manufacturer PGM for precision rifles. French Defense Minister Sebastien Lecornu also pledged a military adviser for Armenia's air defense.⁽¹²³⁾ The deals, amid tensions with Azerbaijan, signal stronger

Armenia-France military ties. In November 2024, a NATO delegation led by Vice Admiral Gunnstein Bruasdal visited Armenia to discuss Armenia-NATO cooperation, focusing on defense reforms and future collaboration.⁽¹²⁴⁾ The delegation also toured the Vazgen Sargsyan Military Academy and the Peacekeeping Brigade. Armenia and the United States also engaged in joint military exercises like Exercise Eagle Partner 24 focusing on weapons training and interoperability. As per reports, The United States is reviewing Armenia's request for a 123 Agreement to transfer civil nuclear technology, following a 2022 memorandum on nuclear cooperation.⁽¹²⁵⁾

There have been US-mediated peace talks between Armenia and Azerbaijan and as per reports in November 2024, Armenia and Azerbaijan have made significant progress in peace talks, with Armenia expressing optimism that a final agreement could be reached. Both sides have been working cooperatively, and after a positive meeting between Armenian Prime Minister Pashinyan and Azerbaijani President Aliyev in October, negotiations continue, albeit with some unresolved issues like border delimitation. Armenia's close engagement with NATO, the EU and United States

underscores the urgency of its strategic realignment in pursuit of more strategic autonomy. However, its continued reliance on Russian energy and defense and the lingering regional disputes will pose challenges to this shift without broader international support.

The Zangezur Corridor: Recalibrating Power Dynamics in the Caucasus

The Zangezur Corridor became more prominent in 2024 as the project plays a major part in complementing the Middle Corridor, thereby fostering East-West trade ties. The railway and road construction on the Azerbaijani side of the Zangezur Corridor is advancing swiftly, while Armenia has yet to take any action on the project.

Iran opposes the Zangezur Corridor, citing concerns over border changes. However, the underlying reason is that Iran would have diminished geostrategic leverage once the corridor becomes fully operational. Tehran fears the corridor will bypass Iran, reducing its transit role and influence over Armenia, while strengthening Azerbaijan-Türkiye ties due to which there have been divergences between Iran and Russia on this issue. This also raises domes-

tic concerns about Türkiye's growing influence in the South Caucasus. Turkish authorities have taken a keen interest in advancing the project. Turkish Energy Minister Alparslan Bayraktar emphasized that the opening of the Zangezur Corridor would boost trade, logistics and energy cooperation between Türkiye and Azerbaijan.

Iran's Foreign Minister Abbas Araghchi criticized Russia's support for the Zangezur Corridor, deeming border changes a "red line."⁽¹²⁶⁾ The Zangezur Corridor's development underscores competing geopolitical interests, with Azerbaijan, Türkiye and Russia pushing for enhanced trade and regional connectivity. At the same time, Iran and Armenia resist due to concerns over diminished influence and territorial integrity. These developments highlight the corridor's potential to reshape power balances in the South Caucasus. The operationalization of the corridor will also align with Western interests as they seek to diversify energy routes away from Russia.

Conclusion and Scenarios for 2025

Central Asian economies are expected to grow by 5.9% in 2025,

with strong contributions from investment, tourism, and regional cooperation.⁽¹²⁷⁾ Kazakhstan's GDP is forecasted to grow by 5.5% and Uzbekistan's economy is projected to expand by 6.0% in 2025. Kazakhstan will capitalize on its uranium exports and nuclear partnerships to strengthen its global energy influence and economic resilience in the coming years. Kazakhstan plans to raise uranium mining taxes in two phases starting in 2025, introducing differentiated rates based on production volumes and uranium prices to support economic reforms and balance the budget. Other countries like Uzbekistan are also projected to achieve greater regional and global attention for investments, trade, and energy partnerships. Uzbekistan's 2025 fiscal reforms aim to boost its GDP projecting it to touch \$126 billion. The positive economic outlook, aligned with IMF and World Bank projections, strengthens investor confidence that could complement and support regional economic development.

Despite growing competition from the West and China, Russia's influence in Central Asia remains signif-

icant due to its historical military and security ties, substantial foreign investments, and dominance in key sectors like energy and minerals, particularly in Kazakhstan. In 2025, Central Asian countries are expected to increase cooperation with China and India and explore and enhance the connectivity trying to manage persisting issues and concerns and taking advantage of mutual commercial interests. The Middle Corridor remains a priority for China, Europe and Central Asian countries and is expected to garner more investments for its development in 2025.

The growing demand for rare earth minerals will also help Central Asian countries to expand their trade footprint. This is evident from the developments in the last two years and it is expected to continue in the coming years as well. The United States will continue to support alternate energy routes and forge partnerships in energy, rare earths, uranium, and infrastructure investments in Central Asia. Under Trump, engagement would focus primarily on economic interests, with less emphasis on democratic reforms or concerns about au-

thoritarianism, and an active US role in regional security is not likely.

Armenia's pivot to the West is expected to gain momentum as reflected by greater EU and NATO cooperation in 2024. However, there will be challenges and limitations emanating from Armenia's energy dependency on Russia and unresolved tensions with Azerbaijan. This realignment reflects broader regional trends, where regional countries have invested in recalibrating their foreign policies to balance traditional alliances and partnerships with emerging opportunities. Central Asia and the Caucasus will continue to be focal points of geopolitical tension and competition, while also paving the way for new opportunities for cooperation across various sectors. As regional countries pursue economic diversification through strategic budgets and development plans, they are seeking to enhance their global standing taking advantage of their natural resources and geostrategic location. The shifting balance of power and regional alignments will likely present new prospects for countries to forge stronger partnerships, espe-

cially in energy, infrastructure and defense.

The Ripple Effect of the Bangladesh Crisis on South Asia

The 2023 ASR predicted that East and South Asia would enter a phase of instability driven by intense international competition among major powers vying for global leadership. This competition was predicted to be characterized by strategies of encirclement and counter-encirclement, as evident in East and South Asia in 2024. East Asia, being a pivotal region with significant global economic centers, has become a focal point of geopolitical conflict as it plays a crucial role in shaping the international order. In South Asia, instability erupted in Bangladesh amid widespread chaos. This was marked by Prime Minister Sheikh Hasina — the longest-serving prime minister in Bangladesh's history — fleeing to India in early August 2024. Her departure followed the storming of her residence by demonstrators amid mass protests against her rule, which spanned nearly a decade and a half. The 2024 ASR focuses on the implications of the Bangladesh crisis

for South Asia,⁽¹⁾ recognizing the country as a critical arena for international power rivalry. The analysis covers three key areas: the root causes of the crisis in Bangladesh, the responses of regional and global powers, and the impact of the crisis on international competition in South Asia. The file concludes with a forecast of developments in 2025.

Drivers and Interpretations of the Bangladesh Crisis

Analysis in the wake of Hasina's sudden overthrow overwhelmingly suggests that the causes were not solely internal. While her government's policies, often described as exclusionary and marginalizing, played a significant role, reports also identify external factors as critical explanations for the turmoil in South Asia, underscoring the interplay between domestic governance issues and regional and international dynamics in shaping the crisis.

Internal Drivers

After the ruling Awami League secured victory in the 2024 parliamentary elections, Hasina was inaugurated for a

fourth consecutive term as Bangladesh's prime minister in January 2024. However, her tenure was swiftly marred by allegations of electoral fraud, vote rigging and the coercive suppression of opposition forces. These accusations gained traction with international criticism of Bangladesh's non-democratic practices during her previous three terms. Consequently, the Awami League's popularity steadily eroded, and public discontent with its policies expanded significantly following Hasina's initial rise to power.⁽¹²⁸⁾

The student protests that broke out in June 2024 against Hasina's government marked a pivotal moment in escalating public discontent and resentment toward her policies. These demonstrations led to the emergence of the quota reform movement, formed by students and faculty from government universities in Bangladesh. The movement opposed the reinstatement of the quota-based employment system* for government jobs after its earlier abolition, calling for its elimination. Protesters argued that the system was discriminatory, violated the principle of equal opportunity, and was

a key factor in the rising unemployment rates among the population in Bangladesh.⁽¹²⁹⁾

The government's rejection of the protesters' demands led to a surge in massive and violent demonstrations, ultimately compelling the government to abolish the quota system. However, the unrest did not subside, as the government and Awami League supporters adopted a policy of intimidation and repression against the leaders and prominent figures of the protest movement. Protest leaders were labeled *razakars*, a term implying treason and collaboration, with opponents of the quota system being denounced as seditious.⁽¹³⁰⁾ This narrative further inflamed tensions, escalating the protests into violent and bloody clashes that resulted in hundreds of deaths.

Amid the escalating mass protests and the army's withdrawal of support, Hasina announced her resignation on August 5, 2024. As a large crowd of angry protesters approached her residence and fearing for her safety, she sought permission to flee to India. New Delhi

(1) The quota system dates back to the era of Sheikh Mujibur Rahman, the founder of the ruling Awami League and father of Sheikh Hasina, in the early 1970s after Bangladesh's independence in 1971. It was established to reward the fighters who contributed to the country's liberation and independence by participating in the war against the Pakistan army to free East Pakistan (modern-day Bangladesh). The quota system remained in place until Sheikh Mujibur Rahman's assassination in 1975. It declined under subsequent governments but was reinstated during Sheikh Hasina's first term in 2006, allocating 30% of quotas to freedom fighters. This system was abolished in 2018 in response to student protests and Hasina's ambition to secure a third term. The abolition persisted through her third term. After winning a fourth term in the 2024 elections, the Bangladesh Supreme Court reinstated the quota system, albeit with a reduction, sparking massive protests that eventually forced Hasina to flee.

swiftly agreed to her request, effectively ending her rule in Bangladesh. Nobel laureate Mohammed Yunus was sworn in as interim prime minister on August 8, 2024. He formed an advisory council comprising representatives from the country's political and civil forces and initiated efforts to hold Awami League leaders, including advisors in Hasina's government, accountable for corruption.⁽¹³¹⁾

Critics of the quota system viewed it as a strategic mechanism employed by Hasina to appoint loyal supporters to key positions, consolidating her grip on the country's administration and prolonging her rule. This approach significantly worsened the youth unemployment crisis. At a time when Bangladesh was pursuing economic development, the quota system was perceived as restricting opportunities for young people, intensifying the frustration and discontent that ultimately contributed to Hasina's downfall.⁽¹³²⁾

External Drivers and Interpretation of the Crisis

Beyond internal challenges, Bangladesh's situation is greatly affected by the external dimension, owing to the country's strategic location and grow-

ing importance in geopolitical competition. With its large population and dynamic, expanding market, Bangladesh occupies a vital position in South Asia. This has made it a focal point in the geopolitical rivalry between the United States and China in the Indian and Pacific Oceans. Situated in China's western sphere, it represents an area that the United States aims to encircle as part of its Indo-Pacific strategy. Despite economic difficulties, Bangladesh ranks second in GDP among South Asian nations and hosts local and multinational industries that produce high-quality goods sought after in global markets. Therefore, its strategic importance and influence have increased, rendering it a critical target in the policies and strategies of global powers seeking prominence and influence in the Indo-Pacific region.

The South Asian landscape is further complicated by US strategies aimed at encircling China, a region marked by countries with limited economic and resource capacity. Many observers see this as part of a broader cold war between the United States and China, playing out in the Indian and Pacific Oceans as a component of a strategy the Biden administration has been pursuing since 2022⁽¹³³⁾

to secure a geopolitical advantage. China's Deputy Chief of Staff of the Joint Staff Department of the Central Military Commission Lieutenant General Jing Jinfeng has accused the United States of adopting a cold war mindset, aiming to build allied systems to maintain its global dominance.⁽¹³⁴⁾ This geopolitical clash intensifies as Washington contends with Beijing's efforts to enhance regional infrastructure across countries like Bangladesh, Pakistan, Afghanistan, Sri Lanka and Nepal under the BRI.

It is notable that four neighboring countries directly or indirectly supporting China's BRI have witnessed the downfall of their governments, with subsequent leadership shifts aligning more closely with US interests. In Pakistan, Shehbaz Sharif assumed power in April 2022 after the ousting of Imran Khan. In Sri Lanka, Ranil Wickremesinghe, who is pro-Western, assumed his sixth term in July 2022. He was granted powers by the former President Gotabaya Rajapaksa before leaving office due to massive popular protests. Wickremesinghe continued as the interim president until he lost the presidential election in 2024. In Nepal, a parliamentary amendment in July 2024 led to KP Sharma Oli's ascendance, replacing the Maoists with ties to China's Maoist legacy.

The Awami League publicly accused the United States of attempting to destabilize Bangladesh's electoral process by backing violent protests against Hasina. Various media outlets highlighted Hasina's direct accusations against Washington, claiming that this criticism contributed to her ouster. She alleged that her continued rule was contingent upon rejecting US demands to cede control over Saint Martin's Island,⁽¹⁾ a strategic location in the Bay of Bengal, to establish a US military base. In June 2023, she stated that Washington aimed to secure the island in exchange for facilitating the victory of the opposition Bangladesh Nationalist Party in upcoming elections. Hasina rejected this arrangement, arguing that the aforesaid party would sell the island to the United States if it assumed power, a move she said was impossible while she was in power. She also asserted that such a deal would undermine Bangladesh's sovereignty and harm regional stability, particularly by weakening relations with China.⁽¹³⁵⁾ These accusations highlight the longstanding, fraught relationship between Hasina's government and the United States.

The United States was concerned about the potential strengthening of Bangladesh's ties with both China and Russia

under Awami League leadership.⁽¹³⁶⁾ Some Awami League leaders disclosed that a high-ranking US diplomat visited Dhaka in May 2024 to pressure Hasina into taking a stance against China.⁽¹³⁷⁾ Director of the Center for South Asian Studies at the Shanghai Institutes for International Studies Liu Zhongyi suggested that Hasina's disagreements with the United States on various matters could be a reason behind Washington's attempts to remove her.⁽¹³⁸⁾ Media outlets also pointed out that the appointment of Yunus as Hasina's successor reflected US influence, given his longstanding and often contentious relationship with Hasina and his close connections with US administrations. This situation aligns with the broader narrative that external factors, particularly geopolitical rivalries between major global powers, are contributing to the internal challenges and political shifts in Bangladesh.

Positions of Regional and Global Powers

India

Hasina's ouster represents a significant strategic setback for India, which had been a key ally and supporter of her government. India maintained strong ties with Bangladesh under Hasina, offering substantial logistical and technical sup-

port throughout her time in office. New Delhi also played a crucial role in safeguarding her regime and garnering regional and international support for it. India's cooperation with Bangladesh was driven by strategic interests, including security concerns and shared religious ideological ties, notably the presence of a significant Hindu population in Bangladesh. A testament to the close relationship between India and Bangladesh is Hasina's escape to India, with New Delhi refusing to comply with Bangladesh's demand to extradite her.⁽¹³⁹⁾

China

Unlike the India-Bangladesh relationship under Hasina, which relied on the strong ties between the two ruling regimes, China approaches its relationship with Bangladesh through a more state-centric lens. Beijing focuses on maintaining strategic interests with the Bangladeshi state as a whole rather than prioritizing any specific political party. Consequently, China responded favorably to the interim government that succeeded Hasina, emphasizing that its trade, economic interests and investments

(1) Saint Martin Island is a landmass of three square km in the northeastern of the Bay of Bengal.

remain unaffected by changes in political leadership. China's welcoming of the new administration reflects its commitment to safeguarding its interests in Bangladesh regardless of political shifts.⁽¹⁴⁰⁾

Pakistan

Pakistan has shown solidarity with the Bangladeshi people, expressing hope for a peaceful resolution to the ongoing unrest. It has also acknowledged the determination and resilience of the protesters, who opposed the previous regime, which was marred by corruption, unemployment, marginalization and social exclusion. This position aligns with Pakistan's strategic interests, as it seeks to shift regional dynamics by building its influence in Bangladesh. Given Hasina's alliance with India, Pakistan's support for regime change in Bangladesh reflects an interest in diminishing Indian influence in South Asia while strengthening its own presence and influence through collaboration with the new Bangladeshi government.

The United States

Media reports and expert analysis indicated that the United States

played a significant role in fueling the opposition movement against Hasina's government. Before the 2024 parliamentary elections, in which the Awami League secured a victory and Hasina's leadership continued, Washington sought to complicate the electoral process and influence citizens' attitudes against the Awami League. To achieve this, it imposed restrictions on granting visas to a large number of Bangladeshis and mobilized its Western allies to adopt the same measures against Bangladeshis.

When Hasina visited Washington to attend a World Bank meeting in May 2024, she did not meet with US President Joe Biden. These measures provided an opportunity for the opposition to escalate their efforts against her. Consequently, before her overthrow, she openly criticized Washington and Western capitals, accusing them of working to bring about regime change in Bangladesh.⁽¹⁴¹⁾ After the elections, Washington questioned the integrity and fairness of the electoral process⁽¹⁴²⁾ and supported the protest movement against Hasina's government. Furthermore, it quickly wel-

comed the interim government after Hasina fled, a development many observers interpreted as part of the United States' broader strategy to contain competing international poles. This strategy includes efforts to limit the new administration embracing policies that challenge US global dominance and hegemony.

The UK and Germany

There is a clear alignment between European positions and the US stance regarding the crisis in Bangladesh. Spokespeople for the British prime minister and the German Foreign Ministry expressed hope for restoring and maintaining democracy in Bangladesh, particularly after a noticeable decline in democratic processes. They strongly condemned the significant loss of life, which included students and law enforcement officers, as entirely unacceptable. The UK specifically emphasized the urgent need to implement measures to restore democracy, promote peace and security for the Bangladeshi people, and safeguard the right to peaceful protest. The Starmer government also called on the authorities to release all peaceful demonstrators.⁽¹⁴³⁾

The Crisis and Global Competition in South Asia

The South Asian region, and Bangladesh in particular, occupies a central position in the competition among major international powers: China and India, as well as the United States and Western nations. This dynamic is apparent in the regional rivalry between China and India for dominance and influence in the Indo-Pacific, and the global competition between the United States and China to establish leadership over the international system. These competing interests have significantly influenced and deepened the Bangladeshi crisis in South Asia. As a result of these rivalries, the future stability and development of Bangladesh could be impacted by the regime's overthrow. This regime previously maintained loyalty to Chinese and Indian interests. Europe and the United States are actively working to establish a regime aligned with Western interests as part of a broad strategy aimed at containing competing rivals. This international competition might hinder Dhaka's ability to fully benefit from Chinese and Indian initiatives aimed at bolstering economic ties. Consequently, this scenario would limit Bangladesh's capacity to diversify its economic invest-

ment opportunities and infrastructure development projects.⁽¹⁴⁴⁾

Chinese Efforts to Protect Its Interests in Bangladesh

Dhaka's decision to join China's BRI in 2016 was a pivotal moment in the ongoing international competition for influence over Bangladesh. This agreement marked the intensification of the rivalry between China, India and the United States over strategic interests in the region. China significantly strengthened its influence in Bangladesh by offering substantial financial support. Over the course of eight years, China invested around \$24 billion in Bangladesh's infrastructure projects.⁽¹⁴⁵⁾ Additionally, China contributed roughly \$2.3 billion in development aid, which facilitated key projects, such as the construction of the Padma Multipurpose Bridge, the Bangabandhu Tunnel, the Dasherbandi Sewage Treatment Plant and the development of the Sonadia Port. China also solidified its strategic ties with Dhaka by becoming the only country to sign a defense cooperation agreement with Bangladesh. This partnership made China the largest arms supplier to the Bangladesh military. According to data from the International Peace Research Institute, China accounted for approxi-

mately 73% of the value of arms imports to Bangladesh between 2018 and 2022.⁽¹⁴⁶⁾

Beijing stands as one of Dhaka's key trading partners and the second-largest source of foreign investment in the country. China has played a significant role in developing Bangladesh's infrastructure, completing projects such as railways, highways, and power plants. By 2024, the relationship between Beijing and Dhaka had deepened substantially. This was highlighted by the signing of a comprehensive strategic partnership agreement during Hasina's visit to China, which took place roughly a month before she fled to India. During this visit, the two nations agreed to establish direct flight operations and signed around 21 agreements aimed at bolstering trade and investment ties.⁽¹⁴⁷⁾ However, Beijing did not shy away from exerting influence over Dhaka when it perceived its interests to be at risk. China issued a stern warning against Bangladesh's potential inclusion in a military quadrilateral alliance composed of Japan, India, Australia, and the United States. Beijing strongly emphasized that such an accession would severely damage their bilateral relations.

Indian Efforts to Enhance Its Clout in Bangladesh

India views the growing Chinese influence in Bangladesh with deep concern, as it seeks to bolster its regional presence and challenge China's expanding influence in the Indo-Pacific. Bangladesh holds significant strategic value for India, prompting New Delhi to strengthen its ties with Dhaka as a counterbalance to China's influence.

To achieve this goal, India provided Bangladesh with a \$5 billion credit line and loan, aimed at improving infrastructure. This amount represents the largest credit line India had ever extended to a single country worldwide, positioning India as a viable alternative to China. Additionally, India made efforts to resolve border disputes with Dhaka and increased its investments in key sectors, such as electricity, railway infrastructure, energy projects and pipeline extensions.⁽¹⁴⁸⁾ A major milestone in India-Bangladesh relations occurred in 2024, when significant projects were agreed upon during Hasina's visit to India in June. These projects included a railway line development and an initiative to connect the India-Bangladesh railway network with the Indian-Bhutanese border. Such projects were expect-

ed to boost trade and stimulate tourism among India, Bangladesh and Bhutan.

US Moves to Draw Bangladesh Away From Rival Powers

The United States sees Bangladesh as a crucial battleground in its strategy to contain competing global powers, even while maintaining a strong relationship with its traditional ally, India. Washington's intervention in Bangladesh aimed to limit China's influence in South Asia by leveraging issues of democracy and human rights to shape the policies of the Bangladeshi government before Hasina's departure. To achieve this goal, the United States maintained sanctions against individuals it identified as human rights violators in Bangladesh, including those accused of compromising the integrity of the 2024 elections. It also implemented restrictions on granting entry visas to Bangladeshi nationals. Washington pressured Dhaka to align with its Indo-Pacific strategy, a request that Dhaka resisted due to China's substantial economic investments in the country. Furthermore, the United States sought control over the strategic island of Saint Martin's as part of a broader plan to strengthen its military presence near the vital Strait of Malacca — a crucial route for China's foreign

trade and essential for economic connectivity across Asia.⁽¹⁴⁹⁾

During the protests, as previously mentioned, the Awami League accused the United States of meddling in Bangladesh's internal affairs, calling on Hasina's government to uphold the right to peaceful protest. In addition to US pressure, India and Japan also joined in urging Dhaka to abandon the Sonadia port project. In exchange, they proposed a new Japanese port project in Matarbari, located in close proximity to Sonadia. The cancellation of the Sonadia project was driven by these countries' concerns about maritime competition, particularly the fear that such a port would grant China a strategic advantage in the Indian Ocean. More recently, both New Delhi and Beijing have invested in the development of the Mongla port, Bangladesh's second-largest port, highlighting the ongoing geopolitical rivalry. China remains vigilant about the shifting alliances and regional dynamics in Bangladesh, striving to safeguard its interests against US-led strategic containment efforts.

Conclusion: South Asia's Geopolitical Competition in 2025

Based on the foregoing, an important conclusion emerges: there is a significant similarity in the strategies employed by international powers in the ongoing geopolitical competition across regions where global leadership contests are unfolding. US policies aimed at encircling China in East Asia mirror its approaches in South Asia and the Middle East, with a consistent willingness to prioritize US interests even at the expense of its traditional allies. Washington's intervention in Bangladesh to facilitate regime change directly clashed with India's interests, despite India being a longstanding US ally. Hasina's departure from power represented a substantial loss for India. As a result, many countries allied with the United States in various regions are recalibrating their foreign policies to establish greater independence. India is among these nations, seeking to prioritize its strategic goals and interests and

distancing itself from Washington to assert its regional ambitions and safeguard its national interests.

The United States is also striving to integrate Bangladesh into its broader strategy for the Indian and Pacific Oceans as part of efforts to encircle China. However, this goal has not significantly impacted China, as Beijing prioritizes maintaining relationships with states rather than with specific political systems — unlike India, which ties its alliances in South Asia to governments and leadership structures. As a result, China stands to lose little from the fall of Hasina's regime, given its robust strategic ties with state institutions. An ironic twist in South Asian geopolitics is that while the United States seeks to stir competition between China and India to divert Chinese focus and prevent it from pursuing global ambitions, it ultimately undermines the interests of both its ally (India) and a regional competitor (China) to serve its own strategic objective of encircling China — an endeavor

aimed at securing a dominant position in the global contest for the world's leading pole.

As the ongoing crisis in Bangladesh reflects the global competition between major international powers vying for leadership, the developments in South Asia in 2025 will be shaped by the policies adopted by President-elect Donald Trump concerning the Indo-Pacific region. This includes balancing efforts to contain China while simultaneously considering India's strategic interests in South Asia.

The primary victim of US policies in this context is not only China but also India, a key US ally, due to the overthrow of Hasina's government. However, unlike more intense and unstable issues seen in US-China relations — such as the Taiwan crisis, which involves the Taiwanese president's strong separatist ambitions and policies that prioritize Taiwan's self-proclaimed state sovereignty over subordination to China — South Asian competition remains more stable and less prone to direct conflict.

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عام الحرف
اليدوية 2025
The Year of Handicrafts

The Floral Headbands Making

3

PART 3

SAUDI ARABIA'S 2024 POLICY

In 2024, Saudi Arabia intensified its efforts to achieve the objectives outlined in Vision 2030, thereby reinforcing its strategic positioning on both regional and global fronts. This section of the 2024 ASR delves into significant internal and external developments within the kingdom during this year.

- The Vision's Resilience in Addressing Challenges
- The Saudi Response to Arab and Regional Developments
- Saudi Policy: Navigating Global Shifts
- Saudi Policy Trajectory in 2025

The 2023 ASR analyzed the strategic shifts experienced by Saudi Arabia throughout the year, using the goals of Vision 2030 as a benchmark to evaluate progress. The report highlighted advancements in modernization and good governance, the kingdom's expanding role in promoting peace and regional stability, its progress in economic diversification away from oil dependence and developments in military modernization and manufacturing to bolster defense capabilities against potential security threats. The 2024 ASR builds on this assessment while incorporating

Saudi Arabia's responses to major regional developments during the year. It evaluates achievements by examining the following three key areas: national policies and responses to challenges within a flexible national vision, Saudi Arabia's engagement in Arab and regional developments and its positioning within the context of global transformations.

The Vision's Resilience in Addressing Challenges

Since the announcement of Vision 2030 on April 25, 2016, Saudi Arabia has undergone a remarkable transformation,

securing top positions in numerous global development rankings. The kingdom's ministries and agencies have approached Vision 2030 not as a mere aspirational plan, but as a concrete initiative to be followed and realized. As a result, the kingdom has remained committed to advancing its Vision 2030 goals, focusing on its three core pillars: a vibrant society, a thriving economy and an ambitious nation.

Developments and Interactions Related to Vision 2030

The 2024 results confirmed that Vision 2030 is progressing toward successful

Table 3.1: Vision 2030: Key Performance Indicators (KPIs)

Indicator	Baseline	2023 Target	Actual Value	2030 Target
Pilgrims from outside the kingdom (millions)	6.2	10	13.56	30
Number of Saudi landmarks on UNESCO World Heritage List (site)	4	6	7	8
Average life expectancy (years)	77.06	---	78.10	80
Percentage of residential areas, including peripheral areas, covered by healthcare services	84.13%	96%	96.41%	99.5%
Percentage of adults (18 years and older) engaging in physical activity for 150 minutes weekly	49%	51%	62.3%	64%

Percentage of Saudi households owning a housing unit	47%	63%	63.74%	70%
Percentage of beneficiaries with subsidies who can work and are empowered (Percentage of job-ready welfare recipient enabled)	1%	32%	32.3%	38.3%
Global ranking by GDP (billion)	\$716	\$809	\$790	\$1,730
Non-oil GDP (billion)	\$405	\$515	\$505	\$1,327
Private sector contribution to GDP	40.3%	45%	45%	65%
Loans to small and medium enterprises as a percentage of bank loans	2%	8.6%	8.3%	20%
Share of local content in oil and gas sector	37%	59%	63%	75%
Total value of exports from industries related to oil and gas-(billion SAR)	\$34.4	\$132	\$161	\$564
Share of local content in non-oil sector spending	52%	59%	56.8%	75%
Percentage of military industry localization	7.7%	9%	10.4%	50%
Total value of assets under management (AUM) of the Public Investment Fund (PIF), (billion)	\$192	\$720	\$749	\$2,670
Share of non-oil exports as a percentage of non-oil GDP	18%	36%	24.1%	50%

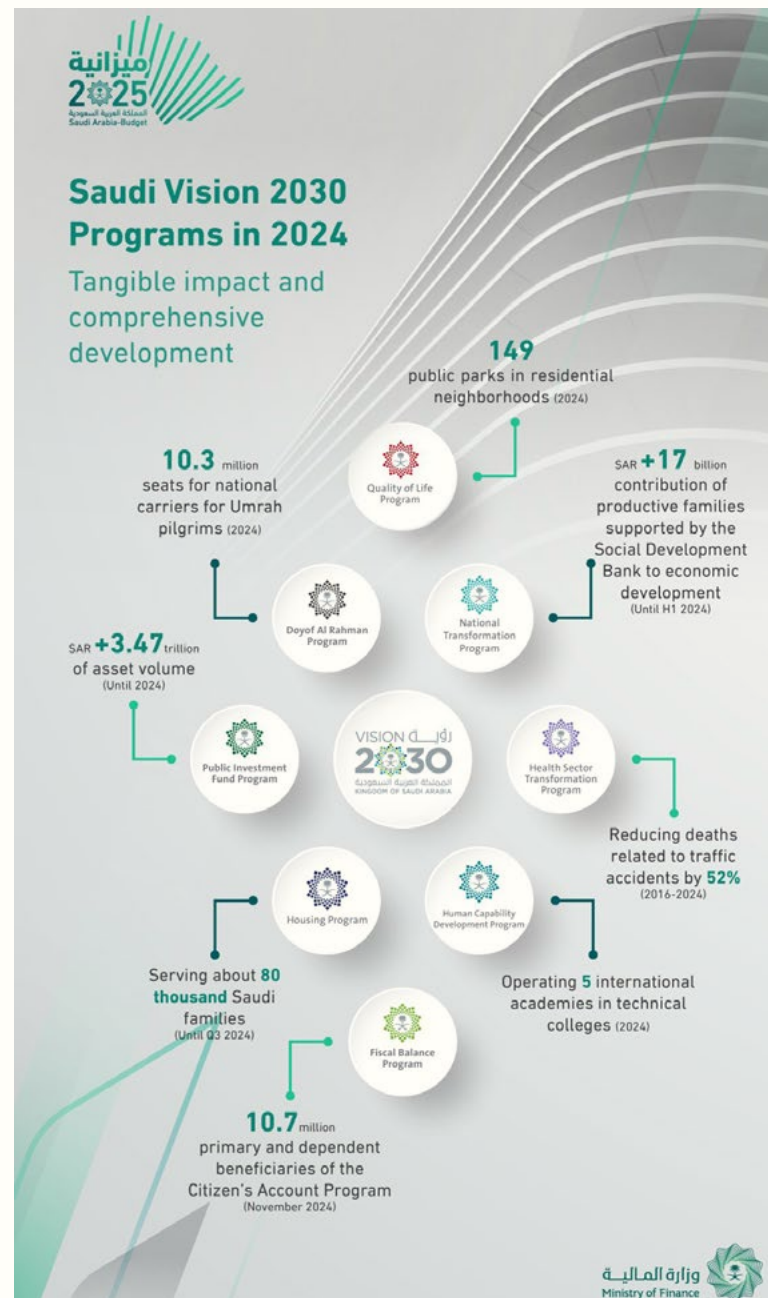
Unemployment rate among Saudis	12.3%	8%	7.7%	7%
Percentage of technical and vocational education graduates employed within six months of graduation	13.9%	46.6%	45.8%	65%
Percentage of university graduates entering the labor market within six months of graduation	13.3%	41.2%	41.2%	75%
Percentage of working persons with disabilities who are able to work	7.7%	12.3%	12.6%	15%
Percentage of women's participation in the labor market	22.8%	35.1%	34%	40%
Economic Participation and Opportunity Sub-index (point)	0.33	0.592	0.637	0.736
Government Effectiveness Index (score)	63	70.8	70.8	91.5
Saudi Arabia's ranking in the United Nations e-Government Development Index (EGDI), (rank)	36	31	31	5
Number of volunteers (thousands)	22.9	670	834	1,000 (1 million)
Percentage of major companies offering corporate social responsibility programs	30%	57%	64.8%	90%
Non-profit sector contribution to GDP	0.2%	0.51%	0.87%	5%
Percentage of employees in the non-profit sector from the total workforce	0.13%	0.39%	0.55%	3.1%

Source: "Vision 2030: Annual Report 2023," *Vision 2030*, accessed January 19, 2025, <https://www.vision2030.gov.sa/en/annual-reports>.

implementation, supported by the central role of the vision and its “institutionalization” within the state apparatus. Various ministries and institutions have aligned their efforts with the vision’s objectives, establishing unified achievement standards. Coinciding with the eighth year since its launch, the annual report for Saudi Vision 2030,⁽¹⁾ released in April 2024, highlighted the targets met in 2023 as well as the impact of programs in 2024 (see Table 3.1 and Figure 3.1).

During the royal speech delivered at the opening of the ninth Shura Council session in September 2024,⁽²⁾ Crown Prince Mohammed bin Salman highlighted the kingdom’s significant achievements under Vision 2030. He noted that non-oil activities reached their highest contribution to real GDP in 2023, while unemployment among Saudi men and women dropped to a historic low in the first quarter of 2024. In tourism, targets were surpassed ahead of schedule, positioning Saudi Arabia as the 16th most

Figure 3.1: Vision 2030 Programs in 2024



competitive nation globally. The crown prince also emphasized the kingdom’s emergence as one of the world’s largest reservoirs of natural resources. These achievements have bolstered international confidence in the kingdom, positioning Saudi Arabia as a prime destination for global corporations and institutions and earning it the opportunity to host Expo 2030 and prepare for the World Cup in 2034.

The annual Vision 2030 report aimed to present indicators with transparency, acknowledging that some 2023 targets were not fully met, with varying shortfalls outlined in Table 1. It emphasized the importance of maintaining realistic benchmarks rather than inflating achievement indicators without actual progress. Notably, the Saudi government took steps to enhance the annual report’s effectiveness. The Royal Court’s Office of Strategic Management collaborated with the private sector, inviting companies and institutions to review the report and provide

feedback. This initiative aimed to ensure that the reports deliver meaningful insights and value to their audience.

The Vision 2030 indicators highlight the importance of treating it as a flexible, open initiative. While its goals remain clear, projects and timelines can be adjusted and reallocated based on shifting Saudi priorities, a practice common in national development plans worldwide. Some projects may advance as scheduled, while others could face delays or downsizing due to global changes that have significantly altered the landscape since the launch of Vision 2030 nearly a decade ago. Following the Council of Ministers' approval of the 2025 fiscal budget, Crown Prince Mohammed bin Salman underscored the interconnectedness of the Saudi economy with global economic developments, emphasizing the need to tackle global challenges proactively. He reaffirmed the kingdom's commitment to the meticulous and transparent implementation of the budget and the completion of Vision 2030 programs and projects.⁽³⁾

The Saudi Economy: Oil and Renewable Resources

In 2024, Saudi Arabia advanced its efforts to diversify its economy, aiming to reduce reliance on oil and prioritize

renewable resources — a key objective of Vision 2030. The minister of industry and mineral resources reported a \$19 billion increase in industrial exports during the year, driven by the growth of new sectors and the introduction of products beyond petrochemicals.⁽⁴⁾

The general budget approved by the Saudi Cabinet for 2025, which was approved with an expected deficit of 101 billion riyals, confirmed that the kingdom is taking bold steps toward transformation, as this deficit is mainly the result of increased spending on projects and economic transformation plans. According to the vision — expressed by the Minister of Finance Mohammed al-Jadaan, after announcing the 2025 budget, he believes that it is possible to expand spending despite the budget deficit because the return to the economy is greater than the cost of borrowing to cover this deficit. After approving the budget, the minister stated that the kingdom is looking forward to reaping the fruits of spending 271 billion riyals over eight years to diversify its economy within Vision 2030. He also indicated that the government is adopting a long-term financial planning methodology to ensure focus on the stability of strategic transformational spending that aims

to achieve economic gains and sustainable growth.⁽⁵⁾

On June 24, 2024, Saudi Arabia launched a groundbreaking geographical survey project for renewable energy, involving the installation of 1,200 stations to monitor solar and wind energy across the kingdom. Covering over 850,000 square kilometers, the initiative, described by Energy Minister Prince Abdulaziz bin Salman as the world's most extensive in terms of geographical coverage, aims to identify optimal sites for renewable energy projects based on resource availability and development priorities. Later, on December 3, Prince Abdulaziz announced plans to launch 20 gigawatts of renewable energy projects in 2024, following a fourfold increase in production from 700 megawatts to 2.8 gigawatts. He emphasized Saudi Arabia's ambition to become a leading global exporter of clean and green hydrogen, highlighting the \$8.5 billion financial closure of the Neom green hydrogen project and the signing of a memorandum of understanding for the IMEC during the G20 Summit in 2023, which is set to bolster energy exports.

In 2024, Saudi Arabia forged multiple partnerships to boost its renewable energy production and advance its transi-

tion to clean energy under Vision 2030. Energy Minister Prince Abdulaziz bin Salman emphasized that localization is a cornerstone of the kingdom's energy strategy, aiming to secure a sustainable energy future by developing the entire supply chain — from raw materials to final products — and maximizing local value.⁽⁶⁾ Saudi Arabia's energy policy follows a dual-direction strategy, balancing efforts to expand renewable energy resources while optimizing traditional energy sources with reduced carbon emissions. This approach aligns with forward-looking projections of rising oil demand in Asia and the Global South. In line with this balanced policy, the kingdom has completed administrative preparations for nuclear regulatory work and has also fulfilled the requirements under the Comprehensive Safeguards Agreement. It continues to implement its national nuclear energy project.

Developing the Minerals Sector and the National Strategy for Industry

In 2024, Saudi Arabia advanced its mining development program as part of Vision 2030, aiming to position mining as the third pillar of national industry and to diversify the economy. The kingdom seeks to secure vital minerals such as

copper, nickel, lithium and iron ore to establish itself as a key hub for electric vehicle battery manufacturing and to bolster its domestic automotive industry. Saudi Arabia has set an ambitious goal of producing 500,000 electric vehicles by 2030.

Saudi Arabia's incentive policies have transformed it into one of the most competitive mining regions globally, with a significant reduction in the tax rate from 45%. According to a June 2023 report by Mining Journal Intelligence's World Risk Report 2024 featuring Mine-Hutte Ratings, the kingdom achieved the fastest global growth in the past five years by enhancing its investment environment. In January 2024, Saudi Arabia raised its estimates of untapped mineral resources from \$1.3 trillion to \$2.5 trillion (9.4 trillion riyals), a 90% increase. The minister of industry and mineral resources attributed this rise to recent surveys revealing additional reserves of phosphate, gold, zinc, copper and the discovery of other critical minerals essential to various industries, as well as a reevaluation of existing mineral resources.

In July 2024, the Saudi Cabinet approved the establishment of the National Minerals Program under the Ministry of Industry and Mineral Resources, con-

tinuing efforts to stimulate investment in the mining sector.⁽⁷⁾ According to the ministry's publications, the program aims to solidify Saudi Arabia's position as a regional and global mining hub, address increasing demand for minerals, develop local capabilities and support exploration activities. Throughout 2024, the ministry issued numerous licenses, with its spokesperson reporting 2,453 active mining licenses as of March.⁽⁸⁾ Additionally, the deputy minister of industry and mineral resources for mining affairs announced in December that the kingdom has allocated \$32 billion to projects including steel production, the extraction of battery minerals and copper mining.

In July 2024, the Ministry of Industry and Mineral Resources launched the kingdom's first-ever mineralized belts for competition, spanning 4,788 square kilometers. The initiative aims to expedite the exploration and exploitation of Saudi Arabia's mineral resources. The mineralized belts included three exploration licenses in the Jabal Sayyad belt, covering 2,892 square kilometers, and two licenses in the Al-Hajjar site within the Wadi Shawas belt, covering 1,896 square kilometers. The ministry also concluded the fifth round of mining licensing, awarding exploration licenses

for six mining sites. In November, it announced that 11 local and international companies had secured these licenses across different regions of the kingdom. By January 2024, investments in the mining sector surpassed \$400 billion. The sector received a further boost with the Jeddah Islamic Port's listing on the London Metal Exchange (LME) as a new delivery center for copper and zinc. This development positions the port as a global hub for storing metals traded on the LME, enhancing Saudi Arabia's role in the international metals supply chain.

Technical and Digital Developments and Artificial Intelligence

In his November 2024 speech, Minister of Communications Abdullah al-Sawaha highlighted that the digital economy in Saudi Arabia had grown from 298 billion riyals to 460 billion riyals. He also noted that nearly 370,000 young men and women are employed within the digital economy. He also projected that the kingdom's AI market would reach \$2 billion by the end of 2024, with an annual growth rate of 29%. This growth is expected to propel the market to exceed \$9 billion by 2030.

In 2024, Saudi Arabia made significant strides in the field of AI, highlight-



The digital economy in Saudi Arabia has grown from 298 billion riyals to 460 billion riyals. And nearly 370,000 young men and women are employed within the digital economy.

Abdullah al-Sawaha
Minister of Communications

ed by the organization of several key summits. The Saudi Data and Artificial Intelligence Authority (SDAIA) hosted the World Artificial Intelligence Summit from September 10 to September 12, themed "Artificial Intelligence for the Good of Humanity." During the summit, SDAIA secured partnerships with leading AI companies, including Microsoft, Dell and Oracle, along with various national entities. Additionally, SDAIA organized the inaugural global edition of the International Artificial Intelligence Olympiad (IAIO) in collaboration with the International Center for Research and Ethics in Artificial Intelligence (IC-

AIRE) and the International Research Center for Artificial Intelligence (IRCAI) in Slovenia, under the patronage of UNESCO. SDAIA's goal in organizing the IAIO is to create a global platform for AI competitions, fostering talent and skill development while providing a forum for scientists and stakeholders worldwide to share experiences. In September, the first edition of the FinTech 24 conference was also launched in Riyadh to enhance the global financial system. During the conference, the minister of finance highlighted that Saudi Arabia had exceeded its target of 168 technology companies in the financial sector, reaching 224 companies by the end of the second quarter. The aim is to increase this number to 525 companies by 2030, as part of Saudi Arabia's ambition to become a global hub for financial technology. FinTech 24 is planned to become an annual conference and one of the largest gatherings of fintech in Asia, Europe and North Africa. In November 2024, the third edition of the Riyadh Global Biomedical Summit was also launched. This summit underscores the Saudi leadership's interest in the biomedical sector, which plays a key role in sustainable development and supporting the national economy. It aligns with the objectives of the National Biotech-

nology Strategy, unveiled by the Saudi crown prince in early 2024. This strategy outlines Saudi Arabia's vision to develop advanced biotechnologies across medicine, agriculture, environment and industry, aiming for the kingdom to become a leading biotechnology hub in the Middle East and North Africa by 2030, and globally by 2040.⁽⁹⁾

In November 2024, Cyberani, one of Aramco's digital companies, launched four cybersecurity products developed by Saudi engineers. Each product serves a different function aimed at enhancing the sector, including technologies designed to protect sensitive data and operational systems. At GITEX Global 2024 in Dubai, Saudi Arabia showcased its technological capabilities through a pavilion that featured 40 Saudi communication and technology companies, operating under the slogan "Saudi Made." This participation was focused on boosting the global presence of Saudi companies and promoting technological innovation. In September 2024, Aramco Digital partnered with Grok, an AI reasoning specialist, in a project aimed at establishing Saudi Arabia as the first country to host the world's largest global data center for AI reasoning. Additionally, in June 2024, the National Semiconductor Cluster was launched

with the goal of localizing the manufacture and design of electronic chips, positioning the kingdom as a regional hub for semiconductors. This initiative seeks to attract semiconductor design companies, localize 50 specialized companies by 2030, train 5,000 Saudi engineers in integrated circuit design and attract over 1 billion riyals in investment for deep technology by 2030.

Culture and Sports: Spearheading Arab Soft Power

In December 2024, a landmark event occurred when FIFA announced on December 11 that Saudi Arabia had won the exclusive right to host the 2034 World Cup. Earlier, on December 4, Saudi Arabia's bid had received an unprecedented rating of 419.8 out of 500, the highest technical rating ever given by FIFA to a World Cup host bid. This achievement was bolstered by substantial support from local federations across Asia, Africa, North and Central America and Europe, with the number of countries backing Saudi Arabia's bid surpassing half of FIFA's 211 registered local federations.

FIFA's evaluation of Saudi Arabia's bid was the culmination of the kingdom's extensive efforts across economic, social, technological, digital and cultural

domains in recent years. It underscored that the country had fulfilled the infrastructure requirements for hosting the World Cup, which include entertainment facilities, road networks, football stadiums and tourist attractions. This evaluation also reflected confidence in the sustainability of the Saudi economy. Thus, FIFA's rating serves as a certificate of appreciation for the kingdom's accomplishments, which are the result of Vision 2030's strategic planning, supported by continuous political leadership. This evaluation not only acknowledges past achievements but also motivates the kingdom to pursue further national successes in the next decade. Hosting the World Cup represents a significant opportunity to boost economic development, enhance the tourism sector and showcase Saudi Arabia's cultural heritage, presenting a modern image of the kingdom as a global destination that embraces diversity, innovation and excellence.⁽¹⁰⁾

In July 2024, the Board of Directors of the Sports Boulevard Foundation, chaired by Crown Prince Mohammed bin Salman, announced the approval of designs for the Global Sports Tower, a key feature of the Sports Boulevard project located on Prince Mohammed bin Salman Road in Riyadh. As the tall-

est sports tower in the world, it is set to become one of the most prominent landmarks of the project. The tower will play a pivotal role in achieving the goals of Saudi Arabia's Vision 2030, including enhancing the quality of life in Riyadh and positioning the city among the world's top 10 largest city economies. This initiative is expected to significantly strengthen Saudi Arabia's economy and bolster its international standing as a leading sports hub.

In 2024, Saudi Arabia witnessed a remarkable cultural boom, with the year standing out for its vibrant cultural, artistic and entertainment events, solidifying the kingdom's role as a central hub for Arab art and culture. One of the standout events was the fourth edition of the Red Sea International Film Festival, held in the Jeddah Historic District on December 6. The festival has become a global platform, enhancing Saudi Arabia's standing in the film industry and supporting promising films and cinematic projects from around the world. Films supported by the festival have garnered success at prestigious film festivals such as Cannes, Venice, Toronto and even the Oscars.⁽¹¹⁾ In an effort to further enrich the region's film industry and support creative talents, General Entertainment Authority (GEA) Turki

al-Sheikh launched on September 9 the Golden Pen Award, dedicated to honoring the most impactful literary and artistic works in the Arab world. This award aims to spotlight popular novels with the potential for adaptation into cinematic works, fostering a deeper connection between literature and film in the region.⁽¹²⁾

In July 2024, Saudi Arabia successfully listed the eighth heritage site in the kingdom on the UNESCO World Heritage list, after the archaeological area of Al-Faw, located south of Riyadh, was included during the World Heritage Committee meetings in New Delhi. This achievement aligns with the goals of Saudi Arabia's Vision 2030. The addition of the Al-Faw archaeological site to the UNESCO list follows the inclusion of other significant heritage sites, such as the city of Hegra in Al-'Ula, the At-Turaif District in ad-Dir'iyah, Al-Balad (also known as Jeddah Historic District), Rock Art in the Hail Region, the Al-Ahsa Oasis, the Hima Cultural Area in Najran, and the 'Uruq Bani Ma'arid Reserve.⁽¹³⁾

Honoring National Talent, Attracting Expertise and Indigenizing Sciences

The Saudi leadership is adopting a strategy aimed at replacing jobs and responsibilities held by non-Saudis with

promising Saudi talent. The kingdom places great emphasis on empowering and strengthening national competencies, striving to increase their presence across various sectors. At the same time, Saudi Arabia does not hesitate to attract foreign experts, distinguished individuals and skilled professionals who can contribute sincerely and knowledgeably to the country's development. This approach was demonstrated by the approval of the Saudi Council of Ministers on May 17, 2022, to establish the Premium Residency Center, a move designed to attract leading international experts and offer them a range of services and benefits in the kingdom.⁽¹⁴⁾

In October 2024, the Saudi Ministry of Human Resources and Social Development, in partnership with the Ministry of Health, announced an increase in the localization rates for four health professions in the private sector: radiology (65%), medical laboratory (70%), therapeutic nutrition (80%)⁽¹⁵⁾ and physiotherapy (80%). Additionally, the ministry launched the second edition of the Waad national training campaign, aimed at enhancing the capabilities of national workers, expanding training opportunities and encouraging the private sector to contribute to empowering them. The campaign also seeks to raise

the participation of Saudi nationals in the labor market and increase their competitiveness both locally and globally. The National Training Campaign “Waad” complements the “Jadeer” program launched in November 2023, which prepares and trains recent graduates for jobs within the ministry by providing them with the essential knowledge and practical experience needed in the workplace.⁽¹⁶⁾

After attracting the wealthy through the Premium Residency system, Saudi Arabia is now focusing on drawing talented minds that add value to Vision 2030. The requirement for naturalized talents to be distinguished and creative reflects the leadership’s commitment to recruiting the highest standards of competence and professionalism.⁽¹⁷⁾ In 2024, Saudi Arabia launched five new types of Premium Residency, alongside the two existing types. These include the residency for exceptional talents (specialist-executive), residency for talents (sports-cultural), business investor residency, entrepreneur residency and real estate owner residency.⁽¹⁸⁾ In July 2024, royal approval was granted to award Saudi citizenship to scientists, doctors, researchers, innovators and distinguished individuals with rare skills. This royal decree aims to enhance



VIA Riyadh is an architectural masterpiece inspired by Salmani architecture and urban aesthetics. It seamlessly harmonizes with the local identity of the capital, preserving the city’s unique character. The VIA Riyadh complex boasts exceptional restaurants and stores, showcasing both international and local brands. Additionally, it features seven cinema halls, each offering a distinctive entertainment experience, with Tuwaiq Hall standing out as it is designed in the style of traditional architecture from Saudi Arabia’s central Najd region.

the environment for attracting and investing in creative talents.⁽¹⁹⁾ The list included 16 doctors, some of the most skilled professionals in the kingdom's hospitals, specializing in rare subspecialties.

Saudi Arabia has made exceptional progress in attracting professionals and talent. According to a study by Boston Consulting Group (BCG), in collaboration with The Network and StepStone Group, titled "Decoding Global Talent 2024," the country has risen two places to rank 26th globally for talent relocation and resettlement. The study also noted Riyadh's increasing international appeal, ranking 54th among the most attractive cities for professionals. The kingdom's growing appeal is attributed to its mega projects, which reflect the government's commitment to economic growth and innovation initiatives.⁽²⁰⁾

Defense Policies: Enhancing Military Competence

During the state budget forum for fiscal year 2025, the minister of economy confirmed Saudi Arabia's plan to continue spending on the defense sector for strategic reasons, including meeting peaceful needs and achieving long-term economic returns. The kingdom has allocated 272 billion riyals for the

sector in the 2025 budget (about 21% of total expenditure) and aims to increase the localization of military industries to 20% by 2025, with a target of 50% by 2030, according to the budget statement.⁽²¹⁾

The most notable discussions regarding the Saudi armed forces in 2024 centered on the potential defense agreement between the kingdom and the United States. Despite several Saudi-US meetings throughout the year, the issue remains unresolved. It has not been confirmed whether the agreement will be a comprehensive defense treaty, similar to those the United States has with Japan or South Korea (in exchange for normalization with Israel and the establishment of a Palestinian state), or a more modest agreement on military cooperation.

In the same context, Saudi Arabia has worked to strengthen military partnerships with countries like France and the UK, as seen in the visits of French President Emmanuel Macron and UK Prime Minister Keir Starmer, just seven days apart (December 2 to December 9). During President Macron's visit, the French presidential palace issued a statement confirming that the visit aimed to strengthen the partnership between the two countries, with a fo-

cus on security and defense. During the UK prime minister's visit, the two sides agreed to make a qualitative shift in their defense partnership with an enhancement in military cooperation. According to the UK Prime Minister's Office, the agreement covers all aspects of the defense relationship, including combat aviation.⁽²²⁾

With regard to maneuvers, the Saudi Armed Forces conducted various exercises in 2024, including: the joint air exercise Spears of Victory 2024 in February, with the Royal Saudi Air Force alongside forces from friendly countries; the joint exercise Sword of Peace 12 in March, involving the Saudi Armed Forces, the Ministry of Interior, the Saudi Arabian National Guard, the Presidency of State Security and other agencies; the logistics exercise Native Fury 24 in May with the US Marines on the Red Sea coast; the Red Wave 7 exercise in May to enhance maritime security in Red Sea-bordering countries; participation in the Eager Lion 2024 maneuvers in Jordan in May; units of the Armed Forces in the EFES 2024 multinational exercise in Izmir, Türkiye, in May; the Saudi-US joint exercise Protection Shield 4 in May; the joint exercise Indus Shield in October with Egypt and Türkiye in Pakistan; participation in Piercing

The Board of Directors of the Sports Boulevard Foundation, chaired by Crown Prince Mohammed bin Salman, announced the approval of designs for the Global Sports Tower, a key feature of the Sports Boulevard project located on Prince Mohammed bin Salman Road in Riyadh.



Arrow 2024 in Egypt in November; and the air exercise Tuwaiq 4 in December, with forces from the UAE, Oman, Qatar, Jordan, Morocco, the UK, the United States, Greece and Bahrain and Egypt as observers.

As regards technology acquisition and arms purchases, the World Defense Show was held in Riyadh in February 2024, where the Ministry of Defense

signed 27 contracts and two memoranda of understanding with local and international defense and security companies. In March, His Majesty's Ship Unayzah, the fifth ship of the Sarawat Project, was launched. In November, the first Saudi military drone boat, operating with AI technologies from manned to unmanned, was launched. In July, the Ministry of Defense signed a contract

with Airbus Defense and Space to purchase four Airbus A330 MRTT multi-role refueling aircraft.

The Ministry of Defense hosted specialized training programs in military media in October. In November, the Prince Sultan Cardiac Center for the Armed Forces launched the Robotic Surgery program for open-heart surgeries. The ministry also signed a memorandum of cooperation with the Saudi Electronic University to enhance capabilities, share expertise and implement best practices in education and training. Additionally, the ministry organized the first international forum for leading non-commissioned officers, centered on "Development and Empowerment."

In November, Saudi Defense Minister Prince Khalid bin Salman and his Iraqi counterpart Thabet al-Abbasi signed a memorandum of understanding for military cooperation. In May, the second meeting of the Security and Military Committee under the Saudi-Qatari Coordination Council took place, followed by the 10th meeting of the Saudi-Egyptian Military Committee in Cairo in August.

Saudi Arabian Military Industries (SAMI) signed several significant agreements, including three memoranda of understanding with leading Turkish de-

fense companies in aviation, space and technology, as well as two agreements with Lockheed Martin and Airbus Helicopters. A joint cooperation agreement was also concluded between SAMI Land Systems and Kia in infrastructure, alongside a strategic memorandum of understanding with Barzan Holdings of Qatar. Domestically, SAMI partnered with national companies to strengthen their capabilities in the defense and security sectors, while also integrating digital solutions for transformation. Additionally, SAMI signed a contract with Zamil Steel Construction Company to build the SAMI Land Systems Industrial Complex (SLIC) in Al-Kharj.

The Saudi Response to Arab and Regional Developments

The key theme of Saudi policy toward developments in the Arab and regional arenas in 2024 was balance and effectiveness. Despite significant disturbances in the region, continuing from the previous year with Operation Al-Aqsa Flood and the Israeli war on Gaza, the kingdom maintained a disciplined and balanced foreign policy. Its diplomacy remained active across various levels, addressing multiple issues, as demonstrated below:

Saudi Arabia's Commitment to the Palestinian Cause and Condemnation of Israel

In 2024, Saudi Arabia placed significant emphasis on the Palestinian cause, recognizing its central importance in the region and the Arab world, especially amid the dangers posed by Israel's aggressive policies in Gaza and Lebanon. Key elements of Saudi policy included: reiterating rejection of Israel's actions, reaffirming Palestinian statehood as the only viable solution and hosting Arab and Islamic summits to oppose Israeli aggression. Notably, the kingdom supported and hosted the Global Alliance for Implementation of the Two-State Solution and continued its humanitarian efforts through relief initiatives for the Palestinian and Lebanese peoples.

Saudi Arabia remained a central hub for Arab and regional political events. In November, it hosted an Extraordinary Arab and Islamic Summit to address Israel's ongoing aggression against Palestine and Lebanon. During the summit, Crown Prince Mohammed bin Salman emphasized that Israel's actions against innocent civilians hinder peace in the region and called for the preservation of Lebanon's sovereignty. He condemned Israel's obstruction of humanitarian aid to Palestinians.⁽²³⁾ The Riyadh Summit

called for the classification of Israeli settlers and settlement movements as terrorist groups, advocated for international support for Palestinian statehood in the UN and held Israel accountable for the failure of ceasefire efforts in Gaza due to its breach of agreements.

A key regional initiative on the Palestinian issue in 2024 was Saudi Arabia's announcement in September, on behalf of Arab, Islamic and European partners, of the launch of the Global Alliance for the Implementation of the Two-State Solution. This took place during a ministerial meeting on the Palestinian issue and peace efforts, held on the sidelines of the UN General Assembly's high-level week in New York. Following this, Riyadh hosted a high-level meeting of the Global Alliance for the Implementation of the Two-State Solution from October 30 to October 31, with diplomats and envoys from various countries and regional and international organizations. The meeting aimed to present a clear timetable for establishing a Palestinian state and advancing the two-state solution, paving the way for lasting peace in the Middle East.

Crown Prince Mohammed bin Salman reaffirmed the kingdom's stance on normalization with Israel. During his speech on September 18, at the opening

of the ninth session of the Shura Council, on behalf of King Salman bin Abdulaziz, he made it clear that Saudi Arabia would not establish diplomatic relations with Israel until the establishment of a Palestinian state. He further emphasized, “The Kingdom will not cease its tireless work towards the establishment of an independent Palestinian state with East Jerusalem as its capital.”⁽²⁴⁾

The kingdom strongly opposed Israel's decision to ban the activities of the United Nations Relief and Works Agency for Palestine Refugees (UNRWA). On October 29, Saudi Arabia condemned the Israeli Knesset's approval of draft laws that would prevent the agency from operating in the occupied Palestinian territories. The Saudi Ministry of Foreign Affairs described the move as a blatant violation of international law and a direct breach of international legitimacy, especially in light of the severe humanitarian crisis facing the Palestinian people.⁽²⁵⁾ Throughout the year, Saudi Arabia continued to provide humanitarian assistance to Gaza and Lebanon through ongoing air bridges. Additionally, the King Salman Humanitarian Aid and Relief Centre (KSRelief) delivered significant aid packages, including food supplies via Jordan, to Gaza. These efforts were part of a broader Saudi ini-

tiative to support the Palestinian people, including the launch of both an air and sea bridge for relief shipments and the passage of hundreds of convoys through the Rafah Border Crossing. Similar assistance was extended to Lebanon during the Israeli aggression against the country.

Saudi Arabia's Approach Toward Arab Nations in Crisis

Saudi Arabia employs a distinctive strategy in addressing Arab crises, centered on promoting security, stability and peaceful resolutions. The kingdom consistently advocates for rejecting violence and fostering internal reconciliation within nations. Upholding the principle of non-interference in the internal affairs of other states and respecting national sovereignty, Saudi Arabia remains steadfast in supporting ceasefires and peaceful negotiations. This foundational approach guides its stance on various crisis-hit Arab countries, including Yemen, Lebanon, Iraq, Syria, Sudan and Somalia.

With relative stability observed in crisis-hit nations like Libya, Iraq and Yemen, Saudi Arabia has shifted its primary focus to addressing newer crises, particularly in Sudan and Syria. The kingdom has intensi-

fied its peaceful efforts to mediate a resolution to the Sudanese crisis, urging conflicting parties to cease hostilities, end the violence and ensure humanitarian aid reaches those in need. During its November 5 meeting, the Saudi Council of Ministers reaffirmed that a political solution is the only viable path to resolving the Sudanese conflict, emphasizing adherence to the commitments outlined in the Jeddah Declaration signed on May 11, 2023.⁽²⁶⁾ Additionally, Saudi Arabia is an active participant in the Aligned for Advancing Lifesaving and Peace in Sudan (ALPS) Group, which includes the United States, Switzerland, the UAE, Egypt, the African Union and the UN. This group operates under the framework of the Jeddah Declaration and with the kingdom's spon-



sorship to foster peace and stability in Sudan.⁽²⁷⁾

In July, Saudi Arabia welcomed a statement by the Office of the UN Special Envoy for Yemen Hans Grundberg announcing an agreement between the Yemeni government and the Houthis on de-escalation measures concerning the banking sector and Yemen Airways. The Saudi Ministry of Foreign Affairs expressed optimism that this agreement would pave the way for the Yemeni parties to engage in dialogue under UN auspices. The ministry emphasized the importance of addressing economic and humanitarian issues as a foundation for achieving a comprehensive political resolution to the Yemeni crisis, aligned with the roadmap for supporting the peace process in Yemen.⁽²⁸⁾

In December 2024, amidst the emerging Syrian crisis following the overthrow of the Syrian regime, Saudi Arabia reaffirmed its support for initiatives that would ensure Syria's security, stability, sovereignty, independence and territorial integrity. The kingdom expressed its solidarity with the Syrian people and their aspirations during this critical juncture, urging measures to prevent the country from descending into chaos or division. Saudi Arabia called on the international community

to support the Syrian people and collaborate in ways that serve Syria's interests while refraining from interference in its internal affairs.⁽²⁹⁾ Two days later, on December 9, the kingdom issued a second statement condemning Israeli actions in the Golan Heights and attacks on Syrian territory. The statement highlighted Israel's continued violations of international law and its detrimental impact on Syria's chances of regaining stability and security. Saudi Arabia emphasized the importance of international condemnation of these violations, respect for Syria's sovereignty and territorial integrity and recognition of the Golan Heights as occupied Arab Syrian land.⁽³⁰⁾

The Kingdom and Red Sea Security

In 2024, the Red Sea's strategic importance was underscored for Saudi Arabia, the region and the world at large. This vital waterway linking East and West, and central to regional dynamics, faced significant disruptions due to Houthi attacks on ships passing through its southern corridor, the Bab al-Mandab Strait. These attacks intensified following Operation Al-Aqsa Flood on October 7, 2023, and the subsequent Israeli war on Gaza and Lebanon. The continuation of these hostilities brought the Red Sea into the forefront of regional conflicts,

further entangling it in the complexities of the Palestinian issue. The United States' announcement of Operation Prosperity Guardian to counter Houthi threats reflected heightened geopolitical tensions in the region. These developments disrupted the regular navigation system of the Red Sea, forcing numerous vessels to reroute via the Cape of Good Hope. This shift adversely impacted ports along the Red Sea and significantly reduced the revenues of the Suez Canal, which lost half or more of its earnings.

The kingdom consistently emphasized the importance of keeping the Red Sea free from tensions, reiterating this position on numerous occasions. Saudi Arabia called on all parties involved in the conflict to cease escalation without exception. Its stance reflected a balanced approach rooted in its extensive experience with regional conflicts. This perspective guided the kingdom's decision not to participate in the Prosperity Guardian coalition established by the United States. It also shaped its response to the Israeli attacks on Yemen's Hodeidah port on July 20, 2024. The Saudi Ministry of Foreign Affairs issued a statement the following day, condemning the attacks as actions that would "aggravate efforts to end the



RIYADH EXPO 2030

“We are proud to see the world choosing Riyadh to host Expo 2030. Hosting this event will undoubtedly enhance the Saudi Tourism Authority’s efforts to attract millions of tourists to discover unique destinations and experience the country’s nature, climate, and cultural diversity while enjoying inspiring activities and experiences.”



Fahd Hamidaddin
CEO and Member of the Board of
the Saudi Tourism Authority (STA)

war on Gaza.”⁽³¹⁾ The statement further urged all parties to exercise the utmost restraint and to protect the region and its inhabitants from the perils of war.

The kingdom’s stance on the Red Sea underscores its strategic and geopolitical significance within Saudi Arabia’s national development agenda, Vision 2030 and the pillars of its broader renaissance. This vision was exemplified on December 3, 2024, when His Royal Highness Prince Mohammed bin Salman, crown prince and prime minister, launched the National Strategy for the Sustainability of the Red Sea (see Figure 3.2). The initiative aims to safeguard the Red Sea ecosystem, foster collaboration for its sustainability, empower communities and support a transition to a sustainable blue economy, aligning with the overarching goals of Vision 2030. Through this strategy, the kingdom is positioning the blue economy as a foundational element of its economic framework. By 2030, the strategy aims for a significant increase in the coverage of marine and coastal protected areas from 3% to 30%. It also aims to boost the contribution of renewable energy to comprise 50% of the targeted energy mix while generating thousands of job opportunities linked to blue economy activities. These efforts collective-

ly contribute to the kingdom’s goals of economic diversification and GDP growth.⁽³²⁾

The Kingdom’s Policies Toward the GCC

The kingdom’s relations with the GCC member countries experienced significant progress in 2024, marked by strengthened cooperation and coordination. A key highlight was the attendance of Prince Mohammed bin Salman, crown prince and prime minister, at the 45th session of the GCC Supreme Council in Kuwait, where he led the kingdom’s delegation. Additionally, the crown prince made a private visit to the UAE on December 1, 2024, further solidifying ties with the Gulf states. Notable developments also included the visit of Prince Mishaal Al-Ahmad Al-Sabah to Saudi Arabia at the end of January 2024. This visit culminated in a joint statement between the two countries addressing the Dorra gas field dispute. The statement emphasized respect for national sovereignty and international treaties, while categorically rejecting claims by any external party (implicitly referring to Iran) regarding rights in the Dorra field and the submerged divided zone.⁽³³⁾

Figure 3.2: the Kingdom’s National Red Sea Sustainability Strategy



The year 2024 saw significant advancements in economic, financial and security cooperation between Saudi Arabia and its Gulf partners, showcasing the kingdom’s commitment to regional collaboration and development. A key milestone was the signing of a memorandum of understanding be-

tween Saudi Arabia and Oman on April 25, aimed at financing infrastructure projects in various Omani industrial zones. This initiative sought to boost private sector activity, provide essential infrastructure services and stimulate the growth of supporting industries and economic activities. Saudi-Qatari relations also witnessed notable progress. On September 1, the Executive Committee of the Saudi-Qatari Coordination Council convened under the leadership of Saudi Minister of Foreign Affairs Prince Faisal bin Farhan and Qatar's Prime Minister and Minister of Foreign Affairs Sheikh Mohammed bin Abdulrahman bin Jassim Al Thani. Their discussions culminated on October 3 with the signing of a memorandum of understanding to enhance financial sector cooperation. This agreement emphasized the exchange of financial information to support international transparency standards. In the realm of security, Saudi Arabia and Bahrain continued their collaborative efforts. The third meeting of the Security Coordination Committee, a key component of the Saudi-Bahraini Coordination Council, was held at the end of October, reflecting the ongoing commitment to strengthen regional security architecture. Adding to the year's achievements, Saudi Arabia and

Kuwait signed an agreement on December 4 addressing income tax. The agreement, facilitated by their respective finance ministries, aimed to prevent tax evasion and eliminate double taxation.

In May, the Saudi Ports Authority (Mawani) and DP World announced the launch of a significant project to establish a DP World logistics zone at Jeddah Islamic Port. This project, strategically located along the key shipping route between Asia and Europe, is designed to enhance global connectivity and facilitate access to international markets. By providing multi-modal logistics solutions, the initiative aims to support the ambitious goals of Saudi Vision 2030, further positioning the kingdom as a hub for international trade. Additionally, in October, the Federation of Saudi Chambers organized the third edition of the Saudi-Emirati Economic Forum in Riyadh, aimed at deepening the economic partnership and integration between Saudi Arabia and the UAE. This forum was an extension of the joint working mechanism established under the Ala'azm (Determination) Strategy, which focuses on fostering cooperation and implementing strategic projects that serve as models for regional economic integration.

Saudi Arabia and Its Neighbors (Iran, Türkiye and Ethiopia): The Kingdom's Strategic Perspective

In 2024, Saudi Arabia's relations with neighboring countries such as Iran, Türkiye and Ethiopia saw significant developments. These three nations are of particular importance in Saudi strategic thinking due to their national projects and regional influence.

In 2024, the Iranian regional project faced significant setbacks due to Israeli strikes on Hezbollah and Hamas, which weakened their influence in the region. The collapse of the Iranian axis was further confirmed with the fall of the Syrian regime, severing the supply and communication lines between Tehran, Damascus, Beirut, as well as Iraq and Yemen.

Saudi Arabia's balanced regional policy principles played a crucial role in strengthening relations between the kingdom and other Gulf states. Amid regional fluctuations and the outbreak of Israeli confrontations with Iran, the kingdom maintained a neutral stance, which helped build trust and stabilize relations. In September, Saudi Arabia, along with Qatar, the UAE, Bahrain and Kuwait, announced that it would not allow its air bases to be used for launching military operations against Iran, reaf-

firming its neutral position in the ongoing Tehran-Tel Aviv conflict.

Saudi Arabia and Iran continued to foster a new relationship based on honest dialogue to prevent misunderstandings, as emphasized by Saudi Foreign Minister Prince Faisal bin Farhan on October 31. This was further demonstrated by the exceptional visit of Saudi Armed Forces Chief of Staff Lieutenant General Fayyad bin Hamed al-Ruwaili to Iran in November. The visit took place amidst Israeli-US pressure on Iran and the collapse of the Iranian axis, marking a period of Iranian vulnerability in the regional confrontation. This highlighted Saudi Arabia's policies aimed at maintaining regional balance and stability. The second meeting of the Saudi-Chinese-Iranian Joint Tripartite Committee in Riyadh on November 19, which focused on following up on the Beijing Agreement, reinforced this strategic direction, with both Saudi Arabia and Iran reaffirming their commitment to the agreement's full implementation.

Finally, Saudi Crown Prince Mohammed bin Salman's statements reflected the significant developments in the relationship between Saudi Arabia and Iran, both politically and psychologically. During his speech at the Extraordinary Arab and Islamic Summit in

Riyadh, he called on the international community to compel Israel to "respect the sovereignty of the sisterly Islamic Republic of Iran and not to violate its lands."⁽³⁴⁾ This shift in tone and sentiment marks a departure from the more adversarial relationship between the two countries in previous years.

Saudi Arabia continues to strengthen its relations with Türkiye, a trend highlighted by Saudi Minister of Foreign Affairs Prince Faisal bin Farhan during his visit to Ankara on July 14. He noted that he was the fourth Saudi minister to visit Türkiye in one month.⁽³⁵⁾ In terms of trade, the volume of commerce between the two countries surpassed \$8 billion in 2024. The Saudi-Turkish Business Forum, organized by the Federation of Saudi Chambers in Riyadh in December, hosted a Turkish delegation of 40 companies exploring export opportunities and partnerships with Saudi investors. In the same month, the Saudi-Turkish Bilateral Military Cooperation Committee held its sixth meeting in Jeddah, discussing ways to enhance defense capabilities, technology transfer and defense research and development in line with Saudi Vision 2030. Both countries plan to activate a joint coordination council protocol to elevate their cooperation.

The kingdom's relations with Türkiye are expected to deepen further in 2025, as the two countries are likely to engage on various regional issues. This comes in light of developments in Syria, broader shifts in the Middle East, the ongoing demands of the Palestinian cause, the repercussions of the Israeli war on Gaza and Lebanon and the setbacks faced by Iran and its allies.

In 2024, Saudi-Ethiopia relations saw significant progress. In May, the sixth meeting of the Saudi-Ethiopian Joint Ministerial Committee took place in Riyadh, resulting in an agreement to strengthen cooperation in areas such as peace, security, trade, investment, livestock, agriculture, infrastructure, energy and minerals. Both countries committed to enhancing their diplomatic and economic ties. Additionally, in June, Saudi Arabia and Ethiopia signed an agreement to establish a joint Saudi-Ethiopian Business Council, aimed at promoting economic collaboration. This agreement was concluded during the Saudi-Ethiopian Business Forum in Addis Ababa. The establishment of the business council is designed to increase Saudi Arabia's market presence in Ethiopia and support various sectors in the kingdom.

Saudi Arabia's interest in Ethiopia is driven by the latter's strategic role in Africa and the Horn of Africa region, particularly in light of recent developments in the southern Red Sea. These include the ongoing mutual attacks between the Houthis and Israel, which pose a threat to maritime navigation in the Red Sea, as well as the evolving dispute between Ethiopia and Somalia. Additionally, the repercussions of Ethiopia's agreement with Somaliland to lease a port on the Red Sea have further heightened Saudi Arabia's focus on Ethiopia's position in regional geopolitics.

Violent Extremism and Counterterrorism Policies

With the rise in terrorist activities at both regional and global levels, Saudi Arabia has adopted a resolute stance against terrorism, creating lists of extremist and terrorist entities. Over the years, the kingdom has shaped its security doctrine to address terrorism as the primary threat to the region. In line with this policy, Saudi Arabia condemned various terrorist attacks in 2024 and continued its robust support for global counterterrorism efforts. The kingdom's commitment to combating terrorism also featured prominently in its political discourse at the international

level, as well as in bilateral and collective meetings. For instance, during Crown Prince Mohammed bin Salman's visit to Egypt in October, a joint Egyptian-Saudi statement underscored both nations' agreement on the need to strengthen cooperation in promoting moderation, tolerance and combating extremism, hate speech and terrorism, as well as confronting practices that oppose Islamic and Arab values.⁽³⁶⁾

In December 2015, Saudi Arabia launched and hosted the Islamic Military Counter Terrorism Coalition (IMCTC), announced by Crown Prince Mohammed bin Salman, with the goal of unifying Islamic countries to confront terrorism. The coalition consists of 42 countries. On February 3, 2024, a meeting of the defense ministers of coalition countries was held in Riyadh, under the theme "Fighting Terrorism is a Shared Responsibility." During the meeting, the participants emphasized strengthening cooperation to combat terrorism and coordinating joint efforts to mitigate its dangers. In early December, the coalition launched its program to combat terrorism in the five Sahel countries — Mauritania, Mali, Niger, Burkina Faso and Chad — in the Mauritanian capital, Nouakchott. These countries have long been among the regions most affected

by terrorist attacks, which have resulted in the loss of thousands of civilian lives. The program aims to strengthen local and regional capabilities to combat extremism and terrorism in the Sahel, raise awareness and support integration efforts to effectively address extremism and confront terrorist groups. It also emphasizes promoting values of tolerance and moderation, spreading peace and ensuring stability.⁽³⁷⁾

Minister of Defense and Chairman of the Council of Defense Ministers of the Islamic Military Alliance to Fight Terrorism Prince Khalid bin Salman bin Abdulaziz announced the kingdom's support for the Islamic Alliance Initiatives Fund with an amount of 100 million Saudi riyals.⁽³⁸⁾ In December, training programs provided by the kingdom's government were launched at the headquarters of the Islamic Military Alliance in Riyadh, which included 46 training programs directed at candidates from the alliance's member states. These initiatives reflected the kingdom's commitment to supporting, financing and qualifying international efforts to combat and eliminate terrorism in various fields. These training programs represent a significant step in building the capabilities of member states and contribute directly to strengthening re-

gional and international security in the long term.⁽³⁹⁾

The importance of the Arab, Islamic and international institutions and mechanisms launched by Saudi Arabia to combat terrorism is expected to grow in the coming years, given the ongoing geopolitical transformations in the region and shifts in Sunni and Shiite power dynamics in conflict-ridden Arab countries, particularly Syria, Iraq and Yemen as well as the repercussions of Israeli aggression. These factors increase the likelihood of another wave of terrorism driven by both international and regional interests, further highlighting the crucial role of the IMCTC in addressing this critical threat.

Saudi Policy: Navigating Global Shifts

Global and regional geopolitical transformations are accelerating, driven by the ongoing Russia-Ukraine war, the protracted Israeli conflict in Gaza and Lebanon and developments in Syria, alongside tensions with Iran. These shifts are compounded by risks to the security of the Red Sea, including expanding military operations south of the Red Sea and Houthi attacks on maritime navigation, as well as continuing crises in Sudan, Libya, Iraq, Somalia, Yemen and Lebanon. Amid these chal-

lenges, regional and international powers increasingly rely on Saudi Arabia due to its global position, policies and vision. Given this context, much of the future of the region in 2025 depends on Saudi Arabia's stance, positioning the kingdom at the heart of pivotal strategic issues in the region. Notably, while conflicts and military options intensify, Saudi Arabia is presenting an alternative model based on diplomatic and political solutions.

Against this backdrop, the following section examines Saudi Arabia's relations with major powers and the kingdom's approaches within international organizations in 2024.

Saudi-US Relations

In 2024, Saudi Arabia played a significant role in the visits and discussions of US officials in the region. Visits to Riyadh continued, with prominent figures such as US National Security Advisor Jake Sullivan and Secretary of State Antony Blinken engaging in discussions focused on the defense agreement between the two countries, Saudi Arabia's stance on regional issues and the Israeli war on Gaza, which were top priorities for US officials.

Throughout the year, discussions regarding the defense pact focused on

Saudi Arabia's demands for increased security commitments, approval for new arms sales to the Saudi military, US support for the kingdom's civilian nuclear program, Saudi Arabia's plans for uranium enrichment and storage and the easing of restrictions on importing the latest generation semiconductor chips used in developing AI tools. Regarding relations with Israel, the kingdom conditioned them on the establishment of a Palestinian state roadmap.

However, 2024 saw little progress in finalizing the Saudi-US strategic agreement, despite indications that it was close to being signed at various points throughout the year. A semi-final version of the agreement, which had been negotiated for many months between the two sides, was prepared. The wars in Gaza and Lebanon, along with the US presidential elections, contributed to delaying the conclusion of the agreement.

For his part, US Ambassador to Saudi Arabia Michael Ratney shared his perspective on the agreements between Riyadh and Washington and the reasons for their delay. In an interview with Asharq Al-Awsat newspaper on August 25, 2024, he explained, "It is more than just a single agreement. It's really a package of agreements that need to be

agreed upon, negotiated and signed together. Part of that is a strengthened US Saudi strategic partnership and military agreement. The second piece is normalization of relations between Saudi Arabia and Israel. There's an economic component. And of course, an important piece of this relates to the Palestinians. It includes a credible pathway with benefits toward statehood for the Palestinian people. All of these are part of a package, and you really can't disentangle one from another." He stressed that this would be a "historic agreement" between the United States and Saudi Arabia, one that would significantly alter the region's dynamics.⁽⁴⁰⁾

On another note, on July 16, 2024, Saudi Arabia and the United States signed a strategic cooperation agreement in the field of exploration and use of outer space for peaceful purposes. The agreement aims to enhance cooperation in space and scientific exploration, increase joint investment in various commercial activities and establish a comprehensive legal framework that facilitates the exchange of expertise and the development of joint programs. It also outlined areas of joint work between the two parties, including space and earth sciences,



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STUDY

The Impact of the Saudi Development Model on the Iranian Home Front



Mohammed Alsulami
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In the last decade, regional rivalry has significantly impacted relations between Saudi Arabia and Iran, notably shaping perceptions of Saudi Arabia within Iran. Iranian official discourse has often portrayed Saudi Arabia in a negative light. However, there has been a recent shift, with the Saudi development model attracting regional and global attention. This newfound recognition holds significance domestically and internationally, as evidenced by various indicators and statistics placing Saudi Arabia in a prominent position on the regional and international stage. Iran has been one of the countries where the influence of the Saudi model has become apparent, particularly among the elite and a broad segment of the Iranian public. This development may have provoked discontent among certain elements within the Iranian establishment and its institutions. This is especially true given that the establishment perceives Saudi Arabia as a regional rival, and any positive view of the Saudi model torpedoes its narrative about the country, causing embarrassment and undermining its legitimacy.




aeronautics, space missions, education and other areas of mutual interest.⁽⁴¹⁾

In 2025, Saudi-US relations stand at the threshold of a new era, with the return of President Donald Trump, who has brought in a qualitatively different presidential team not rooted in US political institutionalism and bureaucracy. This shift aligns, in part, with the unconventional ideas advanced by the kingdom under Vision 2030, potentially giving a boost to bilateral relations. The arrival of President Trump and his team raises key questions: will the completion of aspects of the Saudi-US agreement and the normalization deal occur on new terms? What will be the point of agreement between the Trump and Biden administrations on this deal? How will Trump's new team, distinct from his first term, engage with the kingdom? And will Trump's second term be fundamentally different from the first? Additionally, what impact will the presence of unconventional figures such as Elon Musk have on Saudi projects like The Line and Neom? The answers depend on the degree of policy continuity between the Biden and Trump administrations, as well as between Trump's first and second term.

The kingdom's vision extends beyond the conclusion of a defense agreement

or normalization with Israel and the establishment of a Palestinian state. Saudi Arabia's sense of responsibility toward the Gulf, the Arab world and broader Middle East reflects a greater ambition: to reduce escalation and end conflicts in the region. This vision includes the possibility of Saudi Arabia playing an unmatched mediation role in major regional matters, working between various countries to restore stability and security to the region. This mediation could extend beyond just the kingdom's involvement between Iran and the United States, leading to a historic agreement between the Arab world, Israel and Iran, ending hostilities. Such an agreement would involve the United States, Iran, Israel, Türkiye and the Arab countries, with its core being the recognition of a Palestinian state and a return to the principles of international law. The kingdom's potential role goes beyond mere politics, embodying a mission rooted in its Islamic identity, which has been increasingly strengthened by its internal progress, especially under Vision 2030. This role would facilitate the realization of peace and prosperity across the region and beyond.

Saudi-Sino Relations

In its pursuit of achieving a strategic balance in international relations, Saudi Arabia has focused on strengthening its ties with the People's Republic of China. This aligns with the kingdom's vision of positioning itself as a balancing force between East and West, particularly in light of China's growing global influence. Indicators such as high-level mutual visits, the expansion of bilateral trade and collaborative events highlight the significant progress in the kingdom's relationship with China.

In June 2024, Saudi Defense Minister Prince Khalid bin Salman bin Abdulaziz traveled to Beijing for discussions with his Chinese counterpart Admiral Dong Jun. The visit underscored Saudi Arabia's ambitions to modernize its defense sector and enhance domestic manufacturing capabilities. China, keen to expand its regional arms sales, expressed readiness to share technology to support these goals. The visit also reflected Saudi Arabia's efforts to diversify its defense partnerships amid constraints on acquiring weaponry from the United States and European countries.

In September 2024, China's State Council Premier Li Qiang visited Riyadh to participate in the fourth session of the Saudi-China High-Level Joint Com-

mittee, co-chaired by Crown Prince Mohammed bin Salman, who led the Saudi delegation. Premier Li emphasized that strengthening ties with Saudi Arabia is a cornerstone of China's public diplomacy, particularly in the Middle East. Both sides lauded the robust economic, trade and investment relations between their nations. As China's top trade partner in the Middle East and Saudi Arabia's leading trade partner globally, bilateral trade reached approximately \$48 billion by mid-2024, evenly split between \$24 billion in Saudi exports to China and \$24 billion in Chinese exports to the kingdom.⁽⁴²⁾

In December 2024, the Saudi-Chinese Joint Business Council Forum facilitated the signing of 24 agreements aimed at strengthening economic collaboration between the two nations. The forum highlighted key sectors, including healthcare, biotechnology and foreign and private investments, aligning with the objectives of Saudi Arabia's Vision 2030 reform agenda.

The Kingdom's Relations With Russia Amid Global Developments and the Russia-Ukraine War

Saudi-Russia relations have advanced significantly in recent years, with 2024 marking a notable milestone. Amid the

ongoing Russia-Ukraine war — a major crisis between Russia, the United States and the West — Saudi Arabia has maintained a balanced and neutral stance, focusing on mediation efforts to help end the conflict. A key Saudi contribution was its mediation in a prisoner exchange, facilitating the release of 24 detainees: 16 returned to the West from Russia, and eight to Russia from the West. Russian President Vladimir Putin acknowledged this effort, praising Crown Prince Mohammed bin Salman's "active role" during the Eastern Economic Forum in Vladivostok. Additionally, Russian Security Council Deputy Chairman Dmitry Medvedev, in a November 23 interview with Al Arabiya, described Saudi-Russia ties as "excellent and friendly," highlighting their cooperation in ensuring stability in global energy markets.⁽⁴³⁾

As part of its mediation efforts, Saudi Arabia hosted Ukrainian President Volodymyr Zelenskyy in Riyadh in February 2024, where he met with Crown Prince Mohammed bin Salman. Following the meeting, President Zelenskyy shared on his X account that their discussions focused on Ukraine's "formula for peace." He expressed confidence in Saudi Arabia's role in fostering equitable solutions, stating, "Saudi Arabia's

leadership can help find a just solution" and highlighting the kingdom's support as pivotal to the anticipated first peace summit.⁽⁴⁴⁾

On July 18, 2024, Saudi Crown Prince Mohammed bin Salman held a phone conversation with Russian President Putin to discuss bilateral relations and explore opportunities for collaboration across various sectors. Later, on September 9, Russia extended an invitation to the crown prince to participate in the BRICS summit, which took place in Kazan from October 22 to October 24.

Oil and energy cooperation remained a pivotal aspect of Saudi-Russia relations in 2024.⁽⁴⁵⁾ In November, Saudi Energy Minister Prince Abdulaziz bin Salman joined a tripartite conference call with Russian Deputy Prime Minister Alexander Novak and Kazakhstan's Energy Minister Almasadam Satkaliyev. The discussion underscored the importance of maintaining stability and balance in global oil markets, emphasizing cooperation among OPEC+ members, adherence to the production agreement, voluntary output cuts and compensation for any overproduction. Also in November, Saudi Crown Prince Mohammed bin Salman and Russian President Putin affirmed their commitment to close coordination within OPEC+ during a

phone call, according to the Kremlin. That same month, the OPEC+ coalition, led by Saudi Arabia and Russia, announced the extension of a voluntary oil production cut of approximately 2.2 million barrels per day through December 2024. Subsequently, on December 5, OPEC+ member states held a virtual meeting where they agreed to maintain the 1.65 million barrels per day cuts, implemented in April 2023, until the end of December 2026, as confirmed by the Saudi Ministry of Energy.⁽⁴⁶⁾

The Kingdom's Policies Toward the Indian Subcontinent

The Indian subcontinent holds significant strategic importance for Saudi Arabia due to its historical ties, the substantial Islamic population in the region, the large workforce from the subcontinent employed in the kingdom, and the robust economic and military relations with its nations. Additionally, the region's importance is amplified by the IMEC, unveiled during the G20 summit in New Delhi in September 2023, which aims to connect India with the Arabian Gulf and Europe.

Economic cooperation between India and Saudi Arabia saw significant advancements in 2024. In February, the Federation of Saudi Chambers host-

ed the Saudi-Indian Business Forum, bringing together 100 companies from both countries to explore business opportunities. In late October, Folk Marine Services Company inaugurated a new regional shipping route connecting Dammam and Umm Qasr with two of India's largest commercial ports, aimed at bolstering trade and supporting the growing strategic partnership. Additionally, the second ministerial meeting of the Economic and Investment Committee of the Saudi-Indian Strategic Partnership Council took place in Riyadh in late October. Earlier in the year, the formation of a High-Level Task Force (HLTF) was announced, co-chaired by Saudi Energy Minister Prince Abdulaziz bin Salman and the principal secretary to the Indian prime minister. The task force held its first meeting on July 28, 2024, identifying key investment opportunities to be pursued in the near future.

In November 2024, Saudi Arabia and India took a significant step toward strengthening their ties by agreeing to establish a partnership council, co-chaired by Crown Prince Mohammed bin Salman and Indian Prime Minister Narendra Modi. This initiative, announced during the second meeting of the Ministerial Committee on Political,

Security, Cultural and Social Affairs, aims to enhance cooperation between the two nations. On the military front, the first round of the Saudi Arabia-India Joint Military Exercise "Sada Tanseeq" was conducted in Mahajan, Rajasthan in January 2024. Additionally, the Saudi-Indian Committee for Defense Cooperation held its sixth meeting in Riyadh in September, further reinforcing the growing defense collaboration between the two countries.

In December 2024, Crown Prince Mohammed bin Salman met with Pakistani Prime Minister Shehbaz Sharif in Riyadh, on the sidelines of the One Water Summit. Following this meeting, Saudi Arabia extended the term of a \$3 billion deposit in Pakistan for another year, as announced by the State Bank of Pakistan. The Saudi-Pakistani Business Forum was held in October, where numerous memoranda of cooperation were signed between business leaders from both nations across various sectors. In April, a high-level Saudi delegation led by Foreign Minister Prince Faisal bin Farhan visited Islamabad, accompanied by ministers from several key sectors, including investment, water, agriculture, environment, industry, mineral resources and energy. The visit focused on enhancing economic cooperation,

boosting trade, supporting mutual investments and strengthening security and strategic ties. On the military front, Crown Prince Mohammed bin Salman also met with Pakistan's Army Chief General Asim Munir in November. The two sides continued their collaboration through various military exercises and maneuvers, further deepening their defense cooperation.

The Kingdom's Approximations Within International Organizations

Saudi Arabia, through its active membership in various international organizations across different regions and sectors, aims to foster a culture of peace, cooperation and balance globally. The kingdom remains committed to supporting just causes worldwide, grounded in its unique Islamic civilizational principles. Its primary objective is to reduce conflicts and encourage nations and societies to work toward a compassionate world that prioritizes peace-building and constructive development, rather than engaging in wars and conflicts. In 2024, Saudi Arabia intensified its focus on emerging global issues, particularly water management and desertification, demonstrating its commitment to addressing these critical challenges on the world stage.

In 2024, Saudi Arabia intensified its commitment to global environmental issues by hosting significant international events focused on water and desertification. On December 3, Riyadh hosted the One Water Summit, co-organized by France, Kazakhstan and the World Bank, in partnership with Saudi Arabia. This summit aimed to accelerate action on Sustainable Development Goal 6 (clean water and sanitation) and incubate innovative solutions in preparation for the next UN Water Conference in 2026. Concurrently, from December 2 to December 13, Riyadh hosted the 16th session of the Conference of the Parties to the United Nations Convention to Combat Desertification (COP16).

In a joint statement on November 14, IMF Managing Director Kristalina Georgieva and Saudi Finance Minister Mohammed al-Jadaan highlighted the growing global challenges, such as conflicts, geo-economic fragmentation, pandemics, climate change, food insecurity and the digital divide. They warned that failing to address these issues could threaten the progress made in improving living standards in emerging market economies, potentially destabilizing global growth and financial stability. To tackle these pressing concerns, Saudi Arabia and the IMF

announced plans to co-host an annual high-level conference in Al-Ula, Saudi Arabia. The first conference, scheduled for February 16 to February 17, 2025, will focus on addressing the challenges and opportunities facing emerging market economies.⁽⁴⁷⁾

In November 2024, Saudi Minister of Justice Walid al-Samaani held discussions with President of the Hague Conference on Private International Law Christophe Bernasconi to explore ways to strengthen collaboration between the Ministry of Justice and the Hague Conference in promoting justice and human rights. That same month, Saudi Arabia successfully retained its seat on the Executive Council of the Organization for the Prohibition of Chemical Weapons, a position it has held since 1997, following its reelection for a term ending in 2027. This reflects the kingdom's ongoing commitment to enhancing international peace and security. Additionally, at the 10th Conference of the Alliance of Civilizations held in the Portuguese capital, Lisbon, Saudi Arabia reiterated its call for greater cooperation among governments, civil society, and educational institutions to promote values of cooperation and peaceful coexistence, aiming to build a future marked by diversity and harmony.

Pursuing Balance on International Issues, Initiatives to Settle Regional and International Crises and Relief Efforts

Saudi Arabia plays a unique and significant role globally in humanitarian and development efforts, though this is often underreported in the media and public discourse, perhaps due to the kingdom's commitment to certain values. The kingdom prioritizes strengthening cooperation with nations worldwide and remains committed to its humanitarian mission, particularly in aiding countries and populations affected by natural disasters and humanitarian crises.

In October 2024, Saudi Arabia hosted the Donors' Conference to Support Displaced Persons and Refugees in the Sahel and Lake Chad Region in Jeddah. Later in the year, on November 18, Saudi Foreign Minister Prince Faisal bin Farhan led the kingdom's delegation to the G20 Summit in Rio de Janeiro, Brazil, themed "Building a Just World and a Sustainable Planet." During his speech on behalf of Crown Prince Mohammed bin Salman, the minister highlighted the increasing global tensions, military conflicts and humanitarian crises that impede progress toward the 2030 Sustainable Development Goals.

He emphasized that true development cannot be achieved amidst death and destruction and expressed support for Brazil's Global Alliance Against Hunger and Poverty, reaffirming Saudi Arabia's alignment with this initiative, which reflects its own global development aspirations.⁽⁴⁸⁾

As part of its ongoing efforts to mediate peace in Sudan, Saudi Arabia joined the group Allied to Save Lives and Achieve Peace in Sudan, which also includes the United States, Switzerland, the UAE, Egypt, the African Union and the UN. Additionally, in Sudan, the King Salman Humanitarian Aid and Relief Center launched the Noor Project in August, a volunteer initiative aimed at combating blindness and related diseases in the regions of Atbara, Port Sudan, Kassala and Ad-Damazin. The center also successfully completed volunteer medical projects, including urology surgeries in Port Sudan and neurosurgery and spinal surgeries for both children and adults in the same city.

As reflected in statistics, Saudi Arabia's global relief and humanitarian efforts are substantial. From 1975 to 2024, the kingdom provided nearly half a trillion Saudi riyals (\$131 billion) in development aid across 171 countries, funding over 7,090 humanitarian, relief and

development projects worldwide. Since its establishment, the King Salman Humanitarian Aid and Relief Center has implemented 3,117 projects in essential sectors, impacting 117 countries. These projects, valued at more than \$7.113 billion, have benefited millions of vulnerable and needy individuals in the targeted regions, without discrimination.

Saudi Policy Trajectory in 2025

The events of 2024 underscore the continued progress of Saudi Arabia's Vision 2030, nearly a decade after its launch, with notable advancements across various sectors. A significant milestone came with the FIFA evaluation of Saudi Arabia's bid to host the World Cup. On December 11, FIFA announced that the kingdom had won the exclusive right to host the 2034 World Cup.

The economic benefits of Vision 2030 demonstrate its potential for continued success and sustainability across its societal, economic and technological pillars. These benefits are evident in the spheres of sport, culture and tourism, which, in turn, contribute to the broader economic landscape. This creates a cycle of ongoing success and achievement, marked by strong integration and support. The detailed indicators from

2023 and 2024 further highlight the progress and impact of Vision 2030.

All of these efforts enhance the kingdom's image, boosting its political stature both regionally and globally. They also reinforce its model of modernization and its soft power, positioning Saudi Arabia as the most capable country for mediating and intervening in dis-

pute resolutions, as well as hosting major conferences on global issues.

Despite the significant global challenges, regional crises, conflicts and trade wars, Saudi Arabia's Vision 2030 is progressing strongly. This demonstrates that the kingdom has become a model not only of wise political leadership, stability and financial strength, but also of effective economic progress

and soft power. These successes have drawn international recognition, transforming the kingdom into a global hub, drawing the best and brightest from all fields across the globe. With the publication of Rasanah's 2024 ASR, further progress toward the fulfillment of Saudi Arabia's Vision 2030 goals appears imminent in 2025.

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RIYADH METRO

The Riyadh Metro is a rapid transit system serving Riyadh, the capital of Saudi Arabia. It is part of the King Abdulaziz Project for Riyadh Public Transport and is the longest driverless metro in the world. The system consists of six lines connecting 85 stations over a total length of 176 kilometers, with a speed of 80 km per hour. The Riyadh Metro features six lines, each assigned a unique color and number, covering 176 kilometers. The project cost \$22.5 billion. King Salman bin Abdulaziz officially inaugurated the Riyadh Metro on November 27, 2024, and it began operating on December 1 of the same year, launching the first phase, which includes three main lines (Blue, Yellow, and Purple). Two additional lines (Red and Green) were opened two weeks later, on December 15, and finally, the Orange Line was opened on January 5, 2025.



An aerial view of a modern stadium with a green field and a city skyline in the background. The stadium has a curved, metallic-looking exterior and a large, open-air seating area. The field is a vibrant green. In the background, a city skyline with several tall buildings is visible under a hazy, golden sky. The overall color palette is dominated by greens and yellows.

**SAUDI
ARABIA
WINS BID TO
HOST FIFA
WORLD CUP
2034**



Saudi Arabia has won the right to host the 2034 FIFA World Cup after the FIFA General Assembly voted to select the kingdom's bid. FIFA President Gianni Infantino said that the decision to award Saudi Arabia hosting and organizational rights for the World Cup 2034 underlines the country's growing reputation as a world-class international destination and host of sporting events.

عام الحرف
اليدوية 2025
The Year of Handicrafts

The Handicraft of Wooden Boxes



PART 4

IRAN OVERVIEW

In 2024, Iran underwent critical political, economic, social and military shifts that significantly influenced its domestic and foreign policy strategies. Regionally, Iran encountered unprecedented challenges, particularly in Syria and Lebanon, prompting a reevaluation of its traditional geopolitical strategies in light of diminishing influence. On the international stage, Iran's diplomatic relations with both global and regional powers experienced notable shifts, affecting its strategic leverage and laying the groundwork for potential implications moving into 2025. This section of the ASR delves into the nuances of Iranian developments across national, domestic and regional frameworks, encompassing the following key topics:

INTERNAL DEVELOPMENTS

- The Return of the “Reformists” to the Iranian Political Landscape
- Iran's Economic Situation Under Pezeshkian's Government
- Assessing Iran's Military Capabilities Amid Developments and Crises
- Fulfilling Campaign Promises to Iran's Minorities: Policy Challenges for the New Government

IRAN'S POLICIES TOWARD ARAB COUNTRIES

- A Comparison of Pezeshkian and Raisi's Policies on Militia Support in Conflict Zones
- The Resilience of Gulf-Iran Relations Amid Testing Circumstances
- Cautious, Calculated Progress in Iran's Rapprochement With Egypt and Sudan

IRAN'S RELATIONS WITH REGIONAL AND INTERNATIONAL POWERS

- The Future of the Nuclear Talks Under Pezeshkian's Government
- The Future of Iran's Relations With the Eastern Bloc Under Pezeshkian's Government
- The US-EU Position on Iran in 2025
- Iran and Türkiye: The Continued Iran-Türkiye Conflict in the Caucasus, Iraq and Syria
- Developments in Yemen

INTERNAL DEVELOPMENTS

The Return of the “Reformists” to the Iranian Political Landscape

In 2024, Iran passed through a delicate historical juncture after the death of President Ebrahim Raisi and his Foreign Minister Hossein Amir-Abdollahian in a helicopter crash in northwestern Iran. The sudden death of Raisi shocked those who trusted him to run the country during the next stage and perhaps to succeed the supreme leader. However, his death restored momentum in Iran’s political life. The other surprise was the return of the “reformists” to the political scene with the victory of Masoud Pezeshkian in the early presidential election on June 28, 2024. Although the “reformists” had played a pivotal role in former President Hassan Rouhani’s election and strongly participated in his government, Pezeshkian is the first “reformist” president after former President Mohammad Khatami, who ruled Iran from 1997 to 2005.

This 2024 ASR attempts to monitor the key developments regarding the victory of Pezeshkian and the return of the “reformists” to the Iranian political landscape through two main topics: firstly, the factors behind Pezeshkian’s victory in the presidential elections, and secondly, the challenges ahead for Pezeshkian. It concludes with the

possible repercussions following the “reformists” return to the political scene in the country.

Factors Behind Pezeshkian’s Electoral Victory

The victory of Pezeshkian in the presidential election came in spite of multiple hypotheses that envisaged the end of the era of the “reformist-conservative” duality. According to these hypotheses, the “reformists” would not have a future role in the structure of the Iranian political system in light of “conservative” dominance over all institutions. However, these hypotheses anticipated a shift in the conditions governing the electoral process, the general strategies of the leadership and the possible use of new tactics to ensure the survival, continuity and adaptation of the political system against the backdrop of Iran’s internal and external challenges. Pezeshkian received unprecedented support from “reformist” and “moderate” figures, such as former presidents Khatami and Rouhani, and even from prominent “reformist” figures who are under house arrest such as Mehdi Karroubi. However, the other factors that propelled the “reformists” back into the political limelight were equally important in this victory. Voter

turnout in Iran's last two elections, presidential in 2021 and parliamentary in March 2024, declined significantly. Since the Iranian establishment deems a high turnout as evidence of its legitimacy and standing among the Iranian people, it was necessary for it to allow a "reformist" candidate to heat up the competition between candidates and raise electoral turnout.

Moreover, Khamenei and his officials have become more concerned about the growing popular discontent and disillusionment regarding the establishment's policies, resulting in the country's dire economic crisis and increased restrictions on social freedoms. Therefore, the establishment had no choice but to introduce a "reformist" candidate, helping to defuse the popular discontent and protests that have sharply increased in frequency over the past few years.

Iran faces many challenges and crises; namely the survival of the political system and eliminating internal and external pressures, which are also Khamenei's priorities. Electing a "hardliner" figure like Saeed Jalili, who rejects any rapprochement with the West, would have heightened tensions inside Iran, potentially adding further fuel to the protests witnessed across the country.

Before the first round of the presidential election, the "conservatives" pressured the candidates Jalili and Mohammad-Bagher Ghalibaf to withdraw in favor of the other and focus efforts on one candidate to avoid the "conservative" vote bank being split; however, none of the candidates accepted this suggestion. In the second round, which Pezeshkian and Jalili moved to, Parliament Speaker Ghalibaf decided to support Jalili. However, a number of Ghalibaf's supporters who voted for him in the first round switched their support to Pezeshkian.⁽¹⁾ Their move was likely a reaction to Jalili's refusal to withdraw in favor of Ghalibaf, as well as concerns about Jalili's uncompromising stance on various issues.

A large section of the Iranian people predicted that either Jalili or Ghalibaf would win the presidential election, given the absolute domination of the "conservative" current over the establishment's institutions and apparatuses such as the Guardian Council, radio, television and state media. Hence, they did not turn out in large numbers to cast their votes in the first round of the election. When the election moved next to the second round and the dynamics changed, they decided to turn out

and vote for the "reformist" candidate Pezeshkian.

Challenges Facing Pezeshkian

The election of Pezeshkian is a new test for the "reformists," who have long been accused of failing to implement their goals and "reformist" projects. Pezeshkian made a set of promises in the context of domestic and foreign policy. Internally, he promised to combat discrimination against women and ethnic and religious minorities and lift internet restrictions. In addition, he pledged to curb the activities of the morality police, address the cost of living crisis, strengthen the national economy and resolve the suffocating economic situation that Iran has suffered from over the years. Externally, he promised to open up to the West. He said, "We are not supposed to introduce new policies, as the supreme leader's general policies are clear." His remarks raise doubts about whether he will fulfill his promises, especially given his inclination to avoid clashes or disagreements with the supreme leader and the "hardliners." However, this approach of Pezeshkian could be tactical given the "reformists'" desire to return to political life and a reaction to what they experienced after the presidential election in 2021 and

the “conservatives” attempts to permanently exclude them from political life. It is expected that Pezeshkian will submit to the dictates of the supreme leader and the “hardliners” or make concessions to ensure that the “reformists” return to the Iranian political landscape. In doing so, this may anger those who voted for him as they backed Pezeshkian in the belief that he would make real structural reforms to the political system. To align himself with the goals of the supreme leader and the “hardliner” current and distance himself from “reformist” slogans, there is a potential for deep disagreements between Pezeshkian and the “reformist” current in the future.

Donald Trump’s return to the White House is disturbing for the Iranian leadership because of his previous policies against Iran. Trump rejected the 2015 nuclear deal, withdrew from it in 2018, initiated a maximum pressure campaign against Iran and assassinated IRGC-affiliated Quds Force Commander Qassem Soleimani. Although Iranian officials stressed that Trump’s election would not significantly change both countries’ relations, Vice President for Strategic Affairs Mohammad Javad Zarif said that Trump “must show that he is not following the wrong policies of

the past.”⁽²⁾ Former Iranian officials and journalists have also publicly called for dealing with the Trump administration, avoiding past mistakes and adopting a pragmatic and multidimensional policy.⁽³⁾ These calls signal Iranian concerns that Trump may return to the policy of maximum pressure to weaken and force Iran to make concessions regarding its nuclear program and regional interventions. In addition, the hijab issue has become a security challenge for the Iranian establishment, especially after the death of Mahsa Amini, a young Kurdish woman who was arbitrarily detained and killed by the so-called morality police. Pezeshkian promised to ease restrictions on social freedoms, lobby for leniency when it comes to the policy of wearing the hijab and abolish the morality police and its patrols or limit its activities. To these ends, Pezeshkian is expected to face fierce opposition from “conservative” elements in the Iranian establishment.

The Pezeshkian government has criticized the low gasoline prices in the country on several occasions. The government believes that the fuel subsidies are excessive and unreasonable. However, the economic and living conditions of the people, along with their discontent with gasoline prices, could lead to

instability and a resurgence of protests on the streets of Iran.

Conclusion: The Possible Repercussions of the “Reformists” Return to the Iranian Political Landscape

In light of the “reformists” return to the Iranian political scene after Pezeshkian won the presidential election in June 2024, a number of trends are expected during 2025.

The “reformists” will push to achieve a breakthrough in the policy of opening up to the West, as announced by Pezeshkian during his election campaign. It could be challenging for Pezeshkian to fulfill this pledge, given the tight control of the “hardliners” over this file, Trump’s return to power and tensions with Israel.

There are several indicators of a potential change in foreign policy and a break in the stalemate regarding Iran’s nuclear program through a newfound policy similar to what the supreme leader allowed in 2013, just before the talks with world powers that led to the 2015 nuclear deal. This is despite the fact that the “hardliners” have placed pressure on Pezeshkian and the “reformists,” their political opponents, as they believe that any understandings with the Trump administration is a “betrayal of the blood of

the martyr Soleimani” and the “dignity of the “Islamic Republic.”⁽⁴⁾ The “hardliners” forced Pezeshkian to secure Iran’s nuclear deterrence to counter Israel and the United States. However, Khamenei’s support for Pezeshkian, especially his approval for him to run in the presidential election, allows the “reformists” to rally behind him, and the supreme leader’s assurance to the new government that “there is no harm in engaging with the enemy,” is an indication of a possible change in Iranian foreign policy and a break in the stalemate regarding the Iranian nuclear program. The regional sphere is a special priority for the Iranian government at the moment. The positions and mutual visits between Iranian officials and their counterparts of neighboring states reveal that Pezeshkian is committed to moving forward in the direction of reconciliation as outlined by his deceased predecessor, Raisi. Therefore, Pezeshkian is likely to continue strengthening relations with Arab and Gulf countries in general, and with Saudi Arabia in particular, in response to the directive of Khamenei to follow in Raisi’s footsteps.

Pezeshkian has spoken about the role of the supreme leader in his presidential victory. He announced to the Parliament that all the ministers of his government were nominated in consultation with the supreme leader. The government of national accord was formed, including “reformists,” “hardliners” and “moderates.” This alignment with the supreme leader and the “conservatives” may create profound differences between Pezeshkian and some “reformist” parties in the future, especially those that reject the presence of a “reformist president without reforms.”

The setbacks for the Iranian project in Syria and Lebanon may have disastrous consequences for Iran. This could help Pezeshkian in delivering the promises he made to the people, because focusing on domestic issues is likely necessary to ensure the cohesion and survival of the political system. Iran has realized that the tens of billions of dollars spent on its regional project have been a wasted exercise, especially after the fall of the Assad regime which is a big blow to Iranian regional plans and economic integration.

Iran’s Economic Situation Under Pezeshkian’s Government

Rasanah’s 2023 ASR forecasted that the anticipated rise in Iranian oil revenues would fail to address the country’s financial deficit or lead to significant improvements in the day-to-day lives of Iranian citizens, nor would it catalyze a robust economic rebound in 2024. This forecast has since manifested, as evidenced by an escalation in financial shortfalls, increased domestic borrowing and a further decline in the value of the local currency during the tenure of former President Raisi. Additionally, the report indicated that Iran’s stance on the Gaza conflict would hinder progress in ongoing nuclear talks aimed at sanctions relief, further aggravating the country’s economic crisis.

In mid-2024, President Pezeshkian, a “reformist” politician,⁽¹⁾ assumed office under significantly adverse economic conditions. His presidency followed the death of his predecessor, Raisi. It coincided with ongoing sanctions against Iran and heightened geopolitical tensions in the Middle East, including the Iran-Israel tit-for-tat retaliatory attacks.

(1) The current president and former physician Masoud Pezeshkian is considered aligned with the “reformist” camp. During his 2024 electoral campaign, Pezeshkian emphasized the necessity of lifting economic sanctions on Iran as a critical factor for improving the economic situation and attracting much-needed investment. He also stressed the importance of accepting the recommendations of the Financial Action Task Force (FATF) and developing peaceful relations with the world. Domestically, he called for the non-interference of government and military institutions in the economy, while encouraging the private sector and cooperatives and granting the economy freedom, except in the sectors of health and education. Additionally, he supported currency liberalization and rejected compulsory pricing, monopolies and corruption.

Additionally, the Trump presidency in 2025 raises concerns, given his historically hardline stance toward Iran. These factors adversely affected Iran's economic landscape in 2024 and are expected to further impact the country's trajectory in 2025.

The 2024 ASR discusses Iran's real economic performance in 2024 and the significant future economic challenges facing the new president in light of ongoing sanctions. Finally, it forecasts the potential economic situation in Iran if the Trump administration imposes new sanctions on Iran.

An Overview of Iran's Economic Performance in 2024

According to Iran's Parliament Research Center, the country's seventh five-year plan (2024-2028) aims to achieve economic growth of 8%, limit liquidity and

inflation to 13.8 and 9.5%, respectively, and increase non-oil revenues by 23%, in addition to other objectives,⁽⁵⁾ which are optimistic despite the challenges the country faces.

This discussion sheds light on significant economic performance indicators in 2024 to better understand the reality of Iran's economy and its future trends in 2025. These indicators include economic growth and contributing sectors; oil and non-oil trade; inflation rates, liquidity and exchange rates; the budget and reserves; corruption and economic freedom; and the misery index.

■ **Economic growth and contributing sectors:** In the first quarter of the fiscal year (March 21-June 2024), the Iranian economy experienced a growth rate of 3.2%, as the Central Bank of Iran reported.⁽⁶⁾ By September 2024, this growth

moderated to 1.9% compared to the same period in 2023 — less than the expectations of the IMF.^{(1)*} The service sector emerged as the primary driver of this growth, contributing 53% to the overall economy and serving as the largest employer. This was followed by the industrial sector, which recorded growth of under 30%, and subsequently the petrochemical sector.

The oil and mining sectors remain the cornerstone of the Iranian economy, playing a crucial role in funding the national budget and public expenditure while being the principal source of foreign currency inflows. Despite this, the Iranian economy has faced significant challenges since the reimposition of oil sanctions six years ago. The oil sector is struggling due to a lack of modernization and investment; foreign investment

Table 4.1: Iran's Economic Performance Index, 2024

Economic Index	2023 Actual	2024 Estimated	2025 Expected
Population (million per capita)	85.8	86.6	87.5
Real economic growth rate	% 5	% 3.7	% 3.1
Net foreign investment flows (billion USD)	1.4	1.4	1.5

(1) The IMF expects the GDP to record a moderate growth rate of no more than 3.7% for 2024, decreasing to approximately 3% in 2025.

Economic Index	2023 Actual	2024 Estimated	2025 Expected
Inflation rate (change in annual consumer price)	40.7%	31.7%	29.5%
Liquidity growth	27%	-	-
Unemployment rate	8.1%	8%	8.4%
Currency exchange rate (toman against one USD)	51,000 toman to one USD	77,000 toman to one USD	120,000 toman to one USD*
Average of oil exports (million barrels per day)	1.4	1.6	1.55
Budget deficit to GDP	2.8%	3.1%	3.4%
Current account balance (billion USD)	10.3	12.5	14
Public debt to GDP	34%	34.6%	34.9%
Accessible net international reserves (NIR) (billion USD)	20.7	24	-
Total reserves in months of imports	3 months	3-3.5 months Estimated	-

Sources: "Focus Economics," Standard Bank, 2024; "World Economic Outlook- October 2024," IMF; "Benchmarking Reserves 2024," Central Banking Institute, and Rasanah IIIS. Note: Estimates by Rasanah IIIS are calculated according to the average growth in value of the US dollar, which was 57% during 2017-2024.

in production sectors is nearly non-existent, as illustrated in Table 4.1. To achieve its economic growth target of 8%, Iran requires an influx of \$250 billion in investment. However, according to the newly elected president, the country

currently possesses only half of this necessary capital.

■ **Oil and non-oil trade:** The average rate of Iranian oil exports has seen a notable increase, reaching approximately 1.6 million barrels per day — a rise

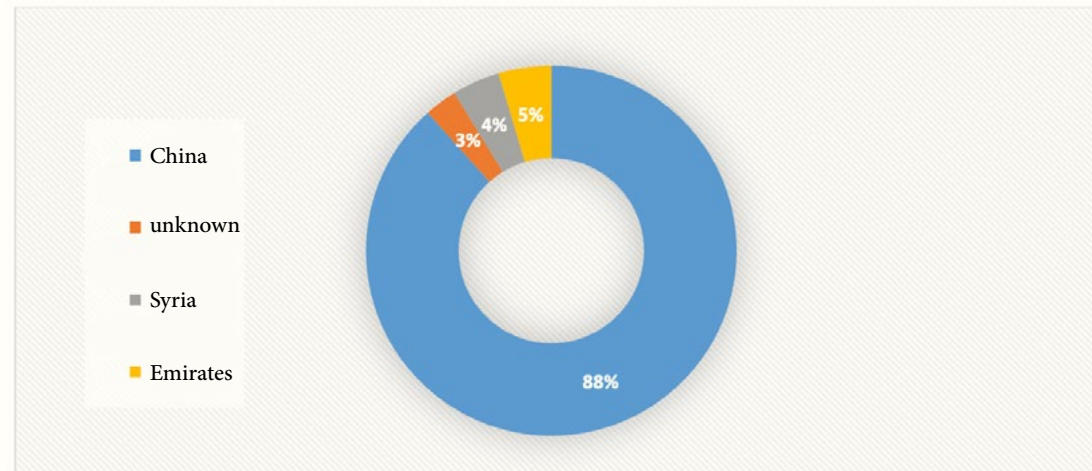
compared to last year. This is particularly significant given Iran's ability to circumvent US sanctions.⁽¹⁾ However, it is essential to note that export levels remain considerably below the pre-sanctions peak, which stood at 2.3 million barrels per

(1) Iran employs various methods to evade US oil sanctions, such as transporting oil on vessels under different nationalities, transferring and reloading cargo at sea, turning off tanker tracking systems and other circumventive tactics. However, these Iranian maneuvers result in increased operational costs, longer delivery times and the need to offer price concessions estimated at approximately 20% below the global market price.

day. China is the predominant consumer of Iranian oil, accounting for around 90% of exports, with purchases averaging over 1.4 million barrels per day. This has positioned China as Iran's key supporter amid sanctions, leveraging discounts offered by Iran, and in return, China purchases large volumes of oil. Oil revenues contributed nearly \$35 billion to the Iranian treasury, significantly lower than the \$100 billion recorded in 2011. The 2024/2025 budget anticipates a further increase in oil exports, expecting an average of 1.83 million barrels per day at a valuation of \$63 per barrel. However, should the Trump administration intensify restrictions on Iranian oil exports, as witnessed during his previous term, achieving this export target may be difficult for Iran.

Regarding non-oil exports, Iran's primary trading partners are China, the UAE, Türkiye and Iraq (refer to Table 4.2). Over the first seven months of the fiscal year (March-October 2024), Iran's non-oil trade reached a substantial \$72 billion, with exports totaling approximately \$32 billion, reflecting an annual growth rate of 15%. The bulk of these exports is made up of petrochemical and mining products. When accounting for oil exports, the overall export figure for Iran rises to \$60 billion, juxtaposed against imports amounting to \$40 billion during the same timeframe. Notably, two-thirds of these imports

Figure 4.1: Importers of Iran's Crude Oil, Condensate Gas (2024)



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Data source: "Iran Tanker Tracking," United Against Iran, January-October 2024.

consist of agricultural commodities, including wheat, corn, soy, rice, sugar and vegetable oil.

■ **Rates of Inflation, Liquidity and Currency Exchange:** Iran's economy has shown a decline in annual inflation rates, decreasing from 44% in January to 34% by October. While these levels remain significantly high, they indicate progress as the newly established Pezeshkian government implements policies aimed at curbing liquidity growth. Notably, inflation has decreased from 42% two years prior to 28% in August 2024.⁽⁷⁾ Simultaneously, the Iranian toman has undergone considerable depreciation against major foreign currencies.

As of November 2024, the exchange rate for the US dollar escalated to 70,000 toman, marking a 37% increase from the previous year, when the rate stood at 51,000 toman per dollar. This depreciation can be attributed mainly to ongoing geopolitical tensions between Iran and Israel, compounded by economic sanctions restricting access to foreign currency reserves. By the end of 2024, the exchange rate further climbed to 77,000 toman per US dollar, influenced significantly by the instability following the collapse of the Assad regime in Syria, a key ally of Iran.

■ **Government budget and reserves:** Iran is facing a growing budget deficit, as nearly a quarter of its budget revenues were not

Table 4.2: Iran's Non-oil Exports and Imports With Major Trade Partners (March 21–October 20, 2024)

Exports		Imports	
China	8.6	UAE	12
Iraq	7.3	China	10.2
UAE	4.2	Türkiye	6.6
Türkiye	3.3	Germany	1.4
Afghanistan	1.3	Russia	1
Pakistan	1.2	India	900\$million
India	1.1	Hong Kong	700\$million
Total exports	32.5\$billion	Total imports	39.5\$ billion

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Data source: Iran Customs Administration.

realized during the first four months of the Iranian fiscal year (March 21–July 21, 2024).⁽⁸⁾ This budget shortfall is primarily due to insufficient oil and non-oil revenues.⁽¹⁾ The budget deficit is expected to reach 3.4% of GDP in 2025, and the public debt-to-GDP ratio is expected to rise to approximately 35% due to increased domestic borrowing

to cover the deficit and the limited availability of oil and non-oil revenues. While Iran's debt ratio remains within moderate limits for developing economies, the ongoing sanctions have significantly impacted the country's accessible international reserves, estimated at only about \$24 billion. This amount is sufficient to cover roughly three

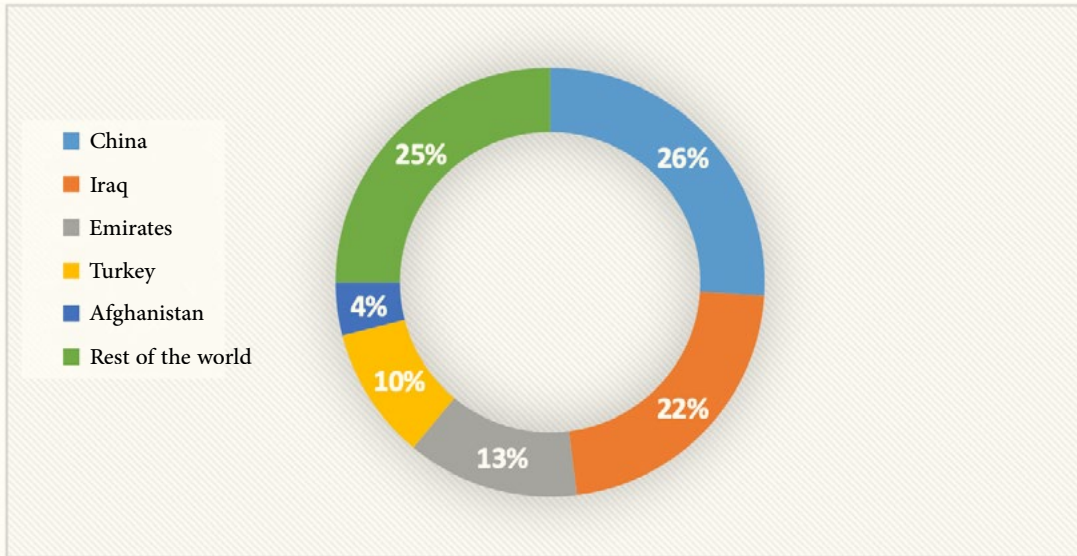
months of imports, representing the minimum required to ensure economic stability against external shocks. This reserve level is notably lower than the global and regional averages for Middle Eastern countries such as Saudi Arabia, Türkiye and Egypt.⁽²⁾

■ **Corruption and economic freedom:** The IRGC and the investment and

(1) Examples include the sale of bonds and revenue from taxes and customs. The deficit is covered by withdrawals from the National Development Fund (funded by oil revenues), as well as withdrawals from the deposits of state-owned enterprises, pension funds and insurance funds.

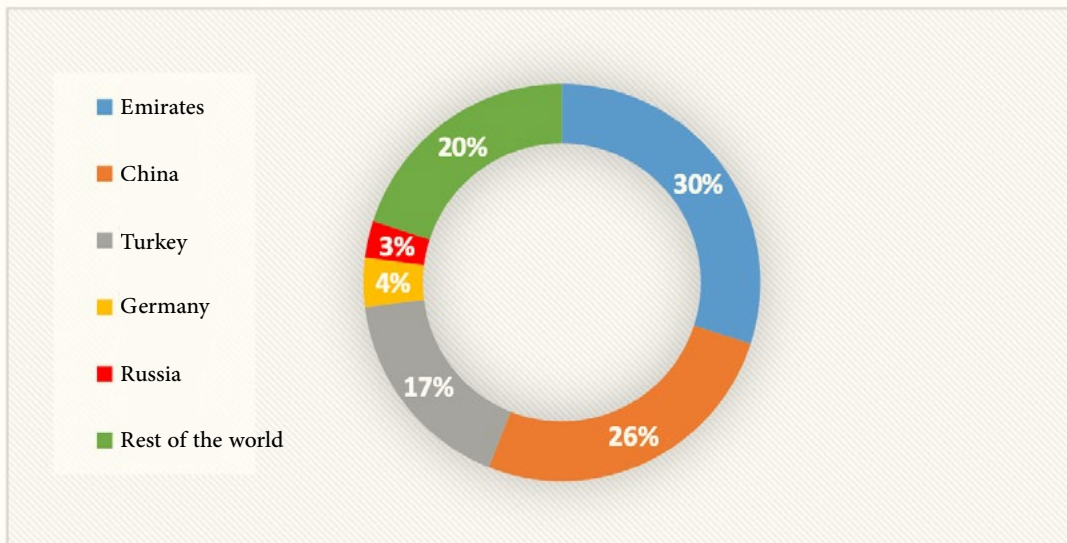
(2) The timeframe for Iran's reserves to cover imports, estimated at three months, is at the minimum threshold required to ensure economic stability against external shocks and sudden crises. In comparison, the global average in 2024 is 6.5 months. For further context, the coverage rate in Türkiye is five months, in Egypt eight months and in Saudi Arabia over 15 months. For more details, see: Reserve Benchmarks 2024 Report, Central Banking Institute.

Figure 4.2: Destinations of Iran's Non-oil Exports (March 21-October 20, 2024)



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Figure 4.3: Destinations of Iran's Non-oil Imports (March 21- October 20, 2024)



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endowment institutions associated with the clergy play an interventionist role in the Iranian economy, often competing with the private sector. This competition severely hinders economic growth. The economic power of the IRGC and the clergy reinforces their influence, creating fertile ground for corruption. Therefore, Iran is ranked 149 out of 180 in the Corruption Perceptions Index conducted by Transparency International.⁽⁹⁾ This low ranking reflects the reality of corruption in the public sector, which overwhelms the private sector, in addition to declining governance and the rule of law. The most notable corruption case that garnered significant attention in 2024 was the Debsh Tea scandal, which included top government officials.⁽¹⁾ Also, Iran was ranked 163 out of 165 in the Index of Economic Freedom in 2024.⁽²⁾

(1) The Debsh Tea scandal is one of the largest corruption cases in Iran, involving \$3.7 billion. The case revolves around the involvement of the Debsh Tea Company in currency smuggling and illegal trading in the parallel market. High-ranking officials were implicated, including the former minister of agriculture in the previous administration of President Raisi, who faces a three-year prison sentence. The case involves more than 60 defendants, including 43 political and banking officials.

(2) Iran's low ranking in the 2024 Index of Economic Freedom highlights the challenges it faces. This index considers factors such as the strength of the currency, the size of the government, freedom of international trade, and laws regarding property rights. For comparison, Saudi Arabia is ranked 58th, the UAE 45th, Türkiye 107th, Egypt 130th, Italy 51st, South Korea 32nd, Germany 16th and China 144th.

Table 4.3: Iran's Rankings in International Indexes

Index of Economic Freedom (EF) 2024	163 /165
Corruption Perceptions Index (CPI) 2023	149/180
Human Development Index (HDI) 2024	79/191
Global Innovation Index (GII) 2024	64/133

Data sources: Heritage Organization, Transparency International, WIPO.

Misery Index: The Misery Index in Iran surged by 29.5 points,⁽¹⁾ reaching 48.8 in 2023, a significant escalation from 19.3 in 2016.⁽¹⁰⁾ This represents a dramatic increase of 153% over seven years, indicative of a considerable deterioration in the quality of life due to systematic mismanagement by successive governments. Iran's rising position on the Misery Index encapsulates the mounting economic and social challenges the Iranian populace faces, including heightened crime rates, increased emigration and a future fraught with

concerns and risks over potential upheavals that can erupt at any time.

According to a study published by the Iranian Parliament Research Center,⁽¹¹⁾ the increase in Iran's Misery Index ranking is directly associated with several long-term factors. These include economic uncertainty regarding the future, which influences spending and investment decisions; fluctuations in black market exchange rates that affect price levels; and the implications of sanctions imposed on Iran.

Economic Challenges Faced by the Pezeshkian Government in Light of Ongoing Sanctions

In reviewing the key economic performance indicators of the Iranian economy for 2024, it is evident that progress has been quite limited. The Iranian economy experienced only an increase in GDP and exports, which did not translate into financial and monetary stability or improvements in the living standards of Iranian citizens. Consequently, newly elected President Pezeshkian has taken steps to address the longstanding economic challenges inherited from previous administrations by appointing experienced economists to key government positions. This includes the appointment of Economy Minister Abdolnaser Hemmati⁽²⁾ and other officials who have previously held executive roles in past governments.

The new government is expected to face a host of serious challenges in the short term, given the continuous US sanctions imposed on the Iranian economy or if the government readopts the old economic policies of the previous

(1) The Misery Index is measured using algorithms that assign each country a score based on unemployment rates, inflation, interest rates and real GDP growth. It serves as an indicator of economic well-being; a higher index reflects a decline in individual economic welfare, while a lower index indicates improvement.

(2) Abdolnaser Hemmati, a "reformist" economist and former governor of the Central Bank of Iran (2018-2021) during the presidency of Hassan Rouhani, has been appointed minister of economic affairs and finance by the current President Masoud Pezeshkian.

governments. The most serious challenges are as follows:

- **Sharp decline in foreign investment:** Iran needs foreign investment worth \$100 billion annually, yet the amount of foreign investment did not reach \$2 billion annually. The country needs \$100 billion—\$150 billion of new foreign investment to achieve its economic growth target of 8%. The lack of foreign investment will cause notable economic instability and a decline in the quality of life of Iranian citizens.

- **Lack of energy supplies:** The Iranian government may face a problem in providing energy supplies for daily needs, such as electricity and gasoline, due to an increase in energy consumption of 6% and the inability to increase energy production to meet emerging needs. Therefore, nationwide power blackouts pushed the government to increase electricity prices by 8% due to a lack of gas supplies — even though Iran has the second largest gas reserves in the world after Russia. The country is experiencing a severe shortage of investment and technology necessary to maintain its power supply. Additionally, there has been an erosion of capital assets in the energy sector and a rising demand for gas for domestic and industrial use, particularly in petrochemical and heavy industry

factories. As a result, the government may encounter significant challenges in meeting the domestic gasoline demand, which could lead to a decision to import it. Another option might be to lift fuel subsidies to limit the growing demand. However, this approach risks triggering widespread protests, making it difficult for the government to pursue this action. Consequently, the government faces a growing crisis resulting in further public disillusionment.

- **Decline in the local currency value, brain drain and capital flight:** The persistent deterioration of the local currency will continue due to simmering

geopolitical tensions in the Middle East and Iran's strained relations with Israel, Europe and the United States. The Iranian currency lost approximately 94% of its value against the US dollar and other foreign currencies within seven years (2017-2024). The exchange rate of the toman against the US dollar increased to more than 1,566% during the same period (see Figure 4.4), i.e., an annual average of 57%.

The devaluation of the Iranian currency directly corresponds with rising inflation, reaching more than 30%. Coupled with harsh living conditions, this has pushed highly skilled workers in critical

Figure 4.4: The Exchange Rate, the US Dollar Against the Toman (2017-2024)



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sectors such as education, health and engineering to emigrate to Europe and the United States, causing an annual drain on human capital estimated at nearly \$50 billion at least.⁽¹²⁾

■ **Further sanctions under the Trump administration and continuous economic deterioration:** The ongoing US sanctions pose a significant challenge to the Iranian economy. These sanctions have led to numerous crises, and Iran continues to suffer the consequences, resulting in the loss of billions of dollars. Assuming that the Iranian economy lost at least \$100 billion in one year due to the decline in GDP and reductions in both oil and non-oil revenues, along with missed direct investment opportunities and capital flight, as well as a significant drop in the national currency's value, it can be estimated that approximately \$600 billion has been lost over the past six years. This amounts to nearly half of the Iranian economy, and the crisis remains unresolved. Suppose the new US administration imposes further sanctions. In that case, the economic situation will worsen, mainly if sanctions target oil exports and the network of countries that cooperate with Iran, whether China or neighboring countries.

■ **Strict austerity measures:** The tightening of sanctions and the ongoing

Table 4.4: Key Economic Challenges Faced by the Pezeshkian Government in 2025

Challenge	Cost
Attract foreign direct investment to increase economic growth to 8%	Investment deficit of \$100 billion
Financial deficit	Reduce spending or increase in liquidity and inflation
Bridge the shortfall in gasoline and electricity production	Choose between increasing prices or facing popular discontent
Increase in the price of the US dollar	Average of 57%
Loss of human capital due to emigration	\$50 billion per year
Lost capital due to sanctions	\$600 billion in 6 years, at least
Combat corruption	Conflict with interest groups reduces the size of the private sector
Banking risks	Cyberattacks and financial shocks

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economic crisis may compel the Iranian government to implement strict austerity measures, potentially leading to public discontent. These measures could involve raising gasoline, electricity and gas prices and reducing subsidies and preferential exchange rates for imported goods. Additionally, the government may decrease the value of the national currency and raise the US dollar's official exchange rate in the budget to help

reduce the deficit. It is important to note that the Iranian government anticipates a 40% increase in its 2024/2025 budget, primarily through increased sales of oil, gas and financial assets. These expectations appear overly optimistic, given the ongoing challenges. The Iranian Parliament Research Center questions these forecasts and anticipates that the budget deficit will reach 18% in the upcoming year.

■ **Difficulties in addressing corruption:** In its quest to strengthen the private sector, the Pezeshkian government faces major obstacles. It may clash with interest groups and traditional active powers in the Iranian economy, or Pezeshkian will be forced to accept the status quo. The Iranian economy, therefore, will face a difficult situation. Needless to say, Iran ranks 158th out of 165 in the Economic Freedom Index for 2024.

■ **Banking risks:** The banking sector in Iran has become increasingly vulnerable to crises stemming from long-standing and accumulated issues such as inadequate capital, noncompliance with international banking standards, sanctions imposed on Iranian banks, deteriorating risk management practices and fragile financial technology – which have resulted in a rising number of cyberattacks and instances of blackmail targeting both individuals and financial institutions. The threats are likely to escalate in the future, particularly given the strained relations between Iran, the West and Israel, which could expose the Iranian economy to greater financial instability and crises. For more insights

into the Iranian banking sector, refer to the Iran Case File published by Rasanah in September 2024. Additionally, it is essential to note that in October 2024, the Financial Action Task Force (FATF) retained Iran on its blacklist of high-risk countries.

Options and Future Trends in Case of Intensifying Sanctions Under the Trump Administration

Challenges and economic decline will continue if sanctions persist at their current level without further escalation. However, the aforementioned challenges will increase if sanctions are intensified under Trump’s administration. The Iranian economy will have few options to cope with the government’s “resistance economy” strategy, which is often employed to respond to sanctions. Additionally, it will face new emerging challenges and threats. In the future, key aspects of Iran’s economic policy can be summarized as follows:

■ **Enhancing trade alliances with regional partners and improving monetary partnerships:** Iran may pursue this strategy if it faces further sanctions.

Therefore, China and the UAE are likely to remain Iran’s primary trading partners. Simultaneously, Iran aims to enhance trade ties with its network of Arab and Asian partners, with a particular focus on Iraq. It is worth mentioning that China stands as the largest importer of Iran’s petrochemicals and the second-largest exporter to Iran, following the UAE. These two countries serve as crucial lifelines for Iran in the event of heightened sanctions. Additionally, Iran will strive to open new markets and expand its trade by conducting transactions in currencies other than the US dollar and cross-border international money transfers using SWIFT. This initiative could be supported by cooperation with BRICS countries.⁽¹⁾ However, Iran is still in the early stages of this approach, as the bloc remains cautious; President Trump has threatened to impose sanctions if Iran conducts non-dollar transactions.

■ **The deepening of economic crises:** An increase in oil sanctions, banking sanctions, or both will sever the crucial lifeline of the Iranian economy: its oil exports. This will result in a growing financial deficit and further deterioration of

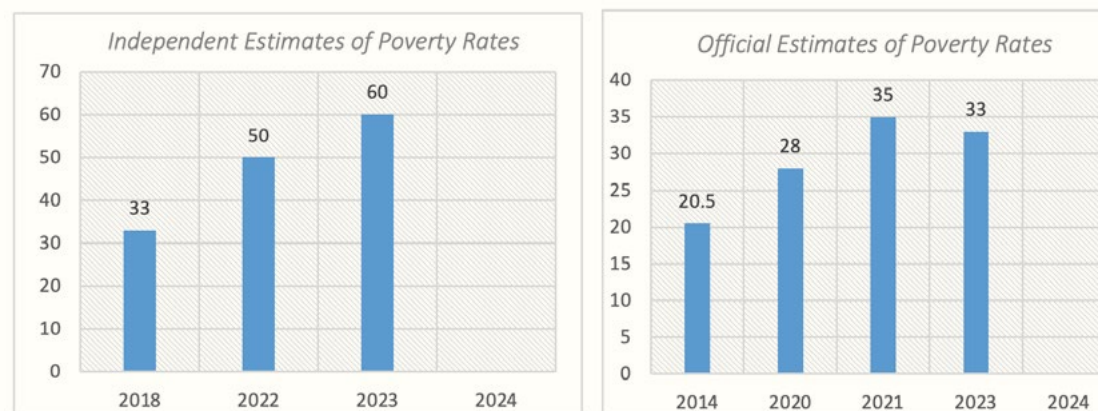
(1) Iran primarily targets China in monetary linkages due to the substantial volume of trade between the two countries. It also aims to strengthen alliances with partners like Russia, either bilaterally or within regional organizations such as BRICS and the SCO, among other emerging trade alliances. The goal is to reduce Iran’s trade isolation and open access to consumer markets in its Asian and Arab surroundings. However, Iran still needs to address gaps and challenges in its banking sector to ensure the success of these trade plans. While it has implemented local currency trade agreements with Russia, their impact remains limited due to the low trade volume between the two nations, accounting for only about %3 of Iran’s total global trade.

the local currency, which has already lost 94% of its value since the reimposition of sanctions. The economy is expected to fall back into stagflation, leading to an accelerated outflow of talent and capital. Additionally, the escalating economic hardship will intensify social suffering among the Iranian people, potentially resulting in security instability within the country.

■ **Fixed production levels and inability to achieve sustainable growth:** The Iranian economy is unlikely to achieve stable or sustainable development in the long term. Key to this growth is the improvement of living conditions and overall economic performance. Sustainable growth is connected to advancements in production components: labor, capital and technology. Unfortunately, these components have not seen improvement in over a decade. As a result, we can expect little tangible progress in living conditions in the future — unless unforeseen changes occur, such as the lifting of sanctions or a rise in oil prices.

To further validate this argument, the workforce and capital index have not changed for over a decade. The index of production components is 106 units for labor and 105 units for capital before 13 years. In 2023/2024, the index of labor

Figure 4.5: Official, Non-official Poverty Rates



and capital reached 105 units, i.e., the production components remained fixed during this long period.

■ **Decline in quality of life and living standards:** Iranians will need 17 years to significantly improve their standard of living compared to their current situation, based on real GDP per capita. The ongoing decline in the value of the national currency and high inflation rates are reducing purchasing power, leading to lower living standards and increased poverty, as illustrated in Figure 4.5. Additionally, these factors contribute to greater social misery and depression. Consequently, the intensification of sanctions will likely worsen these conditions.

■ **Increase in demographic threats:** Demographic challenges will adversely

affect economic development. A decline in population growth threatens the economy, as it will result in an aging society. This shift will likely increase health-care costs, diverting funds from other vital sectors such as education and infrastructure. Additionally, a decrease in the youth labor force, a key driver of economic growth, will further exacerbate these issues. This situation may worsen if immigration rates rise.

The decline in population growth, decreasing from 2.3% in 2015 and 3.9% in 1990 to approximately 0.7% in 2024, raises serious concerns about the future of the young workforce. It is important to note that marriage rates have fallen by 45% over the past 12 years.⁽¹³⁾ One of the most significant factors contributing to this decline in population growth is

families' challenging living conditions.⁽¹⁾ This issue is undoubtedly linked to the recurring economic sanctions imposed on Iran over the past 40 years, as well as the ongoing tensions in the Iranian government's relations with the outside world.

In summary, the Iranian economy is expected to face several challenges in 2025 as US sanctions remain in effect. The most significant issues include the ongoing decline in the value of the national currency, increased pressure on the daily lives of Iranians, rising poverty rates and a reduction in operational revenues within the budget. These challenges will impact the government's ability to provide essential services such as electricity, healthcare and subsidized animal products. Consequently, the government may be forced to implement austerity measures. The economic deterioration, which has persisted for six years, is projected to continue, affecting economic growth, foreign investment and oil and non-oil trade. The situation may worsen if Trump escalates sanctions against Iran or if Israel launches attacks on critical targets within the country.

Iran will enhance its trade and investment cooperation with regional and international partners, particularly China, Russia, Iraq and Türkiye, to tackle these potential challenges. The country will persist in circumventing sanctions using all available means and will seek to strengthen financial and monetary partnerships with key trading partners from neighboring countries.

The fall of Bashar al-Assad's regime in Syria may not trigger a significant economic shock for Iran; however, it could jeopardize Iran's broader economic ambitions in the region, particularly in Iraq and Lebanon. The ousting of the pro-Iran Assad will deliver a substantial blow to Iran's geopolitical aspirations. Although Iran stands to lose some economic leverage in Syria, the overall impact is likely minimal, considering the relatively weak trade volume between the two countries and the inherent fragility of the Syrian economy. Iran may lose limited oil exports to the Syrian regime, as well as some raw materials sourced from Syria. Additionally, Iranian companies engaged in tourism, trade or contracting sectors may be compelled to withdraw, especially those

closely affiliated with the Iranian establishment, including Khatam al-Anbiya Construction Headquarters.

Assessing Iran's Military Capabilities Amid Developments and Crises

Iran's military muscle has diminished compared to last year. Its air defense is scant and critical factories that produce sophisticated weapons systems are confronted with a depleted supply chain. In 2023, Iran readily received two squadrons of Russia's 4++ generation fighter jets – Su 35S – besides an undisclosed number of S-400 Triumf batteries, which are insufficient given the country's large size and potential multiple fronts. The course of the Russia-Ukraine war changed beyond Russia's expectations, not only weighing heavily on its military but also its arms production capability; hence, the advanced fighter jets were commissioned to the Russian Air Force (RuAF) instead. Nonetheless, it restored diplomatic relations with its Arab neighbors and even held joint military exercises with Azerbaijan, a neighbor it felt immensely threatened by a year ago.

(1) Additionally, government campaigns in previous decades promoted family planning after population growth rates surged significantly during periods of economic openness in the 1990s and the improvement of Iran's relations with the world following the end of the Iran-Iraq War.

The developments impacting Iran's military capabilities in 2024 necessitate analyses from the prism of the balance of power in the region and the trajectories of geopolitics likely to develop in 2025.

Air Force, Drones and Air Defenses

Facing persistent delays in the transfer of fighter jets from Russia, Iran is turning toward China. Tehran has been wooing Beijing to sell J-10 fighter jets besides gunship helicopters and submarines. Beijing has so far been reluctant due to Tehran's cash crunch, besides tilting the balance of power in the Gulf and beyond.⁽¹⁴⁾ The commencement of the Trump administration in 2025 further compounds China's cautious approach toward defense collaboration with Iran.

In August, Iran inaugurated an airbase named Martyr Major General Mahmoudabadi Airbase in the northwestern city of Urmia, the capital of West Azerbaijan province. The new air base is meant to boost Iran's defense capabilities and is expected to be a prized asset for the country and its military forces.⁽¹⁵⁾

The base is assigned to cover Iranian Kurdish opposition groups in Iraq, Azerbaijan's expanded border after Nagorno-Karabakh's independence and the Nakhchivan exclave flanking Türkiye. Tehran's decision to establish

the base is necessitated by the prospects of Azerbaijan's takeover of the Zangezur Corridor, severing Armenia's land connection with Iran.⁽¹⁶⁾ Perplexed at Azeri-Turkish plans to establish a land route, Iran has been holding frequent combined arms drills. Recently, Iran's relations with Azerbaijan have improved, notwithstanding the persisting threat-perception in the long run.

The crash of President Ebrahim Raisi's helicopter laid bare the fatal flaws in Iran's much-hyped drone force, which could not locate the wreckage on its own. The Iranian government faced two options: continue searching for the crash site into the night and the next day amid inclement weather using its resources or seek foreign assistance from neighboring countries such as Türkiye and Azerbaijan. By midnight, Iran contacted Türkiye for support in the search and rescue operation. The Akinci drone from the Batman Airfield entered Iran and searched for the missing helicopter for six hours. The high-altitude, long-endurance, twin-engine multirole drone located the crashed helicopter's heat signature 20 kilometers from Azerbaijan's border⁽¹⁷⁾ and left for the base to draw a crescent and star over Lake Van on the flight radar to mark Türkiye's technological forte.

For decades, Iran projected itself as a top drone power, yet its diverse fleet was unable to make its mark when the moment arrived. Its drone capabilities, especially cameras and sensors, fell woefully short of successfully conducting the mission. In a cunning move, the Akinci drone equipped with sophisticated cameras and other sensors flew over a significant number of sensitive Iranian military sites, i.e., the Amand rocket site, Khoy Airport, Tabriz Airport and the Iranian army's rapid response base near Tabriz. Iran's drone power did not receive any significant technological boost and its reputation as a drone power continues to diminish.

Space Program

On September 14, the IRGC launched the Qaem-100 solid-fuel satellite launcher and sent the Chamran-1 satellite into a 550-kilometer orbit. The success of the IRGC's second orbital mission via the Qaem space launch vehicle (SLV) highlights Iran's prioritization of its military space program.⁽¹⁸⁾ Chamran-1 is declared a "research satellite" that tests hardware and software systems as well as in-orbit maneuvering technologies. Iran's Defense Ministry sent three satellites simultaneously via the Sorayya satellite into orbit with an

IRGC rocket in January. The satellites — Mahd weighing 32 kilograms, and two less than 10 kilograms (nano) satellites, named Kayhan-2 and Hatef-1, “were put at altitudes between 450 kilometers and 1,100 kilometers above the Earth’s surface.”⁽¹⁹⁾

In February again, Iran sent a domestically developed imaging satellite, Pars-1, into a 500-kilometer orbit from Russia’s Vostochny spaceport using the Soyuz rocket. The 134-kilogram satellite is equipped with three cameras. It orbits 500 kilometers in space.⁽²⁰⁾ It was accompanying two more military satellites about which no details were released, which are thought to be geographic information system (GIS) satellites. For a satellite to be in sun-synchronous orbit, it should have been 600 kilometers from Earth. Iran’s Minister of Communications and Information Technology Issa Zarepour described the Pars-1 satellite as “100% Iranian.”⁽²¹⁾ Iran has so far launched 13 satellites in the last two years.

The Head of the Iranian Space Agency (ISA) Hassan Salariyeh said, “In less than two and a half years, 12 satellites have been successfully launched into space.”⁽²²⁾ Tehran is said to be working to stabilize the technology for sending satellites into low earth orbit (LEO).

ISA revealed that two new biological capsules are under construction to “send humans into space” but no deadline for crewed space flights was made public.

The satellites are to test narrow-band communication and geopositioning technology. “The IRGC will conduct the test launch of Qaem-105 next year. Within the next three years, Iran will test launch the Qaem-120 satellite carrier, which is planned to send satellites into an orbit 36,000 kilometers above Earth,” Commander of the IRGC Aerospace Force’s Space Division General Ali Jafarabadi stated.⁽²³⁾ Iran’s first military satellite, Noor-I, was launched in April 2020, followed by Noor-II in March 2022 via the Qassed SLV. Like most space-faring nations, Iran’s program is a hybrid of civilian and military applications.

Naval Power

Iran’s submarine research and production is achieving a key milestone given various recent developments, including the air-independent propulsion (AIP) system showcased at the DIMDEX 2024 exhibition in Qatar.⁽²⁴⁾ Tehran claimed that its Fateh-class submarines are set to be equipped with an AIP plug. The propulsion, once tested

and deployed, will markedly improve the operational capabilities of the submarines, such as an increase in underwater endurance. The AIP submarines have longer endurance than ordinary ones which have to resurface after five weeks to pump oxygen for storage after conversion into liquid state (LOX) for submerged use. In line with its tradition, Tehran boasted about the AIP capability before fully installing and commissioning it in the Fateh-class submarine. It is reported to take a year, and if successfully done, all submarines in the class will be upgraded too. The improvement is dubbed as “a qualitative leap from its predecessor, the Ghadir-class with a modest displacement of 120 tons, whereas the Fateh-class displaces around 600 tons.”⁽²⁵⁾ After three Russian-supplied Kilo-class submarines, the Fateh-class submarines are already the Iranian navy’s most potent under-sea asset due to their firepower, i.e., four 533-millimeter torpedo tubes in the bow besides mines and anti-ship missiles. Acquired in the 1990s, the Kilo-class displaces 3,000 tons (submerged). Sutton, a naval technology expert, believes that “AIP will not make the submarine top-tier; it is still a small and relatively basic boat, but it makes it comparatively stealthier.”⁽²⁶⁾

Arms Production and Deals

Iran's new Defense Minister Brigadier General Aziz Nasirzadeh announced a hyper-ambitious plan to bolster the country's military muscle and exports alike. Under his leadership, the ministry plans to develop "jump jets" or short take-off and landing (STOL) aircraft, heavy destroyers, a constellation of satellites and AI-powered drone swarms.⁽²⁷⁾ Nasirzadeh seeks to upscale Iran's space technology by launching over 20 satellites into orbit. He also stresses expanding Iran's aerial and naval warfare capabilities, missile technology, air defense systems and aerospace division. Other lofty aspirations of Nasirzadeh's include the development of heavy multi-mission destroyers "through acquiring new technologies and increasing the production of high-speed vessels capable of launching cruise missiles."⁽²⁸⁾

The minister is confident that Iran's military diplomacy will propel its latest products for export to neighboring countries as well as Latin America and Africa. The Pezeshkian government lacks the money to finance such an ambitious plan not to mention the lack of technological expertise. Quite evidently, Nasirzadeh has high hopes for enhanced defense cooperation with Russia.

On the arms sales front, Iran achieved a breakthrough with Armenia. Tehran and Yerevan reached the biggest arms deal in their recent history amounting to \$500 million, involving the acquisition of Shahed-136, Shahed-129, Shahed-197, Mohajer drones and air defense systems such as 3rd Khordad, Majid, 15th Khordad and Arman.⁽²⁹⁾

Iran is reported to have supplied 400 Zolfaghar ballistic missiles of the Fateh-110s family, though there is no evidence so far of Russia firing them against Ukrainian targets yet. The first reports of the Iran-Russia deal on the transfer of Fateh class ballistic missiles surfaced in late 2022.⁽³⁰⁾ This road-mobile missile is capable of striking targets at a distance of between 300 kilometers and 700 kilometers. The transfer reportedly took place in January in at least four shipments of missiles, by the Caspian Sea and air. Since the UNSC sanctions on Iran's arms deals expired in October 2023, Iranian officials have not denied the reports. "There is no reason to hide it. We are allowed to export weapons to any country that we wish to."⁽³¹⁾

Conclusion: Expected Iranian Steps to Bolster Its Military Capabilities

Iran's military strength requires consideration of the impact of Israeli strikes on

its crucial assets. The Operation Days of Repentance became the single largest attack in Israel's history comprising 100 jet fighters, spy planes and refueling aircraft, which flew 1,000 kilometers to hit 20 vital targets in Iran. Contrary to its claims, several fighter jets entered and struck the targets from within Iranian airspace for absolute accuracy. The attacks left Iran without the cover of credible air defense as all its S-300 and S-200 batteries and its domestically improvised copies were damaged, especially radars and missile launchers. Tel Aviv also inflicted significant damage to missile and drone production and solid fuel production plants. Its undeclared and suspected nuclear sites were not spared either.

In the year 2025, Tehran will not only plug the gaps in air defense by acquiring systems from Russia and China but will also purchase 4++ generation fighters. It needs six to eight squadrons of advanced fighter planes, which are unlikely to be raised in less than three years as Tehran has yet to receive its first advanced jet. It remains to be seen whether Russia will deliver the pledged 24 Su-35s. Tehran will invest in enhancing its drone capabilities, which are lagging far behind its neighbors and rivals alike. The windfall effect of retrieved Western equipment

on the Ukrainian front will yield results in a few years as Russia and Iran both lack plants and/or raw materials for advanced metallurgy and processors. The year 2024 took a toll on Iran's military leadership, doctrine and its warfare and defense capabilities.

Fulfilling Campaign Promises to Iran's Minorities: Policy Challenges for the New Government

The ethnic factor emerged as a salient aspect of Iran's political landscape in 2024, both during and after the electoral process. Analysts attributed certain voting patterns to ethnic considerations, reflecting a more profound ethnic influence on citizens' electoral behavior. Following the election, political engagement by minority groups gained momentum, spurred by President Pezeshkian's pledges to address their demands. These included promises to increase their representation in state institutions and involve them in decision-making processes. Adding to the debate, former Foreign Minister Mohammad Javad Zarif stirred controversy by suggesting that ethnic background should be among the criteria for selecting ministerial candidates.

The 2024 ASR examines the role of Iranian minorities during the electoral

process, their position in the aftermath of the elections, Pezeshkian's capacity to deliver on his promises and the prospects for minority groups in 2025.

The Role of Minorities in the Electoral Process

The ethnic and religious diversity of Iranian society ensures that the ethnic factor remains a significant aspect of the political landscape, particularly during elections. Minorities in Iran often express grievances over the denial of their political, economic and cultural rights. These groups typically align with the "reformist" movement, which advocates for changing policies long upheld by the "hardliner" establishment. This alignment was evident in the stark contrast between the election platforms of "hardliner" candidate Jalili, who omitted minority issues entirely, and "reformist" candidate Pezeshkian. The latter's campaign highlighted minority demands⁽³²⁾ and pledged to promote social justice, balanced development, structural reforms,⁽³³⁾ religious freedoms and minority rights.⁽³⁴⁾ He stated, "The Kurds, Arabs and everyone who lives in this country must have their place based on merit, and the country must be built by all Iranians, not just one group or faction."⁽³⁵⁾ Pezeshkian vowed

to combat injustice, discrimination and restrictions while advocating for the rights of ethnic and marginalized groups.⁽³⁶⁾ He also emphasized national solidarity, warning that divisions — whether within the nation's leadership or among minority groups — would hinder Iran's progress.⁽³⁷⁾

Following Pezeshkian's electoral victory, some analysts attributed his success to the Azerbaijani provinces, suggesting that his affiliation with this ethnic minority played a decisive role. Tasnim News Agency asserted that votes for Pezeshkian were driven more by ethnic loyalties than by political or economic considerations, noting that this phenomenon of voting based on ethnic ties or candidates' origins was unprecedented in previous elections. However, variations in voter behavior across provinces indicate that ethnicity was not the sole determinant of his victory.⁽³⁸⁾ Despite this, the influence of ethnic groups in securing Pezeshkian's presidency remains undeniable. His independent political stance and advocacy for minority rights attracted widespread support from Turkish, Kurdish, Arab and Balochi voters, demonstrating the appeal of his inclusive platform.⁽³⁹⁾

The pivotal role of minorities in the 2024 Iranian election is evident in

several key aspects, most notably the ethnic origins of the presidential candidates, with Pezeshkian hailing from the Azerbaijani minority. His outreach to minorities, including visits to their regions and promises to improve living conditions and boost their representation within the political system, significantly influenced their electoral behavior.

However, this dynamic presents a substantial challenge for Pezeshkian's presidency. He will need to strike a delicate balance between addressing the expectations of minority groups and navigating resistance from "hardliner" elements within state institutions that may seek to obstruct his efforts to fulfill minority demands.

The Place of Minorities Within the Political Process Post Election

The "reformist" background of Pezeshkian and his campaign promises advocating freedoms and minority rights inspired many minority groups to support him in the election. However, these same commitments have fueled heightened expectations among these groups, who are now urging the new president to translate his promises into tangible political, cultural, and economic gains. Leaders of religious and ethnic minorities used meetings and congratulatory

messages to remind Pezeshkian of his pledges, but there are significant structural and constitutional constraints and limitations in fulfilling these, especially as the supreme leader holds ultimate authority.⁽⁴⁰⁾ One prominent example of this tension is the reaction to statements by Zarif, appointed by Pezeshkian as vice president for strategic affairs. Zarif emphasized the principle of positive discrimination when selecting ministerial candidates, highlighting minority representation as a priority. "Hardliner" media outlets strongly criticized this approach, arguing that it conflicts with national unity and undermines the Shiite doctrine as the official ideology. Zarif's remark that "being a Shiite is not a privilege,⁽⁴¹⁾ but being from other sects can be a privilege"⁽⁴²⁾ was seen as a signal of Pezeshkian's intent to form a national unity government. This government would aim to include representatives from ethnic and religious minorities as well as other political factions, including "hardliners," underscoring the president's challenge in bridging "reformist" ideals and "hardliner" resistance.

After Pezeshkian's election victory, his government appointments became a critical test of his commitment to minority rights and his reformist agenda. Faced with balancing his campaign

promises against the constraints imposed by Parliament and Supreme Leader Ali Khamenei, Pezeshkian initially failed to appoint minorities to his "government of national accord." This omission sparked criticism and disappointment among minority communities, with some regretting their electoral support for him. In response, Pezeshkian revisited the appointments and made a historic move by naming Abdul Rahim Hussein Zadeh, a Kurdish Sunni parliamentarian, as vice president for rural development and deprived areas⁽⁴³⁾ — the first Sunni member of the Iranian government in 45 years. The appointment elicited mixed reactions. Hasil Dase, a Kurdish political activist and Sunni representative, argued that it fell short of Sunni aspirations for ministerial or diplomatic roles. However, he praised the move as a groundbreaking achievement that addressed a longstanding Sunni demand and fulfilled part of Pezeshkian's promises. He urged continued appointments of this nature to foster greater inclusivity.⁽⁴⁴⁾ Following this, Pezeshkian expanded his efforts to diversify government representation. Areh Zare Tan, a young Sunni "reformist," was appointed governor of Kurdistan,⁽⁴⁵⁾ Mansour Bijar, a Sunni Balochi, was named governor of Sistan and Balochistan,⁽⁴⁶⁾ and

Mohammad Reza Movalizadeh became the first Arab governor of Khuzestan (Ahwaz) province.⁽⁴⁷⁾ These appointments signaled government efforts to promote ethnic and religious diversity in leadership roles and to challenge the traditional dominance of a single group in decision-making processes. Despite these steps, minority groups remain dissatisfied, arguing that their participation in governance needs to be substantive, not merely symbolic.

Economically, the state's limited resources and pressing challenges hinder its ability to fully address the demands of minorities. The border locations of Sunni provinces further complicate the situation, as these areas are often subjected to security-focused policies and associated tensions and violence. Under

such constraints, the most minorities can expect during this period is the implementation of some development projects aimed at demonstrating that the state is not pursuing a systematic policy of exclusion against them. Within this framework, it is also possible that the government may allocate marginal positions to individuals from minority groups as a placatory gesture.

Conclusion: The Status of Minorities in 2025

These developments suggest that ethnic issues will feature prominently in the political landscape during Pezeshkian's presidency, potentially becoming a source of contention between him and "hardliner" forces. Even if Pezeshkian manages to deliver on some of his

promises, these are unlikely to meet the full aspirations of minorities, particularly given "hardliner" resistance to this approach and Pezeshkian's likely preference to avoid a zero-sum conflict with the "hardliners." In 2025, minority communities may experience growing frustration and discontent, with limited progress expected on social fronts. This will be exacerbated if additional sanctions are imposed on Iran by Trump, further straining the country's economic resources and hindering development projects in minority regions. Furthermore, such conditions could be exploited in the event of an escalation in military tensions between Iran and Israel, potentially fueling armed operations aimed at undermining the security and stability of the Iranian establishment.

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IRAN'S POLICIES TOWARD ARAB COUNTRIES

A Comparison of Pezeshkian and Raisi's Policies on Militia Support in Conflict Zones

The 2023 ASR predicted that Iran would continue to support the armed militias in Yemen, Lebanon, Iraq and Syria to engage in the war raging in Gaza and Lebanon under what Iran calls the “unity of the arenas.” This strategy aimed to pressure Israel to stop the Gaza war, which remains ongoing. On Iran’s instruction and with its support, the involvement of militias in the four countries continued as part of the Israeli-led war in Gaza and Lebanon. This was before Israel weakened the Lebanese front, the Syrian armed opposition successfully controlled Syria and President Bashar al-Assad fled to Russia on December 8, 2024.

The change of presidency in Iran with the death of “conservative” Raisi and the victory of “reformist” Pezeshkian in July 2024 raises questions about its impacts on Iran’s foreign policy. These questions particularly relate to Iran’s longstanding policy of support to regional militias, a key tool for strengthening Tehran’s regional influence, and the heavy losses in its spheres of influence, especially after the fall of the Assad regime in Syria. As a result, Iran has lost two key countries

in its expansionist regional project: Lebanon and Syria. In light of these developments, the 2024 ASR compares the two presidents’ policies toward the militias in the arenas of escalation, the “unity of the arenas” strategy and its results and impacts on Iran’s project during 2024. Finally, it concludes with the outcomes of Pezeshkian’s policy toward its proxy militias and its expected impact on Iran’s expansionist project in 2025.

Iran’s Support to Militias in the Arenas of Escalation Under Pezeshkian

The Iranian policy toward regional developments from the beginning of Pezeshkian’s administration to his commitment to the directives of the supreme leader during his inauguration as president signaled that he would follow Raisi’s foreign policy.⁽⁴⁸⁾ This involves supporting militias in the arenas of escalation under the pretext of pressuring Israel to stop the Gaza war. Pezeshkian believes that the policy of openness is directed toward the capitals of the world except Tel Aviv due to its ongoing occupation and acts of genocide, ethnic cleansing and liquidation of Palestinians.⁽⁴⁹⁾ However, this policy conflicts with the Pezeshkian government’s aim to open dialogue with the West. The

signs of Pezeshkian following in the footsteps of Raisi in the arenas of escalation are as follows:

- **Yemen:** Supporting and mobilizing militias in general and the Houthis in particular given their influential geopolitical position in terms of international trade which is an unquestionable principle in Iran's foreign policy and a long-standing pillar of the Iranian geopolitical project. Raisi underlined the importance of the Houthi militia for Iran when he received the Houthi delegation headed by Mohammed Abdul-Salam as the first foreign delegation after assuming office as president of the republic. He praised the role of the Houthis in the fight against Israel by targeting Israeli ships or those heading to Israel in the Red Sea and threatening the security of international navigation to put pressure on the West. Therefore, the Biden administration accused Iran of involvement in the Houthi attacks on vessels in the Red Sea.⁽⁵⁰⁾

Only a few days after his inauguration, Pezeshkian appointed IRGC Air Defense Officer Ali Mohammed Ramadani as the new ambassador of Iran to the Houthis in Sana'a. Iran's military support to the Houthis is still in place under his administration. Houthi military capabilities have stepped up significantly due to the support of the IRGC, Lebanese

Hezbollah and Iraqi specialists, according to Reuters.⁽⁵¹⁾ The Houthis also announced the expansion of the target area in the Mediterranean and operations in the Red Sea. They also continue their attacks on Israeli cities with Iranian-made ballistic missiles as classified by Western intelligence.

- **Syria and Lebanon:** Under the Raisi administration, Iran adopted an approach based on maintaining negotiations with the United States as a bargaining chip without allowing its proxies to be involved in an escalation against US interests in the Middle East. It continued with this approach until October 7, 2023. The Hamas operation created a difficult reality for Iran, challenging its "unity of the arenas" principle, which Iran had continuously emphasized. It sought to draw Lebanon into the conflict. It launched 3,235 attacks from Lebanese territory, i.e., nearly 270 attacks per month from October 2023 until October 2024.⁽⁵²⁾ It failed to get Syria involved in the conflict as the former Syrian regime took a different position to Iran. However, the Israeli airstrike on the Iranian consulate in Damascus was a turning point, signaling the end of Iran's balanced foreign policy approach. Therefore, Tehran was forced to adjust its policies and alliances to safeguard its

strategic interests, hence, it replaced the broad military response to the Israeli escalation on the centers and figures of its influence in Syria with a diplomatic approach.⁽⁵³⁾ It withdrew its leaders in Syria and moved its militias to a safe area away from Israel's reach.

Pezeshkian signaled an approach to keep in place Iranian support for the militias in Syria and Lebanon. He met with several militia leaders during his inauguration as president of Iran. He expressed his commitment to continuing Iran's policy toward its regional proxies. A message was also sent to former Syrian President Assad and former Hezbollah Secretary-General Hassan Nasrallah, who was killed in an Israeli strike at the end of September 2024, in which he stressed Iran's unwavering support for the so-called Axis of Resistance. In his message to Nasrallah, Pezeshkian asserted, "The Islamic Republic of Iran has always supported the resistance of the people in the region against the illegitimate Zionist regime [...]. Supporting the resistance is rooted in the fundamental policies of the Islamic Republic of Iran and will continue with strength."⁽⁵⁴⁾

Although he followed his predecessor's policy of supporting the militias in Syria and Lebanon, his government was accused of being slow in

taking supportive action on the ground against Israel before Nasrallah and other militia leaders of the so-called “Axis of Resistance” were killed in Israel’s successive attacks. This outraged “hardliner” circles in Iran and the “hardliners” stepped up their condemnation of the Pezeshkian government’s positions compared to former governments.⁽⁵⁵⁾ This delay in response would not have happened without a consensus between the Office of the Supreme Leader and the current executive authority. This delay was because of Iranian concern about the incalculable response Iran may face and its effects on the future of the Iranian establishment.

■ **Iraq:** The militias in Iraq represent the weakest link when it comes to pressuring Israel, especially in comparison to those in Lebanon and Yemen. Under the Raisi administration, Iran wanted the militias to follow the traditional rules of engagement and avoid attacking US troops in Iraq.⁽⁵⁶⁾ This was to prevent violent US retaliation, which could have serious consequences for both the militias and Iran. In January 2024, the US administration accused Iran and its militias in Iraq of conducting military attacks on Tower 2, a US military outpost, in northeast Jordan, near the Syrian-Iraqi

border, resulting in the deaths of three Americans.

Therefore, Iran sent Quds Force Commander Ismail Qaani to Iraq during the Raisi administration after the attacks to pressure militia leaders to stop the attacks on US targets in Iraq. The militias suspended their attacks, but they shifted their attacks during the remaining period of the Raisi administration in 2024 and since the beginning of the Pezeshkian administration toward Israeli towns within the framework of the so-called unity of the arenas. The militias claimed around 47 attacks during October 2024, 35 attacks in September, six attacks in August and 13 attacks in July, using al-Arqaab cruise missiles of the Quds series and Shahed drones.⁽⁵⁷⁾ They initially targeted Israeli ports and then shifted to military positions in the Golan Heights.

With the rise of armed opposition factions led by Hay’at Tahrir al-Sham (HTS), which gained control over the entire Idlib and Aleppo regions and aimed to advance toward Damascus, the media began reporting on Iran’s efforts to pressure influential countries to reactivate the joint operations intelligence room established in 2015 by Russia, Iran, Iraq and Syria.⁽⁵⁸⁾ The purpose of this operations room was to halt the opposition

factions’ advance toward Damascus. Iran sent its Foreign Minister Abbas Araghchi to Baghdad to urge Iraq to participate in the operations room, seeking to ensure Assad’s continued hold on power. Additionally, Iran summoned members of Lebanese Hezbollah, Iraqi Hezbollah and the Fatemiyoun Brigade to fight alongside the Syrian army against the opposition factions. However, in light of the rapidly changing situation and the advances made by the opposition forces, Araghchi met with his Turkish counterpart Hakan Fidan to discuss Iran’s concerns regarding Türkiye’s support for the armed opposition.

The Relevance of the “Unity of the Arenas” Strategy in Light of Regional Developments

The “unity of the arenas” precept pursued by Iran is an essential part of its regional policy to enhance military and political influence by coordinating the efforts of the various fronts in which its armed factions are present in its arenas of influence. Although this strategy was apparent under Raisi and continued under Pezeshkian, its implementation faced many challenges. Many signs of division surfaced among its members during 2024 because it expanded the circle of hostilities on various fronts.

Israel was able to get involved in a multifront war and attempted to dismantle the narrative Iran had been promoting for years on Israel's inability to confront the arenas. Israel's escalation against Iran and its axis and the accompanying regional developments resulted in Iran's apparent failure and exposed the failure of the "unity of the arenas" strategy. Consequently, Iran was forced to change from a defensive position to an offensive stance and promote the isolation and separation of the arenas as an alternative to their unity during 2024 for many reasons such as the following:

- Differing political and military conditions across multiple arenas — Iran failed to unite the fronts of confrontation against Israel simultaneously. In Lebanon, Hezbollah seemed reluctant to get involved in a large-scale war due to domestic pressure and fear of international condemnation. In Syria, the regime distanced itself from involvement in the "unity of the arenas" principle due to internal economic, political and military pressures. The shifts in regional and international alliances and ongoing Israeli threats led to the separation of the Syrian arena from the other Iranian arenas. In Iraq and Yemen, the political and military balances hindered a large-scale escalation that matched Iran's strategy.

- The high cost of the "unity of the arenas" — The Gaza war proved that the opening of multiple fronts would be extremely costly for Iran, both economically and militarily.

- Israel's counter-response to this strategy — Tel Aviv adopted the same confrontational approach, but conversely, with unexpected modern technological tools, by carrying out preemptive and simultaneous strikes in more than one arena, such as Syria, Lebanon and Iraq. It targeted Iran's military commanders, strategic sites and factions in different arenas, weakening coordination between the "Axis of Resistance" factions.

- The corrosive effects of sanctions — Iran is currently facing significant regional and international pressure due to the compounding effects of sanctions. Despite its aspirations to mitigate these challenges, the nation has struggled to navigate this complex landscape. This ongoing predicament has precipitated a series of internal crises, manifesting in acute economic instability and social unrest.

- The loss of coordination and central leadership — Although Iran sought to play a leading role in upholding the "unity of the arenas" principle, the divergence of interests and priorities of its

allies hindered the realization of a unified strategy.

- The imbalance of power between Iran and Israel — The Gaza war exposed the limited capabilities of the "Axis of Resistance" compared to Israel's military superiority, revealing that unifying the arenas was not a viable option in the absence of a balance of power.

Conclusion: Outcomes and the Future of Pezeshkian's Policy of Supporting Militias During 2025

Iran's recent shift to a "reformist" president following years of "hardliner" rule did not significantly affect its foreign policy position. This is because support for militias constitutes a critical lever of the Iranian geopolitical project. President Pezeshkian worked under "conservative" domination of state apparatuses and declared his loyalty from the first day of his rule to the supreme leader. Pezeshkian realized that support for the militias remains unconditional for the establishment. He also retained the strategy of "unity of the arenas," which Israel rendered meaningless at the end of 2024.

The so-called "Axis of Resistance" and the "unity of the arenas" strategy suffered unprecedented blows which will be difficult to recover from. This led many

experts to talk about the collapse of the resistance axis, with Iran losing the crown jewel of the Syria-Lebanon project, representing colossal material and human costs for Iran over the past years. During 2025, Iran will likely continue to monitor the Syrian scene in order to seize the opportunity to secure a new foothold in case of a chaotic scenario and internal fighting between local Syrian actors. It may collaborate with ISIS to stoke chaos and instability. However, its endeavors may collide with a new Syrian government that may ultimately resort to severing ties. The new Syrian government may cautiously build relations with Iran in light of Syrian public outrage over Iran's interference in domestic affairs. It is no exaggeration to state that Iran will never return to the Syrian arena in the short and medium term. It aided and abetted the Assad regime in committing the most heinous crimes against Syrians for almost a decade and a half. It may also collide with Israeli ambitions to secure additional victories and historical achievements. Upon his return, Trump will restore the policy of maximum pressure, making it difficult for Iran to return to the Syrian arena. In addition, its influence in Iraq will decline.

Therefore, Iranian ties with Syria will only be minimal during the next stage if things settle on Syria's part. Iran will be allowed to have diplomatic representation without interfering in Syrian affairs, continuing with demographic change or projects of sectarianism, expanding and investing in Syria, threatening neighboring countries, communicating with Hezbollah in Lebanon and helping it smuggle weapons through Syria. This can be within a conditional and very cautious Iranian-Syrian reconciliation framework. Syria, given the new stage, will ask Iran to pay compensation to the victims who Iranian militia members killed as part of official apologies for Iranian crimes in Syria during the Assad regime. Iran-Syria relations will be overshadowed by confrontation and severance if Iran adopts policies and employs tools that destabilize the situation in Syria in an attempt to fuel chaos and gain a new foothold in the country. In addition, the leaders of the new Syrian equation will likely reject the establishment of diplomatic relations with Iran so as not to affect Syrian relations with parties that fear the Iranian threat. In any case, normal relations between Iran and Syria are unlikely to resume in light

of the new government in Syria and the current government in Iran.

The Resilience of Gulf-Iran Relations Amid Testing Circumstances

Gulf-Iran relations demonstrated significant dynamism in 2024, shaped by key regional developments from the previous year, including the rapprochement agreement between Saudi Arabia and Iran brokered by China, the events of October 7 and the subsequent shift in the Israel-Iran conflict from proxy wars to direct military engagement. These developments spurred intensive diplomatic efforts to contain the resulting escalation. Consequently, Gulf-Iran relations face critical tests, such as overcoming the crisis of mutual distrust, navigating the complexities of maintaining positive neutrality in the Israel-Iran conflict and managing longstanding contentious issues. These dynamics will determine whether the region can establish a new framework for relations that neutralizes areas of contention while promoting security and stability on both sides of the Gulf. This 2024 ASR explores three primary developments in the Gulf-Iran relations: the test of trust-building, the challenge of neutrality in the Israel-Iran confrontation and the handling of traditional dis-

putes. Finally, it concludes with future scenarios for Gulf-Iran relations in light of regional and global developments.

Navigating the Crisis of Confidence

Marred by decades of accumulating crises and repeated failed attempts at rapprochement, simmering tensions have been the hallmark of Gulf-Iran relations. A deep-seated crisis of trust has often driven these relations toward direct confrontation, notably following the severance of Saudi-Iran ties in 2016. Central to these tensions is Iran's regional expansionist project, which is ideologically driven and characterized by its use of sectarian dimensions to achieve strategic objectives. This approach has involved destabilizing the security of the Gulf states and interfering in their internal affairs. As a result, the divergence in orientations has evolved into conflicts of interest, with the instigation of crises emerging as an enduring feature of Iranian policy toward the Gulf to which the Gulf states respond in a bid to counter these persistent challenges.

International and regional powers have leveraged these tensions to advance their interests in the region, exacerbating instability and affecting all parties involved. Iran, in particular, has borne

significant consequences due to its strained relations with key international powers, sanctions related to its nuclear program, and the financial burdens of its expansionist projects, which have come at the expense of domestic development. Consequently, Iran has increasingly recognized that antagonizing its neighbors and undermining their security yields no tangible benefits. Instead, genuine reconciliation has emerged as a more viable pathway to shift relations from conflict to calm, with the potential for future cooperation. Against this backdrop, the Saudi-Iran agreement, brokered by China, has opened a new chapter in Gulf-Iran relations, underscoring Saudi Arabia's pivotal role within the GCC.

The détente between Saudi Arabia and Iran has undergone several significant tests within a relatively short time, yet critical barriers remain, particularly those tied to deep-seated ideological differences. These ideological issues, central to Iranian political discourse, present a notable challenge to rebuilding trust. For instance, during heightened tensions between Iran and Israel, Iranian Supreme Leader Ali Khamenei invoked sectarian narratives in an X post (formerly Twitter). He referred to the Sunni-Shiite dichotomy, describing

the conflict as “the battle between the Hussaini front and the Yazidi front.” In his remarks, he quoted Imam Hussain on the nature of resistance to injustice: “The Messenger of God, may God bless him and his family, said: ‘Whoever sees an unjust ruler.’ The issue is the issue of injustice and oppression; the Hussaini front is today resisting the Yazidi front, that is, the front of injustice and oppression.”⁽⁵⁹⁾ To move beyond such challenges, both sides must avoid inflammatory narratives, engage in meaningful discourse and make conciliatory moves. These measures could contribute to restoring mutual trust over the medium term. Encouraging signs have emerged from Gulf leaders, particularly Saudi Crown Prince Mohammed bin Salman. In his speech at the Extraordinary Arab and Islamic Summit in Riyadh, he emphasized the importance of respecting sovereignty and urging the international community to oblige Israel “to respect the sovereignty of the sisterly Islamic Republic of Iran and not to violate its lands.”⁽⁶⁰⁾

The Challenge of Maintaining Positive Neutrality in the Israel-Iran Dispute

The foreign policy approaches of the Gulf states demonstrate noticeable variations, particularly regarding specific

regional issues. However, they remain united in their stance on shared security challenges. A clear illustration of this alignment is their unified perspective on the ongoing conflict between Israel and Iran. This unity became particularly significant after the escalation of direct military confrontation between Tehran and Tel Aviv following the recent events in Gaza. The conflict has raised critical questions about the Gulf states' positions, especially given their intermediary role between Iran and Israel. The situation is further complicated by the presence of US military bases in some Gulf states, which could, directly or indirectly, become involved in any potential Israeli action against Iran.

In light of these concerns, Iranian Foreign Minister Abbas Araghchi conducted multiple diplomatic tours across Gulf state capitals as part of Tehran's efforts to mitigate the risks of an Israeli attack. A key objective was to prevent such an assault by leveraging influential Gulf powers to pressure the United States into halting Israeli plans or at least limiting the scope of any operation. Tehran feared that without these assurances, an Israeli strike could escalate into a broader regional conflict, posing significant risks to Iran's security and stability. Another crucial goal for Iran was to ensure that

the Gulf states would remain neutral in any conflict, particularly by denying Israel or the United States access to their airspace for a potential attack. Iranian concerns were compounded by the increasing US role in the confrontation, highlighted by the deployment of the THAAD missile defense system in Israel and enhanced US-Israeli coordination regarding the nature, timing and target selection for a potential strike.

The Gulf states have affirmed their commitment not to participate in any military strike on Iran, particularly as it was revealed that Israeli aircraft passed through Syrian and Iraqi airspace. It is also plausible that some Gulf states played a role in persuading the US administration to exert pressure on Israel, urging it to limit the number of attack targets in order to prevent the situation from escalating into a broader regional conflict. This Gulf approach reflects a self-driven conviction rooted in national interests, as outlined in the GCC's vision for regional security, published in March 2024. This vision marked a shift in the GCC's traditional understanding of security, moving toward a multilayered interpretation. In this context, the process of de-escalation between Iran and Saudi Arabia, and by extension between Iran and the GCC, is not merely

a tactical maneuver but represents a strategic shift. If this leads to stable relations, it could signify the adoption of a new approach, informed by the evolving perceptions of decision-makers on both sides.⁽⁶¹⁾

The possibility of a confrontation between Iran and Israel remains a looming threat, particularly with Iran's warning of retaliation against any Israeli attack and Israel's own pledge that its next response will be even more extensive. However, the Gulf states have indicated a firm commitment to maintaining a stance of positive neutrality, refraining from assisting in any military action. At the same time, they are actively pursuing efforts to de-escalate tensions, mediate a ceasefire and support international initiatives aimed at finding long-term solutions to the Palestinian issue, which remains at the heart of the regional conflict. The Gulf states' unique position, along with their complex and intertwined relationships with global and regional powers — including Israel, with whom some Arab nations have normalized ties — puts them in a delicate balancing act. US President Donald Trump may attempt to complete the normalization process, but he is likely to encounter stronger support for the “two-state solution” proposed by international

organizations, Arab and Islamic countries and major global powers. This broader consensus could help facilitate the integration of Gulf-Iran relations and steer the region away from returning to polarized axis-based policies.

Managing Longstanding Contentious Issues

The Gulf states are maintaining their firm positions on contentious issues with Iran, such as the occupied UAE islands, the Dorra field and the nuclear program. While they are working toward improving relations with Iran, they continue their vigorous efforts to rally international support for their stances on these matters. After Russia and China backed the Gulf vision for resolving the dispute over the occupied UAE islands, despite Iranian objections,⁽⁶²⁾ the EU also aligned with the Gulf position during the first EU-GCC summit on October 18, 2024. In its joint final statement, the EU called on Iran to end its occupation of the three islands — the Greater Tunb, Lesser Tunb and Abu Musa — declaring that this occupation violated the sovereignty of the UAE and the principles of the United Nations Charter.⁽⁶³⁾ Similarly, the Gulf states consistently assert that the Dorra field lies entirely within Kuwait's maritime zones, with the natural

resources in the submerged area adjacent to the Saudi-Kuwaiti Divided Zone being co-owned exclusively by Saudi Arabia and Kuwait. Both nations hold full rights to exploit these resources.⁽⁶⁴⁾ Additionally, during the 161st session of the GCC Ministerial Council on September 19, 2024, the council emphasized the necessity of Iran adhering to uranium enrichment limits required for peaceful uses and urged Iran to fully cooperate with the International Atomic Energy Agency (IAEA), underlining the importance of compliance with international nuclear obligations.⁽⁶⁵⁾

Reaching solutions to these complex issues is challenging and it is unlikely that the positions of the Gulf states and Iran will change significantly due to differing visions, particularly as these issues are closely tied to national sovereignty. However, the mutual challenges faced by both parties, along with the pressing need to implement development plans aimed at advancing their economies, encourage efforts to neutralize these problems and avoid allowing them to trigger a new wave of conflict. Notably, the debate has remained within the framework of peaceful diplomacy, even though discussions can be strict and at times sharp from both sides. Furthermore, the success of regional

security cooperation has the potential to serve as an entry point for addressing and eventually resolving these contentious issues over the long and medium term.

Conclusion: Directions of Gulf-Iran Relations in 2025

Gulf-Iran relations have successfully navigated the challenges of 2024, particularly by avoiding involvement in the military confrontation between Iran and Israel. However, risks remain due to the ongoing war in Gaza, developments in Syria, and the uncertainty surrounding Israeli Prime Minister Benjamin Netanyahu's policies. His refusal to alter his war goals, which led to the dismissal of Defense Minister Yoav Gallant, along with the continued resistance of Hamas despite heavy Israeli strikes, has created a volatile environment that could lead to further escalation. Additionally, the rise of tensions in Syria adds to the potential for further escalation between Israel and Iran. The long-term prospects for an agreement to end the war in Gaza and achieve a comprehensive settlement of the Palestinian issue are increasingly uncertain, especially with the return of Trump to the US presidency. His administration's approach, which includes supporting Israel and

imposing sanctions on Iran, could push the Gulf states to apply more pressure on Tehran. However, both Gulf and Iranian positions in 2024 indicate an awareness of the dangers of escalation, which makes 2025 a critical year for the future of their relations. The most likely scenario appears to be the continuation of calm diplomatic engagement, with both sides recognizing the importance of avoiding a return to past tensions, given the significant losses they endured.

Tensions remain a looming possibility, particularly due to the decisions issued by the IAEA against Iran concerning its nuclear program and Iran's increasingly aggressive nuclear activities. This could lead to new sanctions from the United States or the activation of the snapback mechanism, which would result in a comprehensive economic embargo on Iran. Additionally, the risk of an Israeli attack on Iranian nuclear facilities could escalate tensions, potentially destabilizing the region and negatively affecting the Gulf states and their relations with Iran. However, this scenario is considered unlikely, given the pragmatism of the Iranian establishment and the leadership of Pezeshkian, whose government has signaled a desire to improve international relations.

Cautious, Calculated Progress in Iran's Rapprochement With Egypt and Sudan

The 2023 ASR highlighted the possibility of rapprochement between Iran and the Arab sphere amid regional developments, particularly following the Saudi-Iran agreement to restore relations under Chinese mediation in March 2023. This agreement marked the start of a new regional phase, characterized by reconciliations, until the outbreak of the Israeli war on Gaza in 2024. During this period, Iran intensified its efforts to build closer ties with Egypt and Sudan, leveraging regional developments, such as the Gaza conflict along Egypt's border and the turmoil in Sudan due to the conflict between the Sudanese army and the RSF. These circumstances created opportunities for Iran, as Egypt and Sudan sought regional and international support to address security threats. This 2024 ASR examines Iran's calculated progress in its rapprochement with Egypt and Sudan, focusing on three main aspects. First, it analyzes Iranian efforts to strengthen relations with Egypt. Second, it explores Iran's moves to build closer ties with Sudan. Finally, it provides a forward-looking perspective on the potential trajectory

of Iran's relations with both Egypt and Sudan in 2025.

Iranian Efforts to Reconcile With Egypt

Egypt-Iran relations entered a new phase of rapprochement following the Saudi-Iran settlement agreement, which paved the way for broader Gulf-Iran reconciliation. This shift introduced a degree of flexibility in the relationship between Cairo and Tehran. It also alleviated, at least partially, the constraints posed by Gulf states on Egypt's alignment with Iran.

The Gaza War and Egypt-Iran Rapprochement

The pace of rapprochement between Egypt and Iran has accelerated in the wake of the conflict in the Gaza Strip, which has thrust the Middle East back into the center of international tensions. This situation has introduced overlapping threats and challenges, prompting regional countries to mobilize efforts and intensify diplomatic activity to address emerging security risks. The escalation strategy pursued by the Israeli government, particularly its attempts to leverage the war to achieve long-term objectives that pose a threat to Egyptian national security, has further underscored the urgency of such cooperation.

The Israeli war on Gaza introduced new security threats to Egypt's national security, compelling the Egyptian authorities to reassess the regional landscape to counter these challenges and safeguard the country's security and interests. Recognizing early signs of Israel's alleged plan to displace Palestinians from Gaza into the Sinai and those from the West Bank to Jordan as a step toward liquidating the Palestinian cause, Egypt declared a firm and categorical rejection of any such displacement and reaffirmed its commitment to preserving Palestinian rights. Additionally, the Houthi involvement in the conflict, marked by threats to target Israeli commercial ships and vessels heading to Israeli ports at the southern entrance to the Red Sea, further complicated the situation. This escalation caused many shipping companies to reroute via the Cape of Good Hope rather than the Suez Canal due to security concerns. The resulting decline in Suez Canal traffic had significant repercussions on Egypt's already strained economy, given the canal's critical role as a vital source of national revenue.

Iran could not escape the impact of the Gaza war, despite its immediate denial of any involvement in Operation Al-Aqsa Flood. The conflict eventually

drew Tehran into active engagement by deploying its regional proxies. However, Israel deviated from the traditional rules of engagement, escalating the Iran-Israel hostility into a direct confrontation marked by missile exchanges. This heightened tensions, exposing Iran's strategic assets to significant threats, particularly its critical oil infrastructure and nuclear program. The situation intensified following high-profile assassinations, including the deaths of Hamas Political Bureau Chief Ismail Haniyeh in Tehran, Hezbollah Secretary-General Hassan Nasrallah and other key Hezbollah leaders. These developments pushed Iran to seek closer ties with influential Arab states.

Regional Escalation and Enhancing Rapprochement

Faced with threats to their national interests, both Egypt and Iran have pursued distinct but interconnected strategies during the Gaza war. Egypt has worked to garner regional and international backing for its vision of a unified Arab and Islamic stance to pressure Israel to halt the conflict. To this end, Cairo has actively engaged regional and international actors to push for a ceasefire. In this context, Egypt's openness to dialogue with Iran reflects

a pragmatic approach rooted in its strategic interests. On one hand, Iran is recognized as a significant regional power with substantial influence due to its close ties with Hamas and its support for various armed groups active in the conflict against Israel. This influence could escalate the war into a broader regional confrontation with serious implications for Egypt. On the other hand, Egypt views Iran as a potential lever to address Houthi aggression in the Red Sea, which undermines Cairo's efforts to de-escalate the conflict and prevent its expansion. Consequently, consultations with Iran may aid in reducing Houthi attacks and aligning regional efforts toward achieving a ceasefire.

Iran recognizes Egypt's pivotal role in regional dynamics and the Palestinian cause, prompting Tehran to pursue enhanced cooperation and dialogue with Cairo. This strategy aims both to address shared security concerns and to capitalize on the current circumstances facing Egypt. To this end, Iran has intensified its engagement with Egypt through various channels and levels of communication. Notable progress has been made through bilateral meetings on the sidelines of international forums. The first such meeting between the Egyptian and Iranian presidents occurred during the

Extraordinary Arab and Islamic Summit in Riyadh in November 2023, convened to address Israeli aggression against the Palestinians. Another significant encounter occurred at the BRICS summit in Kazan, Russia, in October 2024.

In 2024, high-level diplomatic engagement between Iran and Egypt intensified, with multiple talks between their foreign ministers. Notable meetings included those held in February on the sidelines of the UN Human Rights Council sessions in Geneva, in May during the 15th session of the Islamic Summit Conference in Gambia, and again on September 28 during the 79th session of the United Nations General Assembly. These meetings primarily focused on the fallout from Israel's actions in Gaza, regional security and the unresolved issues between the two nations. Further emphasizing the strengthening of relations, Iranian Foreign Minister Abbas Araghchi visited Egypt on October 17, 2024, marking the first visit by an Iranian foreign minister in 10 years, following Ali Akbar Salehi's visit in 2013. Araghchi, arriving from Jordan as part of a regional diplomatic tour, sought to coordinate efforts to halt Israeli aggression and push for a ceasefire in Gaza and Lebanon, following the Iranian

Operation True Promise 2 launched on October 2, 2024.⁽⁶⁶⁾

Iran's Rapprochement With Sudan

Sudan-Iran relations, which had been strong for over 30 years, shifted dramatically starting in March 2015 when former Sudanese President Omar al-Bashir decided to join the Saudi-led coalition supporting Yemeni legitimacy against the Iran-backed Houthi rebels. This move marked a turning point in bilateral ties. On January 4, 2016, the Sudanese president announced the complete severance of diplomatic relations, expelling the Iranian diplomatic mission and ending all forms of the Iranian presence in Sudan. This decision was driven by the growing influence of Iranian sectarianism in Sudan and was made in solidarity with Saudi Arabia, following the storming and vandalism of the Saudi embassy in Tehran and its consulate in Mashhad.

Evolution of Sudan-Iran Ties

After seven years of diplomatic estrangement, Sudan and Iran announced in July 2023 their intention to restore relations. This decision came after a meeting between the foreign ministers of both countries during the Non-Aligned Movement (NAM) meeting in

Baku, Azerbaijan. Subsequently, the two nations officially resumed diplomatic ties on October 9, 2023, through a joint statement from their foreign ministries. The statement emphasized that the restoration of relations was the result of recent interactions between senior officials and aligned with their national interests.⁽⁶⁷⁾ By July 2024, Sudan and Iran had reopened their embassies, marking the formal resumption of diplomatic activities after years of rupture.

The Resumption of Ties Against the Backdrop of Regional Crises

There are several regional shifts that have contributed to the resumption of Sudan-Iran ties, most notably:

- **The path of regional de-escalation following Saudi-Iran reconciliation:** Saudi-Iran relations were resumed following the agreement brokered by China in March 2023, which led to the normalization of ties between the two nations. This agreement marked the end of the rivalry between competing axes and the escalating confrontation between Iran and its allies on one side and Saudi Arabia and its allies on the other. In light of this shift, Iran has sought to strengthen or restore its relations with Arab countries, including Sudan, as part of its broader strategy to rebuild ties in the region.

■ **The conflict between the Sudanese army and the RSF:** Since mid-April 2023, Sudan has been embroiled in a devastating war triggered by the failure of the Sudanese army and the RSF to reach an agreement on completing the transitional phase. The RSF's rejection of a merger plan under a unified national military command and its subsequent coup attempt to seize power by force deepened the conflict. Regional powers have played significant roles, with both sides seeking external support to bolster their military positions. Amid this chaos, Iran saw an opportunity to reassert its influence in Sudan. The Sudanese army, following the failure of various crisis resolution initiatives and an influx of weapons to the RSF, found itself in need of support. Initially, Iran stayed neutral, likely to avoid taking sides between the Sudanese army, led by Lieutenant General Abdel Fattah al-Burhan, and the RSF, led by Lieutenant General Mohamed Hamdan Dagalo (Hemedti). This stance was influenced by Iran's preference for dealing with regular armies and Hemedti's longstanding distrust of Tehran, along with the RSF's ties to the UAE; the RSF had been involved in Yemen's conflict against the Iran-backed Houthis.⁽⁶⁸⁾ However, in recent months, a

series of secret meetings between Iran and Sudanese officials have led to military support for the Sudanese army. Iran supplied various weapons, including drones, particularly the Mohajer-6, which have played a pivotal role in shifting the course of the war. Information indicates that the Sudanese army's expanded use of drones in 2024 contributed significantly to its recent successes, especially in Khartoum and the recovery of Sennar State, altering the balance of power on the ground in favor of the army.

Conclusion: Prospects for Iranian Rapprochement With Egypt and Sudan in 2025

Egypt-Iran relations have been marked by severance and stagnation for decades, shaped by Egypt's consistent stance. This Egyptian stance combines avoiding direct confrontation with Iran while refraining from adopting policies against the country, and at the same time, firmly rejecting Iran's geopolitical ambitions and interference in the internal affairs of Arab states. Despite some signs of Iranian efforts to improve relations with Egypt, the Egyptian response has been notably slow, characterized by a cautious and traditional perspective that upholds Egypt's longstanding policy toward Iran.

The outbreak of the Gaza conflict has altered regional dynamics, compelling Egypt to reassess its priorities amid ongoing economic crises. In this context, Egypt has been prompted to engage with Iranian rapprochement efforts at the summit level, marking a shift from the past when such efforts were limited to the ministerial level. This shift reflects Egypt's need for both regional and international support to press Israel into halting the Gaza war and preventing its broader objectives, while also addressing the Houthi attacks on commercial ships near the Red Sea's southern entrance, which impact the Suez Canal. However, this new phase of Egypt-Iran rapprochement is driven primarily by Egypt's immediate national interests rather than a desire to completely align with Iran. It does not signify the end of the historical competition between the two countries, with Egypt's approach to Iran remaining cautious and dependent on how regional events unfold in 2025, with significant attention paid to those that will directly threaten Egyptian national security.

The resumption of relations between Egypt and Sudan may have significant repercussions and lead to various trends for both countries and the wider region

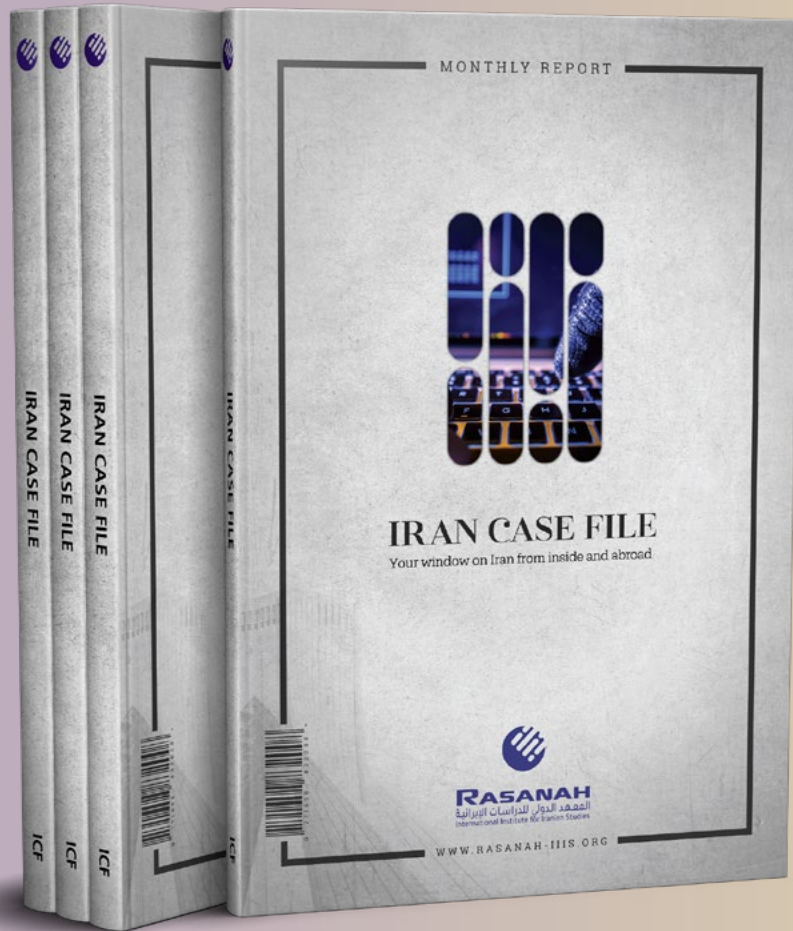
in 2025. These trends can be summarized as follows:

- **Iran regains its influence in Sudan and the African continent:** While Saudi Arabia and the Gulf states have worked to weaken Iran's influence in Sudan and some other African nations in recent years, Iran is poised to regain a foothold in Sudan amid the current crisis. By aligning with the Sudanese army, Iran aims to re-establish its influence, which could have strategic implications for the region, particularly in East Africa and the Horn of Africa. Sudan provides Iran with a gateway to strengthening its position

along the Red Sea coast, leveraging its relative proximity to the African continent's eastern and western shores.

- **Stopping the normalization process between Israel and Sudan:** The resumption of diplomatic ties between Iran and Sudan could potentially halt Sudan's normalization process with Israel. This shift could disrupt the security dynamics of the Red Sea region, especially given Israeli concerns over Iran's growing presence in the area, particularly in the context of Iran smuggling weapons to Hamas amid the Gaza conflict.

- **Supporting the Sudanese army and strengthening Iran's military presence in Sudan:** Iranian military support to the Sudanese army has already started to make an impact, with the army regaining territories from the RSF. This collaboration is likely to increase, with Iran potentially providing more military aid, including equipment and personnel, similar to its involvement in Syria, Iraq and Yemen. Such support would further solidify Iran's strategic position in Sudan.



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IRAN'S RELATIONS WITH REGIONAL AND INTERNATIONAL POWERS

The Future of the Nuclear Talks Under Pezeshkian's Government

Rasanah's 2023 ASR anticipated that Iran might leverage the current regional climate to advance its nuclear ambitions, including potentially militarizing its nuclear program — a prediction that developments have validated. Alongside policies of nuclear ambiguity and increasing production of highly enriched uranium, some Iranian officials have hinted at altering the country's nuclear doctrine, citing intensified confrontations with Israel and a perceived decline in Iran's deterrence capabilities. Notably, this shift in rhetoric coincides with President Pezeshkian's efforts to de-escalate tensions with the West, emphasize diplomacy, and revive negotiations over Iran's nuclear program. However, with Trump's return to office, the Pezeshkian government will face critical challenges, especially if Trump revives his “maximum pressure campaign” against Iran and imposes further sanctions.

The 2024 ASR explores the most significant developments in Iran's nuclear program, in addition to Iran's options for addressing the mounting pressure from the United States and the international community. It is expected that this pressure will intensify the closer

Iran approaches its nuclear threshold. This section discusses two key topics: Pezeshkian's diplomacy and domestic pressure to change the nuclear doctrine, as well as the Western pressure to contain Iran's nuclear program. Finally, it forecasts the future of the nuclear talks in light of the policies of both Pezeshkian and Trump.

Pezeshkian's Diplomacy and Domestic Pressure to Change the Nuclear Doctrine

The death of Raisi in May 2024 marked a significant turning point that unsettled the Iranian establishment. The arrival of President Pezeshkian, accompanied by the return of former Foreign Minister Mohammad Javad Zarif — the architect of the nuclear deal — as a strategic affairs adviser, appeared to be a calculated move by the establishment to regain stability. This leadership shift signaled an effort to reassess nuclear negotiations and seek an understanding with Western powers, recognizing that such a course is crucial to alleviating the impasse Tehran faces. Pezeshkian's program prioritized dialogue with Washington and fostering agreements on the nuclear issue. Pezeshkian's government aimed to ease the pressure on Iran's economy, which has been significantly

strained under international sanctions. Additionally, the new approach sought to navigate Iran out of its regional crises, mitigating the risks of escalating tensions that could potentially lead to a direct confrontation with the United States.

Supreme Leader Ali Khamenei authorized Pezeshkian to resume indirect negotiations with the United States regarding Iran's nuclear program. "There is no harm in dealing with the enemy," Khamenei remarked during a meeting with the new government, signaling a pragmatic shift amid mounting national challenges. This statement came against the backdrop of an Iranian economy nearing collapse due to crippling sanctions, surging inflation and widespread dissatisfaction among the country's youth. In response, Pezeshkian announced from the UN podium that Iran was prepared to resume adherence to the Joint Comprehensive Plan of Action (JCPOA) provided that all parties honored their commitments. Moreover, he expressed Iran's willingness to engage in dialogue on additional matters once the nuclear issue was addressed.⁽⁶⁹⁾ This development paved the way for Oman to sponsor indirect negotiations between Tehran and Washington, which extended beyond the nuclear program to

include discussions on regional de-escalation and avoiding the expansion of confrontations in the Middle East.

However, these negotiations encountered significant obstacles, with Iranian Foreign Minister Araghchi announcing in October 2024 that the indirect talks mediated by Oman with the United States had been suspended. Tehran, he explained, found "no basis for dialogue amid the wars and escalating tensions in the region." This marked a pronounced shift in the rhetoric of Pezeshkian's government.⁽⁷⁰⁾ This rhetorical deviation exposed the lack of a unified internal consensus on the path Pezeshkian was pursuing. The Iranian president's authority over the nuclear file is notably constrained, with multiple factions influencing the country's strategic decisions. Some of these factions actively opposed Pezeshkian's approach, including Khamenei. His reported withdrawal of support for Pezeshkian's negotiation efforts, encapsulated in his assertion that "the United States cannot be trusted," effectively undercut the president's ability to implement his agenda before any practical steps could be undertaken.

Although Pezeshkian advocates for diplomacy, escalating tensions, particularly following reciprocal military strikes between Iran and Israel, have

intensified discussions about the potential need for Iran to revise its nuclear doctrine. This debate gained traction after Kamal Kharrazi, the supreme leader's adviser and former foreign minister, stated that Iran might be compelled to alter its nuclear doctrine if confronted with an existential threat. His remarks came in the aftermath of Iran's missile and drone attacks on Israel in April 2024. Adding to this, Commander of the Islamic Revolutionary Guard Corps (IRGC) Nuclear Protection Unit Brigadier General Ahmad Haq-Talab indicated that a review of Iran's nuclear policies and doctrine was underway, suggesting a departure from previously declared positions. Notably, this marked the first instance of a military official explicitly addressing the subject of nuclear weapons.

This development appears to have paved the way for 39 members of the Iranian Parliament to send a letter to the Supreme National Security Council, urging it to reconsider the nation's nuclear doctrine. While this initiative did not result in any explicit policy changes, it underscored the intensity of the internal debate on this critical issue. The letter also served as a dual signal: it conveyed a message to the United States about Iran's evolving stance and sought to

bolster Iran's deterrence capabilities to restore strategic parity with Israel. This occurred against the backdrop of significant strategic setbacks inflicted on Iran and its regional allies by Israel, with the backing of Washington. Such parliamentary action, alongside broader political rhetoric, aligns with Western and US reports suggesting that Iran may be on the verge of altering its nuclear doctrine.

Western Pressure to Contain Iran's Nuclear Program

Throughout 2024, Tehran intensified its nuclear activities by enriching uranium to 60%, expanding the installation of advanced centrifuges and constructing additional nuclear facilities. These developments occurred alongside measures to restrict the operations of international inspectors, significantly limiting the International Atomic Energy Agency's (IAEA) ability to monitor Iran's nuclear program effectively. Iran also failed to provide satisfactory explanations regarding the discovery of man-made uranium particles at its sites,⁽⁷¹⁾ further straining its relations with the IAEA. Additionally, the agency reported a loss of "continuity of knowledge" concerning Iran's production and stockpiles of critical nuclear materials, including centrifuges, rotors, heavy

water, and uranium ore concentrates, raising serious concerns about the transparency and purposes of Tehran's nuclear activities.⁽⁷²⁾

IAEA Director General Rafael Grossi made consistent efforts throughout 2024 to address the growing crisis surrounding Iran's nuclear program. In May 2024, Grossi visited Tehran and engaged in consultations with Iranian officials, seeking to restore the agency's oversight and obtain explanations for traces of enriched uranium found at three sites. Despite these efforts, the negotiations yielded no tangible results. Subsequent IAEA reports, issued between May 27 and June 13, highlighted Iran's ongoing expansion of its nuclear program in ways which were deemed to lack any credible civilian purpose. The reports also revealed that Iran's stockpile of highly enriched uranium, at 60% purity, had reached approximately 164.7 kilograms. These developments prompted European countries and the United States to submit a draft resolution to the IAEA Board of Governors condemning Iran's actions.⁽⁷³⁾

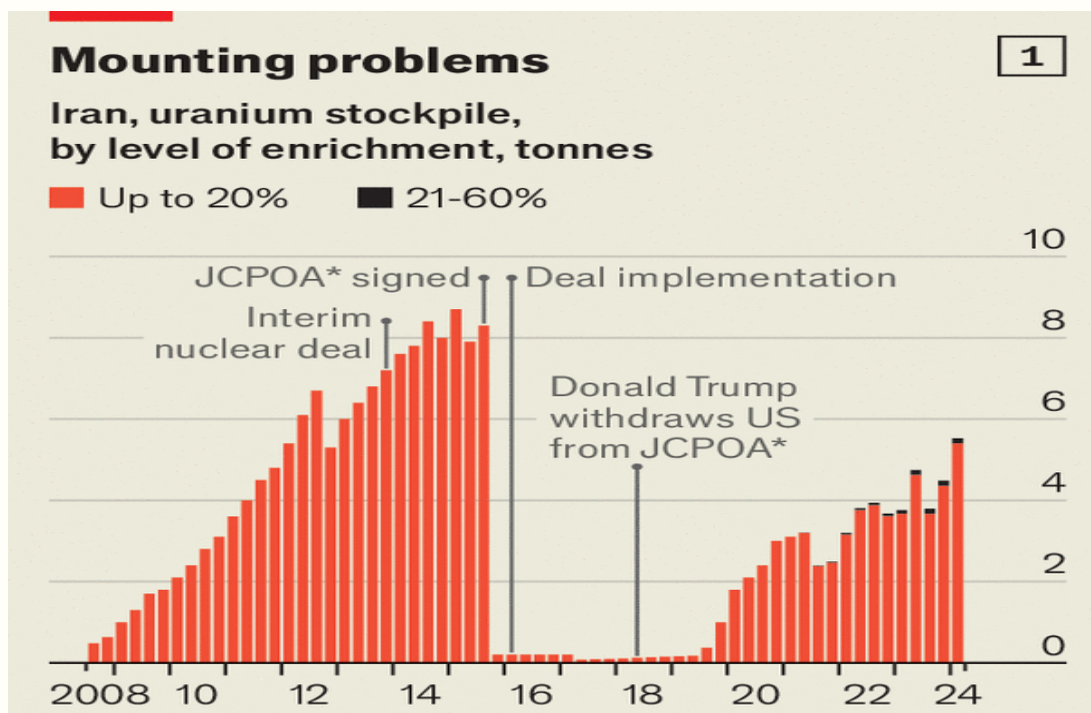
Despite mounting concerns and reports from the IAEA, the agency refrained from adopting any resolution to condemn Iran's actions, likely to preserve the potential for diplomacy.

Consequently, Iran continued its nuclear activities unabated. By October 26, 2024, the stockpile of highly enriched uranium (60% purity) had grown to 183.2 kilograms (see Figure 4.6). This increase in Iran's stockpile, along with its advancements in heavy water production and the deployment of more advanced centrifuges, signaled a clear violation of the 2015 JCPOA.

The Iranian nuclear issue has increasingly become a significant source of concern for the international community, especially with growing internal calls for Iran to alter its nuclear doctrine. Reports from the United States have raised alarm over Iran's accelerated production and operation of centrifuges for uranium enrichment. The IAEA and the European Troika have assessed that Iran has accumulated enough highly enriched uranium, which, if enriched to 90%, could theoretically be used to manufacture up to four nuclear explosive devices. In response, pressures on Iran have intensified once again, as the international community seeks to address these developments and prevent further escalation.⁽⁷⁴⁾

These mounting pressures appear to have led Iran to reconsider its escalatory approach, as demonstrated by its return to dialogue with the IAEA. In mid-November 2024, Iran hosted Grossi and

Figure 4.6: Iran’s Enriched Uranium Levels Before and After the US Withdrawal From the JCPOA



Source: “Iran’s New Leaders Stand at a Nuclear Precipice,” *The Economist*, May 20, 2024 accessed January 1, 2025, <https://n9.cl/3zpz0>.

presented an offer to limit its stockpile of 60% enriched uranium to 185 kilograms, which was the amount it had accumulated prior to making the offer. Additionally, Iran proposed allowing four more inspectors to monitor its facilities and the progress of its nuclear program.

This flexibility can be interpreted as part of Iran’s efforts to contain the ongoing crisis. It appears to be a preemptive

move to calm tensions as Trump returns to the White House, aiming to reposition itself and possibly create a rift between Trump’s stance and that of European countries. This strategy seems designed to prevent the nuclear file from returning to the Security Council. More crucially, it precedes a meeting of the IAEA, where European nations were preparing

to hold Iran accountable — an outcome that indeed materialized.⁽⁷⁵⁾

Although Iran announced the activation of new and advanced centrifuges in response to the IAEA’s resolution, which passed with the support of the United States and Europe by a majority of 19 votes to 3, and with 12 abstentions, Iran simultaneously initiated talks on its nuclear program with the European Troika in Geneva on November 29, 2024. Iran also expressed its readiness to sign a new agreement, which aligns with the demands made by Trump during his first term. This could signal Iran’s desire to de-escalate and seek a path toward calming the situation.⁽⁷⁶⁾

Conclusion: The Future of the Nuclear Talks in Light of Pezeshkian and Trump’s Orientations

The nuclear negotiations have been effectively stalled since mid-2022, but hopes for their resumption were renewed in 2024 following the election of “reformist” President Pezeshkian. Iran’s room for maneuver has become increasingly limited with Trump’s return to the White House, but Pezeshkian faces opposition from “hardliners” within Iran who advocate for the acquisition of a nuclear deterrent to counter Israel and the United States. This stance

is reinforced by the fact that Iran is approaching the nuclear threshold, both in terms of time and technical knowledge. Therefore, Iran may approach the nuclear issue from an ideological perspective, driven by internal pressure to change its nuclear doctrine, and could be working secretly toward developing a nuclear bomb, either at an accelerated or gradual pace. This is plausible given the quantities of highly enriched uranium Iran has accumulated recently, which are seen as an important investment in the survival of the Iranian republic. A nuclear weapon would serve as an effective means of strategic deterrence, help maintain the regional balance of power, and provide economic benefits. This option is further supported by the fact that Iran is facing a critical situation, where its traditional deterrence capabilities are insufficient to secure the establishment's survival. The nuclear file might also be used as leverage in broader negotiations regarding its regional interests. Additionally, Iran's experience in overcoming sanctions and receiving support from Russia and China, coupled with pressure from the "hardliners" who view any negotiations with the Trump administration as a "betrayal of the blood of Martyr Soleimani" and an

affront to the dignity of the Iranian republic, makes this path even more likely.⁽⁷⁷⁾

There is, however, a more pragmatic perspective: Iran could replicate the strategy it followed after Trump's withdrawal from the nuclear agreement in 2018, continuing until the end of his first term in early 2021. This strategy involved relying on a policy of strategic patience, navigating through pressures and sanctions, while resuming cooperation with the IAEA to avoid creating a US-European consensus that could lead to the reinstatement of international sanctions. It is notable that Pezeshkian himself emphasized the importance of managing the relationship with the United States following Trump's success, "We must treat our friends generously, and treat our enemies patiently." Additionally, Iran's announcement of dialogue with European parties and its readiness to negotiate a new agreement with Trump suggest that this approach could be a viable alternative.⁽⁷⁸⁾

What compels Iran to consider this direction is the anticipation of Trump's approach and his unpredictable policies, which could include the restoration of maximum pressure and the potential targeting of nuclear facilities if Iran refuses to sign a new agreement with his administration, or if Israel is supported

in doing so. Iran also fears that Western powers, through the IAEA Board of Governors, may call for the Iranian nuclear file to be referred to the United Nations Security Council. This increases the likelihood of restoring international sanctions on Iran, especially if one of the European Troika members invokes the snapback mechanism for sanctions outlined in the nuclear agreement and Security Council Resolution 2231 before October 2025. This looming threat serves as a significant pressure point on Iran, which may compel it to adopt a more pragmatic approach and resume diplomacy, possibly agreeing to a new deal, especially since Pezeshkian is positioned to bear the burden and cost of this option.

To conclude, Tehran will face a critical decision: either sign a new agreement that aligns with Trump's priorities and the pragmatic approach of Pezeshkian and Zarif, or adhere to ideological mandates, as advocated by Iranian "hardliners," including the IRGC. This would expose Iran to pressures more intense than those it faced during Trump's first term, with the potential for military strikes on its nuclear facilities, posing existential risks to the establishment. However, before making any decision, Iran is likely to test its ability to buy time and exercise

strategic patience, hoping to navigate through Trump's term with minimal losses and commitments, just as it did during the early years of his first term.

The Future of Iran's Relations With the Eastern Bloc Under Pezeshkian's Government

Developments in Iran's relations with the two major leading powers of the Eastern bloc, China and Russia, during 2023 indicated continued progress. This trend was noted in Iran's relations with each of them during 2024. These relations prevailed despite the shift in the presidential landscape from "conservative" dominance to the return of the "reformists," marked by the death of former Iranian President Raisi in a helicopter crash in May 2024, and the election of "reformist" President Pezeshkian at the beginning of July of that same year. Iran also maintained, under Pezeshkian's rule, its "Look to the East" policy established during Raisi's presidency, despite "reformist" inclinations toward opening up to the West in the hope of lifting sanctions as an effective and swift solution to address complex crises. The 2024 ASR discusses the future of Iran's relationship with the Eastern bloc during both the presidencies of Raisi and Pezeshkian.

It reviews regional and international developments through two main topics: the first tackles China's diplomatic balancing approach toward Iran, and the second discusses the pragmatism of Russia-Iran relations. Finally, this part concludes with the expected trajectories regarding Iran's relations with the Eastern bloc in 2025.

China's Diplomatic Balancing Act With Regard to Iran

China is viewed as a potential international power capable of shaping the future global order, thanks to its global tools that aim to transform the world into a system that moves further away from the absolute dominance of the United States. Thus, China holds great importance in Iranian strategy. This was evident in 2024, as Iran continued to pivot toward China to enhance economic relations within the framework of the strategic partnership agreement signed by the two countries years ago. This strategy was part of Iran's efforts to strengthen ties with a significant international ally to reduce its isolation, while also aligning with China's initiative to deepen relationships with a regional power that opposes US influence in the Middle East. This alignment serves China's interests and helps

address its growing energy demands amidst its extensive global production across various sectors.

The year 2024 saw a significant increase in trade between the two countries, growing by 30% compared to the previous year. Iranian oil exports to China rose by approximately 13% of China's total oil imports, solidifying China's position as the largest buyer of Iranian oil. During the first 10 months of 2024, average daily exports reached 1.5 million barrels, representing over 90% of Iran's total oil exports.⁽⁷⁹⁾ This indicates a growing mutual economic dependency: for Iran, China is the primary destination for its oil exports, providing crucial support to an economy affected by sanctions on key sectors. For China, the partnership with Iran offers a reliable source of energy at competitive prices, which is vital for meeting its increasing energy demands and sustaining its industrial growth. Additionally, China has emerged as Iran's largest trading partner, encompassing direct investments and trade, thereby playing a crucial role in the Iranian economy.

In the investment sector, partnership between the two countries grew stronger during 2024, as China continued to advance vital projects, including railway construction, power station

development and the expansion of natural gas networks. These developments illustrate the intention of both countries to pursue mutual economic integration, stemming from the trust they share as significant alternatives for one another within their respective regional and international contexts. This progress is also consistent with China's strategy to invest in the infrastructure of developing nations and supporting Iran's goal of boosting domestic energy production while improving the quality of its current infrastructure which has hindered Iran's involvement in global logistics projects. These projects include either established agreements like the IMEC project. This emphasis has enabled China to finance critical projects in the Middle East. Furthermore, the expansion of gas networks allows Iran to boost its capacity to export gas to new markets. Although many of these projects were initiated the previous year, 2024 has witnessed significant advancements and a heightened commitment to executing these strategic initiatives.

China-Iran relations are not solely focused on commercial ties, despite the fact that trade forms the foundation of their relationship. That said, political dynamics also play a significant role in these relations. Each country wields

considerable political influence in the strategic considerations of the other, influenced by China's capabilities and its position as a global power competing with the United States for international leadership. Meanwhile, Iran serves as an influential regional force on critical issues in the Middle East, despite the complications arising from Israeli strikes and ongoing conflicts in Syria and beyond. Nevertheless, China's support for Iran has remained largely rhetorical, as it seeks to maintain a safe distance to prevent the escalation of conflicts that could affect the entire region and jeopardize its own interests in the Middle East.

China has articulated its diplomatic approach amid the direct escalation between Iran and Israel through a carefully crafted political strategy. This stance is evident in the statements made by the Chinese foreign minister, who conveyed Beijing's support for Iran in "defending its sovereignty, security, and national dignity."⁽⁸⁰⁾ Beijing's diplomatic communications have not only refrained from directly criticizing Iran for its actions against Israel but have also framed Tehran's position in a defensive light, thus portraying the situation in a way that highlights Iran's intention to defend itself.⁽⁸¹⁾ China interprets the Israeli

conflict in Gaza as the primary catalyst for regional escalation. Notably, China has significant investments in Tel Aviv's advanced technology and infrastructure sectors and has worked to protect these interests since the outbreak of the conflict between Iran and Israel, aiming to mitigate the risks of jeopardizing its economic relationship with Israel through its verbal support for Iran.

China, in light of its balanced approach to supporting Iran while avoiding further conflicts with the United States over unresolved issues between the two global powers in various regions around the world, has applied selective pressure on certain Iranian activities in the Middle East. This includes urging Iran to restrain the activities of the Houthis in the Red Sea, which fundamentally conflicts with Chinese interests and could endanger the settlement agreement signed between Iran and Saudi Arabia, the first major security agreement sponsored by China in the region. This maneuver is primarily aimed at safeguarding China's growing diplomatic influence in the Middle East and protecting its essential economic interests.⁽⁸²⁾ Additionally, the issue of the occupation of the three UAE islands became a point of contention in Tehran's relations with Beijing in 2024, as China

supported the UAE's claims to these islands. This backing led to Iranian criticism of China, with demands for the Chinese ambassador to retract Beijing's statements in order to preserve the strategic relationship between the two nations. This scenario mirrors similar actions taken by Tehran two years earlier regarding comparable statements from Beijing, with Iran's response being limited to simply condemning those statements on both occasions.

While Iran perceives China as a competing global power and an alternative to the United States, Chinese policies toward Iran in 2024 demonstrate China's focus on balancing its commercial interests. China is cautious about jeopardizing its investments in the region. Furthermore, Beijing strives to maintain a balanced strategic distance — one of the key characteristics of its policies in 2024 — in its regional interventions. It also aims to influence events without directly involving itself in the intricate conflicts of the region. Beijing recognizes that an imbalanced relationship with Iran could raise concerns among neighboring countries and the United States, which views this partnership as a threat to its interests and strategic influence in the Middle East, potentially reshaping the alliances with China in the region.

Pragmatism in Russia-Iran Relations

Many reports from major global intelligence agencies, senior strategists and defense officials around the world have warned about the increasing level of military cooperation between Russia and Iran. Consequently, Western countries have expressed concern over what they classified as a level of “growing defense partnership” between the two sanctioned states, as Iran has become the largest military supporter of Russia in the field of drones and ballistic missiles in the Russia-Ukraine war. The number of meetings between senior military officials from Russia and Iran increased notably during 2024, with senior officials from both countries confirming the shift in the characterization of military cooperation.

The relationship between the two sides has shown notable growth in recent years in general and especially in 2024, particularly militarily, due to two main factors: first, Western sanctions, and second, the Russia-Ukraine war, which has provided both parties with opportunities to enhance cooperation. Russia needs appropriate Iranian weapons for the war, such as short-range ballistic missiles and inexpensive drones, while Iran needs to modernize its air fleet. In 2024, there were serious negotiations

regarding a Russian-Iranian agreement to supply Iran with SU-35 fighters, which are comparable in capabilities to US helicopters and aircraft such as the F-35. Additionally, discussions included providing Iran with the advanced S-400 defense system and progressing toward the signing of a “comprehensive strategic partnership agreement,” which was postponed indefinitely following the SCO summit in Kazan, Russia, in October 2024.

UK intelligence reports from January 2024 revealed that Iran was equipping its drones with technologies and techniques supplied by Russia, leading to the development of a new drone known as the Shahed-107. This drone features advanced technology designed for striking strategic targets in the conflict, such as Western missile launch platforms and systems utilized in Ukraine's military operations against Russia. Part of the Shahed-101 family, the drone boasts a range of approximately 1,500 kilometers. According to reports, the Shahed-107 is fitted with a transmitter that streams live footage directly to Russian officials in military operations rooms, enabling precise identification of high-risk targets on the front lines for accurate strikes.⁽⁸³⁾

Throughout 2024, several high-level meetings took place between ministers from both countries, with the most notable being the encounter between former Russian Defense Minister Sergei Shoigu and former Iranian Defense Minister Mohammad Reza Ashtiani on the sidelines of the SCO meeting in April. Shoigu conveyed his country's willingness to strengthen cooperation with Tehran, highlighting that Tehran has become a strategic partner for Moscow. In response, Ashtiani remarked that bilateral relations are deepening and evolving to new levels.⁽⁸⁴⁾

Additionally, in August 2024, Russian Deputy Foreign Minister Sergei Ryabkov, who had previously dismissed the characterization of the Russia-Iran relationship as “allies” in 2019, indicated that military cooperation between Moscow and Tehran would not be influenced by Western pressure. He emphasized that both countries maintain independence in their foreign policies from the Western bloc.⁽⁸⁵⁾ Previously, Ryabkov viewed the bilateral relationship as not yet at the level of an alliance, considering it to be tied to common interests in the context of Syria. However, in 2024, he began to refer to Iran as a strategic partner. This change in Russia's perception

regarding the relationship and Iranian military support for Russia coincides with the escalating intensity of the Russia-Ukraine war.

Iran, as a result of regional and international developments that have complicated matters for the new Iranian president, who seeks to improve his country's relations with the West, has maintained its “Look to the East” policy. In October 2024, the Russian president met his Iranian counterpart in Ashgabat, reflecting the desire of both countries to enhance their strategic relationship amid regional developments (the intensification of the Iranian-Israeli conflict) and international circumstances (the continued Western support for Kyiv). This meeting occurred at a time when both were facing significant pressures due to sanctions. The meeting led to Putin extending an invitation to Pezeshkian to visit Russia and suggested that the signing of the comprehensive strategic partnership agreement was approaching. Thus, this meeting highlights the ongoing joint efforts of the two countries to confront challenges by strengthening their partnership.

However, despite the significant advancement in relations between the two parties, the challenges that emerged

during the same year reveal a pragmatic aspect to their relationship. That being said, tensions arose in 2024 over certain issues, particularly regarding the Zangezur Corridor and the “reformists” calls, upon their return to power, to turn to the West as the most effective means of addressing the ongoing Iranian crises since the imposition of US sanctions at the beginning of Trump's first term.

Dispute Over the Zangezur Corridor

The Russian president's declaration of support for Azerbaijan — an arch-enemy of Iran — in establishing the Zangezur Corridor during his two-day visit to Baku in August 2024, presented a major challenge to Russia-Iran relations amid their increasing military cooperation and conflicting interests.

Moscow supports Baku against Yerevan, an Iranian ally, despite its knowledge of Iran's concerns regarding the corridor. This support is driven by geopolitical interests in the South Caucasus and aligns with Moscow's broader strategic aims. The Russians see the corridor as a vital route that could enhance their influence in an area, they believe NATO may target to isolate Armenia from the Eurasian sphere. Putin's visit to Baku coincided with an upcoming trip by the French president

to Yerevan, intended to counter NATO's presence in the Caucasus. Furthermore, the corridor's opening offers Russia important economic opportunities necessary for revitalizing its war-affected economy, particularly as Russian gas exports to Europe are currently hampered by sanctions. Additionally, Russia seeks to impede the "reformist" direction of Pezeshkian's government, which is pursuing a westward trajectory, and to block any potential initiatives by the "reformists" to supply gas to Europe if relations normalize and disputes over the nuclear agreement are settled.

In contrast, Putin's visit to Azerbaijan was met with severe criticism from both official and unofficial Iranian parties, including the "hardliners" who support the "Look to the East" policy and the establishment of strong relations with Russia and China. Tehran expressed its outright rejection of Putin's statements regarding the corridor due to its potentially dangerous implications for Iran's geopolitical situation and strategic interests. Consequently, the Iranian Foreign Ministry summoned the Russian ambassador in Tehran in September 2024 to inform him of Iran's formal and absolute objection to Putin's remarks. Iranian Foreign Minister Abbas Araghchi stated

that any threat directed against the territorial integrity of neighboring states or any geopolitical alteration near the Iranian borders constitutes a red line for his country.⁽⁸⁶⁾

Iran has also insisted that Russia consider its opposition to the establishment of the corridor, as it aims to close one of Iran's access routes to Europe. The proposal for this corridor also has the potential to create a new flashpoint near Iran's northern borders. In that sense, Iranian media employed negative language to describe Russia's actions toward Iran, highlighting the significant official and unofficial anger and resentment regarding Putin's visit and his remarks about the corridor. They characterized it as a Russian geopolitical maneuver against Iran, an effort by Russia, Türkiye and Azerbaijan to suffocate Iran, and depicted it as a betrayal.

The following are the primary reasons behind Tehran's rejection of this corridor:

- Iran is concerned about being cut off from Armenia, which would adversely affect its land connections with Central Asia and the Caucasus, potentially resulting in the loss of a neighboring state. Furthermore, this corridor could undermine Iran's aspirations to expand gas

networks into Europe, as Armenia serves as a crucial transit route for Iranian goods destined for European markets. Consequently, the loss of this economic opportunity could have significant negative implications for the Iranian economy.

- The corridor could negatively affect Iran's position in the BRI, providing an alternative route through Azerbaijan and Türkiye to Europe.

- Azerbaijan's increasing influence fuels separatist sentiments among Iranian Azerbaijanis, the country's second-largest ethnic group, especially in the northwestern regions. This concern is heightened by past efforts of this ethnic group to pursue independence. Additionally, Tehran fears that the establishment of the corridor could strengthen Israeli influence along its northern borders, considering the close ties between Baku and Tel Aviv.

- The implementation of the corridor would diminish Iranian interests and influence in Central Asia, versus bolstering the Turkish presence in the region. Tehran considers Ankara and Azerbaijan among the biggest beneficiaries of this corridor due to the direct connection it would provide between Türkiye and ethnically Turkish Central

Asia, significantly strengthening and supporting Türkiye's ambitions and projects in the region, while substantially reducing Iranian influence.

Russian Apprehensions Regarding the "Reformists" Shift Toward the West

The return of the "reformists" to power in Iran, following President Pezeshkian's victory after mid-2024, along with his expressed desire to engage with the West — as highlighted in his statements during the presidential election campaigns — has raised fresh concerns in Russia. These worries stem from the "reformists'" inclination toward solidifying ties with the West, which is seen as adversarial to Russia, and their aim to revive nuclear negotiations.

Russia is wary of the "reformists" in general, and Pezeshkian in particular. Pezeshkian believes that the policy of pivoting eastward and the approach of economic diplomacy embraced by President Ebrahim Raisi to undermine the effectiveness of sanctions will not succeed in alleviating the repercussions of these sanctions nor will they reduce the level of protests. He contends that these strategies are designed for the long term, while Iran's crises demand immediate and medium-term solutions, achievable only through the lifting of

sanctions. Consequently, the foremost priority for the "reformists" is to resume nuclear negotiations to remove the sanctions.

Russian media has expressed Russia's concern regarding the future of relations with Iran, indicating that Iran needs to balance the potential shift toward the West with its relationship with Russia, which has reached unprecedented levels in the past two years, at a time when Russia's relations with the West have plummeted to their lowest ebb since the onset of the Russia-Ukraine war. It is noteworthy that despite the domestic support for a westward orientation, Trump's presidential victory could significantly limit this orientation, potentially reverting Russia-Iran relations to their previous state.

Conclusion: Trends in Iran's Relations With the Eastern Bloc Throughout 2025

The findings suggest that the "conservative" and "reformist" views on the "Look to the East" policy differ considerably, with some regional developments prompting both sides to change course. The "reformists" generally favor a Western orientation or, at the very least, aim for a balance between the two blocs, as their relations with the Eastern

bloc often come at the expense of Iranian interests. Both China and Russia exploit Iran's contentious issues with the West to further their own agendas, with reports indicating that China imports oil while exporting low-quality products to Iran. Consequently, if not for sanctions, China would likely not adopt such an approach toward Iran or support the UAE's stance on the three islands. The same is true for Russia, which tends to move closer to Iran when its relations with the West decline and distances itself when relations improve. Thus, the "reformists" recognize the need to balance ties with the Eastern bloc, as highlighted by Pezeshkian during his election campaign.

The metrics also indicate that pragmatic considerations continue to be the primary influence on the relations between China and Russia with Iran. Both countries take advantage of Iran's conflicts with the West to advance their own objectives, often at the expense of Iranian interests. Putin's visit to Azerbaijan and his backing of the Zangezur Corridor, despite being aware of Iranian interests and concerns, exemplify this, particularly as Iran supplies the Russian military with drones and ballistic missiles. Russia is wary of Pezeshkian's pro-Western inclinations,

especially in light of recent shifts in executive power in Iran.

The Caucasus region continues to serve as a significant test of Russia-Iran relations. In evaluating the regional dynamics, it can be observed that their cooperative military ties are currently reliant on a temporary alignment of interests driven by sanctions and the Russia-Ukraine conflict.

Given the ongoing regional and international developments by the end of 2024, it is likely that Iran will persist in its “Look to the East” orientation in 2025, unless Trump manages to end the Russia-Ukraine war. If he is successful in resolving this conflict, it could facilitate the resolution of disputes between Russia and Europe, potentially normalizing relations. In such a scenario, characterized by challenges, there could be a warming of ties between Russia and Europe, while relations between Russia and Iran might cool off. However, recent events leading up to the end of 2024 — such as Washington lifting restrictions on Ukraine’s use of weapons capable of striking deep into Russian territory, Russia retaliating with previously unused missiles against targets in Ukraine, and Putin signing a law altering nuclear policy — indicate that tensions between Russia and the West are escalating as

Biden’s term comes to an end. Therefore, Russia’s need to maintain its relationship with Iran remains significant. Furthermore, any future aggressive policies from Trump toward Iran would likely prompt Iran to continue its eastward orientation unless Pezeshkian can secure an agreement with the US administration to resume nuclear negotiations, at which point his government might make strides in its strategy to pivot toward the West.

The US-EU Position on Iran in 2025

In May 2024, after the death of former Iranian President Raisi, “reformist” candidate Pezeshkian won the presidential election. President Pezeshkian pledged to implement significant economic reforms and enhance Iran’s diplomatic relations with Western nations, aiming for a new nuclear agreement. However, given the escalating tensions between Iran and Israel, coupled with European dissatisfaction regarding Iran’s hostage diplomacy and its arms sales to Russia, Pezeshkian failed to fulfill these pledges. The IAEA adopted a more stringent approach regarding Iran’s nuclear program, intensifying efforts to mitigate Iran’s advancements in nuclear capabilities. This shift came in response to Tehran’s signals of a po-

tential withdrawal from the Treaty on the Nuclear Non-Proliferation of Nuclear Weapons (NPT) and its ambitions to cross the nuclear threshold. With the inauguration of Trump as president of the United States, Iran is poised to encounter a series of complex challenges and has the following strategic options: it may either engage in negotiations to establish a nuclear agreement that imposes restrictions on its nuclear program or opt to disregard diplomatic overtures, thereby persisting with its nuclear program while contending with increasing external pressures from the West. The 2024 ASR examines the positions of the US and the EU regarding Iran’s potential nuclear escalation. It also explores the likelihood of alignment between the Trump administration and the EU in their policies toward Iran. Finally, it concludes with an analysis of potential trends in US-EU relations concerning Iran in 2025.

US-EU Position on Iran’s Potential Nuclear Escalation

When asked about the chance of the United States going to war with Iran during his presidency, Trump told Time magazine in a December interview, “Anything can happen. Anything can happen. It’s a very volatile situation.”⁽⁸⁷⁾

The statement is neither definitive nor reassuring. For the United States' allies in Europe and the Middle East, it is alarming. Is the president posturing and hedging? If Trump's first term can be any guide, he did what he threatened regarding Iran. With the fall of Assad and the weakening of Iran's mercenaries across the board, the threat of Iran assembling a couple of nuclear bombs seems acutely plausible. In its last 2024 update, the IAEA revealed a dangerous increase in Iran's enrichment activities at the Fordow enrichment plant. Since December 5, Iran has been feeding 20% enriched uranium (up from 5% low enriched uranium) in two interconnected IR-6 cascades at Fordow to achieve 60% enrichment.

The UN watchdog also reported that Iran accepted tougher monitoring at the Fordow site.⁽⁸⁸⁾ "Iran agreed to the Agency's request to increase the frequency and intensity of the implementation of safeguards measures at the Fordow Fuel Enrichment Plant (FFEP) and is facilitating the implementation of this strengthened safeguards approach," reported Reuters quoting an IAEA confidential report.⁽⁸⁹⁾ Iran's talks with E3 — the UK, France and Germany — have not yielded any results⁽⁹⁰⁾ as the trio remain adherent to their stated position

following the publication of the IAEA report.⁽⁹¹⁾ The E3 has filed a motion to censure Iran for non-adherence to the JCPOA.

US-EU Consensus on Iran During Trump's Second Term?

Iran faces an acute risk of a return of the UN Security Council sanctions as the nuclear deal formally expires in October 2025. The IAEA stated in its November 19 report that as of October 25, Iran's stockpile of highly enriched uranium (60%) in the fissile isotope U-235 weighed 199 kilograms.⁽⁹²⁾

When enriched to 90% weapons-grade level, Tehran is estimated to have fissile material for six nuclear payloads, weighing 25 kilograms each. It must also be considered that Iran maintains a stockpile of 20% low-enriched uranium when upon refining to weapons-grade level would produce a little above three more bombs. The most recent upscaling of enrichment to 60% with two connected cascades suggests that Iran could produce fissile material for 15 nuclear bombs within four to six months.

"Iran is setting up a three step, interconnected enrichment process at Fordow, going from natural uranium up to 5 percent enriched uranium in up to 8

IR-6 cascades in unit 1, from 5 to 20 percent in six current IR-1 cascades in unit 2, and 20 to 60 percent in the two interconnected IR-6 cascades in unit 2. This three-step process works as a system to produce 60 percent HEU from natural uranium, with the capability to rapidly switch to making WGU."⁽⁹³⁾ The UN sanctions on Iran expired in October 2023. Besides the United States, the E3 decided against the lifting of curbs, citing Iran's "consistent and severe non-compliance with its JCPOA commitments."⁽⁹⁴⁾

At the outset of Trump's presidency, concerns over Iran's nuclear breakout are more alarming than speculative. The UN watchdog's latest report acknowledged that Iran had stepped up its enrichment measures more quickly than it could respond to with safeguards measures. Given Iran's moves toward higher enrichment and persistent reluctance to allow IAEA inspections, Pezeshkian's offer for talks to resolve outstanding issues seems utterly irrelevant.⁽⁹⁵⁾ Since his assumption of office, Tehran has taken no significant confidence-building measures. Regional geopolitical tensions remain high against the backdrop of the tit-for-tat spat with Israel.

Europe may not see eye to eye with Trump when it comes to global issues of concern but its policy toward Iran will remain firm. Tehran's effort to engage the E3 in talks and offer insignificant improvements in monitoring and inspections are merely time-buying tactics.

Over the past two years, Brussels dealt with Tehran's bargaining for its convicted nationals including diplomats in exchange for innocent European citizens arrested in the country on fabricated charges. These strong-arm tactics hardened public opinion against Iran which did not matter for Tehran given the significance of its operatives being bartered.

Iran's supply chain of arms to Russia, including ballistic missiles, which it denies and which the Kremlin has not deployed as yet, is a major obstacle in effecting a rapprochement with the EU. Ukraine is Europe's first line of defense and if Tehran requires any concessions, it is required to step back on its arms supply front. The EU's chief negotiator Enrique Mora said, "Iran's military support to Russia that has to stop, the nuclear issue that needs a diplomatic solution, regional tensions (important to avoid further escalation from all sides) and human rights."⁽⁹⁶⁾

Conclusion: The Potential US-EU Policy Toward Iran in 2025

Iran's failure to woo Europe to pursue a divergent policy from the United States ahead of the Trump presidency makes it vulnerable to a host of diplomatic, economic and security threats. Europeans, increasingly frustrated with Iran's approach, see the United States' foot-dragging on Ukraine's defense against Russia and its allies' onslaught as dangerously frightening for its security. Brussels and Washington might move in lockstep vis-a-vis Iran as they attempt to contain the leadership's destabilizing regional stratagem as well as increasing the cost of supporting Russia's war against Ukraine.

For Iran, the options are limited. It will most likely indicate its intention to quit the NPT, following in the footsteps of North Korea. "If an existential threat arises, Iran will modify its nuclear doctrine. We have the capability to build weapons and have no issue in this regard," Kharrazi told Al Mayadeen.⁽⁹⁷⁾

Given the current divisions among EU member states and the differences between the EU's policies and those of Trump regarding Iran, one can expect to see new security challenges and increased instability. This situation may also arise from Iran potentially

increasing its support for Russia in the war in Ukraine. If Iran decides to withdraw from the NPT, it would lose an important bargaining chip and become more vulnerable to international isolation and stricter sanctions. Such action would likely worsen the country's economic situation and provoke public discontent against the Iranian government.

Iran and Türkiye: The Continued Iran-Türkiye Conflict in the Caucasus, Iraq and Syria

In 2023, Türkiye-Iran relations experienced a complex strategic interplay across several geographical areas, including the Caucasus and the Middle East. While the two neighbors adopted a pragmatic approach to their interactions with their surroundings, avoiding direct confrontations, regional competition and rivalry persisted in 2024. This rivalry intensified due to shifting global and regional dynamics triggered by the Russian invasion of Ukraine and the Israeli war on Gaza, prompting both countries to align their respective regional strategic priorities in line with these shifts.

This competition became evident in 2024 through Türkiye's efforts to collaborate with Azerbaijan on the Zangezur Corridor and secure the route

through southern Armenia. The rivalry also manifested in Iraq and Syria, with Türkiye seeking to integrate both countries into its security project to mitigate Kurdish threats and bolster its political and economic influence in the region. Meanwhile, Iran accused Türkiye of supporting armed factions in Syria amid the recent escalation of tensions on the Syrian front.

The 2024 ASR regarding this issue explores three key developments: the South Caucasus as a new arena of competition between Ankara and Tehran, Türkiye's advances in challenging Iranian influence in Iraq, and Tehran's calculations of gains and losses from the rapprochement between Ankara and Damascus. It concludes by outlining the trends in Iranian-Turkish competition for 2025.

South Caucasus: A New Episode in the Competition Between Ankara and Tehran

Several factors have driven the ongoing competition between Iran and Türkiye in this region, including the 2020 Nagorno-Karabakh war, the ongoing Russian invasion of Ukraine since February 2022, Azerbaijan's control of the territory in September 2023 — disputed with Armenia since the 1990s — and

the subsequent withdrawal of Russian peacekeeping forces in September 2024, along with the outbreak of confrontations in Syria. These events not only created a geopolitical vacuum but also brought regional competition and the struggle for dominance back to the forefront for many countries. Türkiye sees the shifting power dynamics as presenting unprecedented opportunities to strengthen its strategic partnerships, particularly with Azerbaijan and Turkmenistan. As a result, Türkiye's role became more prominent in 2024, with ambitions to establish an influence corridor extending from the Bosphorus to the South Caucasus. This role involved Türkiye enhancing its presence in the economic, energy⁽⁹⁸⁾ and transportation sectors, especially concerning the Zangezur Corridor,⁽⁹⁹⁾ and focusing on military considerations, particularly through growing relations with Baku.⁽¹⁰⁰⁾

Iran voiced its opposition to this Turkish project, driven by several factors, including concerns that activating the Zangezur Corridor and the gas initiatives from Turkmenistan would revive Iranian fears of Türkiye bypassing Iran and diminishing its influence in the region's energy market and transit corridors.⁽¹⁰¹⁾

Beyond Iran's concerns over Turkish competition in the energy market and transit corridors, Tehran's broader geopolitical apprehensions center on the shifting regional balance of power. While resolving the Azerbaijan-Armenia conflict regionally aligns with Tehran's security interests, the intensification of Türkiye's role in managing this conflict raises alarms. Specifically, Türkiye's strengthened political, economic and military partnerships with both Azerbaijan and Armenia, alongside its ambitions to revive the "Turkish Crescent" project linking Ankara to Central Asian countries,⁽¹⁰²⁾ amplify fears of Tehran's regional role being diminished.⁽¹⁰³⁾ These fears are heightened by Turkish President Recep Tayyip Erdogan's explicit declaration of Türkiye's intention to join the BRICS group, signaling potential competition with Tehran in relations with Moscow and in shaping political and security dynamics across Eurasia.

Moscow's announcement of its support for Azerbaijan's right to activate the Zangezur Corridor⁽¹⁰⁴⁾ added further complexity to Iran's position. Beyond Iran's concern that the corridor could help Russia reduce its reliance on Iranian routes, a greater worry stems from Russia's alignment with its traditional

rivals, Azerbaijan and Türkiye. This alignment positions the corridor as a tool to pressure Iran and disregards Tehran's "red lines" in regional politics. In response to these developments and the growing tensions and challenges it faces, Iran has sought to reposition itself as a key player in reshaping the region by strengthening its relations with both Armenia and Azerbaijan to reinforce its role and counterbalance Türkiye's expanding influence.

Türkiye Stepping Forward to Compete With Iran's Clout in Iraq

Iraq represents another arena of competition between Iran and Türkiye, with their rivalry in recent years centering on political, economic, and security influence. In 2024, Türkiye sought to expand its role in Iraq across various sectors. This was particularly evident during the presidential meeting between the leaders of Türkiye and Iraq in Baghdad,⁽¹⁰⁵⁾ which included the signing of multiple agreements that focused on enhancing cooperation in energy and trade — most notably the strategic Development Road project — and on security cooperation, particularly concerning the Kurdish issue.

The agreements and understandings Ankara pursued with the Iraqi government aim to achieve several objectives,

including neutralizing threats from the Kurdistan Workers' Party (PKK). Following the signing of the security memorandum of understanding, Türkiye conducted incursions into the region and intensified cross-border strikes on PKK strongholds in the latter months of 2024. Additionally, Türkiye places significant emphasis on the Development Road project, aligning it with its goal of establishing itself as a key economic hub connecting Asia, Europe and Africa. Türkiye views this project as complementary to its broader corridor initiatives amid the security and economic instability in the Middle East.

Türkiye is exerting significant political and military influence in Iraq, aiming to establish more comprehensive relations with the Iraqi government. However, Iran views shifting Turkish-Iraqi relations from a multi-dimensional perspective. On the one hand, Iraq is one of Iran's most crucial areas of influence and dominance in the Middle East, and it must remain free from the influence of rival powers. Strengthening Türkiye's political and security presence in Iraq, especially its military footprint in northern Iraq is perceived as a threat to Iran's influence. Iran has long sought to reshape the political and military landscape in Iraq, particularly in

the northern regions, to ensure secure access to the Mediterranean Sea.

Iranian concerns about Türkiye's role in the Kurdish issue mirror another apprehension related to Türkiye's Development Road project. While some Iranian viewpoints argue that this project does not pose a direct threat to Iran, citing Tehran's political influence within Iraq's government and its military presence on Iraqi territory, which allows Tehran to manage the Turkish project and align it with its own transit and trade interests, other opinions suggest that the completion of such a project could lead Iraq to reduce its economic reliance on Iran. This reduction could particularly affect Iran's exports of electricity and gas, an outcome that Iran may view with at least some reservations, if not outright opposition or attempt to hinder the project's implementation.

In this context, and while Turkish operations against PKK targets were expanding, Iranian President Masoud Pezeshkian chose Iraq for his first foreign mission, visiting several of its major cities. The most notable aspect of his visit was his trip to the Kurdistan Region of Iraq, which highlighted the ongoing competition between Tehran and Ankara over managing their respective interests in Iraq, particularly in its northern regions.

Tehran's Gains and Losses Calculus as a Result of Ankara-Damascus Rapprochement

Syria is the third key arena of competition between Iran and Türkiye, and in 2024, this competition for political and security influence escalated as both nations sought to solidify their presence and achieve strategic interests in the country. In 2024, Turkish political decision-making circles increasingly focused on rebuilding communication channels with Syria for several reasons. Primarily, Türkiye aimed to assert control over its borders with both Syria and Iraq and to counter the influence of the PKK, a goal similar to its approach in Iraq. Additionally, Ankara views regional developments, including the ongoing Israeli war on Gaza since 2023, along with escalating tensions in Lebanon and Syria, as an opportunity for strategic expansion. This would strengthen Türkiye's presence in crucial regions of Syria and Iraq, enabling it to bolster its position and maintain a balance with regional and international powers amid a reshaping of alliances in the Middle East.

Although Iran, a key player in the Syrian arena, did not issue a statement against Turkish-Syrian rapprochement and even visibly welcomed dialogue between Syria and Türkiye,⁽¹⁰⁶⁾ it still

harbored undeclared reservations about the potential expansion of Türkiye's role in Syria. Iranian concerns became more evident in 2024 following a swift 12-day attack that led to factions seizing control of Damascus and the fall of the Assad regime. Iran viewed this as a significant blow to its prestige, strategy in Syria, and regional project, while it saw Türkiye gaining additional influence and strengthening its position in both Syria and the broader regional scene. This apprehension was reflected in the reactions of Iranian leaders, including Supreme Leader Khamenei,⁽¹⁰⁷⁾ and other political and military figures, who expressed clear concern over the diminishing Iranian role in Syria, where it had been a dominant force in recent years, while Türkiye emerged as the primary beneficiary of these developments. To address its fears of Turkish actions, Iran pursued several strategies, including the visit of Iranian President Pezeshkian to Iraq. This visit aimed to counter the potential scenario of Türkiye cutting off the vital road connecting Iraq and Syria, thereby preventing its control over this route. Concurrently, Iran's use of the debt card coincided with the intensification of Turkish rapprochement with Baghdad and Damascus.⁽¹⁰⁸⁾ In this context, Iran sought to ensure its involvement in any

future negotiations regarding the Syrian conflict, thereby securing a seat at the table in the event that Damascus and Ankara engaged in discussions aimed at finding a resolution to the Syrian issue.

Conclusion: The Future of Iran-Türkiye Competition in 2025

Given the competition between Iran and Türkiye in the Caucasus, Iraq and Syria throughout 2024, several conclusions can be drawn, and trends extrapolated for 2025. Türkiye intensified its efforts to improve relations and manage differences with its regional neighbors — particularly in the Caucasus, Iraq and Syria — and made notable strides in certain areas. For example, Türkiye succeeded in advancing the Caucasus issue by facilitating a trade and energy corridor between Azerbaijan and Türkiye, and in Iraq, it secured security and economic agreements with the Iraqi government. This progress occurred alongside a decline in Iranian influence across these three sectors. However, despite the various competitive files, both countries managed to navigate their rivalry with caution, avoiding direct confrontation. This careful balancing act suggests that while their competition remains intense, it is being managed diplomatically to prevent escalation.

It is likely that the Iranian-Turkish rivalry will remain without major escalation during 2025. This trend is supported by the following factors:

- Iran will continue to monitor the progress of its Turkish rival closely, particularly as it views with concern its diminishing role in vital trade and energy projects in the Caucasus and the increasing Turkish influence in the South Caucasus and Central Asia. This could prompt Tehran to take a tougher stance on Turkish ambitions, particularly those that threaten its regional interests. However, given Iran's internal challenges and the fluctuating influence of its forces in Iraq and Syria, it may find itself unable to escalate its confrontation with Türkiye. Instead, Iran is likely to opt for a less confrontational approach, relying on diplomacy to manage its implicit competition with Türkiye. This could include strengthening its role as a mediator to calm tensions with Azerbaijan, maintaining close relations with Armenia, and preserving sufficient influence in the South Caucasus, which is critical for safeguarding its strategic interests.

- Moreover, Tehran is keenly aware that Türkiye is its primary competitor in Iraq, especially in the context of Iraqi politics and security. Despite Türkiye's

achievements in strengthening ties with Baghdad, including the signing of a strategic framework agreement and expanded memoranda of understanding during President Erdogan's visit to Baghdad, Iran recognizes that these agreements will not be effective without its participation. Iran will likely seek to maintain its dominant position in shaping Iraq's political landscape by exerting pressure on the Baghdad government to slow or delay the implementation of security agreements and development projects, particularly those that could affect its presence in northern Iraq in the future.

- Iran's need for Turkish support and maintaining some form of understanding with Ankara is likely to persist, especially given the possibility of continued escalation with Israel and the United States in 2025.

- As for the future dynamics of the competition between Tehran and Ankara in Syria, the political landscape in Syria is expected to significantly influence the relationship between the two countries. The potential progress of Türkiye's influence in Syria, in contrast to Iran's declining role, will be a key factor. How both nations manage their competition in Syria will be one of the critical challenges of the upcoming year. The nature of Syria's new government, and its economic and

security relationships with both Türkiye and Iran, will play a central role in the competition between the two countries in Syria. Additionally, Iran will likely develop alternative strategies to safeguard its influence and prevent further erosion of its position to preserve its regional interests in the coming period.

Developments in Yemen

In our 2023 ASR, we indicated that Iran might contribute to finding some solutions to aid the Yemeni situation in 2024, but these would not be sufficient to resolve the crisis in the country. We also touched on the need for continued UN, international and regional efforts to impose more pressure on the Houthis to engage in the Yemeni peace process. If such efforts were not undertaken, the Houthis were expected to continue with their military escalation to secure further political gains. This trajectory was evident throughout 2024, as the militia escalated military tensions in the Red Sea, claiming support for Gaza as their pretext for doing so. This escalation was the primary factor in the political stalemate in 2024, allowing the Houthis to evade peace commitments on a frequent basis in Yemen. Given the aforesaid context, the 2024 ASR focuses on three main developments: the political

stalemate in Yemen, the international response to the Houthis' escalation in the Red Sea and the nature of the group's military operations in the Red Sea.

The Yemeni Political Stalemate

The year 2024 was marked by political deadlock in Yemen, following unsuccessful negotiations and talks spearheaded by the UN envoy Hans Grundberg. Despite efforts to implement a proposed roadmap, no significant progress was achieved in advancing the Yemeni peace process or offering a clear vision for Yemen's future peace. This impasse led to a decline in political and diplomatic momentum regarding the crisis, with negotiations reaching a standstill.

The reasons for this political stalemate throughout 2024 were primarily driven by the Houthis' involvement in the conflict with Israel, which adversely affected the ongoing peace process among the Yemeni factions. This development occurred during a period of active diplomatic efforts by the UN envoy, Saudi Arabia and Oman to address the Yemeni crisis, with negotiations approaching a critical juncture in the context of signing a roadmap agreement for a settlement in the country. The Houthis' engagement in the Israel-Gaza conflict

appeared to be a tactical move to delay their involvement in peace talks, thereby buying time for increased media and military mobilization. This strategy was aimed at strengthening their future position at the negotiating table.

Consequently, the internationally recognized Yemeni government initiated strategic military adjustments, re-deploying National Shield Forces (NSF) or Dara al-Watan forces to the front lines to confront the Houthis in Tur Al-Baha alongside the Southern Transitional Council (STC) forces. This move anticipated potential setbacks in diplomatic efforts with the Houthis. Chairman of the Presidential Leadership Council Rashad al-Alimi declared from Marib Governorate, "We assure you that we will start from here and from all governorates to liberate the areas still under the control of the Iran-backed Houthi militia, and victory will be achieved through all armed forces in their various formations supported by the popular resistance."⁽¹⁰⁹⁾

Houthi Attacks in the Red Sea

In conjunction with the ongoing Israeli onslaught against Gaza and subsequently Lebanon, the Houthis continued their attacks on ships in the Red Sea, the Gulf of Aden and the Indian Ocean, in addition to attacks targeting

some locations in Israel under the name "Gaza Support Front." The Houthis expanded their maritime attack scope in early 2024, targeting US and UK ships in response to strikes on its locations by the United States and the UK. The Houthis further expanded their attacks, targeting many vessels transiting the Red Sea and the Gulf of Aden using various military tools, including explosive boats and unmanned submarines, which the group began using in early February 2024. Ultimately, these attacks resulted in four civilian fatalities from among crew members. It is worth noting that there are doubts concerning the accuracy and validity of statements made by the Houthi military spokesman, especially those claiming to have targeted Israeli military sites.⁽¹¹⁰⁾ This escalation did not appear to alter the broader conflict dynamics in Palestine. Instead, it appeared to serve as a strategic maneuver by the Houthis to garner internal support within Yemen and attract sympathy from some Arab and Islamic nations and factions. Furthermore, the Houthis sought backing from international players critical of Western policies, notably Russia and China.

With the noticeable change in international public opinion toward the Palestinian cause and opposition to

Israeli policies, much criticism was directed at Western countries for not dealing seriously with the Houthis. Through their attacks on the Red Sea, the Houthis positioned themselves as key players in the so-called Axis of Resistance led by Iran, and as a group capable of influencing the balance of conflicts and international tensions in the Red Sea and Bab al-Mandab Strait. The group tried to militarize the Red Sea to gain international recognition from parties opposing Western policies, particularly Russia, or to be supplied with advanced weapons or to acquire a strong and supportive position at the political level. Some reports indicate that the Houthi-Russia relationship in 2024 was coordinated by Iran, particularly with regard to the group's visit to Moscow, while Iran used Yemen as a pressure card in 2024 in the context of several outstanding files.⁽¹¹¹⁾ However, many observers believe that Russia's handling of the Yemeni file does not conflict with the policies of countries seeking peace between the conflicting Yemeni parties, especially Saudi Arabia.

International Response to the Houthis' Actions in the Red Sea

Globally, there was strong condemnation of the Houthi attacks in the Red Sea that threatened international shipping.

In January 2024, the United Nations Security Council adopted Resolution 2722, condemning the attacks carried out by the Houthis on commercial ships and transport vessels in the Red Sea, demanding an immediate cessation of all attacks by the militia.⁽¹¹²⁾

International reactions to the Security Council's decision varied, particularly between Russia, which refused to vote on the resolution, and the United States, which supported it. This divergence was attributed to the differences between the two countries regarding the Russia-Ukraine war. It seems that Russia was indicating to regional countries that the United States was an unreliable guarantor of stability. This was in the aftermath of US President Joe Biden explicitly acknowledging that US forces failed to deter the Houthis and that US military efforts to keep global maritime routes safe and clear had led to a shortage of some of the United States' most valuable and costly defense missile systems, namely, the SM-3 interceptors.

Furthermore, Moscow presented several reasons for regional countries to achieve balance in their foreign policies by deepening engagement with China and Russia. In response to US support for Ukraine, Russia sensed a potential advantage in its conflict with the United

States if the Houthis exacerbated tensions in the Red Sea.⁽¹¹³⁾

The US approach to the Houthis aligns with its strategic interests and military presence in the region. Increased US and European military activities in the Red Sea are primarily responses to the threat posed by the group. Hence, the US administration seeks to address this threat based on the framework of global competition in the Red Sea. Notably, continued navigation challenges in the Red Sea and the Gulf of Aden affect China more significantly than the US or Israeli economies, given China's substantial trade through these routes, valued at around \$300 billion annually.⁽¹¹⁴⁾

In contrast to the Biden administration's view regarding the Houthi threat, the US conservative center-right/right-wing think tank American Enterprise Institute (AEI) views the militia as a global strategic threat to the United States in the Middle East. The institute confirmed that the continued Houthi escalation in the Red Sea presents a significant long-term risk to the United States. The AEI's article titled "The Cost of Inaction in Yemen" states that the ongoing Iranian presence and the valuable data the Houthis collected on US air defenses during their maritime attacks — which the group may share with Russia — will

likely enhance the Houthis' offensive strategies, consequently endangering US influence in this strategically vital region. Therefore, the institute anticipated that the Trump administration would adopt a firmer stance against the militia as a result.⁽¹¹⁵⁾

Prospects for Yemen in 2025

In 2024, the Houthis intensified their militarization of the Red Sea to engage in international power dynamics, aligning with their political, military and negotiating interests, distinct from Yemen's peace obligations and the rights of its people. This course adversely impacted Yemen's security and stability, complicating the Yemeni political landscape in 2025. Rising tensions in the Middle East, along with Israeli and US efforts to weaken or eliminate the Axis of Resistance, further complicate the situation.

Halting Houthi escalation hinges on the international community and key global powers, particularly the new US administration under President Trump. This includes encouraging the Houthis to back the legitimate Yemeni government,

both economically and militarily, as it stands as the legitimate representative of the Yemeni people globally. It is noteworthy that the Yemeni government is also tasked with safeguarding the Bab al-Mandab Strait, ensuring international navigation and maintaining security along the Yemeni coasts, thereby contributing to Red Sea stability. Therefore, achieving this necessitates creating robust pressure points, whether through economic sanctions or military means, against Iran and its Houthi ally, steering them toward meaningful participation in the Yemeni peace process and resuming political dialogue aimed at arriving at a lasting resolution to the Yemeni crisis and ensuring international navigation security.

Conversely, setbacks in Iranian projects in Lebanon and Syria, paired with the collapse of the Assad regime due to the withdrawal of support from Iran and Russia, could pressure the Houthis to avoid a similar downfall. This scenario could bolster efforts to pressure them to embrace approaches that facilitate the resolution of the Yemeni crisis. It appears that the Houthis are

likely to implement a range of measures, supported and coordinated by Iran, to strengthen their political position and enhance their domestic popularity following the collapse of the Assad regime. The Houthis will strive to win the backing of the Yemeni populace, as well as various political parties and influential figures. In an effort to mitigate public discontent, they may take constructive action, such as restoring homes to their rightful owners and releasing detainees. The likelihood of these positive initiatives materializing has increased following the Houthis' announcement of a draft law aimed at paying government employees' salaries, set to take effect in January 2025. Additionally, it seems probable that Iran will exert further pressure on the Houthis to accept the peace initiative, at least in the short term, to ensure their continued presence in Yemeni politics and to avert any measures or international moves that could completely remove them from the political landscape, particularly in light of potential measures by the Trump administration against the group.

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عام الحرف
اليدوية 2025
The Year of Handicrafts

The Art of Wicker Weaving



THE ROAD AHEAD

The year 2024 was marked by extraordinary global events — wars, elections, assassinations and regime changes — that are set to reshape political, economic and military landscapes in 2025. These events present a bleak picture of a world marred by chaos, the undermining of international norms, widespread double standards and the growing preference for coercion over diplomacy in conflict resolution. The 2024 ASR examines these events on regional and global levels, offering insights into Saudi Arabia's strategic transformations and Iran's evolving dynamics. In addition, it provides a foundation for forecasting near- and medium-term trends.

Global developments indicate that chaos and conflict are likely to persist as major powers engage in intense geopolitical, economic and technological competition, forming alliances that heighten tensions. Without concerted efforts to manage this global competition, the world risks escalating toward a devastating third world war potentially involving nuclear weapons, especially if a major power faces significant aggression or defeat. The future of humanity hinges on the ability of international actors to address and contain conflicts while tackling global challenges like climate change, terrorism and environmental problems. Urgent action is needed to convene an international conference to outline strategies for de-escalation and conflict resolution. In the absence of such action, the world will face increasing ambiguity, rising insecurity, growing poverty and widespread social unrest.

In a world characterized by chaos and strategic rivalry, international powers are vying for resources and challenging US hegemony. To maintain its position, Washington is expected to adopt a proactive approach, grounded in understanding the ongoing shifts in the global balance of power. This includes closely monitoring China's rise, Russia's belligerent actions and the aspirations

of emerging powers to reshape global leadership toward a more pluralistic and diverse order. Trump's re-election signals significant internal changes and a renewed focus on consolidating US leadership through his "America First" policy. The latter will test Washington's global influence, emphasizing peace through strength. Trump, who already faces domestic challenges, is set to deal with complex international crises, including those in Ukraine, the Middle East and US-China relations — key battlegrounds for determining the future of US power on the global stage. The United States possesses sufficient tools to influence the global stage, enabling it to address ongoing chaos and manage conflicts. Nevertheless, the expanding capabilities and room for maneuver of competing powers have grown significantly, suggesting that while the US leadership remains prominent in the short term, it is experiencing a gradual decline; this aligns with the broader global trend of revisionist powers seeking to reconfigure the global system's structure over the long term. Notably, the United States has diversified its strategies to contain China in the Indo-Pacific, frustrating Beijing's ambitions and deterring its global aspirations. In response, China's efforts toward achieving hegemony manifested

in escalatory measures against Taiwan, the conveyance of deterrent messages and notable successes in its competition with the United States across various domains. These Chinese policies are expected to continue through 2025. Despite their reciprocal tactics amid intensifying competition, there remains a possibility that both the United States and China will incline toward a policy of cooperative competition. This possibility is driven by a shared desire to avoid a comprehensive confrontation or an uncalculated escalation.

Economic tensions between Washington and Beijing are likely to escalate during Trump's second term as he is expected to shift from the cooperative competition approach that marked the China policy under the Biden administration. Instead, Trump is poised to adopt a more confrontational stance, which could have significant repercussions for the global economy and security amid ongoing international conflicts. Trump's perspective on China's rise is central to this shift. He views China as the United States' sole rival for global leadership, equipped with the tools and capabilities to challenge US dominance and prepared for confrontation. His previous actions, such as sparking a trade war with China, as well as his campaign pledges to im-

pose higher tariffs on Chinese imports and the appointment of officials with hardline views on China, signal a continuation of this adversarial approach. This stance is reinforced by a broader Republican consensus on the threat posed by China's growing influence. The steady expansion of the Chinese economy, which now competes with the US economy not only at the global level but also within the US market across critical domains, underscores the gravity of China's challenge to US global hegemony.

US-China relations during Trump's second term are likely to experience measured escalation with various issues at the heart of their rivalry, including trade, advanced chips, Taiwan, Indo-Pacific security and competition for global leadership. While Trump may adopt a confrontational policy, the United States is aware of China's significant global clout, which could constrain efforts and necessitate compromises to safeguard US interests.

China possesses numerous economic and geopolitical tools that could be utilized or deployed to counter US measures. These include devaluing its currency to bolster global exports, selling US Treasury bills to weaken the dollar's global standing, restricting exports of raw materials critical for US emerging

technologies and intensifying pressure on Taiwan. Such moves could limit Trump's ability to maintain a hardline stance and force Washington to explore understandings to safeguard its broader economic and strategic interests.

On the European front, the Russia-Ukraine war remains locked in a state of attrition, with neither side able to secure a decisive victory. Russia has expanded its control in eastern Ukraine, while Ukraine has made gains by taking control of Russia's Kursk region. The involvement of North Korea in the conflict and the Western provision of advanced missiles to Ukraine, enabling strikes deep into Russian territory, have further intensified the stalemate. Both parties remain steadfast in their objectives, prolonging the deadlock. Trump is likely to significantly influence the trajectory of the war. His campaign promises suggest he might seek a settlement — potentially one viewed as unfavorable by Ukraine — or reduce US support, shifting the dynamics of the confrontation.

On the global economic front, inflation levels are expected to stabilize in the near future, leading to a relaxation of stringent monetary policies unless significant geopolitical or climatic disruptions occur. Declining interest rates are anticipated to stimulate slow growth

in major economies, potentially driving up the prices of precious metals like gold, silver and platinum as safe-haven assets. Global economic growth is projected to see slight improvement because of weak export growth, sluggish performance of economies in Europe and Japan, and diminishing confidence in a swift recovery of China's economy amid intensifying trade disputes with the United States and Europe. The rise of protectionist trade policies worldwide, particularly under a Trump administration, threatens to undermine the globalization trend of the past three decades, with China's dominance facing heightened scrutiny. However, such policies risk disrupting global trade and destabilizing the prices of raw materials and goods, compelling the major powers to balance their strategic interests with efforts to mitigate significant economic losses from prolonged conflicts.

Meanwhile, investment in AI applications is expected to accelerate, particularly to enhance sales and productivity. This will foster the creation of novel job opportunities and drive unconventional investments, such as electricity generation from small-scale nuclear reactors. This technological progress, however, will reduce demand for traditional jobs and lead to complex security and ethical

challenges that will require gradual regulation. Also, while Western economic models remain influential, they are likely to undergo a phase of reassessment and refinement. The frequency of global economic crises has amplified calls from academics and experts to integrate economics with social sciences such as psychology and history. This approach aims to refine economic theories, making them better equipped to analyze complex human behavior and address global challenges more effectively.

In the sphere of non-traditional security, space exploration in 2025 is expected to see heightened competition as countries seek to access the moon's resources, particularly water and helium. This will unfold alongside a significant increase in the number of satellites launched into low Earth orbit, driven by state agencies and private companies from the United States, China, Japan, Europe and other regions. While the pursuit of lunar and space resources will continue, the growing presence of satellites in low Earth orbit will have broad economic, political and social consequences, particularly through enhancing global internet connectivity. However, the increasing dependence on satellite-driven security and commercial activities renders these systems vulnerable to

hacking by competing nations and rogue actors. Despite the growing importance of space and cybersecurity, the likelihood of a new international consensus to modernize the regulation of space and cyberspace appears slim, especially in the early part of Trump's second term. Additionally, rising political polarization and Elon Musk's attempts to exert influence over elections in sovereign nations could lead to heightened restrictions on social media platforms by states. This, in turn, may negatively affect businesses that depend on advertising revenue from these platforms.

Global expectations for arms development are higher than they have been in the past two decades. Trump's "America First" approach has prompted European and East Asian nations to not only increase defense spending but also prioritize non-US cooperation in arms production. This shift is evident in the countries working on the development of sixth-generation fighter jets and naval equipment. China has already unveiled prototypes of what is likely a sixth-generation fighter and bomber. At the same time, its naval power continues to grow with the sea trials of an amphibious landing ship and a third aircraft carrier. Russia's fifth- and sixth-generation fighter jets, while promising on paper, face tech-

nological challenges, as President Vladimir Putin focuses on strengthening the country's ballistic missile program and modernizing its nuclear arsenal. Meanwhile, both the United States and China are advancing in the development of nuclear weapons, hypersonic missiles and countermeasures, marking a shared trajectory in their military strategies. One significant development in military technology is the rise of AI. Although widely discussed, AI's application in the nuclear and military domains is becoming increasingly real, especially in drone warfare, which has been notably demonstrated in the skies over Ukraine and Russia.

With regard to ideological and religious issues, throughout 2024, the Saudi religious establishment called for unity between the people, the rejection of extremism and the promotion of tolerance among the sects of Islam. It issued documents to this effect and is likely to continue with this approach in the future, aligning with the broader social reforms within the country. Other religious institutions are facing struggles and backlash because of changes to personal status codes, as seen in Morocco and Iraq. Additionally, some religious institutions are dealing with internal conflicts, particularly the emergence of factions seeking

to alter the existing religious order in line with the schemes of regional countries or powerful interest groups. Regarding political Islam, the Movement of Society for Peace (MSP) has experienced a significant decline in support in Algeria, suffering a major blow after losing the presidential election. This defeat triggered a split and widespread discord among the movement's leaders, suggesting the emergence of a crisis of confidence within its ranks that may affect its future. As for Egypt's Muslim Brotherhood, it remains deeply divided and fragmented, with no unified leadership in sight for the foreseeable future. Regarding violent groups, although ISIS has faded and remains dormant, there are concerns about its resurgence, especially following recent developments in Syria. The international coalition has responded by launching airstrikes on areas suspected of being active hubs for ISIS operations. In terms of the far-right, there has been a rise in its influence in countries like India, Türkiye, France and Egypt, fueled by racist nationalist ideologies. Efforts are underway to mitigate its impact, but in some cases, these groups are being used to strengthen political legitimacy or push through controversial decisions.

When analyzing regional developments, it appears increasingly probable

that the Gaza war may come to a close in 2025. This expectation stems from a series of developments indicating that neither party in the conflict can secure further territorial or strategic gains from the war. The new US administration's recent commitment to prioritizing the resolution of conflicts in the Middle East introduces a ray of hope; however, it is essential to underscore that any ceasefire achieved is unlikely to endure for long. The fundamental challenges lie in the inability of both Israel and Hamas to meet each other's conditions, thus rendering the pursuit of a lasting peace a daunting endeavor — especially considering Israel's entrenched positions. The people of the region are aware of the humanitarian crisis afflicting the Palestinian people and fervently hope that the US administration will adopt a more balanced approach, one that addresses the complex realities on the ground and seeks to alleviate the suffering borne from this protracted conflict.

Future transformations in Syria and Lebanon and their geopolitical repercussions will depend on several factors. These include the new Syrian administration's ability to uphold the "logic of the state," the aspirations of Lebanese factions to reshape the political equation in favor of the country and whether the

armed groups allied with Syrian leader Ahmed al-Sharaa continue to prioritize state interests over those of the group. If the interests of the group prevail, it could foster chaos that external actors, like Iran and its militias, may exploit. However, there are factors favoring stability in Syria, such as Gulf-Turkish support for the new Syrian administration, Israel's stance against the return of Iran to Syria and international dynamics, including Trump's return and his positive relations with the Turkish president.

In 2025, the Gulf states will maintain a policy of positive neutrality, fostering cooperative relationships with the new US administration, recognizing potential opportunities for further coordination with the superpower. At the same time, the Gulf states' recent achievements, their active involvement in international affairs, and collaboration with key economic blocs will ensure their significant role in US considerations. However, challenges arise from the fact that the return of the Trump administration comes at a time when the Gulf states have made substantial progress, such as Saudi Arabia's reconciliation with Iran.

Türkiye is expected to continue presenting itself as an influential and active player on both regional and international fronts. Ankara's influence over the

current Syrian political equation allied with Turkish President Erdogan's push for BRICS membership, the recent recalibration of Türkiye's relations with the West and strengthening ties with Arab nations and engagement in Africa will reinforce the country's independent foreign policy calculus. Moreover, Türkiye's strong relationship with the new US administration is likely to play a pivotal role in its endeavors and ambitions. However, the Turkish stance on the Gaza war may become a point of contention with the Trump administration, particularly if, as expected, Trump aligns closely with Israeli policies.

In 2024, Africa experienced a significant increase in internal crises and external interventions, leading to heightened security, political and economic instability. This was marked by a series of wars, military coups, protests, regional interventions and intense international competition for influence, which collectively worsened the situation across the continent. It is anticipated that these challenges will persist into 2025, particularly due to the lack of clear solutions to resolve African political and economic crises. Nevertheless, there remains a possibility for breakthroughs or resolutions, particularly if the new US admin-

istration prioritizes Africa's stability and supports efforts in this regard.

Central Asian countries are expected to maintain their strategy of forming partnerships with major international powers such as China, India, Russia, the United States and European nations to address contentious issues and promote mutual trade interests. Additionally, they will likely focus on economic diversification to reduce dependence on a single country. The Middle Corridor, a key route connecting China to Europe through Central Asia, will remain a priority for both China and European powers, attracting more investment for its development. However, Central Asia and the Caucasus will continue to be a focal point of global geopolitical tensions. The shifting balance of power and evolving regional alliances will likely present new opportunities for Central Asian nations to strengthen partnerships, particularly in energy, infrastructure and defense.

The Bangladesh crisis is expected to have significant ramifications for South Asia in 2025, driven by competition among global powers for leadership. The trajectory of crises in the region will largely depend on Trump's policies toward the Indo-Pacific, particularly how he balances efforts to contain China while considering India's interests in

South Asia. While China will continue to be a central focus of US policy, it is India that will be most affected by the political instability in Bangladesh, particularly in the aftermath of the removal of the Sheikh Hasina government. In South Asia, competition is likely to remain balanced and major conflicts will be avoided, unlike the more volatile issues between the United States and China, such as Taiwan. The Taiwanese president's separatist ambitions and policies toward China are expected to continue to draw significant attention, potentially complicating relations in the region.

In terms of Saudi Arabia, the country made significant strides in achieving its Vision 2030 goals, positioning itself as a benchmark of excellence in the crisis-ridden Middle East. In fact, the kingdom exceeded some of its targets, particularly in diversifying the economy to reduce dependence on oil. Key achievements in 2024 included major investments in renewable energy and mining, positioning Saudi Arabia as one of the most competitive mining countries globally. The kingdom's digital economy expanded dramatically, from 298 billion riyals to 460 billion riyals. The country is also seeking to become the regional leader in AI.

The kingdom's development program also prioritizes hard power, with efforts undertaken in 2024 to enhance military efficiency by localizing military manufacturing, intensifying training and securing more defense agreements. One of the year's highlights was Saudi Arabia winning the bid to host the 2034 World Cup, which was seen as both a capstone achievement and a motivator for further development. Looking ahead to 2025, Saudi Arabia is expected to continue its upward trajectory, provided that global factors like geopolitical tensions do not force a reassessment of its priorities.

On the global stage, Saudi Arabia successfully strengthened its international relations by concluding numerous bilateral agreements with a wide range of countries, thereby advancing its economic development. The kingdom also shored up the GCC collective system and deepened ties with Arab countries, as well as regional neighbors, including Iran, Türkiye and Ethiopia. These successes were accomplished despite a tumultuous regional and international environment, particularly in the Middle East, where the Israeli war on Gaza escalated into a direct confrontation between Iran and Israel, raising concerns about the potential for a regional war. Amid these challenges, Saudi Arabia

maintained its commitment to a policy of positive neutrality and peace, actively engaging in diplomacy at multiple levels. The kingdom worked to monitor and contribute to regional and international efforts to contain wars and crises, reaffirming its positions on key issues such as the Russia-Ukraine conflict. Saudi Arabia also hosted numerous global and regional events focused on efforts to halt the Gaza war and advance a two-state solution for Palestine. Moreover, the kingdom supported peace initiatives in various Arab nations, continued to mediate in the Sudanese conflict, worked toward stability in Yemen, Lebanon and Libya, and advocated for peaceful change in Syria.

Saudi Arabia is closely monitoring the potential challenges it may encounter in 2025, particularly in light of the uncertainty surrounding the trajectory of various regional and international developments, influenced by the return of Trump. The kingdom is expected to continue pursuing its current strategic options while maintaining the flexibility to adapt to emerging challenges and mitigate the risks that could impact the achievement of its established goals.

In the context of Iran, the sudden death of President Ebrahim Raisi represented a significant setback for both

the Iranian establishment and Supreme Leader Ali Khamenei, as Raisi was viewed as a crucial actor in helping the country navigate the upcoming phase. His absence shifted the balance of power between the country's political currents, paving the way for the "reformist" faction to return to the political scene, which previously seemed unlikely due to the "conservatives'" complete control over state institutions. Pezeshkian's government is expected to face numerous challenges, including heightened economic pressures with the return of Trump and various threats that could lead to internal unrest and a resurgence of protests. To prevent this outcome, the "hardliners" may consider cooperating with Pezeshkian to pursue engagement with the West, focusing on reaching agreements with major powers concerning Iran's nuclear program.

The economic challenges faced by Iran in 2024 are expected to persist into 2025, affecting both the Iranian economy and people. With the prospect of a tough US administration, nuclear negotiations are unlikely to progress in the near future. As a result, the Iranian currency is expected to continue its decline, the budget deficit is likely to widen, and capital and skilled professionals may continue to leave the country, contributing to a significant

shortfall in investment and productivity. Moreover, Iranian oil exports, a key source of foreign currency and economic growth, could face severe setbacks if oil sanctions are enforced more strictly under the Trump administration, in contrast to the more lenient approach of the Biden administration. These economic difficulties will place considerable pressure on Pezeshkian's government, forcing it to choose between implementing austerity measures to address the financial deficit or risking popular unrest and internal instability. With little prospect for an improvement in the purchasing power or living standards of the Iranian population in 2025, the establishment is expected to continue adapting to the challenging situation by finding ways to circumvent sanctions, seeking access to markets in neighboring countries and preserving its geopolitical interests, especially as its regional expansionist projects face increasing challenges. The erosion of the "Axis of Resistance," with setbacks in Syria and Yemen, further complicates Iran's regional ambitions.

Iran's military capabilities in 2025 are expected to be shaped by the significant setbacks it has faced in both its military strength and geopolitical influence. In response to these challenges, Iran is likely to intensify its uranium-235 en-

richment efforts, pushing enrichment levels above 80% while also enhancing its ability to assemble nuclear devices with varying yields suitable for multiple delivery systems. In parallel, Tehran is expected to continue negotiations with the EU-3 and the United States to secure a new nuclear deal. Faced with declining defensive and offensive capabilities following Israeli counterstrikes, Iran may redirect its financial resources toward bolstering its domestic military needs, rather than relying on proxies. This could involve prioritizing the production of Russian and Chinese fighter jets, air defense systems, tanks and submarines through securing licenses. However, Iran's domestic industrial base might struggle to meet these demands. While the country is capable of assembling imported sets of military equipment, it may not have the full capacity to produce such advanced military equipment on its own. This could limit the pace at which Iran can enhance its military capabilities to keep pace with its evolving defense needs.

In 2024, the issue of minorities took center stage in Iranian society, overshadowing other social dimensions, largely due to its significant role in the presidential election that resulted in the election of "reformist" Masoud Pezeshkian as

president. Pezeshkian's campaign raised slogans that resonated with minority groups, contributing to the continued controversy surrounding their position in state institutions, where their representation and inclusion remain contentious. This debate extended beyond the election and continued into discussions about improving the living conditions of minorities, as they often face socioeconomic challenges and discrimination. Given the ongoing economic difficulties and the persistent rivalry between the "reformists" and "conservatives," it is expected that the issue of minorities will remain a contentious topic in Iranian society throughout 2025. The debate surrounding the rights and status of minorities will likely be intertwined with other social issues, including the ongoing and divisive discussions about the hijab.

In 2025, Iran's support for armed militias within its geopolitical expansion strategy is expected to be closely tied to the significant regional setbacks it continues to face. Syria's departure from Iran's sphere of influence is likely to have profound repercussions on Iran's internal situation, especially given the already difficult economic conditions and increasing hardship felt by many segments of Iranian society. Additionally, the potential reactivation of Trump's

maximum pressure strategy against Iran in 2025 further heightens Tehran's sense of vulnerability. As a result of these internal and external pressures, it is likely that Iran will scale back its support for the militias in its spheres of influence, especially as the Iranian establishment will focus on stabilizing its own internal situation. The fear of domestic unrest, particularly in the form of protests that could destabilize the establishment, will likely lead to a strategic withdrawal from its regional engagements. However, this shift could be reversed if unforeseen developments allow Iran to regain its footing and resume support for its militias, especially if the geopolitical landscape shifts in its favor or if its internal situation improves.

In 2024, Iran and the Gulf states managed to navigate the delicate balance in their relations, particularly following the military escalation between Iran and Israel in the wake of the Israeli war on Gaza. The commitment to the terms of the Beijing Agreement by both Saudi Arabia and Iran played a pivotal role in steering Gulf-Iran relations toward a more positive trajectory. Although longstanding issues such as the dispute over the occupied UAE islands, the Dorra gas field and the Iranian nuclear program remain unresolved, they are largely con-

tained within the realm of traditional disagreements, with both sides upholding their respective positions. The diplomatic engagements throughout 2024 reflected an awareness from both Gulf and Iranian leaders of the risks associated with further escalation, emphasizing the importance of restraint. As a result, 2025 will be a critical year in determining whether these nations can sustain their cooperative stance, managing tensions while addressing the broader regional and international challenges they face.

Besides Gulf neighbors, Iran also made notable strides in improving relations with regional countries, including Egypt, Sudan and Bahrain in 2024. However, Egypt is expected to view rapprochement with Iran with caution and uncertainty until clarity is gained on regional developments and the Western stance on Iran, including the new US administration's handling of the Iran file in 2025. As for Sudan, Iran will likely continue to bolster relations through providing support for the Sudanese army in its war against the RSF, paving the way for a more pronounced Iranian role in the country post-war.

Under Pezeshkian's leadership, Iran's room for maneuver in the nuclear negotiations will be significantly constrained, as the country can no longer maintain its

policy of nuclear ambiguity without risking severe consequences. To avoid the potential reimposition of the maximum pressure strategy under Trump, which could threaten the establishment's legitimacy, it is likely that the Pezeshkian government will prioritize opening diplomatic channels with the United States. However, this does not imply that the negotiations will proceed smoothly. Iran is expected to engage in a strategic balancing act, seeking opportunities to negotiate with multiple parties, including the IAEA and European powers. The aim will be to buy time and avoid complete compliance with the nuclear demands of Trump and Israel.

The "conservatives" in Iran generally advocate for an eastward orientation, strengthening ties with countries like Russia and China. In contrast, the "reformists," including Pezeshkian, have sought to pursue balanced relations with Western nations, a policy he championed during his election campaign and has continued to emphasize after assuming the presidency. However, several challenges will complicate Pezeshkian's efforts to open up to the West. These include the ongoing regional crises in which Iran is involved, the deadlock surrounding the nuclear negotiations, and Trump's return. Unless Iran agrees to en-

gage in negotiations aimed at resolving the nuclear issue, its options will likely narrow, and the country may have little choice but to further deepen its relationship with the Eastern bloc as a counterbalance to Western pressure.

Iran's regional interventions and nuclear program place it in a vulnerable position, exposing it to potential diplomatic, economic, security and even military threats from the United States and Europe. Under Trump, there is a strong possibility that the United States will once again apply maximum pressure on Iran, aiming to extract concessions for its nuclear program. In this context, it is expected that Europe will align with the US stance, whether it leads to escalation or a renewed push for an agreement on the nuclear issue. If the United States and Europe pursue the maximum pressure strategy, Iran could respond by escalating tensions, potentially withdrawing from the NPT or altering its nuclear doctrine.

Iranian-Turkish rivalry saw significant intensification in 2024, particularly in the Caucasus, Iraq and Syria. Türkiye made headway in strengthening its ties with Azerbaijan and Iraq, while Iran experienced a decline in its influence. In 2025, this rivalry is expected to persist, albeit without major escalation. Iran

will likely continue to monitor Türkiye's progress with caution, opting for a diplomatic approach centered on appeasement, especially in the Caucasus. In Iraq, Tehran will aim to preserve its influence and prevent any initiatives that could undermine its position within the Iraqi state. Meanwhile, in Syria, Iran will seek to adapt to the evolving political landscape and growing Turkish influence. Iran will work to block any Turkish-Syrian rapprochement that could undermine its remaining interests in Syria.

The situation in Yemen in 2025 is expected to largely depend on the developments in Gaza, as the Houthis have used the Gaza conflict as a pretext for avoiding peace efforts in Yemen. If a settlement is reached in Gaza, the Houthis would lose their justification for escalation and military mobilization, which could force them to shift focus to engaging with Yemeni political currents to strengthen their negotiating position with the internationally recognized legitimate government. It is plausible that Iran may play a key role in encouraging the Houthis to enter negotiations with the legitimate government in order to avoid further setbacks for its proxies. Meanwhile, Israel might continue to view the Houthis as a strategic adversary, which could lead to the US administration imposing sanc-

tions, even if hostilities in Gaza come to an end. This dynamic may prompt significant transformations within Yemen that could impact the status and future of the Houthis.

In summary, the global developments observed in 2024 confirm that the international system is beset with crises and challenges, with the prospect of transformations in the global power hierarchy that could shift its current unilateral structure in the long term. Additionally, fundamental changes in regional environments and their strategic balances could lead to the revival of local conflicts or geopolitical disputes. Trump's return may add further complexity, opening greater doors to competition, which could have an unprecedented impact. The world appears to be in a critical transitional phase, during which economic, trade and corridor competition has evolved into an open geopolitical conflict. This competition extends to building alliances, acquiring scarce resources, imposing control over global resources — including in space and untapped areas — exploiting AI, developing weapons and enhancing unconventional capabilities. The renewed conflict between the global poles is clearly visible in regions such as Eastern Europe, the Middle East, the South China Sea and Africa. Mean-

while, the Global South continues to struggle with poverty, dependency, epidemics exploitation and other crises that persist due to a lack of governance, transparency and efforts to combat corruption and violence. Some countries in this part of the world remain trapped by ideology or political incompetence, adversely affecting their internal conditions and regional standing. Iran is a clear example of this, having suffered

heavy losses due to its investment in a regional project that collapsed immediately, leaving the population in the midst of a severe economic crisis. Between the Global North and South, there is a rising power poised to establish its superiority and earn a place among the great powers, enhancing the push toward a more pluralistic international system that appreciates common values and rules. Saudi Arabia is this rising power, striving to

assert its presence as an indispensable regional and international pole. This ambition is clearly reflected in its Vision 2030 agenda, which continues to progress, making notable strides in 2024. It is expected that 2025 will witness further advancement, with the kingdom adapting its policies in accordance with new developments while remaining aligned with its ambitious goals.

PARTNERSHIPS OF THE INTERNATIONAL INSTITUTE FOR IRANIAN STUDIES (RASANAH)

Rasanah has been able to make much headway in forming partnerships with a number of think tanks, universities, and governmental parties in Saudi Arabia and abroad. These partnerships have allowed Rasanah to benefit from the cross-exchange of researchers, publications and the joint organization of events. With regard to building and enhancing relationships as well as offering its specialized consultation in the Kingdom, Rasanah is proud to have extended its relationship with a number of governmental parties with the prospect of signing MoUs in the near future.



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