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**Ideational and Material Forces in Threat Perception
Saudi and Syrian Choices in Middle East Wars**

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Declaration

I declare that this thesis is of my own composition with acknowledgement of other sources, and that it has not been submitted for any other degree or professional qualification.

May Darwich

Abstract

How do states perceive threats? Why are material forces sometimes more prominent in shaping threat perception, whereas ideational ones are key in other instances? This study aims to move beyond the task of determining whether material or ideational factors offer a more plausible explanation by arguing that threat perception is a function of the interplay between material factors and state identity, the influence of which can run both ways. Based on 'analytical eclecticism', I develop a two-layered conception of security as both physical and ontological, in which the interaction of ideational and material forces can be analysed. Ontological security is intimately connected with identity; its pursuit, therefore, requires distinctiveness and differentiation from the 'Other' as well as a coherent and consistent identity narrative at the domestic level. Physical security, on the other hand, involves the identification of threats that constitute a danger to the survival of the state. While ontological and physical security spheres have distinct dynamics and processes, they constitute two interrelated layers. Accordingly, I argue that states can suffer from ontological insecurity while their physical security remains intact, and vice versa. In some instances, physical security and its corresponding material forces condition identity narratives while in other instances the causal arrow points in the other direction. To illustrate these processes, I present a 'structured, focused' comparison of Syrian and Saudi threat perceptions during three major wars in the region: the Iran-Iraq War (1980-1988), the 2006 Lebanon War, and the 2009 Gaza War. While providing novel insights for explaining the dynamics of threat perception in the Middle East, this study contributes to the broader IR literature by proposing a conceptual framework that links the literature on Self/Other relations, ontological security, and realism in IR theory. This study thus demonstrates the potential utility of bringing IR theory and the Middle East as an area study into closer dialogue.

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Note on Transliteration and Translation

For Arab terminology, I have followed the system of translation adopted by the *International Journal of Middle East Studies (IJMES)*. The definite article *al* (the) that often precedes nouns and names is not capitalized, unless it is at the beginning of a sentence. Commonly used proper names and places have followed their standard English renderings, such as Al Saud, al-Assad, Gamal Abdel Nasser, and Faisal. In addition, I have used accepted transliterations of

commonly Arabic words like shari'a, Jihad, Ba'ath, etc. In the bibliography, the titles of all Arabic primary and secondary sources have been transliterated and then translated in squared brackets.

Chapter 1: Introduction

Iran is backing Assad. Gulf states are against Assad! Assad is against Muslim Brotherhood. Muslim Brotherhood and Obama are against General Sissi. But Gulf states are pro-Sissi! Which means they are against Muslim Brotherhood. Iran is pro-Hamas, but Hamas is backing Muslim Brotherhood! Obama is backing Muslim Brotherhood, yet Hamas is against the US! Gulf states are pro-US. But Turkey is with Gulf states against Assad; yet Turkey is pro-Muslim Brotherhood against General Sissi. And General Sissi is being backed by the Gulf states! Welcome to the Middle East and have a nice day.

KN Al-Sabah, *Financial Times*, August 26, 2013

1. Puzzles, Theoretical and Empirical

Trying to explain the international relations of the Middle East with the intricacies of its alliance politics is a challenging task. Rivals share mutual enemies, and allies back opposite sides of the same conflict. The map of alliances in the region is in constant mutation and change. Alliances in the Middle East are usually born out of fear of ideational instability, military aggressions, and the overriding necessity of regime survival. Geographic proximity between states, the intensity of security interactions, states' military weakness, existing overlapping and competing identities at both regional and domestic levels have made threat perception a key component of this regional system.

In the discipline of IR, threat perception has conventionally been a constituent element in the study of alliances,¹ which are considered to be central to the conduct of international politics. Glenn Snyder (1997, 2) attests that 'any interaction between states, friendly or hostile, no matter how minor, may create expectations and feelings of alignment or opposition or both'.

¹ Following Stephen Walt, I define an alliance—which I use interchangeably with 'alignment'—as 'a formal or informal form of security cooperation between two or more sovereign states' (Walt, 1987, 12). Although I might expand the cooperation to include non-state actors, an alliance here means a form of cooperation for a security arrangement that has a regional or international dimension.

Alignment permeates all aspects of IR, in both its theoretical and empirical dimensions and its importance cannot therefore be dismissed. Traditional alignment theories based on balance-of-power theory suggest that states confronted by more powerful states are more likely to balance against those states than to bandwagon with them. Stephen Walt's balance-of-threat theory has refined the theoretical inquiry into alliance dynamics by arguing that states do not balance against superior power, but against perceived threats. Walt argues that power is one factor among others affecting threat perception. The international relations scholarship is nearly unanimous in the view that alliances are driven by security concerns, as states seek to enhance their capabilities in the face of some immediate or future threat.² From the vantage point of systemic or domestic theorizing, alliances can be the product of either balancing or bandwagoning; either way, they are the product of a threat.³

Scholars studying the dynamics of alliance formation focus on two main phases in states' strategic calculus: (1) the perception or identification of a threat and (2) the decision about whether and with whom to ally in response to that threat. Although state behaviour driven by threat perception has been the subject of thorough scrutiny,⁴ the prior process of threat perception remains one of the most theoretically and empirically underdeveloped areas of inquiry. As there is widespread disagreement on the factors that contribute to one state's fear of another, there are still gaps in the scholarly understanding of threat perception. This study, therefore, addresses the following questions: *How*

² Scholars highlight that some alliances are driven by ambition rather than fear. In some cases, states may ally around international offensive goals, such as occupying another country (Schweller 1994).

³ Although the literature is nearly unanimous in identifying threats as sources of alliances, scholars are divided on the origin of threat. Systemic scholars consider threats emanating from an imbalance in the structure of the international system (Schweller 2004; G. Snyder 1997; Keohane 1988; Walt 1987; Dingman 1979). Other scholars, especially those concerned with Third World countries, consider threats to be primarily internal (Miller and Toritsyn 2005; Gause 2003; Barnett and Levy 1991; VanDenBerg and Harknett 1997; Werner and Lemke 1997; Ryan 2009).

⁴ Alliance formation literature focused on how states respond to security threats: balancing, bandwagoning, and underbalancing (Schweller 2004; Schweller 2006; Wivel 2008; Schweller 1994; Walt 1987; Waltz 1979).

do states perceive threats? Why, in some instances, do material forces seem more prominent in shaping threat perception, while, on the contrary, ideational ones are the apparent catalyst in other cases? How do ideational and material forces interplay in this process?

For more than two decades, scholars have been divided between those favouring material explanations and others focusing on ideational factors. On the one hand, Walt's (1987) neorealist-inspired balance of threat theory privileges material factors (aggregate power; geographic proximity; offensive capabilities). Although Walt adds 'aggressive intentions' as a source of threats, ideational factors are secondary in his theory. Focusing on one factor but not the other, neorealism offers viable explanations for some cases, but it cannot adequately account for others. On the other hand, Barnett (1996; 1998) offers an alternative constructivist explanation based on the politics of identity; this approach treats materialist considerations as secondary. As is true for neorealism, constructivism has invaluable insights for an elaborate understanding of the alliance behaviour in the Middle East, but alone is insufficient in explaining the varying outcomes. As Hinnebusch (2003b, 362) puts it, 'the constructivist attempt to prioritize identity over interests is as misguided as the materialist attempt to reduce identity to an epiphenomenon'.

Other scholars have sought a middle-ground position based on the regime security approach, combining systemic and domestic level variables, including external as well as internal threats (Gause 2003; Salloukh 2004; Ryan 2009). Whereas Gause (2003) focuses on ideational political threats to regime security to explain foreign policy behaviour, Ryan (2009) emphasizes economic and normative factors in Jordan's alliance decisions. Barnett (1996), from a constructivist perspective, also emphasizes the salience of regime security at the heart of the symbolic struggle among Arab regimes. These crucial insights on regime security in the Middle East suggest that the domestic public sphere is the battleground for acquiring regime legitimacy and, hence, the origins of the regime's vulnerability to external threats. Although these insights have led to the conceptualization of the role that ideational and domestic factors play in

understanding threat perception and its link to foreign policy, this literature does not identify how ideational and material factor coexist and interact in the process of threat perception.

The modern Middle East raises a number of intriguing questions and puzzles with direct relevance for explaining the interplay between ideational and material forces in the process of threat perception. One of the most intriguing puzzles in the region involves Saudi Arabia and Syria. Since 1979, the two countries—despite shared elements in their identities and similar regional interests— have diverged in almost every alliance choice, based on disparate threat perceptions. Following the Islamic Revolution in Iran (1979), whereas the Syrian regime perceived a rising Iraq as a viable military threat; at the same time, Saudi Arabia considered the message emanating from the Islamic revolution to be the ultimate threat to the Kingdom's survival. This case is not only a research puzzle in Middle East history, but it also yields theoretical questions for the study of threat perception in IR.

Indeed, scholars researching identity politics have asserted that differences in identities were the source of conflict whereas similar identities lead to cooperation (Huntington 1993; Horowitz 1995; Wendt 1999; Hopf 2002; Haas 2012; 2003; Rousseau and Rocio 2007). This ideational explanation would point to the opposing identities of Saudi Arabia and the Islamic Republic (Sunni and Shiite) as the source of Saudi threat perception. Following this logic, pan-Arab identity would stimulate an alliance between Damascus and Baghdad. Nevertheless, scholars privileging constructivism to explain Middle East politics, have arrived at an important conclusion: shared identities can be tied to conflict or cooperation (Barnett 1998; Lynch 1999; Kaye 2013). The rivalry between the Syrian and Iraqi Ba'athist regimes fits into this pattern (Kienle 1990). The puzzle of how shared identities lead to conflict is often reduced to 'regime security' as the main source of symbolic rivalry between Arab regimes. But the label of 'regime security' remains hardly problematized. 'Regime security' as an abstract concept, focuses on ideational transnational forms of threats, cannot adequately account for the Syrian case. Based on this approach, Syria, a secular

pan-Arab regime oppressing Islamist movements, should be equally threatened by the message of the Islamic Revolution. Similarly, if realist explanations can offer a viable explanation for the Syrian alliance based on the balance of power logic, they fall short in answering why Saudi Arabia supported a militarily ambitious Iraq against a militarily weakened Iran. In short, both neorealism and constructivism account for one case but not the other.

This study claims that ideational or material explanations cannot account by themselves for the complexity of threat perception in the Middle East and opts, instead, for an eclectic approach pleading for a multitheoretical synthesis. There is evidence that identity shapes regimes' threat perception in systematic ways, just as there are reasons to believe that material forces—such as the relative power distribution—are also fundamental. My aim, therefore, is not to show that ideational factors override other material factors or vice versa in explaining foreign policy choices. Rather, I argue that causal arrows run both ways. At the same time, I attempt to make sense of how ideational factors interact with material factors in the process of threat perception.

This study presents a theoretical framework that combines a two-layered framework of regime security that views it as both physical and ontological and allows for the interaction between ideational and material forces. Ontological security requires a distinct and stable identity narrative of the 'Self' as opposed to the 'Other'. States therefore perceive ideational threats as those endangering the distinctiveness, consistence, and coherence of their identity narrative, in other words, their ontological security. Physical security, on the other hand, designates the identification of threats that constitute a danger to the survival of the state. While ontological and physical security spheres have different dynamics, they constitute two interrelated layers, which co-exist and interact. Based on this dual conception of security, I argue that, in some instance, states suffer from ontological insecurity while their physical security remains intact, and that the opposite can occur in other instances.

This study differs from the previous literature in its characterization of threat. Whereas previous work has dealt with threat perception as a discreet event that precedes alliance decisions, this study shows that it is a process of interaction among states, between states and societies, and between states' material capabilities and identity narratives. The heavy focus of international relations scholars on alliance formation as the major defence mechanism following threat perception overlooks this process, especially if an alliance is already in place.⁵ It also obscures other types of foreign policy behaviour such as ideational balancing, counter-framing the 'Other', or reframing narratives of the Self.⁶ Therefore, this study looks at threat perception as a dependent variable and as a process that leads to various foreign policy behaviour, such as identity reframing, resource mobilization, and alliance formation or consolidation.

This research presents a rigorous account of threat perception in the region based on theory building combined with a systematic comparative of Saudi and Syrian threat perceptions during three major wars in the Middle East: the Iran-Iraq War (1980-1988), the 2006 Lebanon War, and the 2009 Gaza War. Although the framework was deductively developed through an examination of existing theorizing about threat perception, the empirical narrative of the cases contributed to the refinement of the theoretical framework—which can be tested and further developed in subsequent empirical research. In other words, the theoretical argument was the result of inductive and deductive reasoning. From this perspective, this study belongs to the recent trend seeking a bridge between IR theory and the Middle East as an area studies subfield.⁷ Bringing theoretical debates to an analysis of the region allows a fresh interpretation of the received historical consensus that exists around these cases. In addition, this

⁵ This is relevant to the cases of Syrian threat perception of Israel during the 2006 Lebanon War and the 2009 Gaza War. At the outbreak of the war, the Syrian regime already had an alliance with Hezbollah, Hamas, and Iran. Also, Saudi perception of Hezbollah and Hamas did not result in a shift of alliances or coalition. Instead, the Kingdom used other foreign policy tools such as counter-framing the Other.

⁶ Rubin (2014) shows this process clearly in his study of Saudi and Egyptian threat perceptions.

⁷ Cf. Valbjørn (2003) and Teti (2007).

study's comparative analysis of Syria and Saudi Arabia carries lessons for prominent debates in IR theory.

Beyond providing a valuable opportunity for theory development, the examination of Syrian and Saudi threat perceptions raises provocative puzzles with direct relevance to understanding current and future events in the Middle East. Why did Saudi Arabia—a pan-Islamist regime—fear the rise of other Islamic movements in the region, such as Hamas and Hezbollah? Can ideational powers threaten a state? Why and how? Why has Syria, a secular Ba'athist regime suppressing Islamists at the domestic level, supported similar movements at the regional level? Recent changes in the political landscape of the region as a result of the Arab uprisings make answers to these questions ever timelier and more relevant to the understanding of regional dynamics. The case of Saudi threat perception vis-à-vis Hamas and Hezbollah can inform our understanding of its subsequent threat perception of the rise of the Muslim Brotherhood to power in Egypt in 2012 or towards the Islamic State in Iraq and Syria (ISIS). Also, examining the dynamics of Syrian threat perception and foreign policy bears far-reaching implication for understanding the current regional alliances/coalitions as a result of the Syrian civil war. In addition, the cases of Syria and Saudi Arabia are of 'intrinsic importance'.⁸ Both states have been incredibly important for regional stability and security in several spheres: the Arab-Israeli conflict, Lebanon, and the Persian Gulf. Saudi and Syrian threat perceptions, and their consequent foreign policy behaviour, have had a tremendous impact on regional politics and will do so for years to come.

The study is organized around within-case and cross-case variations to explore interesting theoretical and empirical puzzles. The Saudi and Syrian cases were selected for an in-depth analysis⁹ based on variations in the dependent variable;¹⁰ both cases diverged in every threat perception and their consequent foreign policy choices. I examine both states through within-case

⁸ Cf. Van Evera (1997, 77).

⁹ Cf. Seawright and Gerring (2008).

¹⁰ Cf. Van Evera (1997, 77).

comparisons, which focus on the changes in threat perception and state policies through three different wars. The dynamics of threat perception are also subject to cross-case variations as Syrian and Saudi threat perceptions are compared during each war. Threat perception is assessed using a variety of methods. The empirical evidence at the heart of the study is drawn from primary sources—such as speeches, elite statements, newspapers, and memoirs—and extensive critical examination of secondary sources.

This introductory chapter is structured as follows. The first part aims to establish the theoretical case of the research question by presenting an overview of the existing scholarship on threat perception. This task is undertaken in two steps. I first present a critical cataloguing of contending explanations within IR theory. I then evaluate pertinent theoretical explanations deriving from these IR approaches with a particular focus on Middle Eastern international relations. After surveying the drawbacks and omissions in these theoretical explanations, the chapter turns to the central argument informing this study and the contributions it promises to make. The chapter then closes with an outline of the study.

2. Contending Explanations of Threat Perception: The State of the Art

IR approaches varying from realism to constructivism have attempted to untangle the driving sources of threat perception. By focusing on either material or ideational forces exclusively, the existing literature falls short in providing a satisfactory answer to the central question of this study. In the first section, I map how major IR theories answer two questions: What is threat? What are the sources of threat perception? In the second, I shed light on the heuristic value of these theoretical approaches when applied to the Middle East. This literature review focuses on how well each theoretical perspective fares when faced with the empirical puzzle of this research.

2.1. Threat Perception in IR Theories

'Threat' is a relational concept linking two actors where the first represents a danger and might cause harm to the 'Other'. Threat is defined as 'a situation in which one agent or group has either the capability or intention to inflict a negative consequence to another agent or group' (J. Davis 2000, 10). Although threat perception has been a cornerstone of IR theories, the question of how states identify threats and *a fortiori* what threat is has been scarce. Six scholarly trends can be discerned within the existing literature. The first focuses on balance of power theories, according to which threat is equated to power, which is defined in objective material terms. The second trend derives from Walt's (1987) 'balance-of-threat' theory where perceptual variables are combined with objective material ones. The third represents the constructivist worldview, according to which threats are constructed in the light of ideational factors. The fourth trends belong to the Copenhagen school in IR, namely securitization theory, that focuses on the process of security and threat construction. The fifth, deriving from the neoclassical realist approach, explicates a cognitive materialist explanation that combines perceptual and material forces. The sixth, based on foreign policy approaches, examines psychologically oriented and agent-based explanations of threat perception.

2.1.1. Balance of Power Theory: Materialist Explanations

Classical realists and neorealists assume that threat is the function of power asymmetries. In a world of anarchy, where nothing prevents states from using force, the weaker side fears exploitation and the stronger fears a shift in the balance of power and the ascendance of a challenger. In the *History of the Peloponnesian War*, Thucydides contends that the real reason for war was the power asymmetry between Athens and Sparta. As he puts it, 'What made war inevitable was the growth of Athenian power and the fear which this caused in Sparta' (1972, 49).

Morgenthau (1948) argues that, due to human nature, states are power maximizers. Accordingly, a state's survival is threatened if another state's power is ascending, thereby altering the balance of power. However, if all states are

entangled in a perennial power struggle, cumulating power should be the norm rather than an extraordinary condition for threat. Morgenthau categorizes states into 'imperialist' and 'status quo' states, a reasoning initially coined by Carr (1939) in terms of 'revisionist' and 'status quo' states. If anarchy and aggressive human nature are constants and all states are maximizing power, why will some states be perceived as 'imperialist' while others are considered 'status quo' (Rynning and Ringsmose 2008; Donnelly 2000)? This question remains unanswered. Even if this revisionist/status quo dichotomy can be objectively defined, what drives one state to pursue 'revisionist' goals and another to remain 'status quo'? Do these revisionist and status quo states have different identities or different domestic characteristics? These questions are unexplored, and the ideational dimension in this account remains insufficiently theorized. In short, classical realism has hardly theorized ideational dimensions in threat perception.

A quite similar conception of threat is found in Waltz's (1979) structural realism. According to Waltz, the primary threat endangering states emanates from power imbalances. In other words, threat perception is equated with states' material capabilities and their position in the relative power distribution. For Waltz, as all states are seeking security and survival, they are all in fact defensive or status quo. This 'status quo bias' reveals a paradox in Waltz's argument. If all states are security seekers and do not have any offensive motives, where do threats originate? As Schweller (1996, 91) comments on this predicament, 'If states are assumed to seek nothing more than their own survival, why would they feel threatened? Why should they engage in balancing behaviour? In a hypothetical world that has never experienced crime, the concept of security is meaningless'. Kydd (1997, 116) terms this inherent contradiction the 'wolf in sheep's clothing problem'. In other words, if all states were defensive, there would be no source of threat. In short, Waltz's defensive neorealist account has not provided a clear answer to what is threat and its sources remained very narrowly limited to power distribution considerations.

Whereas Waltz categorizes all states as status quo, Mearsheimer's offensive realist theory further develops the balance of power theory based on the assumption that all states are revisionist. Therefore, all states are potential enemies and probable threats. Like Waltz, Mearsheimer acknowledges that threat perception is primarily driven by military capabilities. As he firmly states, 'When a state surveys its environment in order to determine which state poses a threat to its survival, it focuses mainly on the offensive capabilities of potential rivals, not their intentions' (Mearsheimer 2001, 45).

In contrast, Organski's (1958) 'Power Transition Theory' highlights the role of ideational factors in identifying status quo and revisionist states. Organski argues that war is more likely to occur when a challenger to the dominant power enters into approximate parity with the hegemon and is dissatisfied with the existing system. However, if the challenger is satisfied with the current system, it is not perceived as a threat by the dominant power. Organski claims that satisfaction is a function of shared values, similar beliefs, and shared history. From this perspective, Organski implicitly acknowledges that the threat posed by the challenger is perceived in terms of intentions and ideational factors, not just capabilities. However, these non-material variables lack operationalization, and the interaction between ideational and material forces was not addressed.

All of these theories assume the prior existence of threats as a primary condition for a balancing behaviour in the international system. Nonetheless, they rarely examine threat as a concept and as a variable driving state behaviour.¹¹ To summarize, balance of power theories argue that threats are the function of power asymmetries measured in objective material terms. Even if ideational and perceptual variables are implicitly present in classical realism, they remain marginal and unexplored. Realists dismiss historical anomalies in which ideas seem to exist alongside materialist factors. Limiting their explanations to a single understanding of threat, realists regard state behaviour

¹¹ For earlier realist conceptions of threat, cf. Baldwin (1971), Cohen (1978), and Dorna, Hill, and Mladenka (1979).

driven by ideational factors as irrelevant and irrational (Feaver et al. 2000, 165–169; Kitchen 2010, 121–123).

2.1.2. Balance of Threat Theory: A Subtle Perceptual-Materialist Explanation

While classical realists and structural realists' approaches based on the 'balance of power' theory identify power as the primary source of fear, Walt, the progenitor of the 'balance of threat' theory, introduces a perceptual dimension to objective material variables to resolve the question of why states do not necessarily balance the most preponderant military power.

Walt's *The Origins of Alliances* presents the 'balance-of-threat' theory as a revision to Waltz's balance of power. Walt introduces a cognitive dimension in his materialist explanation. Balance of threat theory advances 'threat' and its perception—not 'power'—as the primary driver behind alliance formation. Threat is defined as the function of four determinants: aggregate power, geographic proximity, offensive capabilities, and aggressive intentions (Walt 1987, 21–26). Therefore, 'threat' is a broader concept where 'power' is one determinant among others. This conception could explain why states do not balance the predominant power as they might not conceive it as the most threatening to their security. Walt's introduction of the 'perception of intent' is the primary development introduced in the neorealist balance of power theory.

Nevertheless, Walt's definition of threat raises more questions than it answers. His analysis remains only a partial explanation of threat perception; he does not provide any clear guidance on how to theorize or to 'operationalize' aggressive intentions (Gause 2003, 280; Barnett 1996, 403–404). Saying that 'perceptions of intent are likely to play an especially crucial role in alliance choices' is too broad (Walt 1987, 25). This extremely wide and subjective category raises another question: what factors contribute to the perception of aggressive intentions? Otherwise stated, Walt does not develop *a priori* any theory of threat perception.

2.1.3. Threat as a Function of Identity: Ideational Explanations

Constructivism¹² has attempted to fill the gap in Walt's 'aggressive intentions' by adding an ideational dimension to the study of threat perception. As Hopf (1998, 187) states, 'what is missing here is a theory of threat perception, and this is precisely what a constructivist account of identity offers'. This argument is prominent in Barnett's constructivist account of threat perception and alliances in the Middle East. He claims to offer a superior alternative to Walt's neorealist explanation. Barnett (1996, 401) summarizes his endeavour as follows: 'It is the politics of identity rather than the logic of anarchy that often provides a better understanding of which states are viewed as potential or immediate threat to the state security'.

Constructivists have presented theoretical models based on the relationship between identity and state behaviour. In contrast to the prevailing realism, constructivism posits that structures are constituted not only by material factors but also by normative elements. In other words, agents and structures are involved in a process of mutual creation and reproduction, which shapes the interests of the agents and their capabilities. From this perspective, identity constitutes interests and therefore defines actors' behaviour (Onuf 1989; Wendt 1992; Wendt 1999; Adler 1997).

While realists assume that interests derive objectively from the relative power distribution, constructivists claim that interests are not objectively derived but are socially constructed. Accordingly, constructivism challenges neorealist propositions about static interests deriving from the anarchic nature of the international system. Relevant to this study, constructivism challenges the deterministic relationship between power and threat advanced by the realist paradigm and argues that ideas are crucial to threat perception. In other

¹² The constructivist literature mentioned in this study is consistent with 'thin' constructivism in IR as opposed to 'thick' constructivism (Wendt 1999). 'Thin' constructivism argues that social reality exists and can be accessed through empirical research. On the contrary, 'thick' constructivism contends that reality does not really exist independently of our observation.

words, constructivists argue that threat is socially constructed with a view to identity. Per Barnett (1996, 408), 'Identity is a better predictor than anarchy to determine friends and foes'. According to this 'thin' constructivist approach, threat is inextricably related to a state's identity and its perception of the 'Other'. This does not mean that constructivism has discarded the material factors in shaping actors' behaviour. Rather, constructivists argue that the ideas states have about the material forces are more important than the material forces themselves. In Wendt's (1992) terms, 'Anarchy is What States Make of it'. Accordingly, if two states share the same identity and the same conception of the balance of power, threat perception should diminish regardless of the material balance of power (Huntington 1993; Horowitz 1995; Wendt 1999; Hopf 2002; Haas 2003; Rousseau and Rocio 2007).

Even though constructivism has addressed actively the role of ideational forces in international relations, it hardly accounts for the interplay between ideational and material forces (e.g. Risse et al. 1999; Meyer and Strickmann 2011).¹³ Constructivism does not only highlight the centrality of identity issues and ideational structures in shaping state behaviour; but it emphasizes them to the exclusion of material factors. By looking at material structure as the result of an actor's perception and understanding, constructivism conflates actors' physical and ideational needs. Constructivism therefore leaves many questions unanswered. For example, why do states need to affirm their identity through foreign policy? Constructivist scholars have focused on how identities are constructed in relationship to Others and how material structures are

¹³ Several existing approaches have sought to combine ideational and material factors by adopting theoretical and methodological pluralism. Notable attempts include the International Society approach or the English School (Buzan 2004; Buzan and Gonzalez-Pelaez 2009), Cox's Neogramiscianism based on the notion of historical structures (Cox 1996; Sørensen 2008), the Historical Sociology approach (Hobden and Hobson 2002; Hinnebusch 2010b), and a few works in FPA (Risse et al. 1999; Nau 2002). Other scholars have borrowed realist insights about the relevance of capabilities, their distribution among state actors, and the role of threat perception, and have incorporated these within a constructivist framework (Rousseau 2006; Meyer and Strickmann 2011). Similarly, neoclassical realists have combined ideational domestic context—such as elites' perceptions—with material systemic factors (Glenn 2009; Wohlforth 1993; Kitchen 2010).

subjectively understood according to these identity narratives. Nevertheless, they overlook how identities are formed and how they change. How does an actor's perception of the 'Other' change from enemy to friend, or vice versa? In other words, what triggers this identity framing and reframing? The conflation of the identity and material interests in constructivism has generated an insufficient appreciation of the myriad mechanisms of identity change.

Whereas constructivists examine threat perception as a function of identity, other scholars have looked at ideologies. Haas (2012, 3–4) defines ideologies as 'leaders' preferences for ordering the political world, both domestically and internationally. Ideologies, in other words, are the specific, often idiosyncratic, political principles and goals that leaders both value most highly and use to legitimate their claim to rule'. Haas (2012) attempts to explain how ideologies are likely to shape leaders' perception of threats. He argues that threat perception is a function of what he calls 'ideological polarity' and 'ideological distance'. In his view, ideological similarity can be source of alignment whereas ideological difference can be source of conflict. Moreover, he argues that the more the system is ideologically multipolar, the less there are incentives for alliances. Although this argument complements the existing literature on threat perception in many ways, it is also subject to criticism. First, whereas Haas argues that ideological similarity is the source of cooperation, empirical evidence from the Middle East often suggests the opposite. As Walt (1987, 170) observes, 'certain ideologies are more a source of division than of unity, even though the ideology explicitly prescribes close cooperation among the adherents'. Similarly, Barnett (1998) finds that pan-Arabism has had a divisive impact on its adherents. Moreover, materialist explanations constituted a significant challenge to Haas' argument, as it does not account for situations where threat perception is the product of relative power distributions.

The Syrian decision to ally with Iran is a good illustration of this puzzle. As Gause (2003:298) notes, 'The [Ba'athist] regime in Damascus and the Islamic revolutionaries in Teheran had very little in common. [Ayatollah Khomeini] excoriated secular and nationalist regimes that suppressed local Islamic

movements; the [Assad] regime was a prototype of such a regime'. In an attempt to solve this anomaly, Haas (2012:xv) argues that threat perception is a function of what he calls 'ideological distance'—that is 'the degree of ideological differences dividing states' leaders'. His hypothesis claims that the more ideologically different, the more states become threatening. In his analysis of the Syrian-Iranian alliance, he highlights the differences between their respective ideologies. Nevertheless, he argues that ideological multipolarity can temper the effect of ideological differences. Accordingly, a common ideological enemy—Zionism—created incentives for cooperation. However, Haas does not answer an important question: why the ideological similarity between the two Ba'athist regimes did not result into cooperation against both Zionism and the Islamic revolution? To answer this question, a consideration of material forces alongside ideology is indispensable, what Haas considers to be secondary. Therefore, my study provides an answer to the above questions, by considering ideational and material factors in the process of threat perception.

2.1.4. The Copenhagen School in IR: Securitization Theory and the Construction of Threats

Over the last three decades, insights of social theory have inspired several approaches in International Relations and led to alternative perspectives on the role of non-material factors in understanding actors' behaviour. In the course of the 1990s, realist strategies dominant in security studies were challenged by theoretical innovations, which 'sociologized' the concept of security and took critical stances against the objective realities of world politics. Emerging from different methodological and ontological perspectives, these approaches offered reflective and dynamic debates on how to understand threats.

One of the most important and controversial contributions to this debate has been the idea of 'securitization', a term advanced and developed by the Copenhagen School in IR. The concept of 'securitization' points to the process by which issues are transformed into security issues, i.e. *securitized*. Based on a broad constructivist approach, securitization theory claims that security is a discursive construction rather than an objective reality. Barry Buzan and Ole Wæver (2003, 491) define securitization as a successful 'speech act' 'through

which an intersubjective understanding is constructed within a political community to treat something as an existential threat to a valued referent object, and to enable a call for urgent and exceptional measures to deal with the threat'. In other words, for an issue to be *securitized*, an actor, or the *securitizer*, presents and frames it as an existential threat, which requires a suspension of normal politics. In other words, the securitizing act is 'not simply a realm of instrumental rationality and rhetorical manipulation' (Williams, 2003: 522), but obligates and enables a certain subsequent behaviour to handle the securitized threat. For securitization to be attained, this '*securitizing move*' needs to be accepted by the '*audience*' (Buzan, Wæver, and Wilde 1998; Waever 1995). In other words, the securitization process is an intersubjective process that requires an interaction between the securitizer and the audience. In short, securitization is a mechanism or a process by which issues are transformed into the field of the existential.

Accordingly, securitization starts as conscious, explicit political act or a 'speech act' that leaders adopt to bring an issue into being a security situation by representing it as such. As Waever (1995, 55) states,

What then *is* security? With the help of language theory, we can regard 'security' as a *speech act*. In this usage, security is not of interest as a sign that refers to something more real; the utterance *itself* is the act. By saying it, something is done (as in betting, giving a promise, naming a ship). By uttering 'security' a state-representative moves a particular development into a specific area, and thereby claims a special right to use whatever means are necessary to block it.

Moreover, as Waever (1995, 54) adds, 'something is a security problem when the elites declare it to be so'. In other words, securitization is a political choice, decision to conceptualize an issue in a particular way. There might be various reasons and motivations behind placing an issue in security terms, such as political survival or overcoming an identity crisis. The Copenhagen school also limits the use of securitization to a particular usage. Securitization is not applicable to any particular situation about security. It is limited to the use and constant repetition of a specific 'rhetoric of existential threat'. As Buzan et al. (1998, 26) argue,

The distinguishing feature of securitization is a specific rhetorical structure [...] That quality is the staging of existential issues in politics to lift them above politics. In security discourse, an issue is dramatized and presented as an issue of supreme priority; thus, by labeling it as *security*

an agent claims a need for and a right to treat it by extraordinary means. For the analyst to grasp this act, the task is not to assess some objective threats that 'really' endanger some object to be defended or secured; rather, it is to understand the processes of constructing a shared understanding of what is to be considered and collectively responded to as a threat.

By framing an issue as an existential threat, political actors give it a sense of urgency and importance to create a sustained political support and deployment of resources (Sjöstedt 2008, 10). These intended measures might not be possible if these issues were regarded as matters of 'normal politics'. A securitizer not only urges 'extraordinary measures' to be taken, but more or less disregard all institutionalised rules of conduct. However, the speech act or the framing of an issue as an existential threat is not a sufficient condition for the success of securitization.

Considering the above, one may come to the conclusion that securitization is an explicit speech act to bring an issue into security by framing it as an existential threat. Securitization theory as a framework of analysis has been widely developed and applied to many issues, such as analyses of state foreign policy behaviour (Kaliber 2005), the construction of transnational crimes, the framing of HIV/AIDS as security threats (Sjöstedt 2008; Elbe 2006), the US-led 'war on terror' (Abrahamsen 2005), and minority rights (Roe 2004). Nevertheless, the theory is widely known as a Western construct, and its application has been confined to Europe and US contexts. In the past decade, securitization has been vaguely adapted to non-Western contexts (Bilgin 2011; Kaliber 2005; Greenwood and Wæver 2013).

Whereas securitization has highlighted the social and subjective aspects in the phenomenon of 'threat construction', it totally undermines objective factors contributing to threat perception. Although securitization can provide how Saudi Arabia framed Iran, Hezbollah, and Hamas as a threat, it does not provide an answer to the 'why' question. Securitization provides only few insights as to *why* some issues are constructed as security threats (Sjöstedt 2008). Moreover, securitization does not account for military and material threats, which can objectively exist beyond actor's perceptions and framing. In short, securitization theory can explain how Syria and Saudi Arabia framed their respective enemies as threats through discourses and speech acts. Nevertheless,

securitization does not explain why Saudi Arabia and Syria made particular choices of friends and enemy.

2.1.5. Neoclassical Realism: A Perceptual-Materialist Explanation

While realism relies on materialist explanations, and constructivism favours ideational ones, foreign policy scholars have demonstrated the utility of another approach in explaining state behaviour. They argue that it is policymakers' cognition of the balance of power that determines state behaviour (Christensen and Snyder 1990; Wohlforth 1993). The new wave of neoclassical realism has integrated this cognitive dimension into an overarching realist framework in order to explain threat assessment. Like balance of power and balance of threat theories, neoclassical realism places material power at the heart of the analysis. However, in contrast to conventional balance of power and balance of threat theories, neoclassical realism offers an alternative way of conceptualizing threat perception. Like structural realists, this approach posits that states identify threats based on shifts in material power. However, states do not balance against changes in the relative power distribution. Instead, leaders make foreign policy decisions and, therefore, a perceptual dimension that includes their personal traits, beliefs, and motivation is in play (Rose 1998; Schweller 2003; Lobell, Ripsman, and Taliaferro 2009). Nevertheless, this psychological cognitive dimension in neoclassical realism has been underdeveloped (Wivel 2005; Goldgeir 1997).

The distinctive contribution of the neoclassical realist approach is the integration of domestic factors alongside the structural level in explaining state behaviour. Based on these assumptions, Lobell (2009) presents a neoclassical model of threat identification titled the 'Complex Threat Identification Model'. While classical and structural realism deal with the state as a coherent actor, neoclassical realists advance a different conception of the state as a complex relationship between state and society. If a state is faced with an external threat, societal leaders will identify it as such if it endangers their specific interest

(understood as socioeconomic interest, regime stability, and/or their position within the social structure) (Lobell 2009, 46–59).

According to neoclassical realism, threat perception is an interactive process between objective material variables and leaders' perception. Whereas neoclassical realism places perceptual variables alongside material power variables and rejects the mutual exclusion undertaken by neorealism and constructivism, it leaves many questions unanswered. The link between objective material power capabilities and subjective variables is still unclear and underdeveloped.¹⁴ Even though the neoclassical realist approach takes a step forward in combining ideational and material factors, it remains loyal to an overarching realist approach, wherein material factors are considered predominant. Furthermore, various attempts at integrating ideational factors in the neoclassical realist approach have limited the role of ideas to intervening domestic variables (Kitchen 2010; Rathbun 2008). In short, neoclassical realism has kept the materialist ontology of structural realism. Neoclassical realism has been dealing with threats as synonymous with material structural shifts, in which ideational factors are intervening variables at play at the domestic level. In other words, the possibility of an ideational threat endangering the state has not been explicitly considered by this approach.

2.1.6. Threat Perception in Foreign Policy Approaches (FPA)

Whereas the international relations theories reviewed above focus on structural factors as sources of threats, foreign policy approaches offer psychologically-oriented and agent-based explanations of threat perception. They shed light on the role of individual leaders in affecting the path of international dynamics. 'Who Leads Matters' as Hermann et al. (2001) acknowledges. Therefore, the decision-making process and the subjective understanding and perception of leaders are at the heart of threat assessment (J. G. Stein 2013; Kaarbo 2015;

¹⁴ Some scholars have borrowed from cognitive psychology to fill this gap in the balance of threat theory without identifying with neoclassical realism *per se* (Rousseau and Rocio 2007; Rousseau 2006).

Levy 2013; Goldgeier and Tetlock 2001). The inclusion of political psychology into foreign policy has brought fundamentally new theoretical perspectives to the study of threat perception.

Scholars have paid close attention to the variations between what leaders perceive as threatening and what the evidence of military capabilities suggests, i.e., perception and misperception (J. G. Stein 1988; Jervis 1976). Psychological approaches are built on the assumption that accurate perception and calculation of threats is impossible, and that this perception might be distorted due to lack of information, inaccuracy of data, and bad judgement (Voss 1998; Holsti 1967; Larson 1989; Khong 1992). Moreover, FPA scholars drawing on insights from psychology grapple with the impact of the beliefs, personalities, emotions, perceptions, and decision-making processes of individual leaders on their threat perception (Dyson 2006; M. Hermann 1988; M. G. Hermann 1980; Kaarbo 1997). The attention to emotions, anger, humiliation, reputation, and image constitutes an important innovation (J. G. Stein 2013, 384). This vein of thought within FPA has inspired the development of a few IR theories, such as models of strategic interaction and bargaining theories to explaining the outbreak of wars, for which rationalists failed to account (such as the 2003 Iraq War). Realist theories cannot explain why U.S. leaders perceived Saddam Hussein as more threatening in 2003 than in 1998. Iraq's capabilities did not grow and its leader remained the same. The integration of psychological insights into the analysis has shown how the difference in beliefs between the senior leaders in the Clinton and the Bush administration mattered in the way threat was perceived (e.g. Lake, 2010).

Despite the fruitful integration of psychology into the study of threat perception and foreign policy behaviour, it bears some limitations which make its integration in this study challenging. Political psychology has been used to explain particular foreign policy interactions such as strategic interaction, but its integration in broader IR theories is still *ad hoc* and limited (Kaarbo 2015, 74). In addition, how important is the agency in explaining these regional/international outcomes? Psychologically-oriented explanations in FPA

focus on particular situations where threat perceptions led to wars or crisis—but what if threat perception does not necessarily lead to an escalation of violence? Moreover, threat perception is hardly an individual process; leaders do not perceive threats in isolation. Their perceptions are usually shared and accepted by the surrounding elite. How threats are perceived in a collective group has been rarely developed in psychology (J. G. Stein 2013, 388–89).

A critical evaluation of the above theoretical accounts in the context of the Middle Eastern international relations is essential to establishing the theoretical case for this study's research question. The following section examines the existing literature on Middle East alliances deriving from the major trends in IR theory. I argue that threat perception is not only a matter of power or perception of power, but also of identity and ideational factors. Nevertheless, the existing literature lacks a theoretical position that combines both in a balanced inquiry.

2.2. Threat Perception in Middle Eastern International Relations

This section contends that ideational factors are present in realist accounts just as material factors are present in constructivist accounts. Nonetheless, the enigma of the interplay between both factors in shaping threat perception has never been satisfactorily resolved. In the first and second parts of this section, I evaluate materialist and ideational explanations when applied to the context Middle East. I then ask whether the introduction of domestic variables would solve the puzzle of how threat is perceived.

2.2.1. Walt's Balance of Threat Theory and Middle East Alliances

With the prevalence of the realist paradigm in IR theory, generations of scholars have been content to view the Middle East through the lens of anarchy and power politics while considering identities to be mere instruments of policy legitimization. Walt's *The Origins of Alliances*, the most comprehensive and

theoretically informed study on alliances in the Middle East, recognizes that anarchy and the distribution of power alone cannot predict which state will be identified as a threat. Threats are determined by aggregate power, offensive capabilities, geographic proximity and aggressive intentions. By considering aggregate power and perception of intent, Walt offers a compromise between ideational and material factors shaping threat identification and alliance formation. In other words, Walt's ontology of the threat rests on objective materialist elements—as aggregate power— and on a subjective ideational element or the perception of intent. Nonetheless, the fundamental ontological assumption is unclear about whether subjective factors are more important than objective ones. Despite combining objective and subjective variables ontologically, Walt fails to make the same compromise on the theoretical level. As Goldgeier points out, Walt 'argues for the importance of perceptions, beliefs, motivation, and bias while leaving the origins of these factors to case-by-case empirical study rather than systematic theoretical investigation' (Goldgeier 1997, 141).

Walt's analysis of alliances in the Middle East exposed the predicaments in his theory. While he was very reluctant to specify which factor would be more important, a better understanding of his argument can be obtained from his neorealist bias. As he presumed that ideological alliances would disappear whenever a military threat arises, he implicitly considered that states give the priority to military threats over ideological ones. Moreover, by arguing that 'ideology is less powerful than balancing as a motive for alignment', he suggests that ideology can only explain the infrequent behaviour that is exceptional to the rule (Walt 1987, 5). In his desire to show that neorealism is proven to be correct even in the Middle East, Walt limits the impact of identity on alliance politics into his under-theorized *potpourri* category of 'aggressive intentions'. Accordingly, he proposes that 'intentions' might be identified through domestic characteristics and ideology. 'Ideology' in Walt's account is an instrument in the hands of Arab leaders to legitimize decisions already made on the basis of

material factors, or in other words, it is a discourse accompanied by propaganda and subversive efforts hiding behind strategic interests.

Nevertheless, in the Middle East, where ideational factors—identities, ideologies and discourses—are most evident, Walt suggests that balancing acts in the Middle East are of two types: ‘balancing conducted by military means for particular military ends and balancing conducted by political means directed at an opponent’s image and legitimacy’ (Walt 1987, 149). In other words, Walt found cases where Arab states balanced threats based on ideational considerations. Yet, his adherence to the neorealist approach and systemic approaches led him to underplay the evidence brought by Middle East cases. He therefore cannot explain shifts in alliance patterns in the Middle East when power distribution remains the same. For instance, although Jordan allied with Israel in balancing against the Palestinian Liberation Organization (PLO) and Syria in 1970, it complied with pan-Arab norms and joined the Arab alliance against Israel during the Kippur War (1973). By understating the role of ideational factors, Walt have not captured the normative aspect of the Arab-Israeli conflict.

Despite the evidence from the mentioned cases, Walt has not developed or revisited his theoretical framework, which makes his argument inconsistent when it came to the impact of ideational factors, namely of pan-Arabism. This inconsistency draws back to his ambiguous conception of threat. As Walt (1987, 26) highlights, ‘One cannot determine *a priori*, however, which source of threat will be most important in any given case, one can say only that all of them are likely to play a role’. As Wivel (2000, 9) underlines this predicament, ‘Walt presents us with a grab bag argument. If one element in his theory does not explain state action, another probably will, but the exact conditions under which they apply to as well as the relation between the variables remained underspecified’.

Consequently, Walt’s balance of threat theory has the potential to explain some cases, but the exceptions are many. It is clear that his theory best explains

why, for example, Syria's alliances reflected a high preoccupation with geopolitical considerations, even when these choices were unpopular, such the rapprochement with Iraq in late 1978 to counter the geopolitical imbalance created by the withdrawal of Egypt following the Camp David Accords in 1977, or as in the case of the alliance with Iran throughout the Iran-Iraq War that was formed with the view of weakening Syria's aggressive neighbour, namely Iraq. However, Jordan's alignment with Iraq during the 1990-1991 Gulf War ran counter to the neorealist balance of threat, according to which Jordan should join the American-led coalition, but it did not. Similarly, Saudi, Egyptian, and Jordanian positions condemning Hezbollah and Hamas during the 2006 Lebanon War and Gaza War in 2009 are baffling.

One empirical analysis that reflects these problems in Walt's theory is Priess' (1996) attempt to study the Gulf Cooperation Council (GCC) as an interpretative case study of the balance of threat theory. Priess concludes that the overall result of his research is consistent with the theory's principal argument that states balance the primary source of threat. However, he assesses that the four dimensions of threat are highly correlated, and that it is impossible to detect the effect of each of these variables. By pushing realism towards considering ideational and perceptual ontological assumptions, Walt underlines the potential of combining ideational and material factors. This potential constitutes the primary motivation behind my study.

2.2.2. Does Identity Politics or Ideology Provide an Answer?

By introducing intangible variables such as identities, values, ideas and beliefs in shaping state behaviour, constructivism converged with the need to fill a significant gap, namely the question of how identity politics systematically shapes regional interactions. Constructivism enabled Middle East scholars to challenge neorealist propositions about static interests deriving from the anarchic nature of the international system. For example, Barnett finds in Walt's 'aggressive intentions' category the starting point of his argument. As Walt fails to specify how intentions are determined, Barnett (1996, 401) offers an

alternative understanding: 'the variable of identity also signals which states are considered more or less desirable partners'. Consequently, he contends that 'identity is linked to the construction of the threat and represents a potential source of alliance formation' (1996, 409).

Barnett claims that the change in the content of identity has an enormous impact on strategic behaviour and alliance politics. During the Baghdad Pact,¹⁵ the debate within the Arab system was over the definition of a 'collective identity'; hence, the rivalry was over the norms that should govern inter-Arab relations. As Barnett (1996, 409) summarizes, 'threats, therefore, derive from a rival's attempt to portray itself as acting in a manner that violates the group's norms and to portray others as acting in a manner that is consistent with those norms and thus potentially threatening the group'. Barnett argues that the dominant norm in any given period determines state behaviour and its alliance choice. During the Baghdad Pact, pan-Arabism was the predominant norm in the region and, therefore, shaped states' alliance behaviour. With the decline of pan-Arabism, threat construction in the Middle East underwent a detour. Barnett considers the Gulf War 1991 and alliances formation during this period to be a revelation of the decline of pan-Arabism and the emergence of state-centric identities. As Arab states ceased to share the definition of threat, they diverged in their security policies (Barnett 1995).

According to this constructivist view, symbolic, not strategic considerations, explain Arab alliance decisions. In other words, identities determine states' threat perception. Just as Walt's materialist inclination is the subject of considerable criticism, the empirical contradictions to Barnett's argument are evident. Ideational and symbolic motivation for alliance formation explains several coalitions, such as Nasser's participation in 1967 war, the formation of the United Arab Republic between Egypt and Syria in 1958, and the Arab coalition during the 1973 Kippur War between Israel and Arab states

¹⁵ Britain, Iraq, Turkey, Iran and Pakistan created the Baghdad Pact in 1955 to prevent the Soviet infiltration in the Middle East. British ambitions were faced with a strong opposition from Nasser in Egypt, who led a popular opposition across the Arab world.

(Egypt, Syria and Jordan). However, it is clear that nothing was symbolic or ideational in al-Assad's rapprochement with Iraq in late 1978. This short-lived coalition was based on al-Assad's attempt to counter the imbalance of power created by the Camp David Accords. Moreover, Syria deliberately withdrew from the Arab-United Republic when the norms of Arabism were at their peak (Salloukh 2000, 41). Similarly, some Arab regimes took foreign policy decisions that were based on material constraints and ran counter to the predominant normative order in the region. Examples include the Jordanian-Palestinian conflict in 1970, Syria's intervention in Lebanon against the PLO in 1976, and its alliance with Iran throughout the Iran-Iraq War (1980-1988). Similarly, when al-Sadat made the peace agreement with Israel in 1979, the norms of Arabism were still active (Owen 2004, 63-65).

Barnett's constructivist account failed to specify when strategic considerations will outweigh symbolic and normative ones, or when the opposite will hold. As Gause (1999, 21) notes, 'it is not clear from Barnett's account when states will be constrained by the norms of Arabism, and when they will ignore them'. Barnett himself underlines that systemic outcomes are the result of both material and ideational factors. As he states, 'sometimes identity politics will figure centrally: at other times a strategic logic might provide an exhaustive explanation. There is no theoretical or empirical justification, however, for assuming the primacy of one over another' (Barnett 1996, 446).

Although constructivist scholars have focused on identity, other scholars have focused on ideology. For instance, Nahas (1985) develops an argument about the challenge of revolutionary ideologies to state-system. Based on the concept of 'ideological homogeneity', he argues that ideological assimilation creates continuity and stability in the system, as states share the same foundational norms. When these interactions are disrupted by revolutions, instability and challenges evolve. He illustrates his argument through a comparative analysis of the Egyptian revolution (1952) and the Islamic revolution in Iran (1979) and their disrupting effects on the regional system in

the Middle East. Although this account presents a convincing argument, it remains structural as it examines the role of revolutions on the state-system. Nevertheless, it cannot account why some states were threatened by these disruption whereas others were not.

Rubin's (2014) *Islam in the Balance* is another attempt to analyse how ideas and political ideology can threaten regime survival. He examines the threat perceptions and policies of two Arab, Muslim majority states—Egypt and Saudi Arabia—in response to the Islamic revolution in Iran (1979) and the Islamic state in Sudan (1989). Using these comparative case studies, Rubin presents an analysis of how ideas, namely political ideology, can threaten states. He argues that transnational ideologies can present a greater and more immediate threats than shifts in the military balance of power. Ideas and transnational ideology pose a threat to domestic stability and legitimacy in another state. As these ideas can find resonance in other states. As a response to these threats, states engage in 'ideational balancing'. Ideational balancing constitute a non-military response involving resource mobilization and counterframing (Rubin, 2014, 37-39). Accordingly, threatened regimes mitigate the symbolic power of the threatening ideology by mobilizing its ideational power, such as media technologies, transnational networks, and symbols to alter the commonly held beliefs about the threatening ideology. Moreover, the regime is counterframing the source of threat to undermine the credibility of its ideological power. Based on this argument, Rubin presented a comparative analysis of Saudi and Egyptian efforts at containing the ideological threats emerging from the Islamic revolution in Iran (1979) and the establishment of the Islamic state in Sudan (1989).

This book makes important contributions to the study of threat perception in Middle East international relations. More precisely, it captures how Islamic states—in broader terms 'ideology'—can be more threatening than military capabilities. Although Rubin's account contributes to the debate on how and why ideational factors can be threatening, material factors were almost absent. In other words, Rubin's examination of threat perception lacks the

dimension of how ideational and material forces interplay in the phenomenon of threat perception. If Saudi Arabia and Egypt perceived the ideological appeal of the Islamic revolution in Iran as threatening, Rubin does not examine why this was not the case for Syria. Syria has been governed by the Ba'ath regime, upholding a secular ideology while oppressing Islamist groups, such as the Muslim Brotherhood, at the domestic level. In other words, the case of Syria poses a challenge to Rubin's argument that ideological threats pose a greater threat than shifts in the military balance of power. In this regard, my study aims to contribute to this gap. This study presents a more comprehensive account of how both ideational and material threats shape threat perception. Moreover, it unpacks the interplay between both factors in the process of threat perception. In some instances, state can perceive ideational threats as more eminent, whereas material threats can be perceived as greater in other instances.

In short, neorealists invoke ideational and normative factors whenever material considerations were unable to explain the totality of empirical cases. Walt calls upon 'ideology' and 'image' to explain alliances in the Middle East when neorealism seems to be otherwise inadequate. For their part, constructivists proclaim the superiority of normative and ideational factors over material considerations of power. They adopt material explanations when ideational factors do not provide a viable one. As Halliday (2005, 32-33) notes, 'if realism ignores values and ideas, constructivism and its outriders run the risk of ignoring interests and material factors, let alone old-fashion deception and self-delusion'.

2.2.3. The Unit-level Analysis: A Middle Ground?

Third World scholars, especially Middle East experts, consider the domestic level to be central when explaining threat perception. They claim that state-society relations and regimes' security are at the forefront of any foreign policy decision (Ayoob 1984; Ayoob 1995; David 1991b; David 1991a; Korany, Noble,

and Brynen 1993; Dawisha 1983).¹⁶ Classic works of Middle East international relations provide a reading of inter-Arab politics as driven by domestic considerations. In other words, foreign policy has been portrayed as a crucial tool in the hands of leaders seeking to preserve their hold on power domestically (Kerr 1971; Seale 1986; Mufti 1996; York 1988; Bar-Simon-Tov 1983).

Most relevant, however, for the purpose of this research is Gause's (2003) 'Balancing What? Threat Perception and Alliance Choice in the Gulf', a study inspired by the neoclassical realist approach. Gause presents a middle ground by combining the elements of threats underlined by Walt (1987), the regime security approach of David (1991a), and the importance of transnational identities highlighted by Barnett (1996) to explain alliance decisions in the Gulf. Gause develops hypotheses about how leaders prioritize among multiple threats. He also conducts a test on alliance choices made by Syria, Jordan, and Saudi Arabia regarding security arrangements in the Persian Gulf from 1971 to 1991.

In his attempt to find a compromise, Gause renders ideational factors more concrete through the logic of regime survival. He argues that Arab states overwhelmingly perceived ideational threats—which emanated from abroad and targeted the domestic stability of Arab ruling regimes—as more salient than material threats. Gause succeeds in presenting ideational factors in a tangible way while bridging systemic and domestic levels. However, this attempt is not free of criticism. First, Gause builds his framework on the assumption that leaders' concerns about their hold on power domestically are the primary driver behind alliance choices. Hence, he limits the whole decision making to leaders' perception of their own security and assumed that Arab regimes are independent from their institutional bases as well as from the organization of state-society relations.

¹⁶ These attempts at integrating the domestic level emerged as part of a larger trend within IR theory (Kapstein 1995; J. Snyder 1991; Mesquita 2002; Barnett 1990).

Second, Gause assumes that ideational factors pervasively override material factors in shaping leaders' threat perception. Paradoxically, the cases reveal some instances where the same Arab leaders gave the priority to military threats over ideational ones. For instance, Gause points out that the Syrian-Iraqi rapprochement, beginning in late 1978 until mid-1979, was driven by the Arab-Israeli balance of power where Syria gave the Israeli military threat the priority over the ideational threat emanating from Iraq, especially after the Egyptian withdrawal from the Arab-Israeli conflict. Gause's theoretical framework cannot not specify precise conditions under which ideational factors would precede material ones in the process of threat perception.

Third, like Barnett, Gause underlines that alliance choices are bound by the exigencies of regime survival. This regime security logic is inextricably linked to regimes' legitimacy, as transnational ideologies target the public opinion to stimulate domestic unrests. Leaders, constrained by calculations of legitimacy, perceive these transnational threats as more salient than others. If public opinion is the primary driver behind leaders privileging ideational threats, how then to explain the fact that Arab regimes have consistently taken unpopular foreign policy decisions based on materialist considerations? Examples include al-Sadat's trip to Jerusalem in 1977, al-Assad's decision to align with Iran against Iraq, al-Assad's intervention against the Palestinians in Lebanon in 1976, Syria's alliance with the US-led coalition against Iraq in the Gulf War (1990-1991), and the Saudi-Egyptian-Jordanian stance on Hezbollah's actions during the 2006 Lebanon War, etc.

Similarly to Gause, Telhami (1999) combines realist theories of alliances with arguments related to the notion of legitimacy to account for Arab regimes' threat perception. He claims that threats are constituted by the transnational symbols of legitimacy in the Arab world. In the absence of any electoral legitimacy, transnational identities become a part of a process of legitimization and coercion. Telhami argues that the force of transnational ideas still matters, because the emergence of the so-called 'New Arabism' as an independent transnational movement is still relevant to the regional coalitions and threat

perception. Accordingly, Arab regimes perceive threats when their domestic legitimacy is undermined. While this approach explains successfully some coalitions in the region—especially the Egyptian-Saudi-Jordanian coalition—, the Syrian-Iranian partnership is incongruent with Telhami’s argument.¹⁷

Other scholars inspired by historical sociology emphasize those historical path dependencies that led to state behaviour in Middle East international relations. They aim to combine material and ideational structures at domestic and regional levels. To scholars inspired by historical sociology, an understanding of regimes’ threat perception and subsequent behaviour in the Middle East requires an analysis of how state formation, the development of state-society relations, and domestic structures affects foreign policy. Halliday (2005), for instance, adopts a historical-sociological framework to examine the regional and international dynamics in the Middle East. He recognizes that power politics, relative power distributions, and inter-state competition are important factors in explaining state foreign policy. Nevertheless, they present only one dimension. Instead, an examination of state’s foreign policy should include an explanation of state’s structure, including the power structure between different institutions, state-society relations, and the weigh of public opinion. These domestic structures affect foreign policy behaviour (Halliday, 2005, chap 2). Based on this approach, historical sociology scholars examine the development of state institutions, which influence policy-making at the regional level.

Hinnebusch (2003a) examines how the interrelation between a state’s specific position in the regional structure and the level of state formation and consolidation determines foreign policy behaviour. Systemic forces are the balance of power, economic dependency, trans-state ideological tides. However, it is level of state consolidation that determines how states react to their

¹⁷ Other studies have integrated domestic variables—such as political economic variables (Barnett and Levy 1991; Brand 1994a, 1994b, 1999), state-society relations (Gause 1990), and regime security and internal instability (Bar-Simon-Tov 1983; York 1988; Mufti 1996)—to state behaviour and alliance choices. However, none investigate the interplay between ideational and material forces.

systemic environment. Accordingly, he presents a comparative analysis of Syrian and Saudi foreign policies. This comparison highlights that the interaction between paths of state formation and systemic factors led to convergence in some instances and divergence in other instances in Saudi and Syrian foreign behaviour.

Moreover, historical sociologists criticize the constructivist approach for distorting the role of ideational factors in Middle East international relations. Stein (2011), for instance, pledges for an approach based on historical sociology and political economy to examine the role of ideas in regional politics. In particular, he focuses on the influence of ideas and their articulation within rising middle classes, which affected regional politics.

To scholars inspired by historical sociology, threat perception and subsequent foreign policy is thus primarily a question of sufficient strong state structure at the domestic level prompting elites in power from domestic and regional sources of threats. In contrast to constructivists, historical sociologists analyze identities at domestic levels while recognizing the role of material structures at the regional level. Ideas are, therefore, seen as entrenched in domestic institutions difficult to change or reverse, as they become established in popular discourse and practices. Although historical sociology has provided one way of combining ideational and material forces in the study of Middle East international relations, it remains focused on structure with little attention to agency. From this perspective, threat perceptions and state vulnerability appears to be dependent on particular historical paths where ruling elites have a marginal role. Moreover, as in case of regime security approaches, identity is presumed to be a tool for self-preservation and a form of undercurrent available to ruling elites when states are under threats.

In short, neorealism, constructivism, regime security approach, and Historical Sociology each allow us to tell a different story about threat perception in the region. These theoretical approaches can be employed as:

[...] different coloured lenses: if you put one of them in front of your eyes, you see things differently. Some aspects of the world will look the same in some lenses, for example shapes, but many other features, such as light and shade of colour, will look different, so different in fact that they seem to show alternative worlds (Smith 2007, 11).

Each of the theoretical approaches discussed here leads us to ask a different set of questions and to privilege some logics over others, as each approach 'uncovers' a different aspect of the same reality. The existing literature suffers from a widespread limitation in theorizing the ideational/material nexus, as it treats either identity or material power as prior to or dependent on the other. Whereas neorealism considers identities as instruments of policy justification, constructivists find material factors to be constituted by identities. Sørensen (2008, 6) identifies this gap: '[A]t a time when we have two major theoretical traditions in IR that emphasize material and social forces respectively, we have very little attempt to examine the relationship between those forces as they play out in the real world of international relations'. In this study, I do not suggest that both should be synthesized into one perspective or that the significant differences between both ought to be downplayed. Incorporating insights from both approaches allows for the exploitation of their strengths and creates new avenues for investigating how material and ideational factors interact.

This study supports Fearon and Wendt's (2002, 52) claim that 'rationalism and constructivism are most fruitfully viewed pragmatically as analytical tools, rather than metaphysical positions or empirical descriptions of the world'. Instead of using these theories as lenses tested against reality to reveal which one is more accurate or presents the correct explanation,¹⁸ one can imagine what Jepperson et al. (1996, 70) calls 'stage-complementarity', whereby one argument covers one phase of the process, while another argument explains another stage. The theoretical framework presented in the following chapter attempts to reveal how these stages hang together to shape

¹⁸ For example, Moravcsik (1998) presented paradigms as competing alternatives in explaining European integration. Also, Wivel (2008) used theories as lenses to explain the bandwagoning of European states with the United States after World War II.

the process of threat perception. The proposed framework therefore fits into what Moravcsik (2003) calls 'midrange theories of concrete phenomenon'¹⁹ that are empirically grounded and are not constrained by prior assumptions about the meta-theoretical ontological or philosophical status of science.

3. Overview of the Argument and its Contribution

Neorealists and constructivists fundamentally agree that ideational and material forces matter in IR, but they remain biased towards one or the other. This study aims to address this gap through a theory-building endeavour combined with empirical analysis from Middle Eastern international relations. Rather than supplanting these narratives, I supplement them by drawing attention to the interaction between ideational and material factors in the process of threat perception. Building on earlier studies that have acknowledged the ontological and epistemological possibility of combining ideational and material forces in IR (Risse et al. 1999; Nau 2002; Sørensen 2008; Barkin 2010), this study develops a theoretical framework based on 'analytical eclecticism' (Sil and Katzenstein 2012; P. Katzenstein and Sil 2010; Sil 2000). This framework underlines how identity and material power interplay in the process of threat perception; I use the cases of Syria and Saudi Arabia during three major wars in the region as illustrations of its utility. I provide a full explication of the theoretical framework in the next chapter, as well as of methods and case selection. However, it is necessary at this point to underline the main argument of this study and the contributions it promises to make.

This study develops a two-layered framework of security as both physical and ontological, where the interaction of ideational and material forces can be analysed together. Ontological security is intimately connected with identity; its pursuits, therefore, requires the state's distinctiveness and differentiation from the Other as well as a coherent and consistent identity

¹⁹ 'Midrange theories' are developed to explain specific sets of empirical phenomena. In this sense, they do not aspire to develop grand theories or universal theories that can be adopted to investigate other phenomena (Merton 1968).

narrative at the domestic level. Physical security, on the other hand, designates the identification of threats that constitute a danger to the survival of the state. In other words, I distinguish between the ontological security necessary for the constitution a distinct Self (security-as-being) and physical security defined as actors' freedom from harm or danger (security-as-survival). While the ontological and physical security spheres have distinct dynamics and processes, they constitute two interrelated layers. In other words, this dual conception of security shows how the dynamics of security-as-survival influence identity framing and how security-as-being affects the dynamics of physical security.

Based on this dual conception of security, I argue that states can suffer from ontological insecurity while their physical security remains intact, and vice versa. When states are in a situation of ontological insecurity/physical security, they attempt to restore their distinctiveness and identity stability. The process of restoring their ontological security influences the practices of physical security. I argue that this was the case of Saudi Arabia during the three wars considered here. However, when states are in a situation of ontological security/physical insecurity, they attempt to fend off danger and harm. This dynamic of security-as-survival constrains and conditions processes of identity formation and framing. This was the case of Syria during the same regional contexts. This line of argument shows that the direction of causality is not fixed or predetermined as states can switch paths. In some instances, physical security and its corresponding material forces condition identity narratives while in other instances the causal points in the opposite direction. To illustrate these processes, I present a systematic comparison between Syrian and Saudi threat perceptions during three major wars in the region: the Iran-Iraq War (1980-1988), the 2006 Lebanon War, and the 2009 Gaza War.

By locating the process of threat perception within the two-layers conception of physical and ontological security, this study accounts for ideational and material forces while examining their interaction. This argument contributes to the broader IR literature by providing a conceptual framework that links the literature on Self/Other relations, ontological security, and

realism. The two-layered conception of security paves the way for interaction and engagement between these literatures. First, the theoretical framework provides a base to examine how ontological and physical security dynamics relate to one another in the process of threat perception. Second, having established ontological security as a distinct and separate motivation for state behaviour, the literature on ontological security may be further developed by investigating the ways in which its dynamics are influenced by physical security considerations. Third, further engagement between the ontological security and Self/Other relations' literatures should shed light on the process of state identity framing and reframing.

Beyond these theoretical insights, this study contributes to the long tradition of studying Arab states' foreign policies. By far, single-country foreign policy analysis predominates in the tradition of studying Arab regimes' behaviour while comparisons remain overlooked and underdeveloped in the field. Whereas the existing literature presents insightful analyses into the foreign policies of Syria and Saudi Arabia, they are presented as part of a single-country analyses or in the framework of regional analysis (Hinnebusch and Ehteshami 2002; Telhami and Barnett 2002; Korany and Dessouki 2008). Moreover, these studies remain generic and do not aim to study particular periods or important events, such as wars. For example, the Syrian-Iranian alliance is often examined as an 'odd' case not comparable to any other alliance in the region (Goodarzi 2006; Agha and Khalidi 1995; Hirschfeld 1986). Likewise, Saudi foreign policy analysis is rarely compared to other foreign policies. In a book chapter examining the broad variations in Syrian and Saudi foreign policies, Hinnebusch (2003a, chap. 6) points to the insights that a direct comparison might bring to theory development. This unique attempt suggests that there is unexplored room for comparative work to be done. Through a 'structured, focused' comparison of Saudi and Syrian alliance choices that uncovers the similarities and spotlights differences, this study provides novel insights for explaining the dynamics of threat perception in the Middle East.

In addition, these cases contribute to the development of the theoretical framework. Examining Syrian and Saudi alliance choices through a comparative perspective should lead to an in-depth understanding of regional political dynamics in the Middle East. The Syrian-Iranian axis, often labelled a 'marriage of convenience', has been studied as an exceptional case (Hirschfeld 1986; Agha and Khalidi 1995; Ehteshami and Hinnebusch 1997; Byman 2006; Goodarzi 2006). By studying this alliance as part of a pattern, and from a comparative perspective, I show that the received historical consensus, which exists around these cases, can be understood differently. Ultimately, an understanding of Syrian and Saudi cases is imperative to any student of Middle Eastern international relations. Because much of the literature on these subjects focuses on these two cases, demonstrating the failure of existing theories to account adequately for their outcomes provides a solid rationale for a thoroughgoing re-examination. Finally, this study demonstrates the potential utility of bringing IR theory and the Middle East as an area study into closer dialogue.

4. Thesis Outline

In chapter two, I present the core theoretical argument deployed in this study. I develop a theoretical and conceptual framework based on analytical eclecticism to account for the interplay between ideational and material forces in the process of threat perception. I then present the research design and case studies selection. The plausibility of the theoretical framework is probed through a comparative case study of Saudi and Syrian threat perceptions during three regional wars, in which I present a theoretically-informed narrative of how identity and power interplayed differently in each case. In chapter three, I examine Saudi and Syrian threat perceptions during the Iran-Iraq War (1980-1988). In chapter four, I present the 2006 Lebanese War. In chapter five, I discuss the case of the 2009 Gaza War. In chapter six, I recapitulate the central themes examined in this study and their implications. I also identify some limitations, some of which are avenues for future research.

Chapter 2: Rethinking Ideational and Material Forces in Threat

Perception: A Theoretical Framework

Of course, we can always construct a theory or a generalization if we wish as long as we remember that it serves the limited and heuristic purpose of throwing light on a small number of features of the phenomenon at the expense of obscuring all others.

James Tully, *An Approach to Political Philosophy* (1993, 276).

This chapter develops a causal logic that shows how ideational and material forces systematically shape regimes' threat perception and their subsequent foreign policies. I also seek to propose a novel theoretical framework for examining the interplay between ideational and material forces in this process. The central claim is that ideational and material forces correspond to a dual conception of security: ontological and physical, which are in constant interaction. Responding to fundamental existential questions of being, ontological security is intimately connected with identity; its pursuit, therefore, requires a state to reinforce its distinctiveness and differentiation from the Other while pursuing a coherent and consistent identity narrative at the domestic level. Physical security denotes the identification of threats endangering the survival of the state. While the two security spheres have distinct dynamics and processes, they constitute two interrelated layers, the influence of which runs both ways. This theoretical framework serves a heuristic purpose for examining divergent Syrian and Saudi threat perceptions. Simultaneously, it establishes a means by which to add empirical substance to the theoretical debate on threat perception and alliances in IR.

The chapter proceeds as follows. First, I explore the overarching eclectic approach of the proposed theoretical framework. My aim is not to put forward a

grand theoretical model for the study of threat perception. Instead, I present a framework that theorizes the ideational/material nexus in the process of threat perception. After presenting the main tenets of this approach, I define the major concepts of the study. I then turn to the definitions ideational and material forces, their influence on threat perception, and their corresponding layers of security: ontological and physical. Subsequently, I explore the interplay between these two spheres of security. The chapter also includes a methodology section that discusses research methods, data, and case selection criteria.

1. Combining Ideational and Material Forces: Elements of Analytical Eclecticism

The puzzle of threat perception cannot be solved with either material or ideational explanations nor can it be addressed from within either uniquely domestic or regional contexts. In order to advance to a position that gives weight to both normative and material structures, and also to systemic and domestic levels of analysis, the present theoretical framework advocates ‘analytical eclecticism’ (Sil and Katzenstein 2012; Sil 2000). It also moves beyond a simple combination of conceptual elements to present a theoretical framework based on a multitheoretical synthesis.

‘Analytic eclecticism’ is defined as ‘any approach that seeks to extricate, translate, and selectively integrate analytic elements—concepts, logics, mechanisms, and interpretations—of theories or narratives that have been developed within separate paradigms but that address related aspects of substantive problems that have both scholarly and practical significance’ (Sil and Katzenstein 2012, 10). Another definition would be ‘a process according to which theorists construct coherent analytical frameworks by evaluating, synthesizing, and reflecting on insights from disparate paradigms’ (Makinda 2000, 206). That is possibly what Walt (1998, 30) envisioned when he wrote that ‘no single approach can capture all the complexity of contemporary world politics’. From this perspective, I argue that developing an eclectic framework allows the analysis to deal with complex empirical puzzles without imposing

any a priori theoretical contour. Jervis depicts this approach as 'engaging with the "isms" without being confined by them' (quoted in Katzenstein and Sil 2010, 67).

Combining ideational and material forces in this study belongs to what Jepperson et al. (1996, 70) calls 'stage-complementarity', whereby one explanatory factor covers one phase of the process, while another factor explains another stage. The framework developed below attempts to reveal how different factors hang together in the process of threat perception. Incorporating insights from both approaches allows for the exploitation of their respective strengths and creates new avenues for investigating how material and ideational factors interact. Accordingly, this study goes beyond flexible eclectic approach that only combines causal insights from separate paradigms; it presents a synthesis based on a multi-theoretical framework. Some scholars outline. Hellman (2003, 149) speaks of a 'pragmatic fusion and synthesis' in solving complex empirical puzzles. Similarly, Moravcsik (2003) offers an exceptional view of 'synthesis' in IR theory. He presents a dissenting view of theories as instruments subjected to testing and synthesis. He argues that elements from different theoretical paradigms do not need to share the whole set of ontological assumptions; only some fundamental coherence while downplaying epistemic principles can lead to fruitful synthesis. For Moravcsik, 'theoretical synthesis' is an additive process, with each element constituting an independent proposition that is subjected to a specific type of test. Following Moravcsik's understanding, this study presents a multitheoretical framework combining ideational and material elements from 'ontological security' and 'realism', sharing some ontological foundational assumptions. Both approaches recognize the presence of ideational and material elements in IR phenomenon. Although each approach is biased toward one element or the other, both fundamentally agree on the presence of both elements.

This theoretical approach is not without pitfalls. Some scholars argue that developing a balanced inquiry combining ideational and material components is fundamentally prevented by theoretical obstacles, based on

Kuhn's (1970, 148) thesis about the 'incommensurability of paradigms'.²⁰ I argue that existing theoretical debates in IR do not represent a compelling barrier to a balanced inquiry (cf. Barkin 2010). The ontological debate is about the nature of the social world; is there an objective reality in the world or is it a subjective creation? In IR theory, the objective position is frequently connected to neorealism and the 'subjective' view is connected to constructivism. These extreme positions or one-sidedness are not, however, reflected in neorealism or constructivism. Although realists and constructivists conduct their analysis based on privileging one side or the other, they fundamentally agree on the presence of both elements in IR.

Another caveat to this eclectic approach can be found in Hollis and Smith's (1990) claim that a synthesis between material and ideational forces is impossible, as there will always be 'two stories to tell'. One story is based on the objective material dimension of the social phenomenon, and the other underpins a normative subjective dimension.²¹ One way to overcome this epistemological caveat is to adopt a positivist approach to ideational factors, according to which identity is treated as a causal factor that is analytically independent of material factors. Although state identity sometimes shapes material interests, it may be the case that states uphold particular identity narratives because it is in their interest to do so. In addition, states can maintain identities that contradict their interests, and it is for this reason that identities and interests should remain conceptually and analytically distinct. As Hinnebusch (2003b, 362) has expressed it,

State interests and identity, are autonomous of each other, but stability depends on a correspondence between them [...] They can be in conflict, but where this is so, in time either norms and identity will likely stimulate revolts against material power structures perceived to be illegitimate or they will be altered to conform to material interests and constraints.

²⁰ The 'incommensurability of paradigms' implies that arguments from different paradigms cannot be combined or matched with one another. This is because they deploy different concepts and conceptual systems, ask different questions, and select different facts.

²¹ Kratochwill and Ruggie (1986) share similar scepticism.

These eclectic and synthetic approaches have been evident in the study of Middle East international relations, especially in Hinnebusch's (2003a; 2004; 2005b) work, even though he does not explicitly refer to it as 'analytical eclecticism' or 'theoretical synthesis'. The impact of this earlier work should not be dismissed, as it represents the first step in encouraging others to pursue eclectic explanations. Nevertheless, Hinnebusch (2003a) presents a malleable framework that lacked specific causal mechanisms. If one element in his argument does not explain state behaviour, another probably will. In other words, the exact conditions under which variables play as well as the relations between them remain underspecified. This study builds upon these previous efforts to deal with ideational and material forces as analytically and conceptually distinct while examining their various interactions.

2. Conceptual Definitions

Before proceeding to the main argument, I define three key terms: 'threat', 'perception', and regime-state nexus. Threats can be defined as 'in the passive sense an anticipation of impending danger rather than in its active sense of an undertaking by one actor to impose a sanction on another' (Cohen 1978, 95). If 'A threatens B', we focus on B's conditions. Similarly, social psychologists have defined threat as 'the *outcome* of A's (intended future) activities as perceived (imagined) by B' (Baldwin 1971, 72 emphasis in original). Perception is defined as 'the process of apprehending by means of the sense and recognizing and interpreting what is processed' (J. G. Stein 2013, 366). Even in the case of concrete objective evidence of danger, if a threat is not perceived, there will be no defensive reaction or alliance. Similarly, a threat might be perceived even if the intention of causing harm is absent or if there is no objective evidence of its presence (Cohen 1978, 93).

This study focuses on threats perceived by regimes in the Middle East. But what is a 'regime'? Is it distinct from the state? Making an analytical distinction between states and regimes has important implications for the question of threat perception, i.e., whose threat perception am I studying? The

literature on democratic transition has made the distinction between state, regime, and government. A regime can be defined as 'the formal and informal organization of the centre of political power, and its relations with the broader society. A regime determines who has access to political power, and how those who in power deal with who are not' (Fishman 1990, 428). Another definition would be 'that nexus of alliances within and without the formal bureaucratic and public sectors that the leaders form in order to gain power and keep it' (Waterbury 1983, xiii). Accordingly, regimes present a form of political organization that is more stable than a government but less permanent than the state. The state, however, is the most permanent structure of political domination, including coercive capacities and abilities to control society.²² Although the distinction has been useful in examining cases in southern Europe and Latin American, the cases of the Middle East present a challenge to this distinction.²³ The history of state formation in the Middle East is inextricably intertwined with regime power and dominance (Anderson 1987; 1986; Ayubi 1996; Owen 2004). As Longva puts it, a Saudi notion of belonging 'to a land or an 'imagined community' is unthinkable because the country itself is appropriated to the ruling family whose name it bears (Longva 2000, 193). The same observation applies to the Hashemite Kingdom of Jordan. In other words, state apparatuses in the Middle East have been co-opted, penetrated, and captured by authoritarian regimes. As Anderson (1987, 7) describes states in the Middle East, 'a stable government administration and a military which controls the use of force are *the sine qua non* of statehood'. Therefore, I provisionally use 'state' and 'regime' in the Middle East interchangeably to signify the threat perception of the elite in power, which becomes diffused and transmitted to state apparatuses. Also, writing about 'regime identity' or 'state identity', I signify these narratives promoted by the elite in power and transmitted to the bureaucratic body in the state.

²² My understanding of the state follows Theda Skocpol's thesis (1979).

²³ On Latin American cases, see Cardoso (1980), and on Southern European cases, see Stephan (1986).

3. What are Ideational and Material Forces, and How Do they Shape Threat Perception?

A good starting point is to define 'ideational' and 'material' factors and their corresponding layers of security. Despite its prominence in mainstream IR literature, material forces as a source of threat remains imprecisely defined. Material forces are intimately related to physical security or *security-as-survival*, which suggests concerns about the physical survival of the state. In other words, some threats are purely physical and put the survival of the state at stake. In this context, I understand 'materialist' factors as those related to 'the capabilities or resources mainly military, with which states influence one another' (Wivel 2005, 368). This definition of materialist factors might be extended to include economic power, which is inextricably related to military capabilities. In this study, I focus on 'relative power distribution' as the primary material factor influencing threat perception. This term refers to the real distribution of capabilities, to which states adjust or fail to adapt. Despite its significance in generating 'fear', relative power distribution is alone insufficient to measure material power. For this reason, I draw a connection between a state's military power and its ability to use it based on the logic of the offence-defence balance, which is defined as 'a state's ability to perform the military missions that are required to successfully attack, deter, or defend' (Glaser and Kaufmann 1998, 48).²⁴ According to this conception of security, changes in the relative power distribution trigger 'fear'. Based on objectified sources of physical harm, states identify their friends and enemies.

Ideational factors are, however, more problematic in their definition. They include diverse elements such as culture, norms, values, beliefs, identity, and ideology. As scholars deal with these elements in different ways, definitions can be overlapping or even contradictory. That is what Abdelal et al. (2006,

²⁴ In some cases, states have considerable military power that cannot be used efficiently. For example, the Saudi Kingdom has grown as the most important importer of military hardware in the region. Nevertheless, the lack of manpower makes the relative power distribution an insufficient lens for assessing the Kingdom's capabilities (Cronin 2014, 236-239).

695) identifies as a 'definitional anarchy'. As Finnemore (1996, 16) highlights, 'one analyst's norm might be another's institution and a third scholar's identity'. Among many ideational forces, my focus here is on 'identity', which deserves a thorough discussion. Although identity is central to social sciences and is at the heart of constructivism within IR, it is a difficult concept to define.

In this framework, I focus on 'identity' as part of the realm of *security-as-being* (Rumelili 2015, 56). This layer of security signifies another motivation for state behaviour, which is the pursuit of a stable definition of the Self that is distinct and different from the Other. Does the content of identity shape state interests and preferences and, hence, define the sources of threats? Alternatively, is it just a mere reflection of material factors? According to Jepperson et al. (1996, 59), identity refers to 'the image of individuality and distinctiveness (selfhood) held and projected by an actor'. However, why do states need to assert a distinctive self-identity? The answer, I argue, lies in the intricate ontological security need of states to have a distinctive and consistent sense of self and to have that sense affirmed by others. Some IR scholars have aimed to transfer the concept of 'ontological security'—which was coined by the psychiatrist R.D. Laing and only recently introduced to IR theory—from the individual to the state level.²⁵ For Laing, an ontologically secure individual is one with a firm 'sense of integral selfhood and personal identity'. The concept was further developed in Giddens' structuration theory (1984; 1991). He defines ontological security as 'the confidence that most human beings have in the continuity of their self-identity and in the constancy of the surrounding social and material environments of action' (1991, 92). This sense of self is reflected in agents' behaviour. As Mitzen argues, 'ontological security is security not of the body but the self, the subjective sense of who one is, which enables and motivates action and choice' (2006, 344). Accordingly, agents choose a course of action that conforms to their self-identity.

²⁵ Cf. Zarakol (2010), Huysmans (1998), McSweeney (1999), Mitzen (2006), and Steele (2008; 2005).

This ontological security lens offers explanations for foreign policy behaviour driven by identity threats. For example, Steele (2005) provides an ontological security interpretation for British neutrality during the American Civil War. Supporting 'slavery' was inconsistent with British self-identity, and, therefore, a decision to intervene would have led to shame. In this situation, where British physical security was intact, identity security was the primary driver behind British foreign policy. Zarakol (2010) provides another illustration to this concept outside the West by examining states' inability to apologize for past crimes: Turkish reluctance to apologize for the Armenian genocide and Japanese discomfort over WWII atrocities. Both states have significant incentives to apologize and endure high costs for not apologizing. In both cases, apologizing threatens the states' identity continuity and consistency, or in other words, their ontological security. Turkey and Japan both suffer insecurities vis-à-vis the West and, hence, have historically shaped their identity around a quest to prove 'modernity' and 'civilization'. As Turkey aimed to differentiate itself from the Ottoman Empire, Japan tried to distinguish itself from the period called the Meiji Restoration. In both cases, apologizing for past crimes challenges Turkey and Japan's present image as part of the 'civilized' world. In ontological security terms, apologizing for past crimes poses a threat to the stability and continuity of their conception of the self.

From this perspective, alongside realist accounts—according to which security and survival are achieved through the accumulation of military capabilities—actors also engage in ontological security-seeking behaviour that affirms their self-identity, which provides them with 'a sense of continuity and order in events' (Giddens 1991, 243). Hence, ontological security involves the ability to 'experience oneself as a whole [...] in order to realize a sense of agency' (Mitzen 2006, 342). In other words, actors need to feel secure in who they are, as they see themselves and as they want to be seen by others. As Giddens claims, 'to be ontologically secure is to possess [...] answers to fundamental existential questions which all human life in some way addresses' (Giddens 1991, 47). This claim suggests that 'insecurity' means that individuals are

confused about who they are and uncomfortable with their identity in social interactions with others (Steele 2005, 525).

How do states acquire this sense of self? The sources of ontological security are the subject of contention among scholars. On the one hand, some scholars have looked at the sources of ontological security as endogenous. Steele (2008) argues that ontological security is couched in a state's intrinsic narrative about the self. From this perspective, the sense of self enables the state to process its environment and build sustainable relationships with others. However, other scholars argue that a state's sense of self is based on social interaction with others. As Mitzen (2006, 354) argues, state identity is 'constituted and sustained by social relationships rather than being intrinsic'. In this interpretation, the sense of self is only reinforced and distinguished through sustainable interactions with others.

Drawing on this debate, Zarakol (2010, 19) has sought a middle ground by arguing that both are 'partly right'. According to Kinvall (2004, 749), 'internalized self-notions can never be separated from self/other representations and are always responsive to new inter-personal relationships'. Building on this compromise, I argue that the exogenous and endogenous sources of ontological security are inextricably related. As identity refers to 'the image of individuality and distinctiveness (selfhood) held and projected by an actor' (Jepperson, Wendt, and Katzenstein 1996, 95), the sense of self acquires meaning not only through the actor's distinctive personal characters embedded in actor's reflexive understanding of the self but also through the uniqueness of this narrative from that of the Other. Here, self-identity is affirmed at the self-versus-other nexus, according to which distinctiveness 'can only be established by difference, by drawing a line between something and something else' (Nabers 2009, 195). This constant effort to forge self-distinctiveness can be seen as part of a larger process, which is an actor's 'struggle for recognition'.²⁶ States not only frame their self-other distinction but also desire to have their

²⁶ For more details on the role of recognition in IR, cf. Wendt (1999, 193–245), Ringmar (2002), Haacke (2005), Greenhill (2008), and Lindemann (2010).

particular narrative recognized by their interlocutors in the international system. As Wendt (2003, 559) argues, 'it is through recognition by the Other that one is constituted as a Self in the first place'. Therefore, acquiring ontological security entails reproducing a particular self-versus-other distinctiveness and having this narrative recognized by others.

According to this relational perspective, state identity acquires a meaning only in a relationship with others. This understanding presupposes that identity is conceived only at the systemic level while domestic and national factors are aggregated into a structure of social relationships. Nau (2002, 19) describes this predicament: 'if a state's foreign policy acquires a meaning only in the context of an external social relationship, is a state's individual foreign policy relevant any longer? It is not unless the state possesses an autonomous domestic capacity to criticize and potentially alter the prevailing international social structure'. In other words, states' identity has an internal dimension that evolves from the interaction among domestic groups and is influenced by historical, cultural, and societal factors. Therefore, and alongside this relational dimension, state identity is also the function of individual characteristics, which are not necessarily dependent on the state's role at the international level. For example, the Islamic element in Saudi state identity evolved from domestic historical and sociological origins. Although this element has been framed and reframed through interaction with others, it initially evolved as an individual characteristic.

It appears therefore that identity is also about how a state perceives itself, which represents the second dimension. According to Wendt (1999, 224), state identity is 'rooted in the actor's self-understanding'. Self-identity does not originate in interaction with others. Instead, actors extract their self-identity from their own characters. For example, states might base their actions on religion, as in Saudi Arabia or Iran, or on a secular ideology, as in the pan-Arab regimes in Syria or Egypt under Nasser. This self-perception mostly relies on domestic sources, and is corroborated by the common belief shared by domestic groups aggregating their views around a particular institution. Is identity

another name for domestic politics? I argue that it is not. The domestic sphere is a pool that provides policy-makers with a 'menu of identities'. Accordingly, the relational and domestic dimensions of state identity and its ensuing ontological security are not separable; rather, they interact with and shape each other. In a word, ontological security emerges from the nexus of an actor's reflexive understanding of the self and the interaction with others. With these two dimensions, the concept of 'identity' and its corresponding realm of ontological security function as a crucial link between external and domestic structures. For example, the emergence of Arab nationalism was a response to both domestic (aimed at uniting and mobilizing societies) and external factors (against colonialism) (Mufti 1996).

Is this Self/Other distinction any different from the friend/enemy dichotomy of the physical security sphere? Are they two sides of the same coin? Ontological security distinguishes between positive and negative security. Accordingly, what makes the Self secure in the Other could be an either negative relationship of enmity or a positive relationship of friendship (Roe 2008, 779). In other words, the Other is not necessarily a threat or an enemy (Rumelili 2015, 56-57). The example of the European Union is indicative. Whereas European member states maintain the us/them distinction vis-à-vis each other, they identify each other as friends (Waeber 1998).

When do states feel ontologically insecure? Because the sources of ontological security are both endogenous and exogenous, insecurity can emerge from the Self. In the first case, actors can become ontologically insecure if contradictions emerge within their identity narrative, or if they choose a course of action that is incongruent with their sense of integrity. This insecurity leads to instability and disruptions, as the actor's self-definition comes under question. At the same time, the sources of insecurity can be exogenous. As the very basis of identity construction is differentiation and uniqueness from others, any disturbance in the self-versus-other distinction leads to agents' uncertainty about their own identity. Therefore, if the discursive constructions of the 'self' and the 'other' become increasingly similar, agents become

ontologically insecure; they perceive the very basis of their self-identity to be eliminated. From this perspective, and in contrast to the conventional wisdom that similar identities lead to convergence and cooperation, cultural and identity similarities can lead to divergence and conflict. Based on social identity theory, Brewer (1991) postulates that the need for distinctiveness is met through comparisons. Consequently, similarity constitutes a threat to one's need for differentiation or distinctiveness. As Currie notes, 'one's individuality is more threatened by similarity rather than difference' (2004, 86). Thus, similarity is a source of disturbance because the old and secure meaning of self and the associated sense of agency lose saliency.

Social psychology literature has pinpointed the process of developing larger collective identities between groups as an effective technique of reducing conflicts. The Common Ingroup Identity Model (CIIM) advocates the elimination of group boundaries by facilitating the inclusion of different groups into a 'superordinate identity' (Gaertner et al. 1993; Gaertner et al. 2000). Scholars applying this model conclude that sharing a common identity can reduce the perception of the Other as a threat (Prentice and Miller 1999; Rousseau and Rocio 2007). Despite supportive literature for the idea that superordinate identities can reduce conflict between groups, some work within social identity theory postulates that low levels of similarity can foster cooperation whereas high levels of similarity can lead to the opposite (C. R. Snyder and Fromkin 1980). Freud (1917, 197) argues that individuals feel aggression, hatred, and envy toward those who resemble them the most. Individuals feel threatened not by the 'Other' with whom they have little in common—the 'nearly-we', who mirror and reflect them. Brewer's (1991) theory of 'Optimal Distinctiveness' posits that actors simultaneously express a need for both assimilation and differentiation. Actors become satisfied and secure when they adopt a level of social identity that lies somewhere between the uniqueness of their own self-identity and larger collective identities. At the extremes, the actor's identity is threatened. Being highly individualized leads to his isolation and stigmatization. At the other extreme, being entirely included in a larger collective identity

eliminates the actor's self-identity, which is based on comparison with others (Brewer 1991, 477–478). Consequently, actors are motivated to find an optimal balance between assimilation with and differentiation from others. From this perspective, similarity may be threatening if a state's assimilation becomes much higher than its differentiation from others. In other words, the sources of distinctiveness from others become minimal in its identity narrative. Similarity, I argue here, becomes threatening if it extends to that particular line of distinctiveness without which the actor's *raison d'être* is meaningless. Conversely, similarity may lead to cooperation if the sources of distinctiveness are so significant that actors are motivated to seek inclusion in a larger collective identity.

Ontological insecurity will trigger *anxiety*, which Giddens distinguishes from *fear*. Whereas fear is 'a response to a specific threat and, therefore, has a definite objective', anxiety is 'a generalized state of emotions' (Giddens 1991, 43). In other words, fear is the reaction to an objective material threat to the agent's survival. Anxiety, however, is the sense of insecurity that emerges when the agent's self-identity is challenged. From this perspective, anxiety causes a state of ontological insecurity that is not based on a specific objectified threat, because it attacks the 'core of the self once a basic security system is set up' (Giddens 1991, 44).

If changes in the relative power distribution trigger physical insecurity and fear, what triggers an actor's ontological insecurity? If continuity and order in the self-versus-other relationships are the primary source of ontological security, 'critical situations' that disrupt actors' distinctiveness can pose risks to their sense of self. Giddens defines 'critical situations' as 'circumstances of a radical disjuncture of an unpredictable kind which affect substantial numbers of individuals' (1984, 61). These unpredictable situations constitute an identity threat, as 'agents perceive that something can be done to eliminate them' (Steele 2008, 12). Giddens' structuration theory presents these critical situations as endogenous to self-identity. In other words, they are situations

constituted by the fragilities of entities; only actors who care about ontological security will perceive these situations to be critical.

Still, this agent-focused conception disregarded the role of external others in the constitution of the Self. Acknowledging that self-identity is the product of interaction with others alongside the reflexive understanding of the Self, my conception of 'critical situations' goes beyond the endogenous sources of ontological security. If the constitution of the Self is related to the other, 'critical situations' can also be external events that alter the representation of the Other, ultimately constituting a source of instability and insecurity for the self. Relevant events can include revolutions, wars, and regime changes that disrupt the relationship between the Self and the Other. When critical situations alter the established Self-Other distinction, agents become uncomfortable in who they are.

However, what is the worst scenario in a case of ontological insecurity? Can it ultimately lead to the elimination of actors just as physical insecurity does? According to Rumelili (2015, 60), 'concerns about instability and uncertainty of being can easily be politically mobilized and manipulated into concerns about survival'. In an extreme case, ontological insecurity can ultimately lead to physical insecurity. If statesmen fail to maintain a consistent narrative about the state's self-identity and its *raison d'être*, domestic rifts can ensue. Because the endogenous and exogenous sources of identity become inextricably related in the state's narrative, such challenges can pose an existential threat to the state, jeopardizing its survival as a collective community of several societal groups. Thus, challenges to states' distinctiveness and uniqueness vis-à-vis the other can lead to physical threats. The resulting sense of insecurity usually leads to policies that affirm and reinforce the state's self-assigned identity.

Figure (1): Two conceptions of security

	Physical security	Ontological security
Security as	Survival	Being
Insecurity manifests into	Fear in the face of a threat	Anxiety (uncomfortable disconnect with the self)
Dichotomy	Friend/Enemy	Self/Other — Us/Them
Structural changes leading to insecurity	Changes in the relative power distribution	Critical situations — change in the identity of the Self or the identity of the Other
Worse case scenario	Physical harm and regime elimination	Disaggregation of political communities – Regime collapse

The ontological security literature stresses that ontological and physical security are distinct, because they are characterized by different dynamics and process. Although the two types of insecurities are inherently separate, I argue that they are interrelated and affect one another. The next section explores this linkage between the two in the process of threat perception.

4. The Interaction of Physical and Ontological Security

This framework is built on the assumption that ontological and physical security are distinct types. Whereas physical security, understood as *security-as-survival*, is associated with military threats to the state, ontological security, or *security-as-being*, is associated with those dynamics and processes that center around the reproduction of identity narratives and the maintenance of a system

of certitude. I do not subscribe to the argument positing that identity politics and material interests—and their corresponding layers of security—are opposed or mutually exclusive. As Keohane (2000, 127) puts it, ‘creating this dichotomy is a bit like arguing whether the heart or the brain is most fundamental to life’. Instead, this section examines how these two layers of security are interlinked and interact in the process of threat perception. In exploring this interaction, I assume that all states seek ontological and physical security. Accordingly, in every situation, states will experience two dimensions of security. States, however, do not vary uniformly in the attainment of ontological and physical security. In other words, states can attain ontological security in the absence of physical security and vice versa. Based on this conception of dual spheres of security, table (2) charts the four possible situations.

The first is a situation of ontological security/physical security, an optimal situation in which states maintain a stable and certain self-identity while remaining physically secure. Nordic states provide the best example. States in this security community maintain a collective identity that maintains the us/them distinction, which is necessary to sustain a stable identity. In the meantime, these states remain in an environment of physical security vis-à-vis each other (Browning and Joenniemi 2013). In this situation, a collective identity evolves and enables actors to see each other as different but not necessarily threatening. The second is a situation of ontological insecurity/physical insecurity, where actors experience the fear of harm while also experiencing an uncertainty and instability about their being. That is an ambiguous situation in which one cannot know how states will attempt to restore their security and how they will prioritize between the two security spheres. Either way, in these situations, physical insecurity and ontological insecurity reproduce one another.

The third is a situation of ontological insecurity/physical security, where actors do not perceive the other as source of harm or danger. Nevertheless, their identity suffers from instability and insecurity as their distinctiveness

from others is challenged or the consistency of their identity narrative is disrupted. In other words, the Other is not a threat to security-as-survival, but instead destabilizes and challenges the Self's identity and sense of being. This situation may arise following revolutions where the Other is not physically threatening but its new identity may threaten the stability of the Self. Also, the resolution of protracted conflicts can challenge the previously shaped conflictual identities. The cases of Turkey and Japan apologizing for past crimes is another example. In the Middle East, one can think of the rise of the Muslim Brotherhood to power in Egypt as source of instability to the Saudi identity narrative based on its image as the leader of the Sunni world.

The fourth is a situation of ontological security/physical insecurity, where actors maintain a stable identity and a distinction vis-à-vis the Other. However, they suffer from danger or harm to their physical survival. Actors experience existential stability and certainty of being in a relationship where the Other is identified as a threat to security-as-survival. In other words, they remain in the conflict as it provides their identity with certainty and continuity (Mitzen 2006). In protracted conflicts where actors portray each other as existential threats, such as in Cyprus or the Palestinian-Israeli conflict, the Self/Other relationship is stabilized through identifying the Other as an enemy.

Figure (2): Situations of ontological and physical security

	Physical security	Physical insecurity
Ontological security	The Self experiences stability and continuity of being/does not experience concerns about physical danger.	The Self experiences stability and certainty of being/experiences concerns about physical danger.
Ontological insecurity	The Self experiences instability and uncertainty/ does not	The Self experiences instability and uncertainty/ experiences

	experience concerns about physical danger.	concerns about physical danger.
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For the purpose of this study, I focus on two main possibilities. The first is the situation where states have fears about their ontological security and the stability of their identity while remaining physically secure. The second it is when states maintain stable identities while their physical security is threatened. In what follows, I will situate the identity-material power interaction within these dual layers of security. I intend to show that these two spheres are not only distinct but also interlinked.

When states are in a situation of ontological insecurity/physical security, they will attempt to restore identity distinctiveness and stability. Two primary adaptive mechanisms can be discerned. First, states seek to demonize the Other. Ontological insecurity leads actors to engage in practices that mark the Other as being not only different but also inferior and threatening (David Campbell 1992, 135–136). Second, states attempt to force a new, stable self-other distinction. The new Self/Other distinction has a *negative* dimension, as the actor aims to discredit the Other. This ontological insecurity dimension affects the physical security dimension. The framing of the Other as an existential threat affects the actor’s perception of the balance of power/relative power distribution and of the friend/enemy identification. In other words, this perception of the relative power distribution and states’ behaviour become subjugated to this self-other distinction, which originally arise to restore the actor’s ontological security.

When states are in a situation of ontological security/physical insecurity, they will direct their identity narratives towards the primary source of threats identified as danger to survival. This second case highlights a different dynamic according to which the Other is identified as a threat to the state survival. The friend/enemy identification needs to be congruent with the Self/Other distinction. In other words, the friend needs to be included in the ‘us’ category, and the enemy should be placed in the ‘them’ category. If the friend/enemy dichotomy that emerges from the new relative power distribution is

incongruent with the Self/Other, then identity is reframed to accommodate this change to avoid any inherent contradiction, potentially triggering an endogenous case of ontological insecurity. Accordingly, a new Self/Other emerges whereby the enemy is placed in the 'Other' category. In other words, the Other is identified as an enemy based on its capabilities and intentions to cause harm. In short, actors move to reframe this self-other distinction based on a friend/enemy dichotomy identified in the realm of physical security.

5. Methodology

The above conceptual framework is deployed in this study to examine the persistently divergent Saudi and Syrian threat perceptions during three major wars in the Middle East: the Iran-Iraq War (1980-1988), the 2006 Lebanon War, and the 2009 Gaza War. As Bennett and Elman (2007, 180) highlights, 'theory development would not have been possible without the authors' close, creative engagement with the cases'. The theoretical framework presents a conceptual tool to enhance our understanding of these empirical cases, which are of intrinsic importance to any student of the Middle East. In other words, the purpose is to present a theoretically informed narrative of intra-regional alliances in the Middle East. In addition, these cases serve a heuristic purpose crucial to the theory-building endeavour in this study. In this section, I present the study's research design, which includes: explaining the methods of analysis, introducing the cases and their selection criteria, and the data.

5.1. *Research Methods and Data*

Given that the aim of this study is theory building through exploring the validity of the above theoretical framework, I deploy a small n case study combined with the 'structured, focused comparison' method of analysis. The case studies serve a dual purpose: they offer empirical evidence to substantiate the overall argument and further develop the theoretical framework. Accordingly, the cases examined here belong to the category of 'heuristic case studies' that 'inductively

identify new variables, hypotheses, causal mechanisms, and causal paths' (George and Bennett 2005, 75). In order to generate considerable inferential leverage from the study of a limited number of cases, the study employs cross-cases as well as within-cases comparisons. Figure (1) shows that cross-cases comparison will focus on comparing Syrian and Saudi threat perceptions in each war. Within-cases comparisons will focus on looking at each Syrian and Saudi threat perception over time in order to discern a pattern.

		Cross-case comparison ←-----→	
Within-case Comparison ↑ ----- ↓		Saudi Arabia	Syria
	Iran-Iraq War (1980-1988)	Iran	Iraq
	Lebanon War (2006)	Hezbollah	Israel
	Gaza War (2009)	Hamas	Israel

Figure (3): Sources of threat perceived by Syria and Saudi Arabia

The comparison of these cases aims to establish the validity of the argument by comparing how it performs in different cases (Collier 1993, 108). Moreover, these comparisons serve as a building-block technique within the theory-building process. Eckstein (1991, 144) describes this method as follows:

One studies a case in order to arrive at a preliminary theoretical construct. That construct, based on a single case, is unlikely to constitute more than a slim clue to a valid general model. One therefore confronts it with another case that may suggest ways of amending and improving the construct to achieve better case interpretation; and this process is continued until the construct seems sufficiently refined to require no further major

amendment or at least to warrant testing by large-scale comparative study.

In this study, within and cross-cases comparisons follow the method of 'structured, focused comparison' (George 1979). This method employs theoretically relevant variables for the purposes of explanation to permit comparison and cumulative findings. Accordingly, I examine the dynamics of ideational and material forces affecting the process of threat perception in each case. The comparison is 'structured' because it examines each case by 'asking a set of standardized, general questions [...] these questions [are] carefully developed to reflect the research objective and theoretical focus of inquiry'. It is 'focused' because it 'deals only with specific aspects of the historical cases examined' (George and Bennett 2005, 67 & 69). Namely, I look at how, and under which conditions, ideational and material forces interplay in the process of threat perception.

In ascertaining the process of threat perception across the case studies, I utilize three research methods: congruence procedure, longitudinal analysis, and process-tracing. As the study is theory-driven, the empirical cases are used to illustrate and to develop the theoretical framework. Congruence procedure is used to test whether there is a strong correlation between the argument's predictions and leaders' perceptions of threat. Van Evera (1997, 61–63) also argues that congruence procedure enables to observe variables in within-cases comparisons and then determine whether these variables co-vary as predicted by the theoretical argument (George and Bennett 2005, chap. 9). For example, if threat perception is driven by identity threats, there should be no evidence of objective military threat. Similarly, in the case of a military threat, there should be relative military imbalance. This does not mean that there is causation. But building correlation is one step towards proving causality.

Longitudinal analysis and process-tracing move us from simple correlation towards establishing a causal logical reasoning. Longitudinal analysis allows a close examination of the timing of changes in both the independent variables (state identity and military capabilities) and dependent

variables (threat perception and subsequent behaviour). Does the change in the dependent variables follow a change in the independent variable? For example, did the Syrian decision to ally with Iran in 1979 followed a change in the relative power distribution? Does the dependent variable (threat perception) occur before the independent variable? If so, then there is no causal relationship to examine. Also, events that lead to the disruption of Self-identity should be followed by important changes in identity narratives. Here a longitudinal analysis shows how identity narratives have changed over time, either as a response to ontological insecurity or physical insecurity. Moreover, it shows the timeline of threat perception.

Process-tracing is one of the best methods in social sciences for building and testing theoretical arguments. George and Bennett (2005, 224) consider it to be 'an invaluable method that should be included in every researcher's repertoire'. Van Evera (1997, 64) describes it as '[exploring] the chain of events or the decision-making process by which initial case conditions are translated into case outcomes'. This method tries to get inside actors' heads by examining speeches, pronouncements, and statements that explain why leaders make the choices they do. Bennett (2010, 208) defines process-tracing as a method that involves 'the examination of "diagnostic" pieces of evidence within a case that contribute to supporting or overturning alternative explanatory hypotheses. A central concern is with sequences and mechanisms in the unfolding of hypothesized causal processes'.

Beach and Pedersen (2013, chap. 2) identify three uses of process-tracing: theory-testing, theory-building, and case-centric. Theory-testing process-tracing is a two-stage deductive research process where the analyst first clarifies the theoretical argument and then empirically verifies each of its parts and stages. Theory-building process-tracing follows an inductive logic, where process-tracing uncovers new causal relationships between variables, after which the discovered logic becomes generalized to wider population of phenomena. Case-centric process-tracing is the most common, where the aim is to craft an explanation for particularly puzzling outcomes, such as a particular war or

event. This study uses process-tracing in the theory testing stage. After presenting the theoretical argument, process-tracing is used to 'get inside' the cases to evaluate what drives threat perception as well as the ideational-material interaction. Moreover, process-tracing performs a heuristic function by unravelling relationships and empirical evidence that enables a refinement of the theoretical argument (Bennett and Elman 2007, 183; Van Evera 1997, 67–70; George and Bennett 2005, 7). In this study, process-tracing follows the comparative logic of the research. If within-cases findings are repeatedly consistent with cross-cases comparisons, the argument is valid (Mahoney 2003, 361–363). This procedure is called 'pattern matching' (Donald Campbell 1975). It is combined with a causal narrative based on historical analysis. Causal narrative seeks to compare the sequence of events across cases to determine if both cases are following the same causal patterns. The variables are contextualized in the cases and disaggregated into sequences across the cases (Mahoney 2003, 365–367).

A 'focused, structured' comparison is combined with the above three research methods. If these methods—congruence methods, longitudinal analysis, and process-tracing—all point to a causal relationship between ideational or material factors (or both) on the one hand and perceptions of threat and subsequent policies on the other, I can be confident about the accuracy of the findings.

It is true that, given the closed and secretive nature of the decision-making processes of both the Syrian Ba'athist regime and the Saudi Kingdom, inaccessibility to primary sources and interviews with current government officials in Damascus and Riyadh remains the chief obstacle to a complete and accurate picture of the inner workings of these authoritarian governments. At the same time, this thesis is not a work in the discipline of International History. It does not seek to reconstruct events but rather to evaluate particular theoretical explanations of events and thereby to judge the validity of the theoretical argument. To recall, the study introduces a theoretical framework based on a combination of ontological and physical security. The successive

chapters offer empirical evidence to substantiate and develop this framework. Therefore, I have undertaken an exhaustive survey and analysis of the available secondary sources in Arabic, English, and French, most notably Middle Eastern and Western newspapers and, more importantly, numerous books and articles published by historians (both from the region and Western countries). I have supplemented these with primary sources, such as speeches, official government statements, and memoirs. The reason for this choice is that this study does not aim to establish what happened, but to address a gap in the literature on threat perception within International Relations theory of which the cases of Saudi Arabia and Syria provide examples.

The choice of secondary sources poses some challenges, however. As Lustick (1996) notes, the reliance on secondary work might result in an arbitrary selection of secondary data. Historians and scholars build particular narratives of events. The problem is how to take the claims made about the past as evidence to confirm a particular theoretical argument. Moreover, how to distinguish accurate from inaccurate stories? Lustick (1996, 605) suggests that this problem may be addressed if

We take seriously the fact that our loadings of variables do not spring from a transparent historical record but from a collection of accounts of sets of events constructedly narrated as episodes. In other words, if we treat our database as 'historiography' or 'histories' and not 'History', then the actual number of 'cases' expands from the number of episodes to the number of accounts of those episodes.

Accordingly, to prevent evidentiary errors, I tried to collect various narratives of each event and to compare them. I also relied on sources from the two sides of a conflict to be able to extract the most accurate picture of events beyond politicized stories. For example, regarding the Iran-Iraq War, I collected narratives from Arab and Iranian historians. For the latter, I mainly relied on English materials written by Iranian historians. Similarly, for the 2006 Lebanon War and the 2009 Gaza War, I examined Saudi and Syrian narratives, but I also compared narratives from Israeli, Arab, and European analysts.

Another challenge is to know how the sources can support the theoretical argument. To answer this question, I 'triangulate' amongst diverse primary and secondary sources, which may increase the confidence in claims I make about the past. Lustick (1996, 616) defines 'triangulation' as '[constructing] a background narrative from the identity of the claims made by different historians despite their approach from different archival sources and/or implicitly theoretic or political angles'. The advantage of looking at particular historical events is that it is possible to exhaustively examine the majority of monographs devoted to them. However, there are still problems related to the distinction between objective and subjective information. As Mouzelis (1994, 35) notes, primary and secondary sources are 'second-order interpretations referring to the first order ones that individuals generate when they act and interact'.

Finally, how to distinguish between what is objective and what is subjective? The objective refers to evidence, which has its own reality external to human experiences and thoughts. The subjective refers to that which is created by the actor's thoughts, perceptions, and experiences. As this research deals with 'material' and 'ideational', historical narratives were also examined to extract both the hard evidence and the subjective stories, or the perceptions held by actors while they were acting or taking a political decision. Consequently, there is the material evidence, but there is also actors' perception of it.

5.2. Case Selection: Why Compare Syria and Saudi Arabia

The choice of Syria and Saudi Arabia as case studies followed three criteria: (1) the intrinsic importance of the cases, (2) the fact that both cases present two extremes cases on the independent variable,²⁷ (3) and the divergence of outcomes from predictions made by various theoretical explanations.

²⁷ These case-selection criteria were in the list identified by Van Evera (1997, 77-78).

Despite the fact that both capitals, Damascus and Riyadh, have generally conveyed the impression of coordination and a kind of alliance—or at least an entente—in various spheres, they have differed on almost every alliance choice during major wars in the region, especially since the Iranian revolution (1979).²⁸ These diametrically opposite decisions are one of the most intriguing puzzles in modern Middle East politics. The intrinsic importance of Saudi and Syrian threat perceptions, as well as the ensuing alliance decisions, stems from their far-reaching implications for regional dynamics.

In 1979, the Islamic revolution in Iran and the Iraqi invasion of Iran were the subject of disagreement between Damascus and Riyadh. Whereas the Syrian regime perceived rising Iraq as a viable military threat and the Islamic Republic as a potential ally necessary to balance Saddam Hussein and Israel, the Saudi regime's perception of the situation was drastically different. For the Kingdom, the message emanating from the Islamic revolution constituted the ultimate threat. Accordingly, the royal family ignored Saddam Hussein's regional ambitions. This divergence is even more paradoxical when seen against the background of the two states' identities. A secular Ba'athist regime in Syria, claiming to be an ardent supporter of the Arab cause, allied with a non-Arab Islamic theocracy that rejects the concept of the nation-state and promotes the overthrow of secular regimes. On the other hand, despite its claim of Islamic universalism and the rejection of pan-Arabism defended by the socialist republics in the region, Saudi Arabia allied with a secular socialist Ba'athist regime in Iraq. Henceforth, Syria and Saudi Arabia joined opposing camps in major wars in the region. The 2006 Lebanon War as well as the 2009 Gaza War constituted a division between the so-called 'moderate camp' (Saudi Arabia, Jordan, and Egypt) and the 'resistance camp' (Syria, Iran, Hamas, and Hezbollah).

Substantive importance and fascination, however, cannot be the only criteria for selecting a case study. As the primary goal of this research is to infer

²⁸ Syria and Saudi Arabia shared common interests in the Arab-Israeli conflict and in Lebanon (Sunayama 2007).

an explanation of the interplay between ideational and material factors shaping threat perception, Syria and Saudi Arabia constitute extreme cases.²⁹ I hypothesize that Saudi Arabia and Syria portray extreme cases manifesting the interplay between ideational and material forces. The Syrian case demonstrates a situation of ontological security/physical insecurity, where physical insecurity has shaped the regime's identity and the ensuing self-other dichotomy. The Saudi case, however, represents a case of ontological insecurity/physical security, as the self-other distinction framed to restore ontological insecurity has shaped the friend/enemy dichotomy.

These puzzles are further intriguing, because both cases diverge from the predictions made on the bases of various theoretical lenses. Beyond the generic foreign policy accounts of Syria and Saudi Arabia, their alliance choices have been examined through various theoretical lenses.³⁰ *Realist explanations* underscore the geopolitically-shaped balance of power as the origin of the Syrian regime's alliances. These accounts argue that the strategic balance in the Middle East throughout the second half of the 1970s provides an illuminating explanation for the Syrian decisions. Due to the failure of the Syrian-Iraqi rapprochement in 1978-79, especially after the Camp David Accords, Syria became marginalized in the regional dynamics (Kienle 1990). In this context, the Iranian revolution was a 'gift' for Syria to create a new geopolitical situation in which it would play a dominant role in the Middle East (Hirschfeld 1986). However, realist explanations fall short of explaining why Saudi Arabia supported a military ambitious Iraq against a military weakened Iran.

As the Saudi case diverged from realist predictions, Syria constitutes a deviation from regime security approaches. *Regime security explanations* are based on a critique of realism's preoccupation with external threats to state security (Buzan 1991; Ayooob 1995; Job 1992; David 1991a). They explain

²⁹ Extreme cases are usually selected because the study variable is very high, making the causes behind it much easier to identify (Van Evera 1997, 79–81).

³⁰ For generic foreign policy accounts, cf. For generic foreign policy accounts, cf. Korany (1991), Hinnebusch (2002), Nonneman (2005), Kandil (2008), and Korany and Fatah (2008).

foreign policy choices in terms of the regime's evaluation of the overlapping domestic and regional threats affecting its stability and survival (Gause 2002; Dawisha 1990). Foreign policy is, therefore, considered a tool for offsetting the domestic legitimacy crisis. Scholars of Saudi foreign policy argue that the ultimate goal of such policy is 'to preserve the Saudi regime and Saudi independence' (Piscatori 1983, 51). From this perspective, the Kingdom is repeatedly caught by the dilemma of balancing external and internal threats (Nonneman 2005; Dawisha 1979). According to this approach, external threats are often related to domestic ones, as foreign opponents instrumentalize transnational identities to destabilize the Kingdom through subversion.³¹ From this perspective, the threat of an Islamic spill-over in the Arab regimes was explained in terms of fear of the Shi'a minorities subversion (Kostiner 1987; Long 1990), which manifested in November 1979, February 1980, and November 1980. According to this explanation, Syria, a secular pan-Arab authoritarian regime suppressing Islamist movements at home, should have been equally threatened by the message of the Islamic Revolution. Moreover, how did Hafiz al-Assad, presiding over a divided society, take a geopolitical decision that so was risky and costly for the survival of the regime? From this perspective, the Syrian choice to ally with Iran was considered as an 'odd' case (Lawson 2007; Byman 2006; Goodarzi 2006). In short, both realism and regime security approach account only for one case but not the other, as Saudi Arabia and Syria constitute extreme cases deviating from the predicted patterns.

Alongside these two theoretical accounts, sectarian explanations deserve a brief discussion. *Sectarian explanations* present a primordial approach towards understanding Saudi and Syrian foreign policy. Relying on divisions within Islam, some scholars have portrayed Syrian foreign policy as driven by *Shiite politik* based on the 'Alawite identity of the ruling elite (Bronson 2000; Susser 2007; Hussein 2012; Agha and Khalidi 1995). This narrow approach

³¹ This was the major dilemma facing the Kingdom during the rise of Pan-Arabism of Nasser in the 1950s and the Islamic Revolution in Iran (1979). For an excellent comparison between both threats, see cf. Nahas (1985).

does not unpack Syria's alignment with the Sunni Palestinian movement Hamas; nor does it account for the incompatible interests and policies implemented by Syria and Iran regarding many issues, such as the US-led invasion of Iraq in 2003 (Ma'oz 2007b; Lawson 2007; Saad-Gorayeb 2007). Similarly, Saudi foreign policy during the Iran-Iraq War was portrayed as a Sunni state facing a Shiite revolution in Iran (Yamani 2008; Ulrichsen 2013a; Goldberg 1990; Fürting 2002). However, this does not explain the rapprochement in the Saudi-Iranian relations throughout the 1990s (Wehrey et al. 2009; Okruhlik 2003). In short, this primordial approach to identities cannot stand alone as an explanatory model for Saudi or Syrian foreign policies.

I now turn to my case studies. I begin with an analysis of Saudi and Syrian threat perceptions during and following the outbreak of the Iran-Iraq War (1980-1988).

Chapter 3: Explaining Syrian and Saudi Threat Perceptions during the Iran-Iraq War

Saudi Arabia wants to balance us out with Iran, and balance us with Syria, and balance us with Jordan. And Jordan wants to balance us with Syria, and wants to balance us with Saudi Arabia, and wants to balance us — we are a priority weight balance over all [...] All of this is a soap opera. We know all of this and we are disturbed.

Saddam Hussein, 1979 (quoted in Woods, Palkki, and Stout. 2011, 131–132).

As rivals often share mutual enemies and allies have been known to back opposite sides in the same conflict, Saddam Hussein's quote underlines an evident fact: Iraq was a source of fear to its Arab neighbours. Nevertheless, a collective regional balancing never materialized; instead, Arab polarization and divergence prevailed. The alliances formed in the wake of the Iran-Iraq War (1980-88) proved enduring in moulding events and reshaping the political landscape of the Middle East for decades. Whereas Saudi Arabia identified Iraq as a friend and Iran as an enemy, Syria considered Iraq as a source of danger and Iran a reliable ally.

This chapter argues that we can make sense of this outcome by paying attention to the interaction between identity and material power, as well as the interaction between their corresponding spheres of ontological and physical security. In 1979 the Islamic revolution altered Iran's regime identity and emerged as a source of ontological insecurity for some actors in the region. Moreover, the revolution altered the regional power distribution, creating physical insecurity for others in the region. In the Saudi case, the emergence of

an Islamic government in Iran claiming to play a pan-Islamic role constituted a source of ontological insecurity for the Kingdom's identity. At the same time, while the change in the relative power distribution left the Saudi elite in a state of confusion and uncertainty, the physical security of the Kingdom remained intact. To restore its ontological security, the Saudi Kingdom discredited the Islamic Republic and invented a new Self-Other distinction based on a Sunni-Shiite discourse. This new Self-Other distinction affected the Saudi elite's perception of their physical security and, therefore, defined the enemy/friend dichotomy.

In contrast, the change in the material configuration led to the isolation of the Syrian regime, which feared its Iraqi neighbour. Unlike the Saudi case, Iran's altered regime identity did not disturb Syrian ontological security as the Ba'ath regime maintained a distinct identity based on pan-Arabism, according to which the Self was defined based on an 'Israeli other'. In this state of ontological security/physical insecurity, the Syrian identification of material dangers defined its friend/enemy dichotomy. This particular configuration shaped the us/them distinction, as the regime's identity was changed and reinterpreted to accommodate the material constraints. In short, the Syrian regime adopted a broader pan-Arab narrative based not on the Arab dimension but on animosity toward Israel. This is the context in which Syria widened its definition of 'us' to include the Islamic Republic.

This chapter is structured as follows. In the first section, I contextualize Saudi and Syrian alliance choices in the regional developments of 1979-1980. Second, I examine the Saudi threat perception and explore the strategic position of the Kingdom in the relative power distribution. I then present how the Iranian revolution disrupted the stability of the Saudi regime identity and led to a case of ontological insecurity. Third, I explore the Syrian threat perception. Here, I discuss the Syrian strategic position in the relative distribution, which led to the regime's physical insecurity. I then demonstrate how identity and the Self-Other distinction followed the physical needs of the Syrian regime.

1. The Iranian Revolution, the Iran-Iraq War, and Regional Reactions

Political shocks — such as wars, revolutions, or economic crises — are often a catalyst for ideational and material discontinuities.³² The Islamic revolution in Iran (1979) was one such exogenous shock, which significantly moulded regional events for decades, as it brought about substantial changes to the normative and geopolitical order in the Middle East.

From an ontological security perspective, this external shock may be considered a ‘critical situation’. The revolution altered Iran’s identity and, hence, its relations with others. As an actor’s identity has a strong relational dimension; based on the Self-Other distinction, changes in any Others’ identity may lead to changes in the identity of the Self. The revolution altered the state identity of Iran from a monarchy ruled by the Shah to a populist Islamic republic governed by Khomeini’s Islamic worldview. The key to understanding Khomeini’s world order is the idea of *vilayat-e faqih*³³ (the rule of the leading jurispudent), according to which the government or the rulership (*vilayat*) belongs to God, to the Prophet, to the infallible imams, and, by extension, to the pious *faqih*. The rule of the *faqih* is temporal until the Twelfth Imam (*al-Mahdi*) appears. Khomeini called on all rulers in Muslim countries to return to ‘true and unique Islam’. The new ideology posited that, being the only ‘Government of God’, Iran had a role in spreading justice around the Islamic world. This drastic change in Iran’s identity could not be contained within its borders since it affected others’ ontological security as the latter remained inextricably tied to the consistent distinction of the Self vis-à-vis the Other (Iran in this case).

The Islamic revolution emerged around the idea of building an ‘Islamic community’ that would transcend sectarian and national boundaries. Khomeini believed that Muslim countries should unite (*tawhīd*) in order successfully counter Western influence. He saw nationalism as a source of disunity and

³² Political shocks are considered to be ‘rare moments’ in history leading to dramatic changes in states’ policies. For examples on ‘shocks’, cf. Legro (2005), Goldstone (1993), Ikenberry (2000), and Walt (1996).

³³ For more details on the religious foundations of this system, cf. al-Labbad (2005).

disintegration between Muslim countries. Therefore, Khomeini's ideology may be regarded as 'pan-Islamic' (Menshari 1990). In September 1980, he declared:

Nationalism that results in the creation of enmity between Muslims and splits the ranks of the believers, is against Islam and the interests of the Muslims. It is a stratagem concocted by the foreigners who are disturbed by the spread of Islam [...] More saddening and dangerous than nationalism is the creation of dissension between Sunnis and Shi'is and diffusion of mischievous propaganda amongst brother Muslims' (Khomeini 1981, 304).

Accordingly, the Islamic Republic pursued a foreign policy strategy that appealed to Arabs and Muslims. Palestine constituted a central theme in Khomeini's ideology from the earliest days of the Islamic Revolution (Ramazani 1986, 151–154). Iran consistently emphasized its commitment to the Palestinian cause. At the height of the Second Intifada (2000), Supreme Leader Khamenei termed Palestine 'a limb of our body' (Wehrey et al. 2009, 23). This pan-Islamist narrative was accompanied by increasing financial support to Hamas, the Palestinian Islamic Jihad, and Hezbollah in Lebanon. The Iranians thus presented themselves as the leader of Islam in the region and as the epitome of virtue in the Arab–Israeli conflict. As pan-Islamism constituted the basic tenet of Khomeini's theory of an Islamic state, some regional actors found the stability of their identity disrupted, negatively affecting their ontological security. Some Arab actors discovered that it was difficult to establish clear and distinctive boundaries between themselves and the 'Persian' Other.

Beyond this ideational perspective, the Iranian revolution was pivotal in altering the material power configuration in the Middle East. Indeed, it destroyed the American-Iranian partnership and distorted the alliance pattern in the region. The relative power distribution was transformed from a situation of Iranian regional hegemony to one of power parity between Iran and Iraq. Throughout the 1970s, Iran enjoyed a considerable supremacy in the region. This hegemony was observable in the size of its armed forces, which was nearly double that of Iraq, and through its yearly military spending, which ranked the highest in the region (Gause 2003, 285). The Shah exerted hegemony over the

Gulf and played a dominant role in the Middle East. The military balance between Iran and Iraq was estimated roughly two-to-one in Iran's favour due to its three-to-one manpower advantage and its predominant American arsenal (Cashman and Robinson 2007, 279).

The Iranian revolution altered this equilibrium. Ayatollah Khomeini's first act after seizing power on 11 February 1979 was to deliberately destroy the Shah's well-trained professional military, which was regarded as disloyal to the Islamic regime. Approximately 5000 of the most experienced officers, mostly trained in the United States or Israel, were executed; thousands more were imprisoned or exiled (Segal 1988, 952–953). By some estimates, 30 to 59 per cent of the highest-ranking officers, mainly majors and colonels, were killed. The size of Iran's army in 1980 was about half of what it has been in 1979 (down from approximately 415,000 men to 240,000 men). Military spending fell from 15 per cent of GNP to 7.3 per cent (Cashman and Robinson 2007, 279). In short, Iran set about destroying its military capacity to threaten its neighbours or to even defend itself. In the meantime, Iraq, which was supported by the Soviet Union and profiting from the oil windfall of 1973/74, increased its own military capabilities throughout the 1970s. By 1980, its military had doubled in size (to 242,000 men). Its military spending jumped from 14 per cent of GNP in 1972 to 21 per cent in 1980. As a result, the military balance tilted toward parity between Iran and Iraq (Gause 2009, 51–54).³⁴

These material and normative changes caused by the Iranian revolution ultimately led to the outbreak of the Iran-Iraq War. The change in the material balance of power provided Saddam Hussein with the opportunity to launch what he thought would be a short victory against his weakened rival. It soon became apparent that Hussein's misperception of the situation led both countries into a costly eight-year war, during which Saudi Arabia and Syria joined opposing camps. The former supported Iraq while the latter allied with Iran. Despite their professed neutrality, the southern Gulf States (Kuwait, Saudi

³⁴ For more details, cf. Chubin and Tripp (1988), Cordesman (1994), and *The Military Balance* (1980).

Arabia, and, to a lesser degree, the United Arab Emirates, and Oman) openly provided financial and military support to Iraq. The financial assistance, including oil and non-oil support, amounted to approximately US\$ 25 billion from Saudi Arabia alone (Ulrichsen 2013b, 115).³⁵ In addition, Jordan also openly supported Saddam Hussein. King Hussein provided Iraq with military hardware and economic aid. He also negotiated credit and loans from Western countries to purchase weapons on behalf of Iraq. Despite Egypt's ousting from the Arab League in March 1979, it sold advanced weapons to the Iraqi army in 1981.

Syria, and to a lesser extent Libya, opposed this main trend in the Arab world and thereby prevented Iraq from claiming an 'Arab' war against the Persian neighbour. On 7 October 1980, Syria became the first Arab state to side officially with Iran. Syria criticized Iraq for attacking a potential ally of the Arabs, especially in their struggle with Israel. Alongside this verbal support, Damascus provided the Iranian armed forces with war materiel and made its airfield available for Iranian strikes in the west of Iraq (Kienle 1990; Marschall 1992; Stanely 1990; Goodarzi 2006).³⁶ This Arab polarization over the Islamic revolution and the Iran-Iraq War led to an unprecedented deterioration in inter-Arab relations, as it exacerbated older conflicts between Arab regimes.

In the remainder of this chapter, I explore Saudi and Syria threat perceptions by examining the interaction at the nexus of physical and ontological security layers. To recall, whereas Saudi Arabia presented a case of ontological insecurity/physical security, Syria was a case of ontological security/physical insecurity.

2. Saudi Arabia and the Quest for Distinctiveness

³⁵ For more details on the financial and military assistance provided by the Gulf States in support of Iraq, cf. Quandt (1981a), Lotfian (1997), Nonneman (2004; 1986), Adib-Moghaddam (2006), and Ulrichsen (2013a).

³⁶ This fact was denied by Syrian leaders (Baraka 2011).

On the eve of the Iran-Iraq War, Saudi Arabia supported an aspiring Iraq against a militarily weakened Iran. The external shock of the Islamic revolution and the resulting change in the regional power distribution created a state of uncertainty that made the Saudis unable to identify any eminent source of danger. Amid this confusion and disarray, the ideational message of the Iranian revolution challenged the stability of the Saudi regime identity. Seeking to distinguish their state identity from Iran's pan-Islamic appeal, the Saudi elite framed the Iranian Other in a demonizing manner. Moreover, the Saudis narrowed down their regime identity from pan-Islamism to Sunni Islam and, thereby, established a new us/them distinction. The new Self/Other distinction provided a channel through which the elite identified the friend/enemy dichotomy in the sphere of physical security. This section is divided into two parts. First, I present the Kingdom's position in the new relative power distribution, which demonstrates a case of physical security. I then explore the case of Saudi ontological insecurity, which influenced the elite's perception of the Kingdom's physical security.

2.1. The Relative Power Distribution: 'A Structure without an Instruction Sheet'³⁷

Although the Saudi support of Iraq seemed assertive at the outbreak of the war, the decision to follow this policy was preceded by a long period of confusion and disarray approximately from January 1979 to September 1980 (Altoraifi 2012, 128–131; Safran 1988, chap. 12,14). Before 1979, Saudi Arabia was successful in pursuing separate and incompatible strategies in different areas—namely, the Gulf, the Arab-Israeli conflict, and the partnership with the US. The Islamic revolution in Iran coincided with other crises: the signing of the Egyptian-Israeli peace treaty, the Soviet invasion of Afghanistan, and strains in the Saudi-US partnership. Embroiled in disarray and uncertainty, the royal elite was compelled to make strategic choices in order to adapt to these critical changes. Nevertheless, the new relative power distribution did not come with evident sources of danger to the Kingdom's physical security. Accordingly, this ambiguity made a coherent friend/enemy identification difficult to sustain. This

³⁷This title is based on Blyth (2003).

section examines three areas relevant to the Saudi physical security: the Gulf, the Arab-Israel sphere, and the Saudi-US partnership.

Physical security in the Gulf is of primary concern in Saudi foreign policy. Before 1979, the major sources of instability in the Gulf were communist infiltration and the Ba'athist regime in Iraq, whose pan-Arab identity constituted a source of threat to the Kingdom. Based on these concerns, Saudi Arabia relied on the United States to ensure the Kingdom's physical security. This security arrangement was part of the so-called 'twin pillar' strategy, according to which the United States ensured the stability of the Gulf through the build-up of two regional powers, Iran and Saudi Arabia. It was in this framework that the Shah's regime emerged as a military hegemon in the Middle East (Ramazani 1979, 822).

In 1975 the Algiers Agreement was signed to settle the long-standing dispute between Iran and Iraq.³⁸ The settlement marked an Iraqi turn towards moderation in its relations with its Arab neighbours (Niblock 2006, 50). This change transformed the strategic configuration in the Gulf as it led to the emergence of the Riyadh-Teheran-Baghdad triangle, which allowed Saudi Arabia more room for manoeuvre. The agreement enabled the Kingdom to play Iraq off against Iran while consolidating its own influence among the smaller Gulf countries (Safran 1988, chap. 10). From this perspective, the Saudis managed to use Iraq's opposition to impede the Shah from consolidating the Iranian hegemony in the Gulf. At the same time, Iran's opposition to Iraqi aspirations of domination constituted substantial gains for the Saudis.³⁹

Although this triangle had brought many gains to the Kingdom, the Islamic revolution turned the post-1975 strategic configuration upside down. With the fall of the Shah, Saudi Arabia lost a friendly regime with which it shared many norms, such as preserving the status quo in the region and a

³⁸ For more details on this agreement, cf. Sirriyeh (1985).

³⁹ For a detailed account of Saudi-Iranian relations prior to the Islamic revolution, cf. Badeeb (1993).

dominant US role in safeguarding stability in the Gulf. Moreover, Saddam Hussein took advantage of the sudden absence of an Iran at the regional level to assert Iraq's own role in the Gulf. After the withdrawal of Egypt from the Arab-Israeli conflict, Hussein positioned Iraq as the champion of the Arab cause and the only regional power capable of saving Arab states from any regional threat, including the spread of the Islamic revolution.

While Iraq asserted itself as an ambitious power aspiring to a leading role in the region, the new regime in Iran was caught up in revolutionary chaos. Iran was weakened and had neither the time nor the capability to contain Saddam Hussein's regional ambitions. Moreover, Iran was unable to launch a war or even defend itself, a situation of which Saudi Arabia and the Gulf States were very much aware. Ahmad Abdulaziz al-Jassim, from the Kuwait Foreign Ministry, described the situation as follows:

In April 1980, an attempt was made on Tariq 'Aziz [Iraqi foreign minister] life and there were some clashes along the Iran-Iraq border. At that time, Iran offered us to sell their Phantom airplanes to Kuwait. When we told them we were not interested, they asked us to relay the offer to the Saudis. They were not interested either. This showed us that Iran was not thinking of entering a war (quoted in Marschall 2003, 67).

In short, the strategic balance of power portrayed the weakness of Iran's capability in standing as a threat to the Kingdom's physical security. The question that arises is why a country ready to sell its air force was consistently identified as a major source of danger to its neighbours?

It is worth noting that the decline in Iranian military capabilities did not usher in an Iraqi hegemony in the region. Instead, the change in the relative power distribution revealed an emerging parity between Iran and Iraq. The Iranian revolution and the subsequent change in the regional configuration did not directly affect the physical security of the Kingdom. Saudi Arabia initially sought to keep the balance between Iraq and Iran by appeasing Iran without provoking Iraq. In case one became too dangerous, the Saudi elite hoped to play one against the other (Ehteshami 2002). The emerging power parity in the Gulf

was too ambiguous for the Saudis to clearly identify their enemies and friends. For example, and despite the Shi'a demonstrations in Saudi Arabia and other Gulf countries, King Khalid sent a letter of congratulations to Khomeini when the Islamic Republic was founded by a referendum on 30 March 30 1979:

We always welcome the establishment of an Islamic government in any country, and we believe that the establishment of such a government in Iran will lead to a greater measure of understanding and to closer ties. After all, this is consistent with our constant call for adopting the Islamic Sharia as the basis of government (quoted in Samore 1983, 423–424).

The fall of the Shah and the changes in the Persian Gulf coincided with other developments in the Arab-Israeli area, where the Kingdom faced additional uncertainty. Before 1967, the Saudi involvement in the Arab-Israeli conflict was limited to the Palestinian question (Piscatori 1983, 37–38). Like the majority of the Arabs, the Saudis resented the Jewish state. Zionism was considered a primary concern for the security and stability of the Saudi regime. In addition, the repeated Arab defeats and the Israeli occupation of Jerusalem made the Arab-Israeli conflict a foreign policy concern for the Kingdom. The Riyadh-Cairo-Damascus trilateral axis thus emerged, with the purpose of maintaining a military balance against Israel. King Faisal developed a partnership with Egypt and mediated the tensions with Syria (Sunayama 2007, 37). Beyond this diplomatic role, the Kingdom's involvement was mainly financial (Safran 1988, 261–264; Taylor 1982, 49).

The short-lived Arab reconciliation over the issue of balancing Israel in 1973 was quickly replaced by inter-Arab polarization, which began to surface following King Faisal's death. The Camp David Accords (1977) and the subsequent Egyptian-Israeli peace treaty (1979) constituted a real challenge to the Kingdom since the Saudis were forced to take sides. Despite Saudi efforts to maintain Arab cohesion, especially through the triangular axis, the alliance finally collapsed. Consequently, Egypt's withdrawal from the conflict created a military imbalance in favour of Israel. While sympathizing with the Egyptian initiative, Saudi Arabia could not afford the costs of taking such a position publicly. As an alternative, Saudi Arabia mediated between Damascus and

another powerful Arab state, namely Iraq (Kienle 1990, 100). A strong Arab opposition front was formed and threatened any party that would not actively penalize Egypt. The Saudis were torn between two options: (1) to espouse the US oriented strategy of endorsing the Egyptian-Israeli peace treaty while confronting the Damascus-Baghdad axis, as well as the Islamic Republic, or (2) to join the Damascus-Baghdad axis in confronting Egypt while risking the US connection. Serious strains emerged in the Saudi-US partnership when Washington proposed to link the protection of the Kingdom to Saudi support for the Egyptian-Israeli peace treaty (Safran 1988, 231). In short, the events in the Arab-Israeli sphere created a confusing situation for the royal elite. Nevertheless, the Arab-Israeli imbalance created by the withdrawal of Egypt did not endanger the physical security of the Kingdom. The conservative, oil-rich Kingdom is not a frontline state in the conflict with Israel and has no territorial quarrel with it. Unlike other Arab states—such as Egypt, Syria, Jordan, and Iraq—Saudi Arabia's involvement in the conflict was limited to financial and diplomatic means rather than military ones (Bahgat 2009b).

Alongside the Gulf and the Arab-Israeli conflict, the partnership with the United States constituted the third pillar in Saudi foreign policy. In 1979, this partnership seemed to undergo some changes, which contributed to the Saudi confusion and uncertainty about the relative power distribution. Since the Kingdom's creation in 1932, Saudi Arabia relied on its partnership with the Great Britain then with the United States as a safeguard to its physical security. This partnership was always a source of tension and embarrassment to the Saudi royal family in the Arab and Islamic worlds. The Saudi elite was, however, successful in maintaining a balance between preserving the US connection and preserving its status in the Arab world. Nevertheless, the Iranian revolution and the signing of the US-sponsored Egyptian-Israeli peace treaty created acute tensions in this partnership.

In the Gulf, losing the Shah undermined the US reliability as a security asset (Safran 1988, 275; Lippman 2004, 209). As Safran (1988, 354) explained,

It provided clear confirmation of a point the Saudis already suspected: that in its dealing with the Gulf countries, Saudi Arabia included, the United States was prompted only by its interest in oil and would work with any regime that would serve that interest. American's refusal in September 1979 to provide asylum to the shah only underscored that point.

Accordingly, Saudi Arabia attempted to rely on regional cooperation to address regional security concerns. Since the November 1978 Baghdad Arab summit, reconciliation between Saudi Arabia and Iraq seemed to be possible (Goodarzi 2006, 27–28). Following the failure of the Baghdad-Damascus axis, Saudi Arabia and Iraq signed a mutual security pact in February 1979 (Nonneman 1986, 14; Nonneman 2004, 173). Nevertheless, this pact did not indicate a firm tilt toward Iraq. Instead, it reflected Saudi Arabia's ambiguous stance on the issue. At the same time, the Saudi minister of the interior declared that this cooperation concerned only civil defence, police, and extradition (Ramazani 1986, 73). However, relying on a wider Arab consensus either in the Arab-Israeli sphere or the Gulf seemed futile as the Syrian-Iraqi axis quickly dissolved leaving the Saudi leadership in an even more puzzling situation.⁴⁰

At the outbreak of the Iran-Iraq War, Saudi Arabia had to take a firm position, especially after the split in the Syrian-Iraqi axis. While the new regional configuration did not generate evident physical security threats to the Kingdom, the position to be taken still had far-reaching implications. In light of this ambiguous regional configuration, the Saudi elite struggled to make a precise identification of enemies and friends and wavered between two options. The first was balancing Iraq's military ascent by supporting a weakened Iran while befriending the nationalist Arab camp—namely Syria and the Palestinian Liberation Organization (PLO)—in the Arab-Israeli sphere. This choice would mean scuppering the long-term strategic relationship with the United States and incurring the hostility of Iraq. It would also involve improving Saudi relationship with Moscow at the expense of the Kingdom's relationship with Washington. The second option was supporting Iraq and sacrificing Saudi

⁴⁰ For a detailed account of the this ephemeral rapprochement, cf. Baram (1986) and Kienle (1990).

Arabia's traditional strategy of maintaining a balance of power between Iran and Iraq in the Gulf. This option would mean accepting Iraq's regional hegemony and depending more on the United States for security. The choice would imply Saudi support for the Egyptian-Israeli peace treaty and would engender the hostility of Syria and Iran.

The absence of a precise source of danger triggered acute tensions within the royal elite, which was divided between those for supporting Iraq and those for befriending Iran. A conservative faction, led by King Khalid and Prince Abdullah, favoured befriending Syria and welcoming the Islamic fervour of the new Iranian regime. This faction was supported by a younger generation in the family led by Saud Al-Faisal that advocated for the strengthening of Saudi ties with the nationalist Arab Camp and for the improvement of relations with Moscow at the expense of the reliance on the United States (Samore 1983, 416–422; Abir 1993, 127–128). In fact, Sa'ud al-Faisal explicitly referred to the Soviet role in the Middle East as 'positive' (Quandt 1981b, 69; Sunayama 2007, 57). The opposing faction—led by Crown Prince Fahd and Sultan, who relied on the influential power of the Sudairi branch in the family⁴¹—advocated a pro-US stance stemming from a deep hostility to the Soviets. Fahd's pro-US moderate foreign policy and modernist project were partly discredited and blamed for the Mecca incidents⁴² as well as the Shiite uprisings in the Eastern province (Abir 1988, 145–147). This divergence between the Saudi elite resulted in the defeat

⁴¹ This is most powerful clans of the Al Saud family, derived from the patronymic of Fahd's mother—Hussa bint Ahmad Al Sudairi—who was married to King Abdel-'Aziz. This marriage resulted in seven sons: Fahd, Sultan, Abdel-Rahman, Nayef, Turki, Salman and Ahmed. The seven sons of Husa al-Sudairi constituted the largest bloc of full brothers forming a strong alliance within the House of Al Saud.

⁴² In 1979, a group of Sunni dissidents seized the Grand Mosque in Mecca for three weeks condemning the rule of Al Saud. In fact, these events had no direct connection to the Iranian revolution. It was only the timing that made these actions even more challenging to the regime's stability (Gause 1991; 2009, 48). For more details on this incident, see Trofimov (2008) and Hegghammer and Lacroix (2007a).

of Crown Prince Fahd and his self-exile in Spain⁴³ when his brothers took over his responsibilities.

Fahd's temporary withdrawal left room for the Khalid-Abdullah faction to impose its own vision. This conservative and nationalist coalition within the royal family temporarily reoriented many of the Kingdom's policies away from those pursued by Fahd and the Sudairis. In the Arab-Israeli sphere, Saudi Arabia now supported the radical Arab countries, in clear contradiction with the Saudi traditional policy. At the Baghdad Arab summit in 1979, Saudi Arabia agreed to the exclusion of Egypt from the Arab League and the imposition of a boycott, based on a total rejection of the Camp David accords and of the US policy in the Middle East. As part of the new regional emphasis of this coalition, Khalid and Abdullah led the first Saudi efforts to accommodate Khomeini. As Abdullah explicitly declared,

The new regime in Iran has removed all obstacles and reservation in the way of cooperation between Saudi Arabia and the Islamic Republic of Iran. Islam is the organizer of our relations. Muslim interests are the goal of our activities and the holy Koran is the constitution of both countries [...] For this reason I am very optimistic about the future of relations between us and the Islamic republic of Iran. Our cooperation will have an Islamic dynamism against which no obstacles facing the Muslims can stand ... the material potentials—money and oil—possessed by the Islamic Republic of Iran and Saudi Arabia, and by the Islamic and Arab worlds will be utilized and directed by an Islamic spirit—a spirit which is superior to all hollow secular pomp such as authority, dominance, or self-interests. The fact is that we are very relieved by the Islamic Republic of Iran's policy for making Islam and not heavy armaments, the organizer of cooperation, a base for dialogue and the introduction to a prosperous and dignified future (Samore 1983, 423M CSL).

Amid this acute disagreement, Saudi royal family members exercised a high degree of self-restraint in dealing with their differences. In the face of rumours swirling around the Kingdom and in the media, King Khalid and Abdullah denied any weakening in the unity of the royal family. In an interview with the

⁴³ There are no consensual explanations for the reasons behind this self-exile (Samore 1983, 417–418).

Gulf New Agency on April 21, Abdullah stated the following: 'We have lived with one another for a long time. We have inherited concepts and a way of life and family ties which we have all established on profound religious and solid ethical bases. We have been brought up in this country on these bases for successive generations. In our firm Islamic beliefs, estrangement among blood relatives is considered an unforgivable sin'. Like Khalid and Abdullah, Fahd denied all allegations of divisions within the royal family, especially between himself and Abdullah (Samore 1983, 425–427). Safran (1988, 238) notes: 'Although the leadership did not visibly split again, the policies pursued showed all the marks of an intermittent tug of war, punctuated by improvisations, compromises, and zigzags'.

These internal tensions demonstrated that the Al Saud were confused about the relative power distribution, and, hence, that an Iranian military threat to the Kingdom was not imminent, as it took almost one year to decide between the two available options. Instead, these tensions underlined an intrinsic contradiction in the Saudi regime's identity. The ontological security of the Kingdom was endangered by the new identity of the Islamic Republic. To restore its identity security, the Kingdom reframed its identity, which eventually influenced its friend/enemy dichotomy pertaining to the physical security sphere.

2.2. The Regime Identity: From Pan-Islamism to Sunni Islam

Whereas the Islamic revolution in Iran and the subsequent regional material configuration did not endanger the Kingdom's physical security, the new identity of the Islamic Republic caused Saudi ontological insecurity. The Saudi regime identity was based on pan-Islamism, which provided the Kingdom with the source of distinctiveness in the region. Ironically, its claim to be the protagonist of 'true' Islam in the world sowed the seeds of its vulnerability to other emerging Islamic models in the region. In 1979, the Islamic revolution in Iran constituted a 'critical situation' that endangered the stability of the Saudi regime identity. The Kingdom feared that it would lose its unique Islamic

credentials once the revolution adopted a similar pan-Islamic identity. In other words, the distinction according to which the Kingdom had consolidated its own identity vis-à-vis the other states in the region became irrelevant. Seeking to re-establish its ontological security, the Saudi state narrowed its regime identity from pan-Islamism to Sunni Islam. Based on the prominence accorded to the Sunni version of Islam, Iran was identified as a Shiite ‘other’, which was framed in demonizing terms. This new emerging Self/Other distinction defined not only the Saudi identity but also determined its identification of enemies and friends.

Before examining the Saudi Kingdom’s ontological insecurity, I will briefly explore what ‘Saudi state identity’ means. As opposed to Arab states, where nationalism was based on ethnic elements—such as Arabism—combined with territorial affinities related to the struggle against colonialism, the Saudi Kingdom was not formed on the basis of a ‘national’ identity.⁴⁴ Modern Saudi Arabia came into existence as a result of the Al Saud’s attempt to establish an Islamic monarchy on the Arabian Peninsula. The unification of the Arabian Peninsula was the outcome of a long-standing alliance between Muhammed Ibn ‘Abd al-Wahhab (the eponym of Wahhabism) and the Al Saud.⁴⁵

Two elements constituted the identity of the newly established regime: religion and the loyalty to the royal family. These two basic tenets were identified by King ‘Abdul Aziz (known as Ibn Saud): ‘Two things are essential to our State and our people [...] religion and the rights inherited from our fathers’

⁴⁴ The nature of the Saudi society—composed of diverse clans, tribes, and Bedouins—did not allow the emergence of a state around a collective national identity. The Arabian Peninsula was rarely unified until the forces of Al Saud succeeded in unifying the country in the early twentieth century (Kostiner 1990).

⁴⁵ Wahhabism refers to the Saudi variant of the Sunni tradition. The word ‘Wahhabism’ is derived from the teachings of the Muslim scholar, Muḥammad Ibn ‘Abd al-Wahhab, who lived on the Arabian Peninsula in the eighteenth century (1703–1792). Ibn ‘Abd al-Wahhab founded a religious movement that aimed to reverse what he perceived as the moral decline of the Islamic society on the Arabian Peninsula. Based on an alliance between Muhammed Ibn ‘Abd al-Wahhab and Muhammed Ibn Saud, the founder of the first Saudi state, Wahhabism provided the ruling family with legitimacy and a powerful tool with which to unite various tribes and regions. It is worth noting that the term Wahhabism is a pejorative term. The Wahhabis call themselves *Muwahhidun* (monotheists). Despite the imperfection of the term ‘Wahhabism’, I retain it, as it is widely used.

(quoted in Nevo 1998, 35). The role played by the Al Saud in unifying the country provided a source of loyalty to the ruling family. Gulf States, including Saudi Arabia, used oil wealth to consolidate their legitimacy among various societal groups (E. Davis 1991, 24). Nevertheless, these new states, the Saudi Kingdom including, lacked a distinct identity that could stand in contrast to the patriotism developing in the neighbouring Arab states.⁴⁶ Since the Kingdom contains within its borders two of the three holy cities in Islam—Mecca and Medina—its identity came to be based on an appropriation of Islamic symbols; ‘our constitution is the Quran and the application of shari’a’. As Nevo (1998, 35) states, ‘religion has played a prominent role not only in moulding the individual’s private and collective identities but also in consolidating [the] national values’.⁴⁷ According to a survey conducted in 2003, Saudis consider religion the most important element of their identity; territorial nationalism comes second (Thompson 2014, 233).

Islam, and its Wahhabi interpretation in particular, enabled the regime to distinguish itself from other regional actors.⁴⁸ For decades, the Kingdom relied on Islam to provide it with a unique identity in the region, separate from the secular pan-Arab ideology that swept the region during the 1950s and 1960s under the charismatic leadership of Egyptian President Nasser (Piscatori 1983).⁴⁹ In an attempt to discredit pan-Arabism, the Kingdom emphasized the imagery of the pan-Islamic *umma*⁵⁰ and crowned itself the defender of the faith in the region. This pan-Islamic narrative, which prescribed solidarity among Muslims, was often identified by King Faisal (1964–1975) as the inherent *raison d’être* of the Saudi state (Sindi 1986). With the demise of the pan-Arab project, the pan-Islamic discourse gained leverage among the Arab masses. Saudi Arabia

⁴⁶ On the lack of a national Saudi identity, see the article of the leading Saudi columnist Hamid Al-Din (2014).

⁴⁷ For further details on the role of Wahhabism in the formation of the Saudi state, cf. Ayoob and Kosebalaban (2008).

⁴⁸ This does not mean that the state identity was an amalgamation of diverse groups in the society. Instead, the Al Saud monopolized the state’s identity narrative.

⁴⁹ Pan-Arabism refers to the political project of unifying all Arabs under a single state.

⁵⁰ *Umma* is used to refer to all Muslims as one community bound by religion.

portrayed itself as the representative of the Muslim world and prided itself on being the only Islamic state to rule according to *shari'a*.

While the ideal of Islamic unity and solidarity is encapsulated in the Quranic notion of *umma*, pan-Islamism became an integral component of Saudi regime identity and foreign policy only in the 1960s and 1970s under King Faisal. To promote this identity narrative, King Faisal established a number of national and supranational institutions that worked to promote cooperation and solidarity in the Muslim world (Hegghammer 2010, 17–18).⁵¹ The support of the Palestinian cause came as the most significant manifestation of pan-Islamism in Saudi regime identity. The Kingdom funded the Palestinian struggle against Israel and directed most of its foreign aid budgets to the conflict, which became consistently framed in pan-Islamic terms (Ochsenwald 1981, 276). This pan-Islamic narrative was strongly supported by the Saudi *ulama*. The Grand Mufti Sheikh Abdul Aziz bin Baz,⁵² in a mid-1960s publication,⁵³ proclaimed: 'It is known in Islam that the call to Arab nationalism, or any other form of nationalism, is false and a grave mistake. It is an assault on Islam and its followers' (quoted Al-Yassini 1983, 13). The pan-Islamic appeal enabled the Saudis to re-establish a distinguishable state identity in a region dominated by pan-Arabism. After the 1967 Arab defeat and the demise of pan-Arabism, Saudi Arabia was able to crown itself the defender of the faith in the region.

Whereas the Saudis embraced a pan-Islamic identity, the Shah opted to construct an identity for the Iranian state that appealed to an Iranian nationalism permeated with liberal Western values. These two very distinct identity narratives did not deter Saudi Arabia and Iran from developing an entente over issues of shared interests, such as the security of the Gulf, the

⁵¹ The Organization of Islamic Conference (OIC) was established between 1969 and 1972 as an intergovernmental organization with influence in the diplomatic sphere. In 1962, the Kingdom funded the foundation of the Muslim World League (MLW), which is a non-governmental institution involved in cultural, educational, and charitable activities.

⁵² Ibn Baz, one of the most prestigious Islamic scholars, was the grand mufti for the Kingdom from 1993 until his death in 1999.

⁵³ From Abdul Aziz bin Baz's indicative title *Naqd al-Qawmiyya al-'Arabiyya 'alā Daw' al-'Islām wa al-Wāqi'* [A Critique of Arab Nationalism Based on Islam and Reality].

alliance with the United States, and containing communism and pan-Arabism in the region.

Just when Saudi Arabia had consolidated its distinct identity as the sole Islamic model in the region, the Islamic revolution broke out in Iran in 1979 and undermined the Saudi's self-identity by altering the representation of the Other. The Islamic revolution downplayed Persian nationalism and promoted Islamic universalism. The revolution aimed to transcend its national context and called for Muslim unity and solidarity (Buchta 2002). The new identity of the Islamic Republic portrayed Iran as the vanguard of revolutionary and anti-imperialist Islam and the legitimate leader of the Muslim *umma*. It thus explicitly converged with the Saudi worldview, which was also based on solidarity among Muslims, and, hence, competed with the Saudi claim to distinctive leadership.

Iranian foreign policy became subordinated to the new norms of the Islamic state encapsulated in the slogan *na sharghi na gharbi, jomhuri-ye eslami* (neither Eastern nor Western; only the Islamic republic). With this detachment from the Cold War rationale, the Islamic republic radically moved from preserving the *status quo* under the patronage of the United States to a revisionist role in the region. According to Khomeini, Muslims formed a single community (*umma*), and the existing borders were the result of imperialism and domination. He argued that Islam was one and that Muslims should henceforth unite: 'Muslims must become a single hand. They must become a united hand, remain united, become one; they must not think themselves separate from us' (quoted in Halliday 2002, 31). This claim remained a core concern for Iran and was reflected in the country's new constitution, which proclaimed solidarity among Muslims transcending all sectarian divisions. Accordingly, the Islamic Republic pursued a foreign policy strategy that appealed to Arabs specifically and all Muslims generally. Iran consistently emphasized its commitment to the Palestinian cause. This pan-Islamist narrative was accompanied by increasing financial support to Hamas, the Palestinian Islamic Jihad, and Hezbollah in Lebanon. The Iranians thus presented themselves as the leader of Islam in the region and the epitome of

virtue in the Arab–Israeli conflict, a narrative similar to the one embedded in Saudi regime identity. In other words, Iran presented an alternative to Saudi regime’s monopoly over the Palestinian cause.

Pan-Islamism should serve as a common denominator between the Iranian Republic and the Kingdom of Saudi Arabia. Ironically, its implications were divisive. The Kingdom saw the foundations of its state identity eroded. As a Saudi official explained this tension,

Iran’s biggest struggle is with Saudi Arabia, not with the United States. Iran wants to challenge the Saudi version of Islam, that is the division of politics and religion. Saudi Arabia wants to help Muslims by sending scholars, for instance to China, and by inviting students. We educate them about religion without political propaganda. In Senegal, for example, Saudi Arabia invests money in order to improve the living conditions of the people without influencing them politically. Iran, on the other hand, pays imams to reach the masses. They want to turn the people into fanatics and preach how evil Saudi Arabia and the United States are (quoted in Marschall 2003, 48).

The Saudi regional position as the leader of pan-Islamism was now challenged by another pan-Islamic movement driven by revolutionary, idealistic, anti-imperialist and anti-monarchic values (Adib-Moghaddam 2006, 28–30). The distinctiveness the Saudi state claimed to have in relation to other actors was endangered by the rise of a pan-Islamist ideology in Iran. Saudi anxiety was magnified by the Iranian revolution’s efforts to discredit the Kingdom’s version of Islam. Turki al-Faisal Al Saud⁵⁴ has offered an interesting perspective on the anxiety the Saudis experienced:

Saudi Arabia is the Custodian of the Two Holy Mosques,⁵⁵ and the Birthplace of Islam, and as such it is the eminent leader of the wider Muslim world. Iran portrays itself as the leader not just of the minority Shiite world, but of all Muslim revolutionaries interested in standing up to the West (Al Saud 2013, 38).

⁵⁴ Turki al-Faisal is a member of the Saudi royal family. From 1977 to 2001, Prince Turki was the director of *al-mukhābarāt al ‘aāma* (the Saudi general intelligence service).

⁵⁵ This title was introduced in 1986 in reaction to Iranian demands to place Mecca and Medina under international rule.

This challenge to the distinctiveness of Saudi identity was also related to the domestic dimension of its identity narrative. The first event in this respect was Juhaymān al-‘Utaybī’s seizure of the Mecca Mosque on 20 November 1979. Employing a discourse grounded in the Wahhabi tradition, Juhaymān accused the regime of deviating from Islamic values (Al-Rasheed 2006, 105).⁵⁶ Moreover, he accused the *ulama* of interpreting the Quran in ways that served the non-Islamic policies of the ruling family (Nevo 1998, 42). Almost simultaneously, the Shiites in the Eastern province of the Saudi Kingdom staged protests on 28 November 1979. The regime claimed that its small Shiite community—estimated at approximately 350,000 in 1986—was subject to Iranian influence (Goldberg 1986, 230). Scholars of regime security approach argue that these domestic problems might have posed a threat to the Saudi regime and led the elite to reframe their identity. I however argue that the domestic dimension on its own could not have posed an identity risk to the regime. There is no compelling evidence that Iran was involved in Saudi internal affairs. Khomeini’s speeches inspired a small number of Shiite clerics in Saudi Arabia (Ibrahim 2006, 117). Nevertheless, this community was small, and its influence on the stability of the Saudi regime was far from significant. From an ontological security perspective, I argue that the domestic dimension became only relevant because the narrative of self-identity is inextricably related to the interaction with the Other, which was disrupted following the critical situation created by the Islamic revolution. The domestic dissent only magnified the shakiness of the regime’s identity narrative and its ontological insecurity.

These circumstances drove the Saudi rulers to reinvent their state’s identity. To re-establish a sense of self vis-à-vis the changing representation of the Iranian ‘Other’, they needed to separate their narrative from generic pan-Islamic rhetoric. The Saudis thus narrowed their identity to privilege the Sunni tradition, known for its rejection of the Shiites as a legitimate Islamic community. Seeking to distinguish the Saudi version of Islam from the Iranian

⁵⁶ For more details on Al-‘Utaybī’s movement, cf. Hegghammer and Lacroix (2007b) and Kechichian (1990).

one, the Kingdom reinvigorated a sectarian discourse. Sunni Islam was broadly introduced into Saudi foreign policy not as a source of legitimacy but as a component of Saudi regime identity distinguishing the Kingdom from the Islamic Republic.

The reduction of the Saudi pan-Islamic identity to a Sunni Islamic one created a new Self-versus-Other distinctiveness couched in sectarian terms (Sunni versus Shiite). Henceforth, the Kingdom adopted an anti-Shiite discourse designed to discredit the pan-Islamic narrative of the Iranian revolution. In pursuing this endeavour, the regime strengthened the power of the *'ulama* (as representatives of the state religion) and promoted the Kingdom's conservative Sunni image. It also reinforced a stricter Wahhabi code of conduct, granting the *'ulama*, such as Ibn Baz, more control over social and religious life (Steinberg 2005, 28–29). This was manifested in the strengthening of the religious strands in the educational system. All of this resulted in the state becoming more closely associated not only with Islamic symbols but also with a Sunni approach that rejected Shiite symbols (Niblock 2006, 55). Moreover, the Kingdom's rulers aimed to consolidate the Kingdom's image as the eminent leader of the Muslim world by using the title of 'the custodian of the two holy sites' — Mecca and Medina.

In addition to creating this new distinction, the Kingdom counter-framed the Islamic Republic to demonize the latter's claims. The Saudi clerical establishment produced an abundant flow of anti-Shiite publications to blunt the pan-Islamic appeal of the Islamic revolution.⁵⁷ Sectarian language became explicit. From the perspective of the Sunni *ulama*, the Shiite propensity for saint worship, shrine and grave cults, and veneration of imams were abhorrent acts of polytheism (*shirk*). Indeed, Sunni-Wahhabi scholars pronounced Shiites to be 'the incarnation of infidelity, and [...] polytheists', making it the duty of believers 'to manifest enmity to the polytheists [who] were perceived as unbelievers (*kufar*), and were therefore liable to the severest sanctions, including that of holy war (Jihad)' (Goldberg 1986, 232). In short, this Saudi counter-framing of

⁵⁷ For an overview, cf. Algar (2002).

Shi'ism placed the Iranian regime outside of the Muslim community, describing them as defectors (*rafidda*). It is important to note here that the Saudi anti-Shiite discourse is not entirely novel (Jones 2007). Since its foundation, the Kingdom has announced its rejection of Shiism based on fatwas issued by Sheikh Taqiyy al-Dīn bin Taymiyyah, who considered Shiites to be heretics. He also accused Shiites of blasphemy. Accordingly, Muhammed Ibn 'Abd al-Wahhab, the founder of Wahhabism, denounced all Shiites as unbelievers (Mouzahem 2013). Nevertheless, the Islamic revolution in Iran and the Saudi need for identity distinctiveness led to an intensified anti-Shiite narrative.

In short, based on the Saudi quest for distinctiveness, and ontological security, the representation of the 'Saudi-Sunni Self' was contrasted with the 'Iranian-Shiite Other' in Saudi foreign policy. The discourse of exclusion—based on religious otherness and framed by a religious narrative—highlighted Saudi Arabia's religious uniqueness, which was necessary to forge a distinct regime-identity narrative. In other words, sectarianism was simply a strategy for re-establishing the Kingdom's distinctiveness and, thus, its ontological security.

The previous interpretation of the Saudi regime identity highlighted how the establishment of an Islamic republic in Iran with a revolutionary pan-Islamic discourse undermined the very distinct identity of the Saudi Kingdom. In its ceaseless quest for distinctiveness, the Saudis narrowed their identity and reinvented a new Self/Other narrative based on sectarianism. The new Self/Other provided the elite with guidance in navigating a confusing and ambiguous relative power distribution. Henceforth, the enemy/friend identification emerged from this Self/Other distinction. This situation of ontological insecurity/physical security explains the Saudi decision to support Saddam Hussein against the Islamic Republic over the eight years of the Iran-Iraq War.

3. Syria: Demystifying Rationalism

If Saudi Arabia faced a situation of ontological insecurity/physical security, the Syrian regime was an illustration of a critical physical insecurity. This insecurity defined not only Syria's friends and enemies but also its identity narrative. Whereas the Islamic revolution endangered the distinctiveness of the Saudi identity, the Syrian identity adjusted and adapted to the dictates of the regime's physical security needs. This section examines why and how an Arab nationalist Syrian regime that claims a secular Ba'athist ideology supported non-Arab Iran—an Islamic regime bent on exporting its revolutionary theological doctrine—against a fellow Arab and Ba'athist regime, Iraq.

'We did not want Iran to be defeated as we were aware of Saddam Hussein's plans' (Baraka 2011). With these words, former Syrian Vice President Abd al-Halim Khaddam⁵⁸ explicated the Syrian position in 1979. Exposed to an Israeli military supremacy on its western borders, Syria could not endure an Iraqi military victory on its east. Just at the moment when Syria was in need of a regional ally, a regime change in Iran provided an opportunity to balance Iraq and Israel. In these circumstances, the Syrian regime reframed its identity to embrace an alliance with a non-Arab state. The Syrian regime's Self/Other distinction was based on pan-Arabism, which distinguishes between Arabs and non-Arabs. This identity underwent a change wherein the Self/Other distinction became based on the animosity toward Israel and the championing of the Palestinian cause. This Self/Other distinction became not necessarily tied to an Arab dimension. In other words, the friend/enemy dichotomy that emerged from Syria's physical insecurity, guided the regime's Self/Other distinction. This process has often been described in the literature as the redefinition of Arab nationalism in Syrian terms (Sadowski 2002; Chalala 1988; Maltzahn 2013). This section first unpacks Syria's physical insecurity, which was caused by Iraq and Israel's military supremacies. I then lay out the regime identity change from

⁵⁸ Abd al-Halim Khaddam was Syria's foreign minister from 1970 until 1984 and then vice-president of foreign affairs until 2005. In December 2005, he went to exile in France. Since then, he has conducted several interviews with Arab newspapers and satellite channels about his relationship to Hafiz al-Assad and Syria's relationship with Lebanon, Iraq, and Iran.

pan-Arabism to a more state-centric conception accommodating the new friend/enemy dichotomy.

3.1. The Strategic Balance of Power: Limited Options

Syria has conventionally faced unfavourable geostrategic conditions. It is unprotected by natural boundaries and, hence, remains vulnerable to its Arab (especially Iraq either under both the monarchy and the Ba'ath party) and non-Arab neighbours (Israel and Turkey). Syria's relatively small size and its limited manpower made the quest for alliances the predominant preoccupation of al-Assad's regime. For instance, in order to keep the balance against Israel, Syria sought alliances with Arab regimes: Egypt from 1966 to 1975,⁵⁹ Iraq from 1965 to 1971, and Saudi Arabia from 1971 through 1975.⁶⁰

Throughout the 1970s, al-Assad was successful in balancing Israel's military capabilities. Following the 1967 defeat, al-Assad improved Syria's relationship with its Arab neighbours. He sought a military alliance with Egypt, which he considered to be an indispensable actor in the case of war. In addition, he terminated Syria's isolation from the oil-rich Gulf monarchies and concluded a *détente* with Iraq (Salloukh 2000, 400–401). During the Yom Kippur War (1973), the emergence of the Damascus-Riyadh-Cairo axis exemplified al-Assad's new pragmatic approach. While al-Assad allied with al-Sadat to combine Egypt and Syria's capabilities in a coordinated attack on Israel, the Saudi Kingdom used the oil weapon to pressure Western powers (Sunayama 2007, 37–39). In 1979, al-Assad's strategy to maintain Syria's regional role collapsed. Two regional developments endangered Syria's physical security and led to its isolation: the Egyptian-Israeli Peace treaty and Iraq's military ascent following the Islamic revolution in Iran.

The withdrawal of Egypt from the Arab-Israeli conflict constituted the most acute challenge to the Syrian regime, as it became exposed to Israel's

⁵⁹ A defence agreement between Egypt and Syria was signed in 1966 ((IISS) 1979).

⁶⁰ For a summary of inter-Arab alliances, cf. Taylor (1982, 123–124).

military supremacy. Although the Egyptian-Syrian alliance was fruitful in 1973, it was severely tested by post-war diplomacy. Despite the constraints of pan-Arabism, al-Sadat showed a willingness to enter bilateral negotiations with Israel under US auspices. Syria's fears of isolation were aroused when Egypt and Israel signed the first American-mediated disengagement agreement in January 1974. In September 1975, al-Sadat signed the second disengagement agreement, known as the Sinai II Agreement. The subsequent direct talks between Egypt and Israel led to the signing of the Camp David Accords in September 1978 and to the Egyptian-Israeli Peace Treaty in March 1979. In one move, this treaty removed the Arab world's strongest actor from the Arab-Israeli theatre and left the Syrian regime severely exposed (Drysdale and Hinnebusch 1991, 63–64; Ehteshami 1996, 50). In March 1978, Syria's fears of Israeli military supremacy materialized when Israel invaded Lebanon and occupied a stretch of South Lebanon all the way to the Litany River. Lacking a strategic depth, Damascus was close to the dreaded scenario: an Israeli attack against Syria through al-Beqaa Valley and on the Golan Heights (Seale 1989, 310–312).

From 1977 to 1979, al-Assad attempted to restore the balance against Israel through three strategies: (1) increasing its military build-up with more reliance on the Soviet Union, (2) mobilizing an Arab opposition front to isolate Egypt, and (3) finding other Arab partners to counterbalance Israel's military capabilities. However, these efforts were unsuccessful.

The breakdown of the Egyptian-Syrian alliance convinced the Syrian elite that self-reliance in defence was a fundamental requirement of the new balance-of-power equation. Therefore, the Syrian regime triggered a huge military build-up, known as the 'strategic parity' policy (A. Khalidi and Agha 1991; Eisenstadt 1992). Syria's conscripted forces grew from 50,000 in 1967 to 227,500 in 1979 ((IISS) 1979, 42). More than 20 per cent of GDP was devoted to this military build-up. Defence expenditure increased from US\$1.12 billion in 1978 to US\$ 2.04 billion ((IISS) 1979, 39, 42, 45). However, the Syrian regime was unable to achieve parity with Israel. In 1978, Israel had a total armed force of 164,000

soldiers with a potential of mobilizing up to 400,000 in 24 hours (Kandil 2008, 428–429). The expansion of the military forces under al-Assad and the supply of a modern arsenal weapons placed a heavy burden on the Syrian economy and transformed Syria into a major recipient of Arab and Soviet military aid. By the late 1980s, Syria's debt to the Soviet Union amounted to US\$ 10 billion (Ehteshami 1996, 55).

Alongside this internal balancing strategy, Syria attempted to mobilize an Arab front to counterbalance Israel's military preponderance. After al-Sadat's visit to Jerusalem, Syria, South Yemen, Algeria, Libya and, the PLO formed the Steadfastness and Confrontation Front (*Jabhat al-Ṣumūd wa al-Taṣādī*). They were later joined by Iraq and Saudi Arabia. Initially, the front attempted to convince Egypt to give up its negotiations with Israel. Following the Baghdad summit of November 1978, a delegation was dispatched to Cairo headed by Lebanese Prime Minister Salim al-Huss. The delegation offered al-Sadat US\$ 5 billion annually for ten years in return for not signing the peace treaty with Israel. However, al-Sadat refused to meet the delegation (Salloukh 2000, 433). Accordingly, the front moved to isolate Egypt and apply sanctions. The coalition had the potential to act as the most important inter-Arab force in the Arab-Israeli sphere. Nevertheless, this Arab quasi-consensus was short-lived as Arab polarization emerged. In short, the Steadfastness and Confrontation Front turned out to be ineffective in realizing Damascus' intentions in building a front to counterbalance Israel.

When Damascus observed this ineffectiveness in building an Arab consensus against Israel, it set its sight on Baghdad as the primary regional partner that could fill the vacuum caused by Egypt's exit from the Arab camp. Given its military capabilities and geographic location, Iraq was the only Arab state capable of counterbalancing Israel. In the first half of 1979, Syria's critical vulnerability and Iraq's regional ambitions brought about what Kienle (1990, 135) termed the '*marriage contre nature*' between the two states. Nevertheless, the rapprochement was short-lived. On 28 July, Baghdad announced that a conspiracy against the regime has been discovered and accused Syria of

domestic interference. Damascus swiftly denied any involvement in Iraqi internal affairs and dispatched Khaddam and al-Shihabi⁶¹ to resolve the issue. Khaddam later claimed that the Iraqi regime was unable to provide any concrete evidence of Syrian involvement (Baraka 2011). The Syrians became convinced that Saddam Hussein intentionally destroyed the partnership. The latter would have moved Iraq to the frontline confrontation with Israel; however Saddam Hussein was unwilling to get involved in this conflict (Khadduri 1988, 74–78). Obviously, the two countries pursued two different aims. While Iraq pushed for the unification of the Ba'ath party and states' apparatuses under its own pre-eminence, Syrian leaders were looking for the regional benefits of unity with Iraq without losing their independence. Henceforth, relations between Damascus and Baghdad degenerated into a cycle of mutual recrimination. By September 1979, Syria accused Saddam Hussein of arming and financing the Muslim Brotherhood to destabilize al-Assad's regime. In less than a year, Syria's strategy of relying on Iraq to balance Israel proved failure, and Baghdad turned from an asset into Syria's most dangerous neighbour.

Worse was yet to come. After the partnership between Iraq and Syria formally failed, Saudi Arabia consolidated a new partnership with Iraq and isolated Syria even further. On 17 September 1979, Saudi Minister of the Interior Prince Nayif concluded an agreement with Iraq on security cooperation. Damascus' fears increased when a parallel Jordanian-Iraqi rapprochement emerged. Throughout 1979, these bilateral arrangements developed into a tacit alliance between Iraq, Jordan, and Saudi Arabia. This rearrangement of allegiances in the region increased Syria's insecurity, as the Arab focus on regional politics shifted from the Arab-Israeli sphere to the Gulf (Sunayama 2007, 59–60).

This isolation did not only affect the position of Syria on the Arab-Israeli front. The change in the balance of power in Iraq's favour following the Iranian revolution in itself constituted another source of fear to al-Assad's regime. Iraq's

⁶¹ Hikmat al-Shihabi (1931-2013) served as the Syrian Army chief of staff from 1974 until 1998.

aspiration for regional hegemony was manifested in its military build-up. Following the increase in the oil prices during the 1970s, Iraq's military forces doubled in size, reaching 242,000 men by 1979. Its defence expenditures increased to US\$ 2.67 billion (The International Institute for Strategic Studies 1980, 42). In short, Syria had to deal both with Israel's military supremacy and with Iraq's ascent, which was not only destabilizing on the ideological level but was also, more importantly, a military threat (Marschall 1992, 433–35). Both hostile states shared long borders with Syria, and both had considerable projection capabilities. Syrian leaders were aware that any confrontation with its Arab neighbour would mean compromising Syria's military capabilities on the Golan Heights. Khaddam expressed Syria's physical insecurity as follows: '[Syria] cannot fight a hundred wars at the same time' (Salloukh 2000, 405).

The overthrow of the Iranian monarchy and the advent of a regime that was not aligned with Israel provided Syria with an opportunity to balance Israel and limit Iraq's regional ambitions. As Hafiz al-Assad stated, 'This revolution introduced important changes in the strategic balance [...] [Iran] supports the Arabs, without hesitation, [...] for the sake of liberating our lands [...] How can we [...] lose a country like Iran of the Islamic revolution...with all its human, military, and economic potential' (quoted in Ehteshami and Hinnebusch 1997, 93). Al-Assad condemned Saddam for 'launching the wrong war against the wrong enemy at the wrong time'. He also argued that 'to fight Iran was folly: it would exhaust the Arabs, fragment their ranks and divert them from 'the holy battle in Palestine' (Seale 1989, 357).

The outbreak of the Iran-Iraq War in September 1980 presented the Syrian regime with an acute challenge. Syria had now to deal with the regional consequences of a potential Iraqi victory in the east, all while continuing to face a militarily superior Israel in the south. For a regime that assumed 'any imbalance [*khala*] in any part of the region affects all the region', a rapid Iraqi victory would mean the cementing of Syria's regional isolation. In other words, Syria would find itself encircled between Israel's military supremacy and Iraq's hegemonic aspirations. Khaddam portrayed Syria's fear in this context as

follows: 'the Iran-Iraq War was two wars: one against Iran and the second against Syria' (Baraka 2011). In short, Syria sided with Iran to protect its regional position from the unbearable consequences of an Iraqi victory (Seale 1989, 353–358; Hunter 1993, 198–210; Chalala 1988, 112–113). The alliance with Iran was popular neither within Syrian public opinion nor among the cadres of the Ba'ath party, but Syria's physical security dictated the choice of its enemies and friends regardless of any domestic opposition. (Ehteshami and Hinnebusch 1997, 64; Batatu 1999, 284–285).

Thus, al-Assad's decision to join Iran to counterbalance Iraq and Israel may be said to have been dictated by *raison d'état* (Ehteshami and Hinnebusch 1997, 102). As the sources of danger and harm were clear, Syria's identification of enemies and friends came as a response to the regime's physical insecurity. The observed dangers led the regime to re-interpret its identity and its related Self/Other identification to accommodate physical security needs.

3.2. The Syrian Regime Identity: A Strategic Adaptation

After accusing Egypt of challenging the very core of Arabism, al-Assad found himself in a similar position a year later. By allying with Iran against Iraq, Syria violated the most conventional pan-Arab norm. Against the fundamental principle of Arabism, according to which Arabs should only unite with Arabs, al-Assad aligned with a major non-Arab state threatening Arab states across the Gulf. In a futile attempt to save Syria's Arab façade, Khaddam stated: 'We told Iran that in the case of any aggression on any Arab state, Syria will follow the Pan-Arab dictates and support the Arab state' (Baraka 2011). However, the statement completely ignored the inconvenient fact that Iraq is an Arab state.

The Islamic revolution in Iran did not affect the ontological security of the Syrian regime, which prior to 1979 had maintained a stable, distinct identity based on Syrianism and Arabism. Syria's strategic isolation imposed high constraints on the regime's identifications of enemies and friends, which led to the redefinition of Self/Other distinction. The following discussion highlights

the changes in Syria's identity as a result of its alliance with Iran and of its animosity with Iraq and Israel. First, I present the two principles in the regime identity: pan-Arabism and pan-Syrian nationalism. Second, I present the changes in the content of the regime identity and its move toward a more defined 'Syrian' nationalism under a pan-Arab label in the context of the Iran-Iraq War. I argue here that the us/them distinction in the regime identity underwent two developments. First, the definition of the Self became distinct from the Arab nation. More precisely, Syrian nationalism supplanted Arab nationalism. Second, the pan-Arab component in Syrian identity changed from emphasizing the unity between different Arab states to focusing on the struggle against Israel. As Hinnebusch (2001, 140) summarized this change, 'the meaning of Arabism [altered] from a cause for which Syria would sacrifice to a means to reach Syrian ends'. In short, the source of distinctiveness became based not on Arabness but on animosity toward Israel. Accordingly, Iran became explicitly integrated within the 'us' category. This section explores the basic tenets of Syria's identity and, then, traces the changes imposed by the physical security needs of the regime.

Throughout the twentieth century, the Syrian regime identity wavered between two poles: pan-Arabism and Syrianism. Pan-Arabism represents a total commitment to the idea of Arab unity to the extent of denying any separate identity to territorial states. The ideology portrays the Arab world as one Arab nation divided between artificially established Arab states. The ultimate goal of pan-Arabists was (and to a smaller degree remains today) to merge these territorial states into a 'true' Arab nation-state. Until then, the *raison de la nation Arab* should take precedence over the narrow *raison d'état* (W. Khalidi 1978, 696). From this perspective, the 'Arab Homeland' (*al-waṭan al-'arabi*) is the primary source of Self/Other distinction. On the other hand, pan-Syrianism presupposes the existence of a distinct Syrian identity, which corresponds to a greater Syrian state to be established within the natural geographic borders of *bilād al-shām* (Zisser 2006). Greater Syria comprises four states in terms of

today's political units—Syria, Lebanon, Jordan, and Israel/Palestine including the Gaza Strip and the West Bank (Pipes 1990, 13–14).

Since the early days of state formation, Syrian leaders sought a middle ground that would combine these two poles. They adopted an 'Arab Syrianist' identity. Syria became portrayed in the official discourse as the 'beating heart of Arabism' or 'the cradle of Arabism'. On its independence day, President Shukri al-Quwatli, outlined the state identity that guided Syrian foreign policy for decades:

Bilad al-Sham [which] was the cradle of the concept of 'uruba and the home of its first champions and martyrs [...] has been the first Arab country to carry its civilizational mission to parts of the world as far away as [...] the hills of al-Andalus and the wall of China, declares today that it believes in 'uruba [...] we shall not accept that any flag other than that of Arab unity (*wahda*) will fly over this country (quoted in Kienle 1995, 58).

The official name of the Republic—"The Arab Syrian Republic"—expressed the declared priorities of the state identity.⁶² Pan-Arab nationalist considerations took precedence over the particular interests of the Syrian state. The Ba'ath party that has dominated Syrian politics from 1963 to the present was established under the same ideology. 'The unity of the Arab nation and its freedom' [*waḥdat al-'umma al-'arabiya wa ḥuriyatahā*] was the first principle enshrined in the 1947 party constitution (Kedar 2006, 2006:35).

From the independence through the late 1970s, pan-Arabism remained predominant in Syria's identity. Consequently, Arab solidarity and unity occupied a privileged place in the regime's foreign policy discourse. Before 1979, Syria initiated nine attempts for Arab unity (Khūrī 1988). Syrian foreign policy was often explained in Arab nationalist terms. Although it was initially imposed by the elites, this meaning of Arabism eventually reached the people who developed a real sense of integration into a larger community and a strong

⁶² This idea can be compared to the one signalled by Anwar al-Sadat, who changed the official name of Egypt from 'The United Arab Republic' to 'The Egyptian Arab Republic' in 1971. This alteration placing 'Egypt' in a prior position vis-à-vis Arabism reflected a change in the order of state's priorities.

belief in its realization. Syrian foreign policy always privileged Arabs over non-Arabs. In countless public speeches and interviews, al-Assad highlighted that the cure for all Arab problems lies in the unity of all Arab states. In 1975, al-Assad emphasized: 'the division we are living leads to a growing regional spirit threatening the fate and the future of the Arab nation [...] We should resist this division [...] it is the greatest threat [...] and if we beat this threat then we would beat any other threat all over the Arab world' (Al-Assad 1975).

This pan-Arab dimension manifested itself in Syrian foreign policy toward the Arab-Israeli conflict and the Palestinian question in particular. Syrian leaders assumed Syria to be the motherland of the other countries in the Levant—Palestine, Jordan, and Lebanon—and considered the struggle with Israel to be a conflict for 'Greater Syria'. Aware of inter-Arab rivalries, the Syrian regime distinguished between long-term Arab nationalist objectives and short-term pragmatic ones. The most important long-term nationalist goal remains the unity of all Arabs under a federative state that would respect the historic idiosyncracies of each country [*qutr*]. As this objective became difficult to materialize, Syrian leaders identified short-term objectives: recovering the territories occupied in 1967, retrieving Palestinian rights, and balancing Israel's military power in the region. Despite this pragmatism and flexibility, Syria's definition of the Self remained centred around a sense of 'Arabness'. Syrian public speeches and media statements were populated with references to the 'Arab people' and the 'Arab Umma' while references to the Syrian entity were ambiguous and minimal (Kienle 1995, 58–61). Arab nationalism was portrayed in the regime identity as the struggle to unite the Arab lands from Morocco to Iraq under one Arab state where the 'nation' and the 'state' coincide (Dawisha 2003; Valbjørn 2009). On 17 October 1978, Minister of Defence Mustafa Talas declared: 'the Arab-Syrian [region] is the only Arab [region] which has undertaken to hoist above its flag the standard of Arab unity' (quoted in Kedar 2006, 2006:29).

Accordingly, Syrian leaders excoriated the Egyptian exit from the Arab-Israeli conflict and described it as a violation of the basic principle of the Arab

nation. Leading the third Steadfastness and Confrontation meeting against Egypt, al-Assad expressed his frustration as follows: 'yesterday, al-Sadat and I planned the October war against Israel and he told us at the time we are the most honourable fighters. Today, he left the most honourable fighters alone in their trenches' (H. Al-Assad 1978). The Syrian media considered the Camp David Accords to be 'a plot', 'a treacherous treat', and 'a treaty of surrender' (Kedar 2006, 2006:195).

Syria's alliance with Iran and its subsequent identification of Iraq as an enemy created the potential for an inherent instability within the Syrian regime identity. In other words, a contradiction within the identity narrative could emerge, possibly triggering a case of ontological insecurity. A secular pan-Arab regime with a Ba'athist ideology allied with Iran, a non-Arab Islamic regime, against a fellow Arab Ba'athist regime in Iraq. In this sense, the Iranian revolution did not disrupt the stability of the Syrian regime, as the Syrian regime was able to maintain its Self/Other distinction. Nevertheless, accommodating Syria's physical needs held the potential of creating a contradiction within the identity narrative. To avoid this situation, Syrian leaders reframed their identity. This process involved two dimensions: widening the definition of the Self and reframing the Self/Other distinction to conform to the friend/enemy dichotomy related to Syria's new physical security needs. In doing so, the Syrian regime identified the Iranian Other as a friend whereas Iraq was portrayed as a threatening Other.

Although the constitutive elements of Syrian nationalism were present since independence, the move toward the consolidation of this 'territorial entity' into a 'nation-state' was slow and ambivalent until 1980 (Pipes 1990, 45–52). The failure of several Arab unity schemes and the different military clashes with neighbouring states—Israel, Lebanon, and Jordan—slowly led the Syrians to imagine and construct their own community (Sadowski 2002, 150). In other words, a sense of 'otherness' emerged that differed from the broader pan-Arab vision. Slowly, Syrians came to appreciate that they are not just Arabs or Muslims, but that they belong to a distinct state called 'Syria'. In the 1980s, al-

Assad actively intervened in this process and redefined the Syrian self 'from above'. As Sadowski (2002, 151) summarizes this development, 'Assad has tended to act as neither a pan-Arabist nor a pan-Syrianist but a Syrian'. Although Arab legitimacy remained the guiding theme of the regime's public statements, the Self/Other distinction underwent spectacular changes.

The primary change was the emergence of 'Syria' as a relatively autonomous entity whose interests are not necessarily compatible with those advocated by pan-Arabism. 'Syria', instead of the 'Arab Homeland' (*al-watan al-'arabi*) increasingly became an essential point of reference in the legitimation of government decisions. Even though Hafiz al-Assad and other representatives of the regime avoided using an explicit notion to herald this change, they consistently employed implicit references to the Syrian people as a distinct entity. After 1979, al-Assad's speeches pointed to 'the Syrian people' instead of 'the Arab people of Syria' and 'the Syrian citizen' instead of 'the Arab citizen in Syria'. Moreover, the regime's policies were justified as being in 'Syria's *qawmi* and *watani* interest' or at least serving 'Syria' (Kienle 1995, 61). In this regard, al-Assad appealed to the experiences of the Syrian people and highlighted the military institution as a nationally recognizable one (Phillips 2012, 52).

The over-arching regime identity of pan-Arabism was weakened. Still, instead of announcing its decline, the regime maintained the fervour of pan-Arabism while changing its meaning in light of the material constraints necessitating the alliance with Iran. Arabism is not defined based on intrinsic characteristics—such as the Arab language or ethnic origins. Rather, it evolved around the struggle against Israel, which defines who the Arab is and who his allies are. According to this nuanced Arab identity claimed by the Syrian regime, Iran's change of strategy toward Israel and its commitment to the Palestinian cause turned it into a new ally. In other words, Iran was no longer portrayed as a hostile Other, but as a friendly one. Accordingly, Syrian media praised Khomeini's opposition to the Israeli-Egyptian peace settlement. As *Al-Thawra's* headline on 27 October 1979 stated, 'Iran: we are in the same Trench as the

Arabs' (Kedar 2006, 2006:179–180). Syrian Foreign Minister Faruq al-Shar' summarized the change in the Syrian conception of Arabism as follows:

It was not long after the signing of the Camp David Accords in 1979 that the Islamic Republic of Iran was suddenly attacked for no reason. The attack came immediately after the success of its revolution, after it closed the Israeli embassy in Tehran and gave it to Palestine, and after it adopted Arabic as an official language in the country. It was very strange indeed for Muslim Iran to be attacked by an Arab capital that sponsored the Arab National Charter and the Arab summit, which came as a reply to the visit to Jerusalem and the Camp David Accords (quoted in B. Rubin 2000, 22).

In short, pan-Arabism was redefined to suit Syria's military needs vis-à-vis Israel and became a concept devoid of its crucial component: Arabness.

4. Conclusion

This chapter examined Syrian and Saudi divergent threat perceptions in the context of the Iran-Iraq War through the prisms of ontological and physical security. In the Saudi case, identity does the causal work in explaining threat perception, as the material power distribution at the time in question was ambiguous and vague. The ontological insecurity that the Saudi regime suffered was the primary drive behind its threat perception. To (re)institute its distinctiveness and identity stability, the Saudi regime narrowed down its identity narrative from pan-Islamism to Sunni Islam, a process that involved the redefinition of the Saudi Self/Other distinction. This distinction not only marked the development of the Kingdom's identity but also guided the friend/enemy dichotomy within an ambiguous relative power distribution. In the Syrian case, however, the material power distribution was clear and determinate. The regime sought an alliance with Iran as a response to physical security needs. Nevertheless, this alliance held the potential for contradictions and instability within the regime identity narrative. Therefore, the regime identity underwent accommodation and adjustment.

These empirical cases contribute to the development of this study's theoretical framework in many ways. Looking at the interaction between

ideational and material forces is only possible because ontological security is distinct from and not reducible to physical security. This two-layered conception of security paves the way for further interaction and engagement between material forces and questions of identity. The cases of Syria and Saudi Arabia demonstrate that physical concerns have to be combined with a configuration of Self/Other processes. In some cases, the Self/Other distinction guides the identifications of physical security threats. In other cases, physical security threats emerge as the primary drive behind the Self/Other reconfiguration.

In addition, the divergent cases of Syria and Saudi Arabia help identify the different mechanisms according to which actors (re)institute their ontological and physical security. Actors can restore their ontological security by demonizing the Other and reinventing their identity distinctiveness. Physical security can be reinstated through privileging a particular Self/Other distinction. Beyond this major theoretical proposition, the empirical cases discussed above are two examples of how identity narratives provide a bridge between domestic and external spheres. In the process of Self/Other reconfiguration, Syria and Saudi Arabia reinvented their identity narratives by emphasizing certain existing components of their identity. These elements did not exogenously emerge at the relational level but were deep-rooted in the domestic texture of those political entities.

Although Syrian and Saudi threat perceptions during the Iran-Iraq War demonstrate the benefit of analytically dissociating ontological and physical security, they also illustrate the interaction between both spheres. In the Saudi case, ontological insecurity led to a sense of physical insecurity. The new Self/Other distinction influenced the process of friend/enemy identification. To consolidate its distinctiveness and ontological security, the Kingdom went further to portray Iran not only as a distinct and different Other, but as an eminent enemy. This interaction has implications for the theoretical argument of this study. Although actors can be located in one of the four combinations of

ontological and physical security presented in the previous chapter, ontological and physical security affect each other. The Saudi Kingdom initially experienced a situation of ontological insecurity/physical security. By identifying Iran as an enemy and supporting Iraq, the Kingdom's subsequent foreign policy led to physical insecurity. In the process of restoring its ontological security, the Kingdom moved to a situation of ontological security/physical insecurity.

The Syrian case reflected a different dynamic. The al-Assad regime initially faced a situation of ontological security/physical insecurity. The alliance with Iran was an attempt to increase Syria's physical security vis-à-vis Iraq's regional ambitions and Israel's military supremacy. One of the consequences of this alliance was a challenge to the consistency of al-Assad's regime identity. In other words, the Syrian regime moved to a situation of ontological insecurity/physical security. To avoid the exacerbation of this inconsistency, the regime undertook a reframing of its identity.

To conclude, this empirical chapter has shown the benefit of addressing the following interrelated questions in an integrative theoretical framework: how to maintain the stability and consistency of Self-narratives? How to transform the relation with the Other? Finally, how does identity relate to physical security concerns?

Chapter 4: Explaining Saudi and Syrian Threat Perceptions during the 2006 Lebanon War

'[This war] exposed half-men and people with half-positions, and exposed all [people with] 'delayed' positions, i.e. those who waited to see where the scale of power would settle before aligning their positions'.

Bashar Al-Assad, August 2006 (B. Al-Assad 2006b).

This chapter examines Saudi and Syrian threat perceptions during the 2006 Lebanon War. Although the war occurred between Israel and a non-state actor in the Lebanon, its implication transcended the boundaries of the Lebanese-Israeli conflict and caused regional divisions and divergences. The Saudi Kingdom, conventionally portraying itself as the main supporter of the Arab cause against Israel, appeared to side with Israel against a resistance movement. Consequently, a controversial question arises: why would a non-state actor with limited capabilities—located, moreover, far from Saudi borders—be perceived as a threat? Meanwhile, Syria, a Ba'athist secular regime, oppressing Islamist movements at home, supported Hezbollah and engaged in a pan-Arab discourse. In light of these complexities, this chapter looks at these two cases of threat perception through the two-layered conception of security: ontological and physical. Whereas Hezbollah constituted a source of identity instability for the Saudi Kingdom and, hence, endangered its ontological security, Israel's military supremacy constituted the primary source of danger to the physical security of the Syrian regime.

The chapter proceeds as follows. I first outline disparate regional reactions to the 2006 Lebanon War. I then examine the Saudi enmity toward

Hezbollah. By looking at the relative power distribution at the regional level, I conclude that the physical security of the Kingdom was not affected by the war. However, Hezbollah's version of Islamic identity and its conception of 'Islamic resistance' endangered the ontological security of the Kingdom. I then examine the Syrian threat perception. I argue that the regional power distribution and the material constraints following the 2003 Iraq war isolated Damascus and endangered its physical security. In this context, Hezbollah emerged as a strategic asset for the regime. To accommodate these material constraints, the Syrian regime identity underwent a reconfiguration of the Self/Other.

1. The 2006 Lebanon War and Regional Reactions

Following the Israeli withdrawal from southern Lebanon in 2000, the struggle between Israel and Hezbollah continued on a small scale. Hezbollah maintained the legitimacy of the 'resistance' against Israel by focusing on two issues: the recovery of the Shab'a farms⁶³ and the liberation of Lebanese prisoners held in Israel. This state of affair collapsed in the summer of 2006 when Hezbollah kidnapped two Israeli soldiers with the intent of using them in prisoner exchanges. Although this action had a precedent in previous prisoner exchanges, Israel retaliated with a massive attack that lasted from 12 July until 14 August 2006. Throughout the thirty three days of the war, popular and societal expressions of support for Hezbollah resounded throughout the Arab world ('Aḥmad 2006). Regional opinion polls ranked Hezbollah's leader, Sayyid Hassan Nasrallah, as the most admired Arab leader (Telhami 2007).

Although Arab societies expressed unified support for Hezbollah, the war was the source of contention among Arab regimes. Alongside its violent conflict with Israel, Hezbollah was engaged in a bloodless clash with Saudi Arabia, Egypt, and Jordan. Saudi officials spoke of Hezbollah's 'reckless adventurism'. Egyptian President Hosni Mubarak and King Abdullah of Jordan accused

⁶³ Shab'a Farms is a small strip of disputed land at the intersection of the Lebanese-Syrian border and the Israeli-occupied Golan Heights.

Hezbollah of 'dragging the region into adventures' (Rasid Al-Ikhbariyya 2006).⁶⁴ Whereas Syria supported Hezbollah due to the fear of an Israeli military supremacy in the region, this constituted a regional exception. The Saudi Kingdom, which portrayed itself as a long supporter of the Arab cause against Israel, astonishingly condemned Hezbollah. In addition, it identified this resistance movement as endangering Arab interests and putting the stability of the region at risk.⁶⁵

Two politicized narratives emerged to explain the divergence in Arab positions. The first was articulated by the US Secretary of State Condoleezza Rice. According to her, the region was divided between 'violent radicals' and 'moderate reformists'. The former group was constituted of Hezbollah, Hamas, Syria, and Iran.⁶⁶ Egypt, Saudi Arabia, and Jordan led the other camp, in a way that conformed to the United States' vision for a New Middle East. As Lynch (2010) notes, 'The Bush administration sought to polarize the Middle East into an axis of 'moderates'— grouping Saudi Arabia, Egypt, Jordan, and other like-minded Sunni autocrats with Israel—against 'radicals' such as Iran, Syria, Hezbollah and Hamas'. Another narrative was sponsored by the so-called 'moderate' camp, which described their clash with Hezbollah using sectarian terms. Talks of a 'Shiite axis' comprising Hezbollah, Syria, and Iran became widely spread.⁶⁷ Accordingly, the 2006 Lebanon War was portrayed as a proxy war launched by Iran to destabilize the region. In Saudi Arabia, this position was supported by regime owned-media outlets, such as the newspaper *Al-Sharq al-Awsat* and the satellite channel *al-Arabiya*. Some scholars have also embraced this sectarian narrative (Nakash 2011; Yamani 2008; Zisser 2009a). For example, Susser (2007) states, 'the fault line between Middle Eastern states is no longer monarchies versus republics or pro-US governments versus pro-

⁶⁴ For the full statement, cf. (Al-Ahram 2007:9).

⁶⁵ Some accounts went further to claim that Saudi Arabia implicitly supported Israel (Bilqiz 2006, 70).

⁶⁶ Also called *Jabhat al-Muqāwama wa al-Mumāna'a* [Resistance and Defiance Front].

⁶⁷ In December 2004, King Abdullah of Jordan coined the term 'the Shiite crescent' (Cole 2006, 20).

Soviet one, but the Sunni-Shi'ite divide'. Similarly, Nasr (2006) predicts that cleavages within Islam would shape future political dynamics in the Middle East. Beyond these politicized narratives, IR scholars have refrained from conducting theoretically informed studies of Arab regimes' behaviour.⁶⁸

This chapter argues that threat perception is more complex than the sectarian or the moderate-radical narratives would suggest. The alliance between Syria and Hezbollah is far from being driven by religious convergence. Similarly, the Saudi fear from Hezbollah is not related to Shiism *per se*. I argue that a two-layered conception of security—ontological and physical—provides a third fruitful approach for understanding the seemingly odd foreign policy choices these two states made in the course of the Lebanese-Israeli conflict. For this reason, the aim of this present chapter is to move beyond these politicized and simplistic narratives to offer more rigorous and theoretically grounded explanations for Syrian and Saudi threat perceptions in 2006.

2. Saudi Arabia: Resisting the Resistance

From a realist perspective, scholars have argued that Saudi animosity toward Hezbollah represented a balancing strategy against an expanding Iranian influence in the region (cf. Gause 2007). Nevertheless, this argument does not explain how a non-state actor fighting Israel on southern Lebanese borders can be considered a military threat to the security of the Kingdom. In the following section, I demonstrate that Hezbollah, despite its alliance with Iran, could not endanger the physical security of the Kingdom. Instead, I argue that Saudi Arabia feared Hezbollah's Islamic conception of resistance, which endangered Saudi conception of the Self. To bolster its ontological security, the Kingdom framed its Self/Other distinction based on a sectarian narrative, which influenced its perception of enemies and friends.

⁶⁸ For an exception, cf. Bank and Valbjørn (2010; 2007), Valbjørn and Bank (2012), and Ahmad (2006).

2.1. The Relative Power Distribution: Saudi Physical Security

Following the overthrow of Saddam Hussein in 2003 and the destruction of Iraq's military capabilities, Iran gained prominent influence in the Arab world (Rajab 2010, 293–299). Considering Hezbollah's strategic alliance with Iran and Syria, Saudi opposition to Hezbollah might be read as a *raison d'état* reaction to balance Iran in the Middle East. Nevertheless, this realist-inspired narrative alone is insufficient for explaining Saudi opposition to Hezbollah. First, US military capabilities in the region are more important than Iranian ones. Second, this narrative assumes that regional actors lack agency. Hezbollah is not a mere Iranian offshoot in Lebanon.

The fall of the Ba'ath regime in Iraq following the US-led invasion in 2003 removed a critical set of military threats to the Kingdom and brought a new power distribution to the region. As its conventional military forces were destroyed, Iraq no longer poses any military threat to the Saudis or to any of its neighbours. Before the invasion of Kuwait, Iraq had over one million men in uniform, 5500 battle tanks, and one of the largest deployed air defence systems in the world. The Gulf War (1990-91) destroyed around 40 per cent of Iraq's military capabilities. After the Gulf War, Iraq could not repair this damage as it was not allowed to import arms (Cordesman and Obaid 2005, 3). By 2003, Iraq had approximately 400, 000 men under arms, and demonstrated little conventional warfighting capabilities (The International Institute for Strategic Studies IISS 2003, 110–111). With the US-led invasion, Iraq's land forces, its naval forces, and its air-defence were entirely destroyed within few weeks. In short, any potential Iraqi conventional military threat to Saudi Arabia vanished for decades.

The destruction of Iraq's conventional capabilities led to an unprecedented vacuum in the Persian Gulf. As the Gulf monarchies were unable to fill this void, Iran emerged as the only rising power in the region. Iran's military capabilities seemed impressive compared to those of the six Gulf monarchies seemed dominant. Whereas the Gulf monarchies had approximately

10,391,795 men in uniform in 2003, Iran had 18,319,545 men in 2004 (Langton 2004, 121–140). The conscript in Iran was approximately 540,000 as opposed to 330,800 in the six Gulf monarchies (Cordesman 2004, 2–3). Despite its failure to export the Islamic revolution to the Arab world throughout the 1980s, Iran deployed successful efforts to expand an indirect influence in Iraq, Lebanon, and among the Palestinians. In Iraq, the Islamic Republic has enjoyed political and military influence, supporting the Shiite governments from 2003 onwards. Iran swiftly recognized the transitional government on 17 November 2003 and restored full diplomatic relations with Iraq on 18 April 2004 (Rajab 2010, 294). In addition, by the time of the Lebanese-Israeli conflict the Iranian influence had extended to the Israeli-Palestinian struggle. During the Palestinian Intifada of 2000, Supreme Leader Khamenei referred to Palestine as ‘a limb of our body’ (quoted in Wehrey et al. 2009, 23). Alongside the verbal support, Iran became a major player in Gaza through its financial support for Hamas and the Palestinian Islamic Jihad (PIJ).

Since its establishment in 1982, Hezbollah was identified as an Iranian ally. In the wake of Israel’s invasion of Lebanon in 1982, a group of clerics drifted away from Mūsā al-Ṣadr’s⁶⁹ movement *Ḥarkat al-Maḥrūmīn* [The Movement of the Deprived] and established a militia to resist the Israeli invasion (Fuller 2007, 141–142). This militia constituted the basis for Hezbollah, whose organization was officially announced in 1985 with an ‘open letter’ to the ‘Downtrodden in Lebanon and the World’ (translated in A. Norton 1987, 167–187). This document clearly reflects an ideological inspiration from Khomeini’s interpretation of *wilāyet al-faqīh* [The Rule of Jurisprudence]. The founders of the group expressed their loyalty to the Islamic Revolution and pronounced themselves as ‘[abiding] by the orders of a single, wise and just command represented by the guardianship of the jurisprudent (*waliyy al-faqīh*), currently embodied in the Supreme Ayatullah Ruhollah al-Musawi al-

⁶⁹ Al-Ṣadr was an Iranian cleric who came to Lebanon in the late 1950s and assumed a prominent role in the mobilizing Shia community on the social and political levels. For more details, cf. Norton (2007).

Khomeini [...] who has detonated the Muslims' revolution, and who is bringing about the glorious Islamic renaissance'.

The document framed its worldview around struggle of the oppressors versus oppressed. Whereas the oppressors identified by Khomeini in the context of the Islamic revolution were the Shah's regime and Western powers (particularly the United States). Hezbollah's oppressors were the invading Israelis and supporters, the United States including. The document explicitly states that: 'Imam Khomeini has stressed time and again that America is behind all our catastrophes, and it is the mother of all vice [...] The US, its NATO allies, and the Zionist entity in the holy land of Palestine [Israel] attacked us and continues to do so without respite' (Alagha 2011, 40–41). Moreover, Hezbollah leaders have often expressed their loyalty to Ayatollah Khomeini and his successors (Hamzeh 2004, 38–48).

Beyond this ideological subscription to the Islamic revolution, Hezbollah has been a prominent recipient of financial support from Iran, which has been reflected in the group's social and philanthropic programs.⁷⁰ In addition, Iranian funding has extended to military assistance (El Hussein 2010, 809; Levitt 2007, 137). According to reasonable estimates, this support has been of approximately US\$ 25-50 million per year (Cordesman 2006a, 3). Beyond financial and military aid, Iran provided Hezbollah with logistical support. In the early days of Hezbollah, the Iranian Revolutionary Guard Corps (IRGC) trained the party of God's members in Iran or in al-Beqaa Valley in Lebanon (Fuller 2007, 142; Mus'ad 2006, 301–302; Qassem 2005, 240). Even after their official withdrawal from Lebanon in the early 1990s, Iran's Islamic Revolutionary Guards continued to train Hezbollah's members (Hamzeh 2004, 71).

In this context, Saudi discourse was able to portray Hezbollah as an offshoot of the Islamic Republic in Lebanon. On 29 July 2006, the Saudi-owned daily newspaper *Al-Sharq Al-Awsat* published a detailed article on the

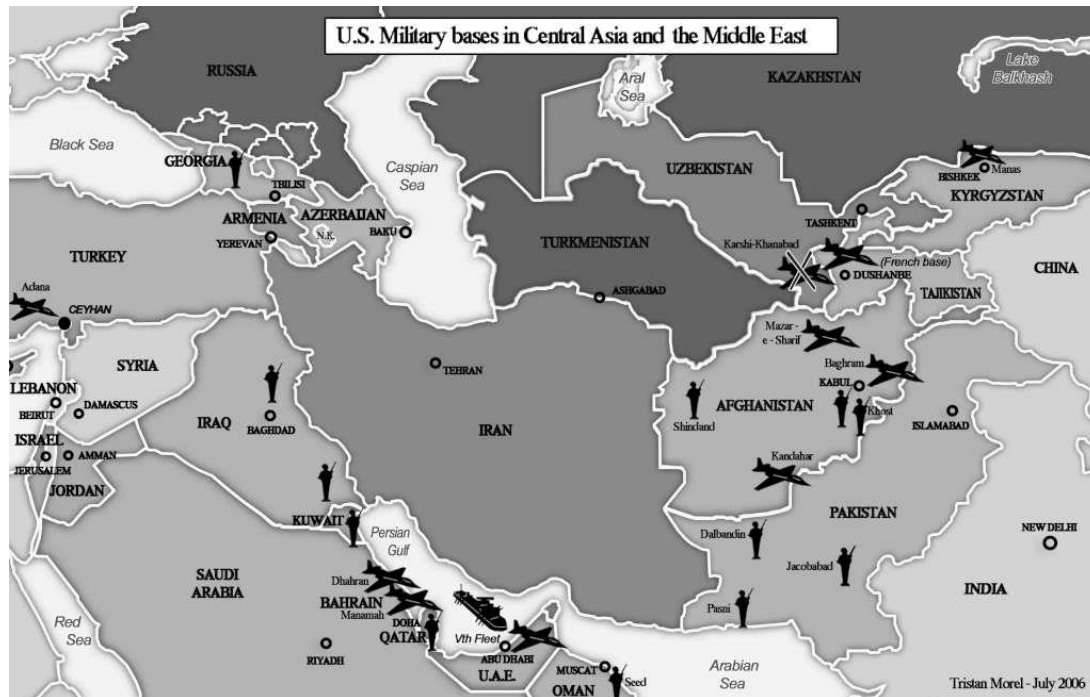
⁷⁰ This assistance did not officially come from governmental channels. Instead, it came from charitable foundations affiliated with the Supreme Leader.

assistance that Iran's Revolutionary Guard extended to Hezbollah. The article went as far as to claim that the Revolutionary Guards officers were fighting along with Hezbollah (Zādah 2006). Saudi Columnist Mshari al-Dyadhi expressed the fear of an expanding Iranian influence as follows: 'examine all the big Arab portfolios—Lebanon, Palestine, and Iraq. They are being stolen from Arab hands [...] and turned over to Iranian hands gradually' (quoted Wehrey 2011, 22). Other Arab regimes—mainly Egypt and Jordan—seconded this Saudi position during the meeting of Arab foreign ministers meeting on 16 July 2006, as they announced their 'complete refusal to all projects that aim to turn Lebanon into a theatre for open confrontations to achieve regional and international goals at the expense of the national interest of the Lebanese people and their security and stability' (Ḥasīb 2006, 44–45; Al Riyadh 2006).

Considering the Hezbollah-Iran connection, the Saudi perception of Hezbollah as a threat could be seen through the lens of physical security needs, according to which Riyadh needed to balance Teheran's infiltration in the region. I argue that this realist-inspired narrative misses the bigger picture. Despite its connection with Iran, Hezbollah could not and did not pose a threat to the physical security of the Kingdom.

First, even though Iran could be considered to pose a conventional military threat to Saudi Arabia at this juncture, this does not mean that the Iranian power was left unbalanced. Ever since its involvement in Iraq in 2003, the United States was willing to increase its military presence in case its geostrategic interests were threatened, such as the flow of oil from the Gulf. Moreover, the United States maintained military bases in various Gulf states. They also deployed large military forces in countries neighbouring Iran from the east (Afghanistan) and the west (Iraq) (Kam 2004, 18–20). Accordingly, the military presence of the superpower in the region constituted a considerable source of pressure on Iran. As shown on the map below, after 2003, Iran became surrounded virtually on all sides by countries associated with the United States and hosting US military bases, with considerable projection capabilities (Piven 2012). In this context, Iranians became aware of their limited capabilities. As

Iranian Minister of Foreign Affairs Javad Zarif explained, ‘Do you think the United States, which can destroy all our military systems with one bomb, is scared of our military system?’ (quoted in Chubin 2014, 66). Alongside the superpower’s presence in the region, the collapse of Iraq’s military power provided Israel with a set of opportunities to entrench its military supremacy, which in itself also would impede any Iranian expansion in the region.



Source: Dufour (2007).

Second, Iran’s infiltration in the region might be considered a sign of weakness rather than power. As Wehrey et al. (2009, 22) argue that ‘Iran’s hyperactivism on pan-Arab issues is not necessarily proof of its influence, but rather just the opposite—an effort to overcompensate for its fundamental isolation from the rest of region’. In other words, appealing to ‘Arab’ issues reveals Iran’s failure to export its revolution and to mobilize any mass-based opposition to existing regimes in the Arab world. Moreover, Iran is separated from Saudi Arabia by an oceanic moat (the Gulf) and lacks meaningful technological capabilities to project its military power across the Gulf or even to

the Arab-Israeli sphere (Chubin 2014). In addition, Iran's infiltration in the region does not mean that it will become a dominant power. As Gause eloquently expresses it, 'If the United States, with all its power, could not dominate the region post-2003, it is hard to imagine that Iran could' (Gause 2011, 182).

Moreover, Iran's conventional military power is far less modern than it was during the time of the Shah, or during the Iran-Iraq War. Most of its military equipment is aging, and arm imports have considerably decreased since the eight-year conflict. According to US estimates, Iran imported US\$ 8.8 billion worth of arms between 1988 and 1991, but only US\$ 2 billion between 1996 and 1999, and US\$ 600 million between 2000 and 2003 (Cordesman and Obaid 2005, 16). Its overall military expenditures were comparatively limited in the last two decades. The International Institute for Strategic Studies (IISS) estimates the Iranian military expenditure of US\$ 3.051 billion in 2003 and US\$ 5.2 billion in 2005. In contrast, according to the IISS, Saudi Arabia spent US\$ 18.747 billion in 2003 and US\$ 18.4 billion in 2005 (The International Institute for Strategic Studies 2006; The International Institute for Strategic Studies IISS 2003). If Iran's military expenditures can be compared to that of the Gulf monarchies, it is hard to argue that it aspires to military hegemony (Cordesman 2014). As Chubin (2014, 65) succinctly states, 'by orthodox standards Iran is militarily weak, and cautious, defensive and prudent in resorting to force'.

Third, and most importantly, the Hezbollah-Iran connection cannot be seen as a mechanical transfer of Iranian power to Lebanon. Whereas Western and Saudi discourses claimed that Hezbollah's decision to kidnap the two soldiers was an Iranian-led operation,⁷¹ there is no evidence of any control of Iran over Hezbollah. The Hezbollah-Iran connection can be rather considered a conventional form of alliance. In responding to the claims that Iran directed

⁷¹ This claim is based on the assumption that Iran used Hezbollah as a card in its negotiations with the United States, especially with regard to the nuclear programme. For example, Makovsky (2006) mentions that on the eve of the kidnapping of the two soldiers, Ali Larijani, Iran's head of the Supreme National Security Council, threatened that the West 'will suffer if the Iranian nuclear issue was taken back to the United Nations Security Council'.

Hezbollah, Hassan Nasrallah declared, 'This is a great lie. We are an independent Lebanese organization. We do not take orders from anyone. However, this does not mean that we are not going to form alliances' (*CounterPunch News Service* 2006). Most analysts have argued that despite the financial and ideological linkage with Iran, Hezbollah is an independent local organization. Based on interviews with Israeli decision-makers conducted in August 2006, Cordesman (2006b) stresses that no Israeli officer thought that Hezbollah was acting under Iranian command. According to Hezbollah Deputy Secretary General Sheikh Na'im Qassem (2005, 56–57),

There is no connection between the internal administration of the Iranian state and Hezbollah's administration. These are two separate issues, each having its own particularities and bodies of administration, despite the commitment of both to the commands and directions of the Jurist-Theologian.

Furthermore, Hezbollah's relations with Iran have wavered over time. The death of Ayatullah Khomeini as well as the end of the Cold War led to significant changes in Iranian foreign policy towards Lebanon, and towards Hezbollah in particular (El Husseini 2010, 807; A. R. Norton 1999, 18). As a result, Hezbollah's leaders turned to the domestic sphere and made a considerable effort to transform the militia into a Lebanese political party. Since the 1991 elections, Hezbollah has participated in all Lebanese parliamentary and municipal elections. This process is often termed as the 'Lebanonization' of Hezbollah.⁷² The 2009 New Hezbollah Manifesto unmistakably reflected this process. The document defers the ideologically inspired goal of establishing an Islamic state in Lebanon. Moreover, it places Hezbollah's relationship with Iran squarely in the context of its relations with other Islamic countries. The New Manifesto explicitly states:

In this context, Hezbollah considers Islamic Iran to be a focal nation in the Islamic world. For Iran was the country that thwarted the Zionist-U.S. scheme through its national revolution, supported resistance movements in our region, and stood with courage and determination alongside Arab

⁷² For further details on this process, cf. Hamzeh (1993) and Norton (1999).

and Islamic causes, at the forefront of which is the Palestinian cause (Alagha 2011, 131).

Signs of this wavering relationship between Iran and Hezbollah were manifested even during the 2006 War. Beyond verbal support, Iranian officials denied any military intervention to support Hezbollah. In his meeting with Lebanese Foreign Minister Fawzi Salloukh, Iranian Ambassador Muḥamad Riḍā stated that: ‘There is no military defence treaty between Iran and Lebanon, similar to the one we have with Syria. Regardless of this matter, historical records clearly show that Iran has been, still is, standing behind Lebanon’ (*Al-Hayat* 2006a). In response to allegations that the Revolutionary Guards were assisting Hezbollah, Hamid Rida Asifi, the spokesman of Iran’s foreign minister, denied the existence of any Iranian soldiers in Lebanon and stressed that Iranian support for Hezbollah is limited to ‘political, diplomatic, and humanitarian support’ and if ‘there was any military support, Israel would be defeated long before’ (*Al-Hayat* 2006b).

From this perspective, Hezbollah did not, in the run up to the 2006 war, pose a physical security danger to Saudi Arabia. The organization’s linkage with Iran or Syria did not even imply any Iranian influence in the region that could threaten the physical security of the Kingdom. Israel’s supremacy in the Arab-Israeli sphere would not allow Hezbollah to play a military role beyond the Lebanese borders. Why then was a Lebanese local organization identified as a threat to the Kingdom? The following section argues that Hezbollah’s Islamic identity threatened the identity stability of the Kingdom. The process of ontological security restoration involved reframing the Self/Other narrative based on sectarian terms. This Self/Other distinction influenced the Saudi identification of friends and enemies during the 2006 War.

2.2. Regime Identity and the Ontological Security of Sectarianism

Since 1967, Saudi Arabia has played a prominent role in the Arab struggle against Israel through financial and diplomatic means. Despite this traditional position against Israel, the Saudis astonishingly condemned Hezbollah in July

2006. For the first time in the history of the Arab-Israeli conflict, an Arab state claiming the leadership of the Muslim world condemned a resistance movement and inadvertently backed Israel (Yamani 2008, 153). This section argues that Hezbollah's Islamic identity narrative challenged the stability and the distinctiveness of the Saudi regime. As a response, the Kingdom framed a Self/Other distinction based on sectarianism (Sunni versus Shiite). This newly framed 'Other' was furthermore identified as an enemy.

The Saudi involvement in the Arab-Israeli conflict manifested itself in two aspects. First, the Kingdom financially supported the frontline states—Egypt, Jordan, Syrian, and the PLO—in their struggles against Israel, especially after 1967. Second, the Kingdom emerged as the primary regional mediator in the conflict (Kostiner 2009; Al-Dakhil 2007; Kamrava 2013). The Kingdom put forward a progressive agenda that portrayed the Arab interest as pacifying the Arab-Israeli conflict through the peace process. Furthermore, this role became embedded in the Saudi Islamic narrative.

The first Saudi mediation was in the early 1980s with the Fahd peace plan,⁷³ which illustrated the Saudi vision supporting a peaceful settlement of the Arab-Israeli conflict. In contrast to the Egyptian initiative in Camp David, which was based on bilateral negotiations with Israel, Saudi Arabia promoted a comprehensive peace plan including all Arab states in order to avoid any rift within the Arab camp. Among the eight points proposed by the Fahd plan, the seventh point stipulated that all Middle East states have the right to live in peace. In other words, if Israel withdraws from the territories occupied in 1967, it will be given the right to live in peace with the other states in the region (Kostiner 2009, 419). The peace initiative was a Saudi attempt to bring the whole region to order while positioning the Kingdom as the maestro of this concert.

This Fahd plan constituted a compromise that enabled Riyadh to capitalize on its relationship with Washington while maintaining a consistent

⁷³ For more details on the Fahd Peace Plan, see Long (1986).

Islamic identity narrative (Sela 1998, 274). During the 1970s, the Egyptian-Israeli peace treaty created a rift in the US-Saudi partnership, as the Kingdom found itself forced to participate in the Arab Steadfastness and Confrontation Front boycotting and punishing Egypt (Kostiner 2009, 418; Sunayama 2007, 54–55). While promoting its pan-Islamic narrative in the region by demonstrating solidarity against Israel, Saudi Arabia employed the peace plan to portray itself in the West as a promoter of peace. Nevertheless, the initiative was not successful. The Fahd plan encountered Syrian opposition and was foiled by the absence of the Syrian delegation from the Arab summit meeting in Fez, Morocco in November 1981. Following this Arab objection, the Saudi initiative was reintroduced with changes at the second Fez Summit in September 1982. The seventh point stressing that all states in the region have the right to exist in peace was eliminated (Kostiner 2009, 419–420).

In 2002, Saudi Arabia re-cultivated the same strategy through the Abdullah peace initiative—also known as the ‘Arab Peace Initiative’. Instead of offering Israel mere ‘recognition’, this new plan offered full ‘normalization’ with the Jewish state in return for the complete withdrawal to the pre-1967 borders. This new Saudi initiative reflected Arab states’ weakness; Egypt under the leadership of Mubarak was unwilling to play a regional role, and Iraq was extremely weakened and isolated ever since the invasion of Kuwait. All Arab states unanimously accepted this initiative during a summit in Beirut in March 2002 (Bahgat 2009a).

In the meantime, the peace-making strategy became embedded in the Kingdom’s identity narrative. In other words, the Saudi role in the Arab-Israeli conflict became inextricably related to the Kingdom’s position as the guardian of Islam’s holiest sites. Religious clerics close to the royal family claimed that

from a religious perspective seeking peace is more favourable than taking risks and going to war. As 'Abd al-Muhsen al-'Ubayykan⁷⁴ (2006) stated,

[A] condition of Jihad is the possession of sufficient power to defeat the enemy, repulse its evil, and ensure the safety of the Muslim people's lives, property, and honour and safeguard them from assault and loss, namely, the squandering of resources, violation of honour, and loss of lives. [...] If we consider [the prophet's example] and compare the two situations, *we will find that at this time we are required to make a truce with the Jews or seek peaceful political solutions* on the grounds that the Muslims lack the requirement of sufficient military strength. This can continue until the time when the Muslims are prepared to regain their rights because they have sufficient power. In this way we will be obeying the prophet's example in word and deed' (emphasis added).

By linking its role in the peace process to an Islamic narrative, the Kingdom tied the legitimacy of its foreign policy to the stability of its identity narrative. Accordingly, Hezbollah's conception of 'Islamic resistance' not only challenged the Saudi role in the conflict but also endangered the stability of its identity narrative.

Whereas Saudi Arabia claimed that the Arab Peace Initiative was the only solution capable of preserving the 'Arab interest' (Teitelbaum 2009, 19), Hezbollah presented a competing vision based on armed resistance (*muqāwama*). Since the party's foundation in the early 1980s, Hezbollah's *raison d'être* has been intimately tied to resistance against the Israeli occupation of South Lebanon. Hezbollah has defined itself as a '*jihadi* movement', whose ultimate priority has been the liberation of the Lebanese territory from Israeli occupation as well as the Liberation of Palestine. Accordingly, for Hezbollah, resisting the occupation took precedence over the goal of establishing an Islamic state. In addition, this declared objective could only be achieved through armed resistance (Saad-Gorayeb 2002, 112–117). Because it considers Israel an oppressive occupying force, Hezbollah defines

⁷⁴ Al-'Ubayykan is a senior ultraconservative Wahhabi cleric. He was member of the Shura Council and a consultant for the Ministry of Judiciary. Moreover, he was adviser to the Royal cabinet until he was dismissed in May 2012.

'*Jihad*'⁷⁵ as a 'defensive' duty (Mahmoud 2010, 42–44). Consequently, by capturing the two Israeli soldiers on the morning of 12 July 2006, Hezbollah considered itself to be taking a legitimate action to restore its rights, which included liberating the Shab'a farms, exchanging the soldiers for Lebanese and Palestinian war prisoners, and deterring Israel from any expansion in Lebanon (Ḥasīb 2006, 26–28). As Sheikh Qassim (2007) declared, 'The confrontation with Israel is not an elementary choice for the resistance, but it is a current and future defensive choice'.

Behind the logic of armed of resistance lies a strong belief in the unviability of the land-for-peace based negotiations with Israel. First, this position stemmed from Hezbollah's non-recognition of Israel, which the party considers to be an unjust oppressor state.⁷⁶ Second, the negotiations have so far proven fruitless. As 'Abbas al-Musawi, Hezbollah's former secretary-general, has expressed it, 'Any rational person who thinks objectively will reach one conclusion: that force is the only option when political activity and negotiations are of no avail. We announce that resistance is our only choice and that our talk is based on logic' (quoted in Saad-Gorayeb 2002, 120). According to Hezbollah, Israel cannot be trusted, and the conflict will continue until all Muslim territories are liberated (Bilqīz 2006, 48–50). According to Sheikh Qassim, 'Confrontation with Israel is inevitable. If we refuse the occupation of our lands, we should expect violent confrontation because Israel is aggressive, expansionist, and self-oriented' (2007). Hezbollah believes that even if Israel was granted recognition by the entire Arab region, it would not withdraw from the occupied territories (Mahmoud 2010, 43). This belief was based on Hezbollah's experience; Israel withdrew to the security zone in 1985 and from the South of Lebanon in 2000 only because of the armed resistance.

⁷⁵ '*Jihad*' is derived from the Arabic word '*Juhd*' [effort]. Jihad means the exertion of any effort in God's cause.

⁷⁶ For further details on Hezbollah's view of injustice, refer to the first Manifesto in Alagha (2011, 39–55).

Still, Hezbollah's armed approach to the conflict per se did not challenge the Kingdom. Instead, it was the Islamic colour of the resistance that disrupted the stability of the Kingdom's identity. Although Hezbollah's pan-Islamic ideology and its related goal of establishing an Islamic state in Lebanon has wavered and become increasingly replaced by political pragmatism, the party is still fighting Israel under a banner of 'Islamic resistance' (A. R. Norton 2007, 83; Bassedas 2009, 18–28). This Islamic dimension has been based on the concept of Jihad. Although Hezbollah's concept of Jihad borrowed heavily from Khomeini's doctrine, its ideological flexibility and its exclusive focus on fighting Israel made it appealing to Arab public opinion. In addition, Hezbollah's path of *Jihad* against Israel and its commitment to the Palestinian cause has served a role model for other groups, such as the Palestinian Islamic Jihad and Hamas (Hamzeh 2004; Khashan and Mousawi 2007). In short, Hezbollah's logic of resistance has undermined the Saudi identity narrative favouring peace negotiations. Furthermore, it has impeded the Kingdom from speaking in the name of Islam.

The Saudi official position toward Hezbollah reflected the regime's anxiety. Following the outbreak of the Lebanese conflict, a Saudi formal statement on 13 July 2006 accused Hezbollah of 'not serving the Arab interest', which can be implicitly understood as the stability of the region based on the peace process promoted by the Kingdom. Resenting Hezbollah's logic of armed resistance, the statement distinguished between 'legitimate resistance' and 'miscalculated adventures'. Saudi Arabia accused Hezbollah of 'adventurism' as its actions were carried 'without consultation or coordination with Arab countries'. The Saudi statement further described Hezbollah as threatening the Arab interest by 'creating a gravely dangerous situation exposing all Arab countries and its achievements to destruction with those countries having no say'.⁷⁷ On 14 July 2006, the same statement was issued again with the same text with the following added concluding paragraph: 'The Kingdom will continually

⁷⁷ The full text of the Saudi statement can be found on <http://www.spa.gov.sa/English/details.php?id=375383>

seek for security and stability in the region, exerting everything that it can do to protect the Arab nation from an Israeli oppression and transgression'.⁷⁸ This Saudi leading role in defining the Arab-Israeli agenda was seconded on 14 July 2006 by the joint statement of King Abdullah of Jordan President Mubarak of Egypt, who condemned Hezbollah's actions and assigned the responsibility for the suffering of the Lebanese people to the party.⁷⁹ From this perspective, Hezbollah's actions against Israel emerges as threatening the status of Saudi Arabia as a normative leader in the Arab-Israeli sphere.

In the process of restoring its ontological security, the Kingdom attempted to demonize Hezbollah's Islamic identity by claiming that Hezbollah was serving Iranian interests. Moreover, the Saudi regime promoted a sectarian discourse to distinguish its own identity from that of Hezbollah's. Whereas Nasrallah framed the struggle against Israel in religious terms: 'A defeat for us is a defeat for the whole Muslim nation', Saudi Arabia portrayed Hezbollah's 'irresponsible acts' as providing Iran with an opportunity to extend its influence in the region (Amba 2006).

In addition, the Kingdom reinforced a sectarian Self/Other definition, which identified Hezbollah as a threatening 'Other' because of its Shiite roots. On the 18 July 2006, shortly after the Saudi official statement condemning Hezbollah, the Saudi Press Agency republished an old fatwa of Sheikh Abdullah bin Jibrin⁸⁰ and circulated it through state-influenced media outlets. Originally published in 2002, this fatwa states:

It is forbidden to support this *rāfiḍ*⁸¹ party, joining it or even praying for it to achieve victory, I advise all Sunnis to deny this party and those who join it and to explain its hostility to Islam and Muslims, specially that such

⁷⁸ For the full text of the second statement, cf. <http://www.spa.gov.sa/English/details.php?id=375423>

⁷⁹ For the full text of this statement, cf. <http://www.ahram.org.eg/Archive/2006/7/15/ARAB6.HTM>

⁸⁰ Ibn Jibrin was the second top leading scholar in the Wahhabi movement. He was also a member of the Permanent Committee for Islamic Research and Fatwa in Saudi Arabia.

⁸¹ A word used by Wahhabi clerics to refer to Shiites.

rejecting parties have always been hostile to Sunnis and tended to expose their shortcomings (*Rasid Al-Ikhbariyya 2006*).

Religious *ulama* closely related to the royal family have expressed hostility toward Hezbollah based on religious considerations. Sheikh Nasir al-'Umar described Hezbollah the 'the party of the devil'. In addition, he claimed that 'Hezbollah does not represent Sunni Muslims' resistance in Palestine or any other place, but it serves the Iranian Revolutionary Guards' (Fattah 2006). Similarly, Safr al-Hawali issued a fatwa according to which 'it is forbidden to pray for Hezbollah or to provide any support for its war against Israel' (Al-Rashid 2013). From this perspective, the Sunni-Shiite discourse served as a mechanism to re-establish Saudi ontological security.

3. Syria: The Quest for Physical Security

In contrast to Arab positions condemning Hezbollah and blaming it for the devastating effects of the war, the Syrian regime pronounced its alliance with Hezbollah against Israel. When asked about the possibility of a regional war, Syrian Foreign Minister Walid al-Mu'allim replied as follows: 'Welcome to the regional war; we are ready for it and we do not hide our preparations.' He then added: 'I am ready to be a soldier under the leadership of Hassan Nasrallah' (quoted in Ziadeh 2011, 117).

This section argues that Syria's support for Hezbollah during the 2006 Lebanon War was driven by Syria's physical security needs. Indeed, Syria had played a direct role in the establishment of Hezbollah.⁸² Throughout the 1980s, the Syrian regime had allowed Iranian units to enter Lebanon to provide logistical and operational support for the party. Given this historical context, two erroneous assumptions predominated. The first assumption claims that

⁸² Cf. Zerden (2000).

Hezbollah is only a 'proxy' or a 'pawn' implementing Syria's will in Lebanon. Following the abduction of the two Israeli soldiers by Hezbollah on July 12, Western governments accused Syria of being an accomplice.⁸³ As the US National Security Council spokesperson Frederick Jones stated, 'We charge Syria and Iran who support Hezbollah with the responsibility for the attack and the violence which followed it' (quoted in Ziadeh 2011, 115). The second assumption considers the alliance between Syria and Hezbollah to be driven by sectarian affinities between Hezbollah, described as a Shiite group, and Syria's 'Alawite ruling elite (Amidror 2007). Yet, these assumptions do not reflect the complex nature of this alliance.

Thinking of Hezbollah as Syria's proxy is inaccurate. Prior to 2005, while Syria had 20,000 troops stationed in Lebanon, the chiefs of Syrian *istikhbarat* mukhabarat (military intelligence) had exerted considerable influence over Hezbollah's operational planning (Perthes 2006:36). Following Syria's military withdrawal from Lebanon in 2005, the Syrian regime could no longer control Hezbollah's strategic actions. The group asserted itself as an independent actor with operational autonomy and a distinct decision-making process (El-Hokayem 2007). During the 2006 War, the two actors asserted dissimilar policy imperatives. For this reason, Syria's alliance with Hezbollah should be understood as a strategic decision made by the regime. With Syria's regional isolation, this alliance became strategically more vital to Syria than to Hezbollah.

Ideological convergence is hardly a driver behind this 'marriage of convenience'. Despite the seemingly sectarian affinity, the alliance between the Alawite ruling elite in Syria and Hezbollah is driven by strategic factors more than by ideological ones. The Islamic ideology of Hezbollah has been the source of discomfort to a Ba'athist pan-Arab secular regime oppressing its own Islamic movements (El-Hokayem 2007, 36). However, the repeated convergence of interests has enabled the protracted cooperation between both actors (El

⁸³ Cf. White House statement on the kidnapping of two Israeli soldiers (2006).

Husseini 2010). As Norton (1999, 11) put it, 'Syria has no eternal allies and no perpetual enemy in Lebanon' and Hezbollah is a 'wary ally of Damascus'.

This section explores Syrian threat perception in 2006. I argue that Syria's physical insecurity was endangered by Israel's military supremacy following the US-led war in Iraq (2003). Those fears were substantiated with the failure of Syrian-Israeli peace negotiations and Syria's regional and international isolation. The alliance with Hezbollah provided the Syrian regime with leverage in its struggle against Israel. However, allying with a militia with an Islamic ideology belying the secular pan-Arab nature of the Syrian regime compelled the regime to adapt its own identity. First, I examine the relative power distribution that led to Syria's physical insecurity. I then examine how the regime in Damascus adapted its identity to accommodate this alliance.

3.1. The Relative Power Distribution: Surviving Isolation

Following the US-led invasion of Iraq in 2003, Syria suddenly faced a new geopolitical situation, which fostered its regional isolation and made its position in the Arab-Israeli balance more fragile than it had been. These regional developments made the alliance with Hezbollah more vital for Syria's interests than ever before.

The conflict with Israel maintained its centrality in Syria's security priorities. Although the Syrian-Israeli front had been relatively quiet since 1967, the outbreak of war always remained in the background. Syria's ruling elite was aware of the country's military incapability of defending itself in the case of an open military confrontation with Israel. On the one hand, the absolute numbers reflected a military imbalance in Syria's favour. In 2003, Syria's armed forces counted approximately 319,000 active soldiers, 548 combat aircraft, and 4,500 main battle tanks. Israel could field approximately a total of 167,000 active soldiers, 438 combat aircraft, and 3950 main battle tanks (The International Institute for Strategic Studies IISS 2003, 111–112; 122–123).⁸⁴ Nevertheless,

⁸⁴ For similar figures, cf. Feldman and Shapir (2001) and Kam (2004).

Syria's military hardware has not been modernized since the collapse of the Soviet Union; it has been poorly maintained, and its technical standards have lagged far behind those of Israel. For instance, more than half of the Syrian tanks are T-55 or T-62s — models from the 1950s and 1970s. In case of war, Israel's air force would predominate, and its troops would be in Damascus before any Syrian troops could enter Israel's territory. Syria's military capabilities were limited to launching a surprise attack on the Israeli instalments in the Golan Heights or to shoot Scud missiles at Israeli cities. In short, Syria could not effectively balance against Israel. Also, its deterrent capabilities were limited, particularly since it did not possess nuclear weapons (Perthes 2004, 42).

At the outbreak of the 2006 War and under the conditions of military imbalance in favour of Israel, the Syrian regime had two policy options. First, Syria could deviate from the Iran-Hezbollah axis to join the so-called 'moderate' camp. In this case, Bashar al-Assad would mend its fences with the United States and seek peace with Israel. This option would allow the Syrian regime to escape its regional isolation and re-establish itself as an active regional player through mediating between the Iran-Hezbollah axis and other Arab regimes. For domestic reasons, Bashar could endorse this policy only in return for the Golan Heights, Arab financial support to the Syrian economy, and strategic influence in Lebanon. In short, if it took this option, Syria would bandwagon with the United States in the region and give up any balancing behaviour against Israel. The first option was unlikely to materialize as both the US and Israel rejected the idea of integrating the Syrian regime into the peace process. Moreover, Israel rejected the notion of returning the Golan Heights. Bandwagoning would, therefore, threaten rather than protect the regime (Salloukh 2009, 165).

The second policy option was bolstering the Syria-Iran-Hezbollah axis to counterbalance the Arab 'moderate' camp, Israel, and the United States. This option meant participating in anti-American and anti-Israeli operations. It provided Damascus with strategic depth vis-à-vis Israel. In other words, Syria could—and did—take advantage of its alliance with Hezbollah in Lebanon to advance its political and military interests, for example by using any Hezbollah

attack against Israeli forces in south Lebanon as a leverage for Israeli concessions in the Golan (B. Rubin 2000, 18). Regional observers called this strategy 'the resistance card' (Perthes 2001, 41). In addition, observing the US failures in Iraq and Israel's poor performance against Hezbollah, Syrian leaders could reassert their regional role without making any concessions to the United States or other Arab regimes.

Syria initially attempted to go with the first option and to end its isolation by engaging in peace negotiations with Israel. Nevertheless, the failure of the peace negotiations, the withdrawal of Syria from Lebanon in 2005, and its isolation from the other Arab countries made the alliance with Hezbollah and Iran the only option for preserving Syria's physical security.

Sine the 1990s, aware of Syria's inability to either balance or deter Israel and wanting to escape from international isolation, Hafiz al-Assad sought a peaceful settlement for the conflict with Israel. Between 1991 and 2000, Damascus participated in the US-brokered peace talks with Tel-Aviv in a bid to regain the Golan Heights in exchange for peace and recognition of Israel (Goodarzi 2013, 46-47). Syria's approach to the negotiations was best characterized as a zero-sum game, according to which Israeli gains were automatically considered Arab losses. After numerous US-sponsored meetings between Syrian and Israeli representatives, the failure of the peace talks became evident in 2000.⁸⁵ In November 2000, Syria turned back to its old enemy—Iraq—for support. Despite the fact that Syria supported Iran in its war against Iraq (1980-1988) and provided troops in the coalition effort to liberate Kuwait in 1991, Iraq—which was desperate for any regional ally—gave Damascus the opportunity to break its regional isolation.

In this context, the fall of Saddam Hussein was a substantial setback for Damascus, as it became deprived of its regional ally. Al-Assad provided Saddam Hussein with military supplies, hosted Iraqi refugees, and allowed Islamist

⁸⁵ For further details on the Syrian-Israeli peace talks, cf. Ma'oz (2007a), Miller (2000), and Ziadeh (Forthcoming).

jihadist to cross the borders to Iraq to support the resistance against the US. Moreover, the swift US victory in Iraq raised fears among the Syria ruling elite that they could be next in the Bush administration's 'war on terror' (Goodarzi 2013, 47). In a word, the Iraqi developments heightened Syria's exposure to the US foreign policy in the region.

After the quick fall of Saddam, Syrian fears grew that Damascus was next. In the post-9/11 environment, the Bush administration categorized states as being 'for' or 'against' terrorism. In this context, the term 'rogue states' resonated with neoconservative proposal to extend the war on terror beyond al-Qaeda to states that sponsor terrorism. From Washington's viewpoint, Syria supported terrorist groups (Hamas, Hezbollah, and the Palestinian Islamic Jihad) and possessed Weapons of Mass Destruction (WMD). Syria was on the top of 'rogue states' list (Lesch 2005). Following the fall of Baghdad, prominent figures in the Bush administration voiced their desire to see 'a regime change' in Damascus. As Deputy Secretary of Defence Paul Wolfowitz declared, 'there will have to be a change in Syria' (quoted in Salloukh 2009, 164).⁸⁶

The Syrian elite's fear gained saliency when the US army cut the Iraqi oil pipeline to Syria shortly following the invasion of Iraq. On 12 December 2003, the US Congress signed a bill entitled 'Syria Accountability and Lebanese Sovereign Act'. According to this bill, the US required Syria to stay away from Iraq and to close down the offices of Palestinian organizations in Damascus. Moreover, Syria should not interfere with the 'road map' of the Israel-Palestinian talks. The US indirectly pressed Syria to restrain Hezbollah and withdraw its troops from Lebanon. If Syria failed to comply with these requirements, military measures would be used (Lesch 2005, 99; Perthes 2004, 50-51). Although Syria opposed the US invasion of Iraq, the Syrian elite responded to the Act by backing away from any overt support for Iraqi resistance. In addition, Syria extended an offer to reach an understanding with Washington. Syrian leaders offered to provide intelligence against al-Qaeda and

⁸⁶ Cf. Seale (2003).

to help stabilize Iraq through tightening the control over the borders (Hinnebusch 2009, 19–20; Ziadeh 2011, 88–90).

At the same time, al-Assad was reluctant to comply with all US requirements in the Accountability Act, as it would lead to Syria's weakness and dependence on the United States for security. Accordingly, these negotiations revealed Syria's strategic isolation in this new geopolitical situation. Syria became locked between Israel on the south and a US-dominated Iraq on the east. This line of thinking was best described in General Bahjat Sulayman's article in the Lebanese newspaper *al-Safir*. Sulayman, former head of Syrian intelligence, suggested that Syria would help control Hezbollah and Palestinian Jihad and would contribute to the stability of Iraq in exchange for US guarantees regarding the survival of the regime and Syria's reintegration into the peace process (*al-Safir*, 15 March 2003). Nevertheless, Washington was not willing to bargain or negotiate with Damascus; it expected full compliance with its demands and insisted on isolating Syria (Salloukh 2009, 164–165).

This new geopolitical situation aggravated Syria's regional predicament and its physical security, especially vis-à-vis Israel. In a final attempt to enhance its position, Syria renewed the peace talks with Israel. In December 2003, Bashar al-Assad implored Israel's Prime Minister Ariel Sharon to return to the negotiating table. In the history of peace talks, this was the first time that Syria independently proposed talks with Israel over the Golan (Simon and Stevenson 2004). This Syrian initiative reflected the increased pressure on Damascus and its attempt to survive under these unfavourable conditions. Nevertheless, Bashar's offer for peace negotiations was rejected by the Bush administration as well as Israel.

Instead of surrendering to the United States' requirements, the Syrian regime undertook a number of actions aimed at counterbalancing the US and Israel. Damascus continued to provide discreet support to the Iraqi resistance. In addition, Syria bolstered its alliance with Iran, especially in terms of the latter's activities in Iraq. In an attempt to prevent the United States from using

Iraq as a base to launch attacks on Damascus or Teheran, both regimes fuelled the insurgency in hopes that it would pin down US forces. On the one hand, Teheran maintained close relations with all groups in Iraq in order to ensure that the new government in Iraq would not take any hostile positions toward it. On the other hand, Damascus aided the passage of Arab and Sunni fighters from Syrian territory to Iraq (Goodarzi 2013; Ma'oz 2007a).

These counterbalancing measures aggravated Syria's isolation at the regional level. Arab regimes—Egypt and Saudi Arabia in particular—traditionally gave the Syrian regime strategic depth in its conflict with Israel. They supported the al-Assad regime in the peace process and approved of Syria's position in Lebanon. In addition, Syria was one of the principal recipients of Saudi aid. In return, Syria accepted a Saudi influence in Lebanese affairs. But these relationships were deeply affected by the disagreement over Iraq. Following the invasion of Iraq, al-Assad furiously attacked pro-US Arab regimes for siding with the US strategy towards Iraq. Moreover, Bashar al-Assad regularly denounced Arab regimes for not cutting relations with Israel. This Arab populist rhetoric, which was directed toward Egypt, Jordan, and Saudi Arabia, led to the animosity of Arab regimes (Perthes 2004, 47–48). Syria's active diplomacy in the Arab world declined, especially in regards to the Israeli-Palestinian conflict. In July 2003, an Arab summit was organized in Sharm al-Sheikh to give an impetus to the 'road-map', which is a plan to solve the Palestinian-Israeli conflict suggested by the United States, Russia, the European Union, and the United Nations. Only the so-called 'moderate' Arab states—Egypt, Jordan, Saudi Arabia, Bahrain, and the Palestinian Prime Minister Mahmoud Abbas—were allowed to attend. Although Syria had played a crucial role in the region for decades, it became completely isolated (Ziadeh 2011, 94–95).

Syria's regional predicament reached its peak following the assassination of Lebanese Prime Minister Rafik al-Hariri, as Syria had to withdraw its forces from Lebanon in 2005. Lebanon has always been a sphere of influence granting the Syrian regime a strategic depth vis-à-vis Israel. Losing such depth, especially

considering the above regional developments, only increased Syria's physical insecurity vis-à-vis Israel. Therefore, holding on its strategic relationship with Hezbollah became a necessity. Remaining in the Syria-Hezbollah-Iran axis became Damascus' only option. In other words, Syria had no choice but to 'defy the hegemon' (Hinnebusch 2005a).

In this context, and especially after the Syrian withdrawal from Lebanon, the strategic importance of Hezbollah to Syria shifted from the status of a 'resistance card' to an indispensable strategic ally. As El-Hokayem (2007, 36) noted, 'Syria is more pro-Hezbollah than Hezbollah is pro-Syria'. On the one hand, Hezbollah and the Syrian regime converged in their struggle against Israel. On the other hand, reinvigorating the alliance enabled Damascus to escape its regional isolation. According to a high-ranking member of the Ba'ath Party 'after Syria left Lebanon, the West thought the regime was dead, and so Damascus used its support to Hamas and Hezbollah to prove that it was alive' (quoted in Perthes 2006, 39). Therefore, Damascus understood any attempt to defeat Hezbollah militarily or politically to be an effort to emasculate and isolate Syria. During the 2006 War, Damascus considered Riyadh's animosity toward Hezbollah and its refusal to offer overflight rights to Iranian supply planes as part of a strategy of encircling the Syrian regime (Salloukh 2009, 171).

3.2. The Regime Identity: Widening Pan-Arabism

Although the physical insecurity of the Syrian regime determined the identification of its friends and enemies, this choice did not affect the stability of its identity or, in other words, its ontological security. Syria's support for Hezbollah during the 2006 War conformed to its previous Self/Other distinction. To avoid any potential contradiction within its identity following its strategic alliance with Hezbollah, Syrian leaders expanded Syria's identity narrative to accommodate Islamic movements.

The alliance between Syria and Hezbollah has often been attributed to the Shiite nature of the 'Alawite ruling elite in Syria (cf. Talhamy 2009).

Describing the Syrian regime as a minority-based regime by referring to the 'Alawi minority is simplistic.⁸⁷ As stated by Ismail (2009, 14–15), the case of the Syrian regime is described as 'the sectarianism of the authority' rather than 'the authority of the sect'. In other words, the 'Alawi elite does not rule, but the authority consecrates the 'Alawi sect and relies on alliances with other sects when their interests coincide. Instead, the regime identity narrative is based on a nuanced pan-Arabism, where the struggle against Israel constitutes the source of distinctiveness. This pan-Arab narrative coincided with Hezbollah's struggle against Israel. Despite this apparent convergence, Hezbollah's identification as a 'friend' presented a potential for inconsistency within the Syrian identity narrative. The Syrian regime has been claiming a secular identity oppressing Islamist movements at home while Hezbollah is an Islamist movement with an active pan-Islamic call. To avoid the pitfalls of this contradiction, Syria's strategic need for this partnership led Damascus to reframe its identity by embracing Islamist and anti-imperialist dimensions from Hezbollah's worldview.

The Iran-Iraq War, the Egyptian-Israeli peace treaty, and the rise of the 'me-first'⁸⁸ policies by Arab states led to the growth of a reconsidered 'Syrian identity'. Instead of rejecting pan-Arabism, the regime maintained its commitment to this ideology but reframed its meaning to suit Syria's physical security needs. Since then, Syria's definition of Arabism has been based not on the 'Arab' component but the struggle against with Israel. This slow emergence of Syrian nationalism was consolidated throughout the 1990s. Driven by a strategic and economic quest for regional reintegration, the Syrian regime decided to join the US-coalition to liberate Kuwait in 1991. This decision further solidified the new Syrian nationalism. During the Syrian-Israeli negotiations throughout the 1990s, Hafiz a-Assad often explained his participation in the

⁸⁷ This argument is strongly present in Pipes (1990), Van Dam (1996), and Ma'oz (1988).

⁸⁸ These policies reflected the endeavor of Arab states to consolidate their national identities and to drift away from pan-identities. For instance, Egyptian leaders point to an 'Egypt-first' policy, according to which the interests of the state should come first, then those of the Arab nation.

peace process as based on Syria's interests (Hinnebusch 1996; Seale 1992). On 16 January 1994, Hafiz al-Assad declared:

Syria seeks a just and comprehensive peace with Israel as a strategic choice that secures Arabs right; end the Israeli occupation; and enables the people of the region to live in peace, security, and dignity. In honour we fought; in honour we negotiate; and in honour we shall make peace...we want the peace of the brave, a genuine peace which can survive and last, a peace which secures the interests of each side...' (Rabil 2006, 105).

When he commenced his rule in 2000, Bashar intended to follow his father's legacy. Bashar initially pursued pragmatic regional policies toward Arab states, Turkey, and the United States. More importantly, Bashar expressed his adherence to pan-Arabism defined in Syrian terms (Ma'oz 2007a, 11). Throughout the 1980s and 1990s, Syria's physical security needs led Hafiz al-Assad to pursue the course of peace and redefined the notion of pan-Arabism. During the 2006 War, this identity narrative fit well with Syria's physical security needs to ally with Hezbollah in balancing Israel.

Under these circumstances, the regime identity narrative appealed to a pan-Arab identity, according to which the main line of Self/Other distinctiveness evolved around the struggle against Israel. Bashar appealed to audiences beyond Syria and expressed his loyalty to the Arab nation. His speeches depicted Syria as a stronghold of Arabism or as 'the throbbing/beating heart of Arabism'.⁸⁹ On 21 January 2006, in an interview with *al-Hayat*, Bashar publicly declared that he considers 'Syria the heart of the Arab world', and that his main goal was to 'reinvigorate Arab unity' (quoted in Kandil 2008, 430). He also stated the following:

Many have tried in the past to destroy the Arab national perception by attempting to position it in confrontation with feelings of 'local patriotism', which ostensibly are contaminated by separatism. Some tried to position Arabism in confrontation with Islam [...] Others even tried to turn Arabism into the equivalent of backwardness and isolationism [...] But none of this, of course, is correct (quoted in Zisser 2006).

⁸⁹ Cf. Bashar al-Assad's Speech at the Arab Parties General Conference (B. Al-Assad 2006c).

Bashar went further to widen the definition of pan-Arabism beyond Syria's interests. Whereas Hafiz al-Assad limited the idea of 'a comprehensive peace' to Syrian interests, which ruled out the Lebanese and the Palestinians, Bashar declared that any agreement would not constitute a comprehensive peace plan without 'a balanced Lebanese, Palestinian, and Syrian axis'. He noted that 'signing an accord with Syria would not be enough to solve the problem and attain the purpose of coordinating other policies' (quoted in Ziadeh 2011, 85). From this perspective, Bashar highlighted not only the importance of achieving a comprehensive peace, but also the necessity of establishing an agreement with all Arab states to resist the 'Zionist project'. He harshly criticized the so-called moderate Arab regimes—Egypt, Jordan, and Saudi Arabia—for backing the Saudi-sponsored Arab peace initiative (2002). He claimed that Arabs should reconsider their policy of 'peace as a strategic option' vis-à-vis Israel and cut their diplomatic relations with Israel (Ma'oz 2007a, 12).

In this context, Syria's alliance with Hezbollah conformed to the regime's pan-Arab narrative. On 15 August 2006, Bashar gave a significant speech to the Syrian Journalists Union, where he declared that Hezbollah's resistance to Israel followed the tenets of Arabism. He claimed that 'resistance and peace' are not contradictory or mutually exclusive and 'constitute one pillar rather than two pillars, and who supports part of it has to support the other part'. The innovation in Bashar's pan-Arab rhetoric lay in condemning the past failure of Arabism. He argued that Arab weakness and failure is the main reason for Israeli supremacy: 'The only thing Israel possesses is the destructive force at the military level and some other factors at the international level, but at the same time it possesses a very big force; namely the weakness of the Arabs, both morally and physically' (B. Al-Assad 2006b). He also conceded that Arabs talked much and hardly achieved anything in their history. For that matter, al-Assad considered Hezbollah to be a model of a regional Arab resistance against Israel (Wikas 2006).

This pan-Arab narrative, however, belied an inherent contradiction with Hezbollah's identity. This contradiction could potentially endanger the stability

of the regime identity narrative and the regime's legitimacy at the domestic level. Syria's pan-Arabism was secular in nature. In addition, the regime oppressed Islamist movements domestically and criticized their identity. In an attempt to accommodate Syria's identification of Hezbollah as a friend, Bashar further widened Syria's definition of pan-Arabism by incorporating two dimensions. First, pan-Arabism was declared to be compatible with Islamic values. Second, Bashar incorporated Nasrallah's worldview in his opposition to the United States, describing it as a struggle against the '*oppressor*' (El-Hokayem 2007, 43). An example can be found in the speech delivered to the conference of Arab lawyers in Damascus on 21 January 2006.

[the US policy] is meant to target Syria and Lebanon as part of an integrated project to undermine the region's identity and reshape it under different names that finally meet Israel's ambitions to dominate the region and its resources [...] But what is targeted are [not only Syria and Lebanon, but all] *the Arabs and even the Islamic nation* [...] What is happening now [with Syria and Lebanon] is part of a big conspiracy (B. Al-Assad 2006a).

During the 2006 Lebanon war, Bashar adopted the same rhetoric. He described the Israeli aggression as 'Israeli in tools, but [...] American in decision shared by certain Western countries' (B. Al-Assad 2006b). In short, Syria's pan-Arab narrative was broadened to include non-Arabs and Islamists dimensions to accommodate Syria's identification of Syria and Hezbollah as friends and Israel as enemies. From this perspective, Syria's Self/Other distinction converged with the enemy/friend identification.

4. Conclusion

This chapter examined Saudi and Syrian threat perception during the 2006 Lebanon War. It explicated their divergent reactions towards Hezbollah's fierce confrontation with Israel, namely Syria's decision to support Hezbollah's against Israel and Saudi opposition to the actions of this Islamist movement. The Saudi case reflected a situation of ontological insecurity/physical security. Despite Iranian and Syrian support, Hezbollah, which is a non-state actor that does not share any borders with the Kingdom and is militarily focused on its war against

Israel, cannot pose a danger or source of harm to the Kingdom. Instead, it was Hezbollah's Islamic narrative that constituted a serious challenge to the regime identity narrative in Saudi Arabia. In order to restore this identity stability, the Kingdom demonized the Islamic credibility of Hezbollah while reinforcing Saudi Self/Other distinction based on a sectarian narrative (i.e. Sunni versus Shiite). This Self/Other distinction was framed in negative terms. In the process of restoring its ontological security, the dynamics of the Kingdom's physical security underwent a change as this Self/Other distinction affected the friend/enemy identification during the war. Accordingly, Hezbollah was identified not only as an Other but also an enemy.

Compared to its Saudi counterpart, the al-Assad regime was in a situation of ontological security/physical insecurity. Whereas Hezbollah and Israel did not endanger Syria's identity stability, its physical security was endangered, especially in the context of the 2006 Lebanon War. This chapter explored the geopolitical imperatives that impelled al-Assad regime to support Hezbollah. Alongside the military imbalance in favour of Israel, Syria suffered severe regional and international isolation following the 2003 Iraq War. Based on this relative power distribution, Israel remained Syria's bitter enemy whereas Hezbollah was an ally. This friend/enemy dichotomy was partly congruent with Syria's identity narrative. Israel was consistently portrayed as a threatening Other. On the other hand, Syria's alliance with Hezbollah held the potential for infusing the regime's identity narrative with contradiction and instability, as the Ba'ath regime is a secular pan-Arab regime oppressing Islamist movements at home, which were always portrayed as 'Others'. From this perspective, Syria's Self/Other distinction underwent an accommodation to integrate this friend/enemy dichotomy. Al-Assad reframed the regime identity narrative from Syrian pan-Arabism to a wider pan-Arabism that includes any actor involved in confrontation with Israel, whether it be Islamist or secular.

One of the most important implications of the cases examined above for the theoretical framework of this study is that identity framing and reframing are important mechanisms to restore ontological security both in the Syrian and

Saudi case. Saudi Arabia adopted had a stake in maintaining a sectarian discourse to differentiate itself from Hezbollah and its ally, Iran. Syria, on the other hand, broadened its pan-Arab framing to include Islamist movements to avoid inconsistencies. From this perspective, the processes of identity framing and reframing can be triggered by ontological security concerns but also by physical security concerns.

Chapter 5: Explaining Saudi and Syrian Threat Perceptions during the 2009 Gaza War

Hamas, Hezbollah, the Muslim Brotherhood, and Tehran have decided to put the Palestinian cause and its martyrs into Iran's hands. However, everyone is forgetting one important point—namely, that we will not hand over our people's capabilities to lunatics who hide out in Syria and who fire not a single bullet at Israel [...] there is a plan to set the entire regional ablaze, and to kill as many Palestinian and Lebanese martyrs as possible, in order to expose the helplessness of Egypt, Saudi Arabia, and the [entire] moderate Arab axis.

Mohamed Ali Ibrahim, *Al-Gumhuriyya* (Egypt), 29 December 2009.

This chapter examines the divergent Saudi and Syria threat perceptions during the 2009 Gaza War. On 27 December 2008, Israel launched a military operation called the 'Cast Lead' in Gaza against the Palestinian militant group, Hamas—also known as the Islamic Resistance Movement (*Harakat al-Muqāwamah al-Islāmiyya*). Although the Palestinian-Israeli conflict has its own internal dynamic, Arab reactions reflected other dynamics that yield empirical and theoretical insights. Saudi Arabia, traditionally a supporter of the Palestinian cause, surprisingly condemned the resistance and blamed it for the suffering of the Palestinian people. While Syria supported Hamas—that is, a Sunni Islamist movement with Muslim Brotherhood origins—the al-Assad regime simultaneously continued oppressing a group with a similar ideology at home. Why did Saudi Arabia perceive Hamas as threatening while Syria conversely considered it to be an asset in its struggle against Israel's military supremacy? Why did Syrian and the Saudi regimes diverge in their threat perceptions?

This chapter addresses these questions by looking at the interplay between the physical and ontological security spheres that led to this outcome. Whereas Saudi Arabia demonstrates a case of ontological insecurity/physical

security, Syria is a case of ontological security/physical insecurity. Hamas challenged the Saudi regime's Islamic identity. At the same time, while struggling for survival in a hostile regional and international environment, Syria found in Hamas an opportunity to advance its regional leverage. Although Syria's alliance with Hamas could have created an internal contradiction in the regime's identity, the al-Assad regime preempted this problem by widening its pan-Arab discourse in such a way that Syria's secular pan-Arabism does not contradict the Islamic ideology of Hamas.

As the previous two empirical case studies have showed how identity and power interplayed, examining Saudi and Syrian threat perception during the Gaza war aims to contribute to the wider debate on the role of identities in Middle East international relations. The previous two cases have established that sectarian identities per se were not the driving force behind threat perception. Instead sectarian identities served as tool reinforce ontological security and distinctiveness, especially in the case of Saudi Arabia. The previous chapters have also showed that the widely spread narrative about the Shiite nature of the Syria-Iran-Hezbollah axis are mistaken. An examination of threat perception towards Hamas provides further evidence confirming the previous findings. As opposed to Hezbollah, Hamas is a political Islam movement that finds its ideological origins in the Muslim Brotherhood belonging to a Sunni school of thought. Despite the identity convergence between Hamas and Saudi Arabia, the Kingdom perceived Hamas as a threat. Also, the Ba'ath regime, often depicted as Alawite in nature, has perceived Hamas as an ally. The Gaza war provides uncontroversial evidence that threat perception is not driven by sectarian identities per se.

From this perspective, this chapter aims to contribute to the wider literature on the study of sectarianism as a significant texture undergirding Middle East international relations. Sectarian identities at the regional level have gradually spurred growing scholarly interest, especially since the outbreak of the Islamic revolution in Iran. Broadly, it has been situated within the debates between primordialists (essentialists) and rationalists. The primordialist

approach belongs to this major trend in IR theory that puts emphasis on culture and identity as determinants of conflict and cooperation among actors. Primordialists have analysed Sunni-Shiite identities as the core conflict in the region since the 7th century, and it continues to shape its political dynamics {Citation}. Based on Huntington's (1993) famous argument about the clash of civilizations, according to which conflicts would erupt around cultural divides, some scholars argued that the 'clash' is within Islam (Sadiki 2014). This approach clearly fails to explain threat perceptions during the Gaza war.

Rationalists have, however, adopted an instrumentalist top-down approach, which derives from neorealism and Marxist structuralism in IR theory. As the structure is constituted of relative power distribution, identities and norms are instruments manipulated to legitimize actors' material interests (Walt 1987; Kedourie 1992). From this perspective, the Sunni-Shiite divide in the region emerged as prop of power and material interests in the region (Gause 2007; F. Wehrey et al. 2009; F. Wehrey 2013; Lynch 2013; Gause 2014; Zubaida 2014; Berti and Paris 2014). Instrumentalist approaches clearly answer more questions than primordial ones do. Nevertheless, this top-down approach leaves many questions unanswered: if leaders are motivated by material interest, can they manipulate identities whenever and however they wish? Moreover, by reducing identities to superstructures, rationalists cannot why Saudi Arabia feared a non-state actor with limited military capabilities and situated far from its borders.

In this context, this chapter provides an understanding of sectarianism that goes beyond primordial and instrumental approaches to identities. It argues that ontological security provides a third way to examine the role of sectarian identities in the processes of threat perception.

The chapter proceeds as follows. I first present the context in which the 2009 Gaza War occurred and the subsequent regional reactions. I then explore Saudi enmity towards Hamas. The relative power distribution demonstrates that the war did not endanger the physical security of the Saudi Kingdom.

Instead, Hamas' Islamic Sunni identity put the ontological security of the Kingdom at risk, as it endangered the consistency of the Saudi identity narrative. Throughout the 1980s and 1990s, the Saudi regime had preserved its distinctiveness by maintaining a sectarian narrative based on Sunni-Shiite divisions. The emergence of a Sunni Islamist movement challenged the distinctiveness of this narrative. By presenting a resistance strategy based on an alternative Sunni Islamic narrative in the region, Hamas challenged the Saudi regional role and the Kingdom's related Sunni Islamic identity. Third, I explore Syria's threat perception. I argue that the relative power distribution and the unfavourable regional and international environment endangered the physical security of the Ba'ath regime. In this context, Hamas emerged as a strategic ally of Syria in its struggle against Israel. I then examine how the Syrian regime revived an inclusive pan-Arabism to accommodate its alliance with a Sunni Islamist movement and to avoid any contradictions in its identity.

1. The 2009 Gaza War and Regional Reactions

On 27 December 2008, Israel began a series of air attacks on Gaza, which was later expanded into a ground offense. This war underscored the regional divisions that crystallized during the 2006 Lebanon War between two camps: the so-called 'moderate' regimes—Egypt, Saudi Arabia, and Jordan—and the 'resistance'—Iran, Syria, Hezbollah, and Hamas. Syrian and Saudi perceptions toward Hezbollah in 2006 were replicated in regards to Hamas in 2009.

During the extraordinary Arab summit in Doha on 16 January 2009, Bashar al-Assad declared: 'we should show our clear support for the Palestinian resistance. I suggest that this summit official calls the Zionist entity a terrorist entity' (BBC 2009). Against this clear and explicit support for the resistance movement, the Saudi Kingdom criticized Hamas for abandoning the cease-fire with Israel and blamed it for the war casualties in Gaza. As Prince Saud al-Faisal, Saudi Arabia's foreign minister, declared: 'This terrible massacre [from the Gaza war] would not have happened if the Palestinian people were united behind one

leadership, speaking in once voice' (Black 2009). Hosni Mubarak, the Egyptian president, echoed the same sentiment: 'You all know that efforts Egypt had undertaken to extend the ceasefire and our warnings that a refusal by factions to extend it was an open invitation to Israeli aggression' (Reuters 2009).

Saudi newspaper *al-Sharq al-Awsat* compared Hamas' reckless instigation to Hezbollah's move that had led to the 2006 Lebanon War. Similarly, Egypt explicitly blamed Hamas for abandoning the ceasefire with Israel. As Foreign Minister Ahmed Abou al-Gheit stated, 'Hamas served Israel the opportunity on a golden platter to hit Gaza' (Erlanger 2009b). Egypt and Saudi Arabia portrayed Hamas as a mere pawn of non-Arab Iran and, hence, accused it of serving Iranian instead of Arab interests. Consequently, critics of Saudi and Egyptian foreign policies accused the so-called 'moderate' regimes of collusion with Israel, the Arab and Islamic world's bitter enemy.

Although Arab reactions to the 2009 Gaza war underscored the intra-Arab divisions that emerged during the 2006 Lebanon war, these events pose further questions. In contrast to the Shiite religious identity of Hezbollah, Hamas is a Sunni movement recognized as an offshoot of the Muslim Brotherhood ideology, combining a traditional pan-Islamist ideology with Palestinian nationalism. Situated at the heart of the Arab-Israeli conflict and with a Sunni background, Hamas should have attracted the support of the Saudi Kingdom, a monarchy with a Sunni pan-Islamic ideology. Paradoxically, the Al Saud, a ruling elite claiming the leadership of the Islamic world and of the support for the Palestinian cause, condemned the resistance. The Syrian regime—a secular regime oppressing the Muslim Brotherhood at home—explicitly sided with Hamas and supported it verbally and financially.

2. Saudi Arabia and the Struggle for Consistency

The Palestinian question has traditionally been the subject of an ideological and religious sensitivity in Saudi foreign policy. Saudi Arabia, as the custodian of the two most important holy cities of Islam, Mecca and Medina, sees itself as having a divine mission to protect the holy sites of Islam. From this perspective, Palestine, especially Jerusalem, is particularly important to Saudi Arabia's self-conception, historically leading the Kingdom to defend and support the Palestinian cause. The following extract is a speech addressed to those making pilgrimage to Mecca in 1997, by King Fahd bin Abdul Aziz and Crown Prince Abdullah bin Abdul Aziz:

The Kingdom of Saudi Arabia has continued to hold the same position of giving support to a just and comprehensive peace which will bring an end to oppression and which will return occupied Arab lands to their own people in Palestine, Syria and Lebanon. In relation to Jerusalem and the construction of Israeli settlements there, the stand of the Kingdom of Saudi Arabia is one which is completely clear and to which it has given expression many times. The Kingdom deplores and condemns all actions in Jerusalem, which are in conflict with the nature of the city and with the legitimate rights of its Arab population therein (quoted in Khan 2004, 176).

Although the Kingdom has never been a frontline state in the Arab-Israeli conflict and has never had any troops involved in military operations against Israel, the Palestinian cause has remained at the centre of Saudi international and regional diplomacy.

Following the defeat of the Arab forces in the 1967 Six-Day War, the Al Saud became actively involved in continuing the struggle against Israel, henceforth serving as the primary financial supporter of the frontline states. From that moment, the Saudis financially and diplomatically supported the Palestinians, particularly their primary organization, the Palestinian Liberation Organization (PLO), and later Hamas during the 1990s. During the 1970s, the Kingdom provided the PLO with hundreds of millions of dollars, and an estimated US\$1 billion in the 1980s (Bowen 2008, 124–25). With the Egyptian retreat from the conflict (1979) and the Jordanian-Israeli peace treaty (1994), Saudi Arabia opted for a regional role, playing a mediating role in Lebanon and

in the Palestinian-Israeli peace process. From the early 1990s onwards, the Kingdom provided financial support to the Palestinians to attend peace talks and actively participated in some regional talks that led to the Madrid and Oslo rounds of negotiations (Wilson and Graham 1994, 125). Throughout, the Saudis consistently portrayed themselves as supporters of the Palestinian resistance, an image they bolstered by funding secular leftist Palestinian groups as well as Islamist groups such as Hamas and the Islamic Jihad. Yet, in 2009, the Saudi Kingdom perceived Hamas as an eminent threat.

To explain this paradox, I argue that Hamas, despite its alliance with Iran, did not pose any threat to the Kingdom's physical security. Instead, Hamas' Islamic ideology endangered the Kingdom's ontological security, as it questioned the Saudi claim of Sunni leadership and its associated position as a sponsor of the peace negotiations in the Arab-Israeli conflict. In what follows, I first examine the relative power distribution before and at the outbreak of the 2009 war. I argue that Iran's support for Hamas did not at the time make it a source of physical insecurity to the Kingdom. I then examine the ideational challenge Hamas posed to the Saudi regime's identity narrative.

2.1. Saudi Physical Security: Is Hamas a Threat?

Saudi perception of Hamas as a threat in 2009 has been often read as a realist strategy, in accordance with which the Kingdom was balancing Iran's expanding influence in the region. Considering Iran's support for Hamas and other Palestinian groups, this realist logic seems accurate at first glance. Upon further examination, however, the story appears to be more complex. Iran's support for Hamas did not necessarily mean any Iranian military presence and, hence, did not endanger the physical security of Arab states, the Kingdom including. Furthermore, this argument erroneously assumes that Hamas is not an independent actor. This section argues that Hamas' drift toward Iran did not contribute to any military imbalance in the region. Instead, the balance of power in the region remained in Israel's favour, and Iran's support of Hamas could not threaten the physical security of the Kingdom.

The 2009 Gaza War broke out under conditions similar to those of the 2006 Lebanon War. The regional configuration that emerged following the US intervention in Iraq was manifested in 2006 and again in 2009. The fall of Saddam Hussein's regime and the destruction of Iraq's military capabilities changed the regional power distribution. Israel's military supremacy became evident in the Arab-Israeli sphere, especially with the persistence of the Egyptian-Israeli peace treaty since 1979 and the conclusion of the Jordanian-Israeli peace treaty in 1994. Moreover, by 'shattering' the Iraqi state, the United States eliminated Iraq's power as a regional buffer vis-à-vis Iran, which in turn attempted to fill the vacuum and expand its own influence (Roy 2007). This meant that the traditional stable triangle of Iran, Iraq, and Saudi Arabia—in which the three powers balanced one another—collapsed and left room for a Saudi-Iranian confrontation (Fürting 2007). Arab states became fragmented around two camps. On the one hand, the US-backed coalition consisting of Saudi Arabia, Egypt, and Jordan supported the peaceful settlement of the Arab-Israeli conflict. Moreover, this camp identified Iran as the most substantial threat to the stability of the region. The second coalition included Iran, Syria, Hezbollah, and Hamas. This camp, often called the 'resistance axis', considered the United States and Israel to be the ultimate sources of threat in the region. The fragmentation of the region around these two camps has often been termed as the 'New Arab Cold War'.

From this perspective, Hamas' threat to the so-called moderate camp was often exacerbated by Iran's support for the organization. Hamas was accused of serving Iranian interests rather than Arab or Palestinian ones. It was also portrayed as a threat because it allowed Iran to expand its influence over the Palestinian question, thereby acting counter to the 'Arab interest'. The portrayal of Hamas as an Iranian pawn was abundant in the Arab media coverage, especially in Saudi media outlets. Hamas was accused of assisting Iran in taking over the Middle East (Carmon 2009). For example, Tarik al-Humayd, a journalist in the Saudi newspaper *al-Sharq al-Awsat*, questioned whether Iran's support for Hamas and Hezbollah and their designation as 'freedom fighters' or

'liberation movements' amounted to the 'hijacking [of] Arab causes to serve Iran's interests' (Chubin 2009, 170). In the Saudi daily *Al-Riyadh*, Saudi Columnist Ali Al-Mahmoud warned about Iran's 'octopus-like expansion'. In his view, 'Iran wants to control the region, not by spreading its ideology [...] but by maintaining armed organizations [in Arab countries] it violates their loyalty to their homelands, replacing it with loyalty to Iran' (*Al-Riyadh*, 29 May 2008). In the Saudi daily *Al-Watan*, Saudi Columnist Ali Sa'd Al-Moussa wrote that Arab countries were being subjected to 'Persian colonialism'. He added:

Iran has become a major and central player in Arab politics [...]. Today we are seeing new signs of Persian colonialism. This is a [new] more advanced colonial model: We are no longer talking of troops occupying [certain] regions or of flags [flying] over public buildings. The colonialism of the modern era is manifested by the submission of [various regional forces to Iran]... Iran chose [regions] on the Arab map and attacked them without [even] pulling the trigger. Arabs are implementing its entire plan (*Al-Watan*, 29 May 2008).

In light of this, it is not surprising that Saudi state-influenced newspapers presented the Israeli attack on Gaza as an attack on Iranian influence in the region.⁹⁰ Leading Saudi Columnist Khalaf al-Harbi accused the Saudi state-led propaganda of marketing the idea that 'any support for the [Hamas] resistance is an incitement to terrorism' (Al-Harbi 2009).

Existing explanations of Saudi fear from Hamas, I argue, have conflated physical and ontological security spheres. Iran's support for Hamas did not in fact mean a change in the balance of power and did not transform Hamas into a material threat to the physical security of the so-called Arab moderate countries, Saudi Arabia included. By the time of the 2009 war, Iran's support for Hamas did not mean any military presence in Gaza. Instead, Iran's support for Hamas remained mostly ideological.

Since the Islamic revolution, Iran has considered Israel to be its ultimate enemy in the region and—for religious reasons—the Palestinian issue has featured as a core component of Iranian foreign policy. The Iran-Hamas

⁹⁰ This was the case of Egyptian and Jordanian newspapers as well.

relationship developed during the 1990s and matured in the wake of Hamas' international isolation after 2006. The relationship started in 1992 when Israel expelled hundreds of Hamas' leaders to Lebanon, where they met with representatives of the Iranian Revolutionary Guard. Since this meeting, Iran has been funding and training Hamas. The relationship was consolidated during the Oslo Accords in 1993 and the following Israeli-Palestinian peace negotiations in 1996. Following its isolation in 2006, Hamas relied more extensively on the so-called 'axis of resistance' for funding. In addition, the organization was inspired by the successful model of Hezbollah in its war against Israel in 2006 (Frankel 2012).

Iran became Hamas' biggest donor. Estimates of Iranian financial assistance to the organization have varied significantly between US\$30 and US\$250 million per year (Levitt 2008, 172–174; Haaertz 2006; Al-Mughrabi 2013). Nevertheless, this Iranian support for Hamas did not mean any Iranian military presence in Gaza that could threaten neighbouring Arab states. On the geopolitical level, whereas Iran was able to support Hezbollah logistically through sending military hardware via Syria, the same was not possible in the case of Hamas. As Head of Iran's Revolutionary Guard Gen. Mohamed Ali Jafari declared,

Gaza is under siege, so we cannot help them. The Fajr-5 missiles have not been shipped from Iran. Its technology has been transferred and (the missiles are) being produced quickly (CBS News 2012).

In other words, military assistance consisted of the transfer of technical know-how necessary for manufacturing weapons (rockets and anti-tanks missiles). This knowledge transfer also included military training for Hamas members (Szorm 2009). Throughout, even though Iran might have possessed the potential military capabilities to balance Arab states, it was unable to project these capabilities far beyond its borders, because Iran's economic capacity was not sufficient to support such expansionism (Chubin 2009).

More importantly, Hamas cannot be considered as a mere Iranian proxy devoid of agency. Although Iran was its primary funder of Hamas since 2006, Tehran did not have any control over the Palestinian group. As Sadjadpour puts it, 'Iran supports Hamas, but Hamas is no Iranian puppet' (2009). Hamas' agency became evident after the 2009 War when the organization broke its alliance with Iran and turned to Egypt during the short-lived rule of the Muslim Brotherhood (2012-2013). In other words, the alliance between Iran and Hamas around the time of the 2009 Gaza conflict was built upon shared interests. On the Palestinian side, Hamas was encircled and isolated after winning the elections in 2006, as Arab states followed the US in isolating Hamas and cutting funds. From this perspective, Iran filled a vacuum. On the Iranian side, the support for the Palestinian cause served the interests of Iranian foreign policy, as it enabled Iran to overcome its regional isolation and to enhance its leverage in the negotiations over the nuclear program (Chubin 2009).

Hamas' sense of agency was evident, as Hamas had the choice between the support of Sunni Arab states and Iran's support. According to Ahmed Yusuf, the adviser to Hamas Leader Ismael Haniyah, 'our relations with Iran have angered Saudi Arabia but sometimes we have no choice. We would prefer to have closer relations with Saudi Arabia and maybe that will come' (Urquhart 2007).⁹¹ Hamas' leaders had two options: moderating their core principles in order to ensure the support of Arab states, or accepting Iranian support while maintaining a bellicose stance against Israel. As Egypt and Saudi Arabia followed the US boycott of Hamas, the organization's leaders opted for the latter option. They took into consideration Iran's uncompromising position on Israel and turned to the Islamic Republic for financial and military support. In short, Hamas took advantage of the region's rivalries to enhance its own position (Kostiner and Mueller 2010). At the end of the day, the relationship between Hamas and Iran is merely strategic, and the former will not act on behalf of the latter. According to Salah Bardawil, a member of Hamas' political Bureau in Gaza, in case of war between Israel and Iran, 'Hamas will not be part of such

⁹¹ See also the interview with Khaled Mesh'al on ABC Channel (Willacy 2006).

war' (quoted in Sherwood 2012). The same position was seconded by Gaza leader Ismail Haniyeh: ' Hamas is a Palestinian movement that acts within the Palestinian arena and it carries out its political and field actions in a way that suits the interests of the Palestinian people' (Nakhoul and Stott 2012).

The subsequent Gaza wars of 2012 and 2014 decisively demonstrated Hamas' independence from Iran. Following the breakout of the Syrian crisis, Hamas refused to follow Iran in supporting the al-Assad regime against the rebels. Iran considered Hamas' position to be a betrayal to the axis of resistance and fiercely scaled back its support and cut financial aid to the Palestinian group (Al-Mughrabi 2011). Under these circumstances, and with the rise of the Muslim Brotherhood to power in Egypt in 2012, Hamas shifted its alliance back to Egypt (Qassir 2014). Hamas leaders also sought a rapprochement with Turkey and Qatar (Abu Amer 2013).⁹² Still, despite Iran's waning support for Hamas in 2014, Saudi perception of Hamas as a threat persisted (Riedel 2014). Whereas the Kingdom refrained from condemning Israel's assault on Gaza that year, it openly blamed Hamas for the suffering of the Palestinian people; the Saudi royal elite was thereafter accused of colluding with Israel in destroying Hamas (Kirkpatrick 2014).

Why has Hamas been perceived as a threat to the Saudi Kingdom despite the fact that the group is not Iran's proxy? The Kingdom has often justified its fear of Hezbollah by referring to a sectarian narrative, i.e., Sunni versus Shiite. Hamas is, however, a Sunni Islamist movement. Despite the seemingly sectarian convergence, the Kingdom has portrayed Hamas as a threat. The following section examines this paradox. I argue that Hamas' Islamic nature endangered the stability of the Kingdom's identity narrative and, hence, its ontological security.

2.2. Saudi Regime Identity: 'Othering' Hamas

⁹² Nevertheless, this alliance shift was intermittent. With the fall of the Muslim Brotherhood in Egypt Hamas has sought to re-activate its relationship with Iran (Al-Mughrabi 2013).

The Palestinian question has been central to the Kingdom since the early stages of its formation (Piscatori 1983; Kazzuha 1985). As King Fahd bin Abdul Aziz stated:

The cause of Palestine which the Kingdom of Saudi Arabia has always placed at the top of its priorities will always have that position for us because this issue is linked to positions of principle and to encompassing vision which embraces the higher Arab interest and necessities of comprehensive Arab security.⁹³

As already discussed in the previous chapters, the Palestinian question and Jerusalem is constitutive of the Islamic dimension in the Saudi identity narrative. According to Esposito (1998, 114), 'The liberation of Jerusalem and the creation of a Palestinian state became a major component of Saudi foreign policy and an Islamic issue to which Faisal rallied worldwide Muslim support'. In other words, the Palestinian question has constituted a core element in Saudi self-conception at the regional and domestic levels (Khan 2004, 175–178).

As already discussed in the previous chapter, since the 1980s, the Saudi Kingdom has developed a vision for the conflict based on a comprehensive peace. The Custodian of the Two Holy Mosques King Fahd launched the first Arab peace initiative in 1982, while he was still crown prince. In February 2002, following the Palestinian Intifada in the West Bank and Gaza (2000), Crown Prince Abdullah presented a second peace initiative, which was later endorsed by the Arab League and became known as the 'Arab Peace Initiative'.⁹⁴ The proposal was an explicit expression of the Saudi stance on the conflict and offered Israel full normalization of relations with its neighbours in return for full withdrawal to the 1967 borders; it did not, however, lead to real negotiations. In 2007, King Abdullah attempted to revive the 'Arab Peace Initiative' during the Riyadh Summit in order to boost a new round of negotiations between the Palestinians and Israel.

⁹³ <http://www.saudinf.com/main/x003.htm>

⁹⁴ For further details on this initiative, cf. Kostiner (2005).

At the same time, the Saudi Islamic narrative enabled the Kingdom to play a crucial role in the inter-Palestinian mediation between Fatah and Hamas. As a result of the 2006 elections, Hamas won the majority of seats in the Palestinian National Council, with its leader Ismail Haniyah becoming the Palestinian prime minister. Hamas' growing power in relation to Fatah, together with the struggle over the new government, created acute tensions. In February 2007 King Abdullah invited both factions to Mecca to negotiate the terms of a 'unity government'. The Saudi King also promised US\$ 750 million in aid to the unity government (Kostiner 2009). The mediation was a failure, as following the Mecca agreement, tensions between the two factions crystallized and led to a split in the government: Fatah ruled over the West Bank and Hamas ruled Gaza.

The Saudi vision favouring negotiations was a strategy developed to combine the Kingdom's physical security needs related to its partnership with the United States and its identity narrative inextricably related to the support of the Palestinian cause. By mediating between Palestinians and Israel, the Kingdom was able to actively portray itself as the guardian of the Palestinian cause. In the meantime, it conformed to the US narrative by playing the role of the maestro of a 'moderate' Arab coalition aiming to counterbalance 'radicalism' in the region. Moreover, by engaging in negotiating intra-Palestinian conflicts, the Saudis aimed to lure Hamas back into the Arab fold in order to deprive Iran of its influence in the Palestinian question. This strategy constituted a compromise for the Al Saud, balancing their interest in bringing Hamas back to the Arab camp and limiting the Iranian influence in Palestinian issues without controverting the Western boycott of Hamas. More importantly, this strategy allowed the Kingdom to maintain a consistent identity narrative.

As the Palestinian question is at the heart of Saudi identity, the Al Saud had to link their strategy with their identity narrative. The late senior Saudi Mufti Ibn Baz issued a fatwa stating that peace between Jews and Muslims was compatible with *shari'a*, citing the Prophet's example. Ibn Baz even issued another fatwa permitting Muslims to visit Al-Aqsa mosque as a way to facilitate

peace with Israel (Chubin and Tripp 1996, 59). By tying its strategy in the Arab-Israeli conflict to its Islamic identity narrative, the Kingdom risked a loss of credibility in the face of alternative strategies. Which is precisely what happened in the run up to the 2009 War: all while relying on a Sunni Islamic identity narrative similar to that of the Saudis, Hamas presented an alternative vision of the conflict based on the concept of 'resistance'. It should not therefore be surprising that the Hamas vision endangered the stability of the Saudi regime identity, as inconsistencies between its claim of support for the Palestinian question and its opposition to Hamas' rejection of the peace process emerged.

From this perspective, Hamas presented a two-fold challenge to the Saudi regime identity. The Saudi elite already condemned Hezbollah's mode of struggle against Israel by relying on a sectarian discourse based on the Sunni-Shiite divide. Following this Saudi Self/Other distinction, one would expect the Kingdom to support Hamas. However, by presenting an alternative approach to the conflict based on armed resistance linked to a Sunni Islamic narrative, Hamas questioned the Saudi dedication to the Palestinian cause and, hence, to its related identity narrative. In short, Hamas' Islamic identity associated with the resistance endangered the Saudi exclusive identity narrative portraying the Kingdom as the champion leader of the Sunni world.

Hamas regional policies and narrative came in stark contrast to the Saudi plea for a peaceful settlement. The Palestinian group has embraced as a fundamental tenet the belief that independence and freedom will be achieved only through armed struggle. According to Hamas, this is the only logic that Israel understands. From this point of view, peace with Israel is not an option for Hamas. As Hamas leader Khaled Meshaal stated, 'Our enemy only comes under pressure when they are under fire and as our rockets hit them they were forced to hold talks with us' (Bakr 2014). Although Hamas has consistently opposed peace negotiations with Israel, it has considered the *hudna* (cease-fire) to be a strategic option. Sheikh Ahmed Yassin launched this idea in the early 1990s. In his view, 'Islam permits a temporary truce for a limited period with the Jewish enemy if necessary' (quoted in Jensen 2008, 34). Despite Hamas'

moderation throughout the 1990s and after it won the elections, the armed struggle against Israel was and remains at the heart of its ideology and *raison d'être*.

Hamas' ideology exposed the inconsistencies in the Saudi Kingdom and, hence, raised questions about the credentials of its Islamic identity narrative. In other words, the stability of the Saudi regime identity and its ontological security were shaken. This challenge did not only affect the external dimension of the Kingdom's identity narrative, it exposed this identity inconsistency to Saudi public opinion, garnering Hamas admiration among domestic Islamic groups within Saudi Arabia. As a consequence, the Arab public, including the Saudi one, came to resent the positions of the so-called moderate Arab regimes and to largely sympathize with the resistance. Massive demonstrations took place in Jordan, Egypt, Lebanon, as well as in the Gulf, showing support for Hamas and virulently criticising the positions of Arab regimes (Pollock 2009). In order to escape these inconsistencies in its identity narrative, the regime attempted to restore its ontological security through various mechanisms aiming at demonizing and Othering Hamas.

First, the Saudis blamed Hamas for calling the 2009 War upon itself by refusing the negotiations with Israel. Indeed, the Gaza War broke out, at the end of a six-months ceasefire between Hamas and Israel, as on-going negotiations between Israeli and Palestinians failed.⁹⁵ In other words, the Saudis blamed Hamas for being the cause of the Palestinian suffering in Gaza that could have been avoided if the organization had complied with the Saudi vision of conflict resolution. This Saudi narrative became even more explicit during the second and third Gaza wars (2012 and 2014), where the Saudi King explicitly blamed Hamas. In 2014, in a stunning statement, King Abdullah called the Hamas-Israel war a 'collective massacre' caused by Hamas (Batrawy and Al-Shihri 2014).

Just as the Saudi mediation on the Palestinian-Israeli level failed to temper Hamas' stance toward Israel, the Kingdom's interference in the intra-

⁹⁵ The cease-fire was from June 2008 through December 2008.

Palestinian split also failed. A few months following the Mecca Accord, the situation evolved into a civil war that ended in Hamas' control of the Gaza strip with Fatah remaining in control of the West Bank. Accordingly, the Saudi Kingdom considered the Israeli war on Gaza in 2009 to be a direct result of Hamas' failure to unite with Fatah. As Saudi Foreign Minister Prince Saud Al-Faisal declared, 'This terrible massacre [from the Gaza war] would not have happened if the Palestinian people were united behind one leadership, speaking in one voice' (Erlanger 2009a).

Moreover, to fend off domestic discontent, the Kingdom attempted to portray Hamas as Other by questioning the organization's religious credibility. For example, the Kingdom did not recognize Palestinian casualties as martyrs (*shahīd*), a position clearly reflected in the Saudi media, such as the TV channel *al-Arabiya* (L. Rubin 2014, 110). Second, Hamas was portrayed as an Iranian agent undermining the so-called 'Arab interest', defined in Saudi terms as the peace process with Israel. Finally, the regime relied on the 'ulama's religious discourse to delegitimize the protests supporting Hamas. 'Abd al-'Aziz Al-Sheikh⁹⁶, the grand mufti in the Kingdom, issued a *fatwa* forbidding protests in support of Gaza and describing these acts as *ghawghā'iyya* [demagogic]. Instead, the grand mufti stated that the best way of helping the Palestinians is to send aid and financial support (Al-Ifrig 2009). In addition, the Kingdom aimed at improving its regional credibility by offering financial support to the Palestinians. At the end of the war, the Al Saud offered to donate US\$ one billion for rebuilding Gaza (Al-Faisal 2009). In short, despite their shared Sunni ideology, the Kingdom demonized Hamas and portrayed it as Other. This similarity exposed Saudi identity inconsistencies and threatened the stability of its regime identity narrative. Moreover, the sectarian (Sunni-Shiite) discourse employed by the Kingdom to distinguish and distance itself from the 'Resistance Axe' seemed losing credibility.

⁹⁶ He is the grand mufti and head of the Permanent Committee for Islamic Research and Issuing Fatwas.

3. Explaining Syrian Threat Perception

Whereas the Saudi regime perceived Hamas as a threat despite their shared Sunni background, Syrian policies operated based on an entirely different logic. Under the secular Ba'ath regime, Syria fostered a strategy that combines the oppression of the Syrian Muslim Brotherhood at home and support for Hamas, a Palestinian offshoot of the Muslim Brotherhood in the Gaza strip. In an interview on Al-Jazeera, senior Hamas Leader Mahmoud al-Zahar highlighted this paradox: 'Syria has very good relations with Hamas, but terrible relations with the Muslim Brotherhood group. More than 24,000 people [members of the Muslim Brotherhood] were killed in 1982 [in Hama] by the Syrian regime' (Al-Zahar 2009).

Although the Syrian regime perceives Islamist movements as its bitter enemy at home, this did not impede al-Assad from adjusting its identity in response to physical security needs in the run up to the 2009 War. Due to Israel's perpetual military supremacy, the Syrian regime perceived Hamas as an asset in its quest to counterbalance the southern neighbour. The regime further understood that an alliance with Hamas would allow Syria a strategic depth in its struggle against Israel and enhance its leverage in pushing Israel back to the negotiation table. Accordingly, Syria's support for Hamas included providing refuge in Damascus to senior Hamas figure Khaled Meshal. In addition, the Syrian regime provided the Palestinian ally with arms and military training (Karmon 2008, 33-34; Ghadry 2009). All told, in 2009 Syria's threat perception represented a case of ontological security/physical insecurity.

I argue that Syria's physical insecurity and its regional isolation dominated the regime's threat perception. This perception led the secular Ba'ath regime to support Hamas' Islamic narrative, an ideology it heavily oppressed on the domestic level. Although Hamas' ideology *per se* did not challenge the Syrian regime identity, alliance with the group held the potential of unravelling the contradictions within Syria's identity narrative. To avoid

imminent ontological insecurity, the regime revived an extensive pan-Arab discourse that includes support for any other group engaged in a struggle against Israel, regardless of its secular or Islamic nature. The first section below outlines the regional environment affecting Syrian foreign policy in the aftermath of the 2006 Lebanon War up until the 2009 Gaza War. The second section examines the ideational accommodation the Syrian regime underwent during its alliance with Hamas, where the Islamist narrative converged with Syria's pan-Arab vocation.

3.1. The Relative Power Distribution: Escaping Isolation

In the early years of Bashar al-Assad's presidency, the regional system established by Hafez al-Assad collapsed, and Syria became internationally isolated and regionally estranged. The Ba'ath regime in Syria became a target of the US war on terror under the George Bush administration following a series of events that led to a serious fracture in Syrian-US relations: the outbreak of al-Aqsa Intifada (2000), the 9/11 attack on the United States, and the 2003 Iraq War. In addition, Syria became isolated at the regional level following its rapprochement with Iran and Hezbollah, which created a rift in Syria's relationship with the so-called 'moderate camp'. This regional fragmentation culminated during the 2006 Lebanese War, when Bashar al-Assad called the leaders of Saudi Arabia and Egypt 'half-men' (B. Al-Assad 2006b). Following Hezbollah's performance in 2006, the isolation of the Syrian regime became partially alleviated, as international and regional actors understood the al-Assad regime's value in managing Middle East conflicts. This section argues that despite these improvements in Syria's position, it remained under a condition of severe physical insecurity. Alongside the constant risk of an Israeli attack, the Syrian regime feared a return to its isolation.

In immediate terms, after the Lebanon War Syria's influence in the Iraqi and Lebanese spheres of conflict made the Ba'ath regime a 'sought-after player' (Zisser 2009b). As Martin Indyk, a former American Ambassador to Israel, stated at the time, 'Syria is a strategic linchpin for dealing with Iran and the

Palestinian issue' (quoted in El-Khawas 2011). This influence constituted Syria's card in the negotiations with Israel over the Golan. At the same time, despite a long history of enmity, Syria moved into a close alliance with Turkey. The empowerment of Kurds in Iraq following the 2003 Iraq War gradually brought Syria and Turkey together (Hinnebusch 2014, 229). Despite an Iranian objection, Turkey even sponsored the renewal of peace talks between Syria and Israel in May 2008 (Bronner 2008).

During the same year, Syria's participation in the Doha agreement—which eased the tensions in Lebanon—made Syria indispensable for European and US efforts to stabilize the region. As French President Sarkozy broke with the US policy of isolating Syria, Bashar al-Assad was invited to the Paris launch of the European-Mediterranean Union, with Syria's accession to this partnership on the agenda. The overall improvement in relations was made possible by leadership change, as Nicolas Sarkozy replaced Jacques Chirac in France and Barack Obama replaced George W. Bush in the United States. The Obama administration adopted a more conciliatory approach to the Ba'ath regime and opened a cautious dialogue to explore the possibility of improving relations (Hinnebusch 2010a). At the regional level, the tensions between Syria and Saudi Arabia appeared to ease in 2007, especially during the Arab summit in Riyadh when King Abdullah expressed his wishes to restore Syrian-Saudi détente (Kabalan 2010, 39–42).

Although the severe isolation and the regional estrangement of Syria seemed alleviated in 2008, its physical insecurity persisted due to its protracted geopolitical predicament vis-à-vis Israel. Syria was unable to sustain a conventional military balance with Israel as a growing technological and airpower gap opened between the two countries. Such an imbalance in Israel's favour is quantitatively evident. Israel was predominant in several aspects, including land weapons, air forces, artilleries, arm deliveries, mobilized army manpower, and military expenditures. Worse, from Syria's point of view, this Israeli predominance was not only quantitative. After the 2006 Lebanon War, Israel sought to make considerable progress in developing the quality of its

reserve manpower and making technological advances in conventional military hardware (Cordesman and Burke 2008). In the face of this situation, Syria sought to consolidate its alliance with Iran, Hezbollah, and Hamas (Goodarzi 2013). Moreover, it turned to Russia for arms purchases. From 2007 to 2010, the value of Russian arms deals with Syria more than doubled—from US\$ 2.1 billion in 2003 to US\$ 4.7 billion in 2006 (Herszenhorn 2012). The continuation of Israel's occupation of the Golan Heights remained a constant pressure on the Syrian leadership. Unable to recuperate the occupied lands by military means, the regime was aware of its inability to compel Israel to withdraw to the 1967 borders. The only alternative means to achieving this goal was through negotiations.

When the Gaza war broke out in December 2008, the Ba'ath regime saw an opportunity to enhance its position in the negotiations with Israel as well as in its relationship with the United States. In other words, Syria sought to replicate the 2006 Lebanon War scenario, which led to Syria's reintegration at the regional and international levels. By hosting Hamas' leadership and allowing them to maintain permanent offices in Damascus, the Syrian regime demonstrated a strong support for the Palestinian resistance during the Gaza conflict. On the ground, Syria backed Hamas' military efforts by relaying information on Israeli air sorties that were detected by Syrian Radar installations. Domestically, the Syrian regime facilitated a donation campaign for the Palestinians in Gaza (ACRPS 2014). Moreover, Syria, together with Qatar, spearheaded an effort to convene an extraordinary Arab summit aimed at supporting the resistance and bringing the Israeli aggression to an end. During the extraordinary Arab summit in Doha in mid-January 2009,⁹⁷ Bashar al-Assad expressed his full support for Hamas and stated that Israel only understands 'the language of blood'. In addition, he called on the Arab world to boycott

⁹⁷ The divisions among Arab states over Gaza manifested during the preparation for Arab summits. Whereas Syria and Qatar pushed for an extraordinary Arab summit in Doha aiming to put an end to the Israeli aggression, Egypt, Saudi Arabia, and other Arab states boycotted the Doha summit and discussed the Gaza issue one week later in Kuwait during the Arab Economic summit (Black 2009b).

Israel, to close any Israeli embassies in the region, and to sever all 'direct and indirect ties with Israel'. Furthermore, he announced the suspension of peace talks between Israel and Syria ("Bashar Al-Assad Speech in the Doha Summit" 2009).

The Syrian support for Hamas cannot be understood without a detailed examination of the relative power distribution and Syria's physical insecurity in its geopolitical environment. Developments immediately post 2006 encouraged Syria to play a more confident role. Its alliance with Iran and Hezbollah made it a regional asset indispensable in solving Middle East conflicts. As Carter summarized it: 'Syria is a key factor in an overall regional peace' (Carter 2009, 174). The Syrian leadership employed its support for non-state actors in the Middle East as a strategy to manage its regional isolation and acquire leverage during the negotiations with Israel to recuperate the Golan Heights. As this strategy led to a partial alleviation of Syria's regional isolation, the Syrian regime finally managed to obtain a foothold in-between two networks in the region. On the one hand, it was a constituting part of the Iran-led 'resistance axis', pursuing a policy of defying the West made sustainable by economic relations with Asia and renewed economic and military relations with Russia. On the other hand, Syria's relationship with the West was revived, which manifested itself in the détente in the relationship with France, the Turkish-sponsored peace talks with Israel, the cautious dialogue with the United States, and the détente with Saudi Arabia. The Syrian regime aimed at maintaining such a balance with the ability to tilt towards one camp or the other with the view of obtaining benefits from both sides

Yet, Syria still found itself in an unfavourable physical security environment that made it, at the end of the day, inclined to support Hamas in 2009. Despite the Obama administration's willingness to open the dialogue with the Ba'ath regime, it maintained continuity with Bush's policy by setting pre-conditions and making demands on Syria. The United States offered to play a role in Israeli-Syrian negotiations, remove Syria from the list of states sponsoring terrorism, and lift the economic sanctions, if Syria severed its

relations with Iran, Hezbollah, and Hamas. In other words, improving the relationship with the United States and the 'moderate' axis in the region could only come at the expense of depriving Damascus of all its 'cards', especially in the negotiations with Israel (Hinnebusch 2010a). Unsurprisingly, the Syrian regime remained suspicious of US motives and refused to sever its relationship with the 'axis of resistance'. As Bouthaina Sha'ban, al-Assad's political and media advisor, stated, 'improved relations with the US would not come at the expense of Syria's relationship with Iran (*Al-Quds Al-Arabi*, 19 March 2009).

Consequently, in 2009 the Syrian regime believed that its ability to maintain a dialogue with the United States and leverage over Israel during the negotiations stemmed from its ability to influence the political and military outcome in Gaza, especially given that the military balance heavily tilted in Israel's favour. Therefore, Bashar al-Assad steadfastly backed Hamas, even though this led to the suspension of the Turkish-sponsored negotiations with Israel. As former Syrian Information Minister Mahdi Dahlallah explained,

The most important factor that brought about the change [in U.S. policy] is the Arab resistance camp, [comprising] Syria, the Lebanese and Palestinian resistance, and the Iraqi people, who refused [to accept] the occupation. Additional [factors] are the Iranian position, which refuses to accept the [American] hegemony, as well as the new Russian policy [...] Had Bush been able [to implement] his policy without meeting opposition from anyone, the new administration would have continued the same policy [...] The change introduced by Obama [...] does not stem from an [American] reassessment of its ideology [...] but from [Bush's] failure to achieve the goals that the U.S. was—and still is—pursuing [...] [This administration simply] realized that it cannot promote the totality of its interests in the region without a relationship with the Syrians' (quoted in Hinnebusch 2010a, 26).

From this perspective, by backing Hamas during the Gaza War, al-Assad aimed to advance his position against Israel over the Golan Heights and to prevent the United States from demonizing his regime. Syria attempted to persuade the United States to abandon the strategy of aligning with the so-called 'moderate' Arab Sunni states as a coordinated front against 'Shiite' Iran, Hezbollah, and Hamas. In short, the Syrian support for Hamas during the Gaza

War seemed tied to Syria's overall regional security strategy of resisting Israel's regional predominance and US intervention, both of which threatened the physical security of the Ba'ath regime. According to Patrick Seale (2009), the above strategy was efficient in guarding the vital interests of the Syrian regime, as it protected Syria's sphere of influence in Lebanon and prevented foreign penetration. In addition, this strategy countered the US-Israeli hegemony in the region by strengthening the Teheran-Damascus-Hezbollah-Hamas axis, which continued to steadfastly back the Palestinians. More importantly, the Syrian policy blocked the US strategy of reshaping the Middle East, or at least that component of it which aimed at bringing down al-Assad's regime.

In 2009, Syria's support of Hamas seemed to result in a slight change in US foreign policy toward Syria. Shortly after the ceasefire in Gaza, the Obama administration opened a dialogue with Bashar al-Assad, as the regional weight of Syria in Middle East issues became evident. In February 2009, four US officials visited Damascus to negotiate Syrian-US relations (Islammemo 2009). The negotiations were over the following issues: the stability of Iraq and Lebanon, a comprehensive peace process for the Arab-Israeli conflict, and the Iranian-Syrian alliance. In July 2009, US envoy George Mitchell visited Damascus as a prelude to starting the Syrian-Israeli peace negotiations (BBC Arabic 2009). Despite Syrian and US optimism, however, the negotiations ultimately did not produce the intended *détente*. By the end of 2009, no agreement was reached, and the United States renewed the sanctions on the Syrian regime. Furthermore, the al-Assad regime was further accused of bombings in Iraq in August 2009 as well of fostering the instability in Lebanon.

The failure to reach an agreement reinforced Syria's fear of a return to isolation and explains the regime's insistence on maintaining its alliance with Iran as well as its refusal to disassociate itself from Hamas or Hezbollah. In other words, it was this physical insecurity that led the regime to capitalize on its alliance with Hamas, which was identified as a 'friend'. The next section explores how the Syrian regime's pan-Arab narrative converged with its realist-based foreign policy choices.

3.2. *The Regime Identity Narrative and the Resistance Discourse*

After 1979, the Syrian regime identity had been narrowed from pan-Arabism to a 'Syrio-centric Arabism', which is a confluence of pan-Arabism and Syrian nationalism. Yet, Syria's physical security needs following the 2003 Iraq War led to the reassertion of an inclusive pan-Arab narrative. This return to pan-Arabism converged with Syria's new regional struggle against the United States and Israel as well as its alliances within the axis of resistance (*muqawma*) or the steadfastness (*muman'a*) front. Despite this apparent convergence between Syria's pan-Arab narrative and Hamas' struggle against Israel during the 2009 Gaza War, this alliance posed a potential source of instability for Syria's regime identity and its ontological security. The secular Ba'ath regime, which oppressed the Muslim Brotherhood at home, found itself allying with Hamas, which was itself an offshoot of the Muslim Brotherhood in Gaza. The Syrian regime avoided this contradiction by reviving an overarching inclusive pan-Arabism in the context of the resistance against Israel and the United States. This section examines the new Self/Other framing Syria's regime identity narrative.

The pan-Arab discourse was discernible in Bashar al-Assad's speech during the extraordinary summit in Doha. He repeatedly referred to the Arab people as 'the Arab nation', a term that targeted Arab public opinion. He described the struggle between the Palestinians and Israel as a struggle between 'Arab resistance' and 'Israeli terrorism'. The following statement summarized this pan-Arab dimension: 'the destiny of Gaza is not that of Gaza Citizens alone; it is our shared destiny. The battle of Gaza is the battle of every Arab citizen'. From this perspective, Syria's pan-Arabism was inclusive. The 'us'-versus-'them' definition depended on identifying Israel as the enemy. In other words, the friend/enemy identification guided the Self/Other framing. From this perspective, the definition of the pan-Arab Self reasserted an inclusive dimension gathering those secular and Islamic groups who fight against Israel. al-Assad framed this Arab dimension in the context of the struggle against Israel: 'Israel wants through its aggression on Gaza to change the new realities

created by the resistance, especially after the resistance has been victorious in Lebanon, stronger in Palestine, and been spread to the consciousness of the Arab Citizen' ("Bashar Al-Assad Speech in the Doha Summit" 2009). On a front-page article in the government Syrian daily *Teshreen*, pro-Syrian former Lebanese MP Nasser Qandil stated that the Doha summit was a turning point in the position of the Arabs, who began to adopt the Syrian discourse:

President Assad's speech at the summit was a prime example of the new [Arab] discourse—a discourse that Syria had used [even] in the midst of the crises and wars, and whose [main principles] are adherence to the resistance and a quest for partners and sources of power within the shifting world [order]. This [will be achieved] by formulating a new Arab conception capable of generating alliances with rising regional powers that are interested in partnership—especially Turkey and Iran—while suspending the [Arab] peace initiative, which has been killed by Israel more than once (*Teshreen*, 5 April 2009).

Whereas the Syrian regime depicted its struggle with Israel as primarily related to the territory, Hamas portrayed the conflict as one about faith and belief. In this regard, Hamas was known for 'Islamizing' the Palestinian-Israeli conflict. In Livtak's words (1998, 149), 'at the heart of Hamas' ideology is the emphasis on 'the Islamic essence' of the Palestinian cause'. Interestingly, Bashar al-Assad entirely ignored the Islamic nature of Hamas' ideology. Hamas was even referred to in his speeches as the 'Arab resistance' ("Bashar Al-Assad Speech in the Doha Summit" 2009). The same struggle against Israel, the United States, and the so-called 'moderate' Arab regimes was pan-Arab for Syria and Islamic for Hamas. Nevertheless, the Syrian regime framed an inclusive pan-Arabism wherein Islamism fit into the discourse. Such identity fluidity enabled the Syrian regime to accommodate its physical security needs.

Does this mean that leaders can manipulate identity narratives whenever and however they need to? No. Leaders can only activate or deactivate identity elements already present at the domestic level that provides leaders with the 'menu of choices'. In Syria's case, adopting this inclusive pan-Arabism was possible as the domestic audience supported the struggle against Israel. Subsequently, the Syrian official discourse that followed during the 2012

and 2014 Gaza Wars merits further attention because of the way it shifted with the changing political landscape in the Middle East. The Syrian regime's position toward Hamas in the 2012 and 2014 Gaza Wars only confirmed that the resistance axis, including the Syrian-Hamas alliance, was based on strategic interests. It also suggests that leaders cannot easily manipulate regime identity. At the outbreak of the Syrian uprisings on 15 March 2011, Hamas played an ambiguous role and attempted to conciliate the two opposing sides. Once the conflict between the protesters and the regime transformed into an armed struggle, the Ba'ath regime requested Hamas' unconditional support in its struggle against the revolutionary movements. The Iranian regime even echoed this request. When Hamas refused to assist Damascus, the Syrian regime demanded the departure of Hamas' leaders from the Syrian capital and the shut down of their permanent offices in November 2012 (ACRPS 2014).

Despite Hamas' refusal to support the Syrian regime, al-Assad could not follow the 'moderate' Arab regime in renouncing or condemning the resistance. In his inauguration speech on 17 July 2014, the Syrian president insisted that his government would remain committed to the Palestinian cause. He did, however, make a distinction between the Palestinian resistance and Hamas, which he deemed to be a 'fraudulent' resistance movement. As the following statement summarizes,

[We are required] to distinguish carefully between the Palestinian people who resist, whom we must support, and some ingrates among them [...] between real resistance fighters, whom we must back, and those amateurs who wear the garb of resistance according to their interests and to improve their image and bolster their power. If we do not do this, then, consciously or unwittingly, we will be serving Israeli goals (quoted in ACRPS 2014, 3).

In line with this position, the Syrian official media henceforth referred to various Palestinian factions as the 'resistance' and avoided mentioning Hamas. Instead, the media stressed that the faction that allied with the Syrian regime represent the 'genuine resistance'.⁹⁸ Yet, the Syrian regime could not go further

⁹⁸ E.g. the Jihad Jibreel Brigades.

in condemning Hamas, which reflects the significance of the Palestinian question in the domestic struggle for legitimacy in Syria. Following a decade of reviving pan-Arabism in the Syrian regime identity discourse, the Syrian uprisings reversed this process. As a consequence, in its on-going struggle for survival, the Syrian regime has downgraded pan-Arabism in favour of a strong Syrian nationalism (Rifai 2014).

4. Conclusion

This chapter provided further evidence for the utility of a two-layered conception of security in explaining the divergent Syrian and Saudi threat perception. In 2009, Saudi Arabia, traditionally portraying itself as a supporter of the Palestinian cause, condemned the resistance movement, Hamas. It is hard to imagine that a non-state actor enslaved in the Gaza strip could pose a threat to the Kingdom, even though it received financial support from Iran. The analysis showed that the Kingdom's physical security was not endangered. Instead, the stability and distinctiveness of its identity were disrupted. In the aftermath of the Islamic revolution in Iran, the Saudi Kingdom narrowed its identity from pan-Islamism to Sunni Islam. Since then, the Kingdom has portrayed itself as the leader of Sunni Islam in the region against a Shiite Other. Hamas, a Sunni Islamic movement presenting an alternative vision of the Arab-Israeli conflict to that of the Kingdom, was a source of anxiety and ontological insecurity for the Saudi regime. In response, the Kingdom criticized Hamas not only for its war against Israel but for its version of Islamic ideology, which was described as untruthful. In other words, the Saudi Kingdom redefined its identity and presented a new source of distinctiveness (Muslim Brotherhood versus Salafi), according to which Hamas is considered to be the 'Other'.

In contrast to its Saudi counterpart, the al-Assad regime supported Hamas against Israel, which was perceived as a source of danger to Syria's physical security. In this chapter, I examined the geopolitical situation surrounding the Syrian regime. Fearing a return to its regional and international

isolation following the failure of the peace talks with Israel, the al-Assad regime identified Hamas as a 'friend' whereas Israel and the United States were identified the 'enemy'. Based on this physical insecurity, the regime identity adopted a broad pan-Arab discourse according to which the 'us' includes any actor identifying Israel as an enemy, justifying the alliance with Hamas.

This empirical chapter contributes to the development of this study's theoretical framework in several ways. First, the analysis of Saudi threat perception towards Hamas showed that identity convergence and similarity can be source of threat and conflict. Whereas Saudi Arabia was able to reframe its identity narrative and distinguish it from the Islamic revolution in Iran and Hezbollah using a Sunni-Shiite discourse, the same narrative was not possible in the case of Hamas. Instead, Saudi Arabia further narrowed down its identity by stressing the Sunni-Wahhabi element and demonizing the Muslim Brotherhood ideology. In other words, this chapter has showed that ontological security provides a theoretical lens through which sectarianism can be seen as a source of security and distinctiveness for the Saudi Kingdom. This empirical chapter provides some insights to examine Saudi behaviour during the Arab uprisings, especially towards the rise of the Muslim Brotherhood to power in Egypt.

Second, Syrian threat perception towards Israel and its alliance with Hamas showed how states can hold diverging identities and interests. Whereas the Syrian regime oppressed the Muslim Brotherhood at home, they supported a group with a similar ideology at the regional level. This case shows the benefit of examining identities and interests as separate spheres of analysis. A constructivist approach assuming that identities and interests are co-constituted masks these dynamics. In these cases where identities and interests dictate contradictory behaviour, the study showed how the Syrian regime reframed and accommodated its identity narrative to conform to its physical security. The case also showed that holding contradictory identity and interests create a potential for a situation of ontological insecurity, where states face 'shame'. Giddens (1991, 65) defines shame as 'anxiety about the adequacy of the narrative by means of which the individual sustains a coherent biography'. At

the state level, shame translates into states' anxiety over the ability to reconcile actions with the narrative states use to present their self-identity and justify actions at both domestic and international levels. As the Syrian regimes supported Islamist movements beyond its borders—namely Hamas— while oppressing groups with similar ideology at home could be an insurmountable source of shame. To avoid cases of ontological insecurity, the regime had to accommodate its regime identity narrative in a way that conforms to its material interests.

Finally, this chapter contributes to the debate on the role of sectarianism in Middle Eastern international relations. It provides empirical evidence that sectarianism is a complex process that transcends primordial and instrumentalist approaches. On the one hand, Saudi animosity with Hamas—a Sunni movement—seemed like a replica of Saudi behavior towards Hezbollah—a Shiite movement. On the other hand, Al-Assad's regime, often depicted as Alawi, allied with a Sunni movement. Both cases have showed that threat perception is hardly driven by the content of these sectarian identities. Likewise, instrumental approaches have failed to provide an answer to this enigma. By focusing on power structures, instrumentalist approaches have ignored sectarian identity formation or what it means to make sectarian claims. Instead, this chapter using ontological security provides a third way to examine sectarianism as serving actors' need of distinctiveness and their security-as-being. In this way, it examines the processes of sectarian identity formation alongside power dynamics.

Chapter 6: Conclusion

The exception is more interesting than the rule. The rule proves nothing; the exception proves everything. In the exception the power of real life breaks through the crust of a mechanism that has become torpid by repetition.

Carl Schmitt, *Political Theology: Four Chapters on the Concept of Sovereignty* (1922, 15).

How and why states perceive others as threats and what factors drive the process of threat perception remain core issues for scholars of international relations. To answer these questions, theories have been designed, refined, and applied to a broad range of cases as well as to different regions. These intellectual efforts have occupied a central place in IR theory as they explain state behaviour and unravel the dynamics of cooperation and conflict. Although uncovering the patterns of alliances and coalitions in the Middle East can be an intimidating exercise, the study of Middle Eastern dynamics has added to and continues to contribute to this theoretical endeavour.

The claim that Middle East international relations, enmity, and conflict have been driven by ideational factors is indisputable. Pan-Arabism, pan-Islamism, and sectarian identities have shaped regional security dynamics. Ideational factors are not only present as trans-national driving forces, but also play a crucial role at the domestic level. Supranational, national, religious, ethnic-tribal identities not only operate within states, but transcend state borders and influence state behaviour at the regional level. In this regional context, realist lenses treating identity as secondary have proved limited when faced with controversial empirical cases. Likewise, empirical analyses provide compelling evidence that focusing on identity while considering material forces secondary can be equally misleading. In a region known to be the most militarized in the world, inter-state conflicts and war are still pervasive. According to the Global Militarization Index (GMI), six of the top ten countries

with the highest degree of militarization are in the Middle East. Nearly all other Middle Eastern states can be found among the first 40 positions (Grebe 2014, 6–7). As Gause (2003, 274) put it, ‘if there is one area of the world where fears that a neighbour’s military power could be turned against a state should be high, it is the Middle East’. From this perspective, the Middle East, a region where ideational and material forces are constantly in play, provides an optimal pool for examining anomalies and puzzles that could advance theoretical debates about threat perception.

The existing literature on threat perception is divided between those who prioritize identity over material power and those who reduce identity to an epiphenomenon or a mere instrument of material power considerations. Here, I have attempted to move beyond the ‘either/or’ dichotomy to explore how these two phenomena coexist and interplay in the process of threat perception. This chapter briefly summarizes the findings. I highlight the implications of the argument for the study of Middle East politics and IR theory in general. I also discuss some of the limitations and anomalies that this study could not address, some of which provide avenues for future research.

1. Summary of the Findings

This study has explored some of the ways in which ideational and material factors interplay in affecting and shaping international politics, by focusing on how and why states perceive threats based on ideational forces in some instances while threat perception is driven by material forces in other instances. It has offered a different way of thinking about threat perception by presenting a two-layered conception of security: ontological and physical. Whereas physical security, dominated by the logic of *security-as-survival*, is associated with military threats that endanger the survival of the state, ontological

security, or *security-as-being*, is associated with those dynamics and processes that centre around the reproduction of identity narratives and the maintenance of a system of certitude. The purpose has not been to generate a universal theory outlining the conditions under which ideational factors override material factors or vice versa. Instead, I have sought to advance the debate around the ideational/material nexus in threat perception by examining how these two distinct layers of security interact leading to divergent threat perceptions.

The empirical focus was on Saudi and Syrian threat perceptions during three major regional wars in the Middle East in an effort to understand how and why states diverge in their threat perceptions. The findings from the cases suggest that states, or more specifically regimes, perceive their ontological security to be threatened when the Other's identity disrupts the continuity or the distinctiveness of their identity narrative, or in one word, their security-as-being. This logic becomes even more apparent if states' physical security is not threatened. In this situation of ontological insecurity/physical security, states tend to restore their identity security through various mechanisms, namely, demonizing the Other and reinventing their identity narrative. Their perception of the relative power distribution, hence, becomes driven and influenced by the need to restore their security-as-being. This logic was dominant in the Saudi case. The Syrian case, however, showed that states could experience a different situation, that of physical insecurity, as the regime's security-as-survival is at stake due to an imbalance in the relative power distribution. This situation becomes even more evident when the regime's ontological security is stable. In other words, the regime is in a situation of ontological security/physical insecurity.

The study has presented a second argument connected to the first: examining how states perceive threats provides additional insights into how ideational and material forces interact. Although the two layers of security—physical and ontological—are distinct and have different logics and dynamics, they are systematically intertwined and in constant interaction, which is an aspect that is often overlooked in the study of international relations, and of

Middle East politics in particular. This study has shown that states fearing for their physical security usually reframe their identity narrative to adapt to the constraining relative power distribution. Also, states fearing for their ontological security can mobilize military and material resources to bolster their ideational defensive mechanisms. To illustrate this point, this study has made a direct link between two dichotomies corresponding to the two layers of security: friend/enemy (physical security) and Self/Other (ontological security). According to the logic of physical security, states identify friends and enemies based on material forces. Following the ontological security logic, states, however, identify the us/them distinction or the Self vis-à-vis the Other based on ideational non-tangible factors. By dissociating these two spheres, one can come to the conclusion that the Other is not necessarily an enemy. Nevertheless, the enemy is necessarily an Other. Any incongruence between these two layers of security and their corresponding dichotomies requires adaptation and accommodation.

If states are in a situation of ontological insecurity/physical security, they attempt to restore their security-as-being by framing or reframing the us/them distinction. In order to reinforce this distinction, states attempt to mobilize material resources and build alliances. To justify this use of resources, leaders frame the Other as an enemy or an existential threat. In this case, the Self/Other distinction becomes the driver behind the friend/enemy dichotomy. The case of Saudi Arabia's situation during the three wars discussed in this thesis exemplifies this dynamic. Iran, Hezbollah, and Hamas were all consecutively identified as Saudi Arabia's enemies. This identification followed the us/them distinction. Saudi Arabia, the leader of pan-Islam, perceived other Islamists movements as a source of disruption for its identity distinctiveness. By relying on new sources of distinctiveness, such as Sunni-Shiite sectarian narratives, the Kingdom removed these groups from the category of 'us' to 'them'. In order to reinforce its identity-as-being narrative, the Kingdom subjugated its friend/enemy dichotomy to the ontological security logic.

In the reverse situation, when states experience a situation of ontological security/physical insecurity, their identification of friend/enemy needs to be congruent with the existing Self/Other distinction. The Other does not necessarily need to be an enemy. Nevertheless, the enemy needs to fall in the 'Other' category. If the regime's alliance decision based on physical insecurity concerns generates a friend/enemy dichotomy that is incongruent with the us/them distinction, then a particular identity reframing is needed. Otherwise, regimes can potentially suffer from ontological insecurity that might evolve out of contradictions in the identity narrative. The case of Syria is informative. In 1979, when the physical insecurity of the regime required an alliance with Iran in order to fend off Saddam Hussein's military ambitions, Syria's main identity narrative was based on Arabism. According to this narrative, Iraq is identified as 'us' and Iran as 'them'. From this perspective, identifying Iraq as an enemy based on material considerations was a clear violation of the regime identity. To resolve this contradiction, the Syrian regime reframed the regime identity and changed the meaning of Arabism. According to the new narrative, Arabism does not identify the us/them based on the ethnic component of 'Arabness' but based on animosity toward Israel. Thus, because Iran identified Israel as the major enemy, it fell into the Syrian 'us' category. Likewise, Iraq fell into the Syrian 'them' category as it did not identify Israel as its most important enemy. The same adaptation took place in the cases of the Syrian alliance with Hezbollah and Hamas. Considering their Islamist background, the Syrian regime had to adapt and reframe the secular component in its identity narrative to make it more inclusive. In short, the friend/enemy dichotomy identified according to the logic of security-as-survival needs to conform to the Self/Other identification belonging to security-as-being. Otherwise, states might encounter future problems of inconsistencies in their identity narratives, ending up in a situation of ontological insecurity.

This study has shown that while physical security is obviously important, ontological security is just as important, because its fulfilment affirms state's self-identity and determines how a state sees and defines itself vis-à-vis Others.

Accordingly, states seek to maintain a consistent self-conception through a stable identity narrative. While the costs of ignoring physical security are evident, such as wars, arms races, etc., little research has been done on the cost of ignoring threats to ontological security. Ignored threats to ontological security produce what Steele (2008, chap. 3) has referred to as 'shame', according to which states recognize how their actions were (could be) incongruent with their sense of self. This feeling of shame can produce a severe case of insecurity. States therefore attempt to avoid those situations that might result into shame. Treating the need for ontological security as a simultaneous layer to physical security when examining the Syrian case led to novel empirical findings. While contributing to restoring its physical security, the Syrian regime's actions were incongruent with its identity narrative. This incongruence presented a potential case of 'shame'. To avoid this situation, leaders reframed their identity narrative so that actions and self-identity narratives become consistent.

These arguments and findings come together to form the basis of the theoretical framework that guided the empirical analysis. As I mentioned at the outset of this study, this framework allows for the examination of regimes' threat perception as a phenomenon present at the nexus of ideational/material and at the intersection of domestic/structural levels. By themselves, ideational or material lenses are insufficient to examine the phenomenon of threat perception; examining both layers that exist simultaneously and are in constant interaction allows for the drawing of a more comprehensive picture.

Saudi threat perception revealed the Kingdom's steady quest for a distinct, consistent narrative of self-identity vis-à-vis other Islamic models emerging in the region. The Islamic character of the Islamic revolution in Iran (1979), the emergence of Hezbollah as an important regional actor during the 2006 Lebanese war, and the Sunni model of resistance portrayed by Hamas all constituted sources of anxiety to the Saudis, as they threatened the stability of the regime's self-conception as the leader of the Muslim World. In these three cases, it is safe to say that the physical security of the Kingdom was intact. For

decades, the Islamic Republic of Iran was weakened and had no interest in launching a war with anyone. In the cases of Hezbollah and Hamas, the military balance was clearly in favour of Israel. Instead, the Saudi Kingdom saw the tenets of its identity narrative challenged by these three alternative Islamic models, and attempted to demonize them as a defence mechanism. Moreover, the ruling elite tried to draw a clear distinction between their identity own narrative and these models by reframing the Saudi identity narrative, arriving at a new Self-Other distinction. In relation to the Islamic Republic and Hezbollah, the Kingdom promoted a sectarian distinction based on the Sunni-Shiite divide. Henceforth, the Saudi Kingdom portrayed itself as the leader of Sunni Islam. Therefore, Hamas, a movement with a Sunni background, presented an even more challenging case to the Saudis. To surmount this challenge, the regime aimed to demonize Hamas' Muslim Brotherhood background. Saudi threat perceptions in these cases highlighted not only the interaction between ideational and material forces, but also the process of identity framing and reframing throughout several stages.

The case of Syria during the same three instances revealed another dynamic in the process of threat perception. As a result of Syria's geopolitical position and lack of resources, the al-Assad regime constantly operated under severe conditions of physical insecurity. In 1979, Syria feared a military imbalance with Israel and the hegemonic ambitions of Iraq. In 2006 and 2011, the al-Assad regime suffered a severe imbalance in favour of Israel. Moreover, Syria was regionally and internationally isolated and deprived of any Arab support. In these three cases, the physical insecurity of the regime guided the Syrian friend/enemy identification. Syria allied with Iran, Hezbollah, and Hamas to balance the source of military imbalance, i.e., Israel, and also to escape its regional and international isolation. Nevertheless, these alliances created various contradictions in the regime's identity narrative. The Ba'athist secular pan-Arab identity of the regime suffered a potential contradiction in the face of the alliance with a non-Arab Islamic regime in 1979. To a lesser degree, al-Assad supported two Islamic movements (Hezbollah and Hamas) while oppressing

their Islamic counterparts at the domestic level. Despite their importance to Syria's physical insecurity, these alliances constituted the potential for future ontological insecurity, which might lead to shame. To avoid this situation, the regime reframed its identity at each stage. In 1979, the regime changed the meaning of pan-Arabism, from an identity based on an ethnic origin to one defined by the struggle against Israel. In other words, Arabism in the Syrian context does not necessarily lead to alliances with Arabs but with anyone who supports the struggle against Israel. The alliance with Hezbollah and Hamas also resulted in the reframing of Syria's identity narrative, as al-Assad revived a pan-Arab discourse to include Islamist movements in the struggle against Israel. In a word, Syria's pan-Arab identity narrative widened and became more inclusive. Ultimately, the Syrian case demonstrates that states care about ontological security even under severe cases of physical insecurity.

The two cases presented in this study constituted extreme cases: Syria constantly suffered from physical insecurity whereas Saudi Arabia was in a perennial quest for ontological security. This leads us to an important question: are some states more prone to suffer from ontological insecurity whereas others are doomed to be victims of physical insecurity? On the one hand, Saudi state formation has contributed to its ontological vulnerability. The lack of a distinctive Saudi identity differentiated from Islam has contributed to the Kingdom's anxiety towards other Islamic models. Nevertheless, the study has shown that Saudi identity has narrowed over time from pan-Islamism to Sunni Islam. In other words, regime identities are in constant mutation. One can expect that the Kingdom will develop a more state-focused identity over time, which might lessen the effects of its ontological vulnerability. In the Syrian case, the country has suffered from physical insecurity imposed by the geopolitical situation. Nevertheless, this physical insecurity is unlikely to last. The ever-shifting regional alliances might eventually evolve towards enhancing Syria's geopolitical position in the relative power distribution. Moreover, the domestic and regional struggle in Syria can pose novel challenges to the consistency and continuity of the regime's identity narrative. Therefore, its situation of relative

ontological security might change into one of anxiety and ontological insecurity. In short, although these cases constituted extreme situations of insecurity, this does not mean that states are enclaves in perennial states of physical or ontological insecurity. On the contrary, the second part of the argument shows how the interaction between these two layers of security keeps states' vulnerabilities in constant mutation. States can alternate between possible combinations of ontological and physical security (see figure 2, p. 70).

Moreover, the cases presented here have shown that ontological and physical security can affect each other through interaction. Ontological insecurity can create or reinforce physical insecurity. In the Saudi case, in responding to ontological security needs the Kingdom pursued a foreign policy behaviour that endangered its physical security. In 1979, to restore its distinctiveness and identity difference in the face of the ontological challenge from Iran, the Kingdom allied with Saddam Hussein in his war against the Islamic Republic; concurrently, the Kingdom discursively framed the Islamic revolution not only as a threatening Other, but as one that was physically threatening and endangering the Kingdom's interests in the region. The Kingdom, in other words, pursued a foreign policy based on a particular perception of the relative power distribution, which was necessary to affirm its ontological security. As a result, conflictual relations with Iran preserved the Kingdom's ontological security, but endangered its physical security. As Mitzen (2006) argues, states may remain in conflict and can sacrifice their physical security if it preserves their ontological security. Physical insecurity may also lead to ontological insecurity. In the Syrian case, restoring physical security led to situations of ontological insecurity, as the regime pursued a foreign policy that partially contradicted its identity narrative. In order to avoid possible situations of 'shame', the regime adapted and reframed its identity narrative.

2. Lessons for IR Theory and Middle East International Relations

This thesis makes significant empirical and theoretical contributions to Middle East international relations and broader IR theory. The study's major contribution is in showing that the treatment of ideational factors as a function of material forces or vice versa has obscured the myriad ways in which both aspects are in constant interaction. Moreover, relying on the ideational versus material argument obscures the dynamics of threat perception and hinders explanations as to why states diverge in this regard. This study has put forward a theoretical framework based on a two-layered conception of security. A major contention of the thesis has been that relevant literature on threat perception in both the realist and constructivist theoretical frameworks has overlooked the co-existence and the interplay of ideational and material forces in real-world events. Rather than being confined by the '-isms', this research has aimed to advance the debates around substantive mid-range theories by adopting an eclectic approach driven by empirical puzzles.

This study contributes to the broader IR literature by providing an integrative conceptual framework that bridges and links together the specialist literature on ontological security, Self/Other relations, and realism. My analysis both complements and challenges in important ways major international relations theories, including balance-of-threat theory, regime security approaches, constructivism, and securitization theory.

First, the analysis adds specificity to Walt's balance-of-threat theory. Although Walt (1987) claimed that states balance against the greatest threat, his theory did not specify how threat are perceived or how ideational and material power considerations play out simultaneously in this process. My analysis addresses this issue by showing how ideational and material spheres coexist in each case of threat perception. Moreover, by focusing on threat perception as a dependent variable, the analysis has considered other relevant foreign policy behaviours beyond alliance formation, such as identity reframing and the consolidation of existing alliances.

My argument has important similarities with and differences from regime security approaches (cf. Gause 2003). Scholars writing in this vein suggest that leaders will resist both external and internal threats to the survival of their regime. My argument obviously shares this focus on the dual levels of threat perception. Regime security approaches focus on transnational ideologies and their diffusion as the ultimate source of ideational threat, proposing that leaders often fear that these ideologies will transcend borders and lead to domestic unrest and instability. I however demonstrate that threats to identity can operate in many other ways. The analysis here shows that the Other's identity can be also threatening as it drives actors to question their own identity. Moreover, identity similarity with the Other may threaten actors' identity distinctiveness and consistency. These threats are external, but they also relate to domestic vulnerabilities. From this perspective, identity threats emerging from the interaction with the external Other can lead to domestic rifts and struggle as the identity narrative that holds the political community together is threatened. From this perspective, looking at the separate dynamics of ontological and physical security has allowed the analysis to delve further into this concept of 'regime security', which has many meanings and dynamics beyond the ones already identified in the literature.

Barnett's constructivist account offers the most direct challenge to my understanding of the ideational sources of leaders' threat perception. Consequently, his account of Arab politics constitutes the principal competing argument to my own. Focusing on the ontological security layer allows us to understand the role of identity from another angle, one that is different from the one presented by either the constructivist approach or the rationalist-instrumentalist approach to identity. Despite sharing with constructivism the notion that state identities are constructed, a theoretical account that privileges ontological security takes a step further by providing an insight into what motivates states in their actions. Whereas constructivists argue that *interests and identities are co-constituted*, ontological security answers the questions of why they are co-constituted. By addressing the question of why states want to

affirm their self-identity, or even why they pursue a foreign policy that conforms to their identity narrative, ontological security provides a more comprehensive analysis. In addition, ontological security shows why and how shared identities can be source of conflict and enmity, a relationship that has been observed in previous works on Middle East international relations but rarely investigated (Walt 1987; L. Rubin 2014; Barnett 1998).

Moreover, the present analysis has the potential to contribute to critical security approaches, in particular to securitization theory. The latter points to the process by which issues are transformed into security issues, i.e., are securitized. Securitization is a successful 'speech act' through which actors construct others as existential threats, enabling a call for urgent and exceptional measures to deal with the threats (Buzan, Wæver, and Wilde 1998; Wæver 1995). Dissociating ontological and physical security has many merits that contribute to the development of securitization theory. My analysis has shown how ontological security—and its associated Self-Other definition—can affect physical security and its associated friend/enemy dichotomy. This type of interaction is similar to the dynamic explicated by the concept of securitization. Actors promote a Self/Other definition and tie it to a friend/enemy dichotomy, so that the Other is not simply 'different' but is an existential threat that requires the mobilization of all resources. The dissociation of ontological and physical security contributes to a better understanding of both securitization and desecuritization processes (Rumelili 2015). Moreover, the interaction between physical and ontological security informs the question of how and why the securitization process is initiated in the first place, an underdeveloped area of inquiry within critical security studies (Sjöstedt 2013, 146).

Beyond its theoretical contributions, this study makes important empirical contributions. I have shown that a serious engagement with IR theory can lead to a new understanding of established historical narratives of past events in Middle East international relations. The thesis contributes to the debate on the role of identities in the Middle East, which is divided between

primordial and instrumental approaches. This study has presented a middle ground and a novel theoretical entry based on ontological security. First, I counter the primordial approaches that have predominated in the analysis of Middle East alliances, and which portray the Syria-Iran-Hezbollah axis as a 'Shiite axis' and the Egypt-Saudi Arabia-Jordan alliance as a 'Sunni axis'. Instead, I have argued that sectarianism emerged as a defensive mechanism employed by actors whose ontological security was endangered. Second, this study also shows that a rationalist-instrumentalist approach to identity obscures those cases where identity is the major driver behind state behaviour. Moreover, the theoretical framework presented here may explain other instances in Syrian or Saudi foreign policy. For example, the ontological security lens provides an insight as to why the Kingdom perceived the rise of the Muslim Brotherhood to power in Egypt as a threat. In addition, the theoretical framework presented here can inform the study of alliance decisions taken by other Arab states—such as Iraq (pre-2003), Jordan, and Egypt—where there is evidence of ideational and material interplay.

3. Unresolved Anomalies and Avenues for Future Research

My study also has notable limitations, some of which suggest areas that deserve further study. Five issues stand out. First, the argument may be limited in terms of the types of behaviour it explains. It cannot explain all cases of threat perception, as it focuses on those particularly driven by relative power distribution and identity narratives. Moreover, the ideational forces I have considered are mainly limited to regimes' identity and their effect on threat perception. Culture, ideas, and other ideational factors that might contribute to threat perception and state behaviour are not accounted for in this study.

Second, the argument tells us little about the sources of the replacement identity narratives that are central to restoring or maintaining ontological security. My argument shows how leaders frame and reframe their identity to cope with ontological or physical insecurity, but I have not delved into the

sources of these identity narratives or why particular narratives emerge among others. The case of Saudi Arabia is relevant in this respect: namely, why did the ruling elite frame their identity narrative to be distinctive from their Iranian counterparts using a sectarian Sunni-Shiite reference, whereas the Arab/non-Arab distinction, like the one Saddam Hussein used, could have served the same purpose? I am far from asserting that leaders can enforce any random identity narrative. Instead, this identity narrative should be socially accepted and figure within the existing social and historical structures. That is an important part of the story that takes place in this process of restoring security, and it certainly deserves more attention in future research.

Third, the argument is limited to non-democratic contexts or, in other words, to authoritarian regimes where authority is centralized in the hands of the elite in power. I have told the story of specific elites perceiving threats to the survival of their regimes while possessing some power to control their societies. From this perspective, some threats might be perceived by the elite but not be understood as such by the subject society. For example, the Saudi people and social groups did not share the regime's perception of Hamas or Hezbollah as threats. A similar situation could be found in Egypt and Jordan. From this perspective, the role of domestic institutions in allowing the regime this sort of independence from domestic forces has not been considered. Also, divided societies, where no one powerful elite is in control, are also outside of the scope of this research. Nevertheless, as stated in the previous section, this thesis makes a contribution to the dynamics of interplay between ideational and material powers beyond authoritarian regimes. For this framework to be applied in democratic or semi-democratic contexts, a different account of how domestic and regional spheres interact would be necessary. Ideational and material factors interplay is a phenomenon that exists beyond autocratic regimes and beyond the phenomenon of threat perception. As Risse et al. (1999) show, national identities and interests interacted in European states' decision to join the European Economic and Monetary Union. They examine how the interaction between national identities and interests led to divergent

policies in the cases of Germany, France, and Great Britain. In other words, the interaction between identity and relative power distribution in this study can inform similar processes in other democratic and autocratic countries. For application to democratic contexts, domestic structures as well as regional interactions might require an adaption of the assumptions underlying the theoretical framework. Moreover, as democratic regimes operate differently, the sources of threats affecting their ontological and physical security can be of different nature.

Fourth, the argument does not consider the weight of dynamics at the international level in regimes' threat perception. The Middle East is often referred to as the most 'penetrated' system, as it is deeply influenced by international interventions but not fully subordinated (Brown 1984, 16-17). Both bipolarity during the Cold War and the Pax Americana after 1991 have influenced regional politics in myriad ways. To examine this influence, Hinnebusch (2003a, chap. 2) distinguishes between interactions at the international system level, or the 'core', and those at the regional level, or the 'periphery'. This study did not, however, make this distinction explicit. International actors and their influence on regimes' threat perception were accounted for only at the empirical level, such as the Saudi-US partnership. The dynamics of the international system and their influence on regional interactions were not theorized. Future studies should explore to what extent this international level of analysis systematically influences regimes' threat perception in Middle Eastern international relations.

Fifth, the research design did not allow for variations in within-cases comparisons. Although the case studies were chosen based on variation in the dependent variable, within-case comparisons presented similar cases on the independent variables (ontological and physical security). Syria during the three wars consistently evinced a situation of ontological security/physical insecurity. Meanwhile, Saudi Arabia consistently experienced ontological insecurity/physical security. Further research should examine states that alternate between these situations. Another defect in the research design is the

absence of empirical cases that reflect the situation of ontological insecurity/physical insecurity. The argument does not tell us how states would behave in this case or how they would prioritize between different types of threats. Would the state sacrifice ontological security for the physical or the other way around? Ontological security scholars claim that ontological security is far more important, and that states can sacrifice their physical security to satisfy their self-conception (e.g. Steele 2008). In contrast, neorealists argue that leaders' understanding of the danger posed by other actors in the system is primarily the product of relative power distributions. This position can be summarized in Waltz's (1986, 329) claims that material power considerations 'weigh more heavily than ideological preferences or internal political pressures'. Further studies should examine empirical cases where states had to choose between ontological and physical security to test these hypotheses.

In this study, I aimed to examine threat perception as a process in Middle Eastern international relations. By integrating ontological and physical security in an eclectic framework, this study has provided a theoretical model that facilitates the exploration of ideational and material forces as well as their interaction in the process of threat perception. By bridging the literature on ontological security, Realism, and Self/Other relations, this study has prepared the ground for further research. Such research can be developed in two ways.

The first is through widening the scope of the theoretical argument by applying it to other cases. Potential cases may include Jordan, a small state where physical security has been important, but where ideational factors have also been significant in holding together various domestic groups. Jordan could serve as a potential case for examining how states prioritize between ontological insecurity/physical insecurity. Another interesting case to examine is Egypt, where threat perception towards Iran constituted a cornerstone in the country's foreign policy for decades. The examination could involve looking into the factors that led to the regimes' threat perception. Egypt is a rather homogenous country with no Shiite minority. Why was Iran, a geopolitically distant country, identified as a threat? Moreover, why did the Mubarak regime

perceive Hamas as threat while deemphasizing Egyptian animosity towards Israel? This study has answered many questions on threat perception in the Middle East but raises many more.

A second way to move research beyond the scope of this study is to examine other dimensions in the process of threat perception, by addressing some of the limitations discussed above. For example, how do states prioritize between ontological and physical security? How do they choose among the available possible identities? Does threat perception operate differently in divided societies?

The Middle East constitutes an important pool of empirical data for fruitful theoretical frameworks that could be extended to other areas, such as Central Asia and Southeast Asia (cf. Solingen 2007). Moreover, it is an important repertoire to test and build theoretical arguments that contribute to the development of IR theories. In the previous two decades, many scholars with expertise in Middle East politics have noted the schism between Middle East area studies and mainstream International Relations and Comparative Politics. Nowadays, the common perception that the Middle East is too exceptional to be theory-relevant is diminishing. During the last decade, scholarly trends have shown that the Middle East is increasingly studied under the lens of theories produced by non-Middle East specialists. Instead, the Middle East can serve a more important role than theory application. It has the potential to be in itself an invaluable pool of empirical anomalies for both theory development and theory-building efforts.

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