

The Islamic State, the Kurdistan Region, and the Future of Iraq

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- ⌘ The rise of the Islamic State has crystalized Iraq into 3 *de facto* states.
 - ⌘ How durable are they?
 - ⌘ What are their trajectories?
- ⌘ Realities in Islamic State
- ⌘ Realities in the Kurdistan Region
- ⌘ Realities in the Baghdad-Basra Region

‘Iraq’, or ‘Baghdad-Basra’, Islamic State, and
Kurdistan Region, in November 2015



Islamic State of Iraq and Al-Sham (ISIS)



↳ Consider Islamic State of Iraq (ISI)

- ⌘ Much smaller
 - ⌘ Much less capable
 - ⌘ Much less popular support
 - ⌘ Much less territory
 - ⌘ Fewer resources
 - ⌘ Less equipment
 - ⌘ Facing stronger Iraqi security forces
 - ⌘ Facing overwhelmingly powerful US forces
- ⌘ And they still nearly 'won'...

The scale of the problem

- ⌘ Consider the Islamic State of Abu Bakr al-Baghdadi
 - ⌘ Much larger
 - ⌘ Much more capable
 - ⌘ Much more popular support
 - ⌘ Much more territory
 - ⌘ Greater resources
 - ⌘ Much more equipment
 - ⌘ Far weaker Iraqi security forces
 - ⌘ Limited international forces
 - ⌘ Can they win? ... What does 'winning' look like?

The scale of the problem

❧ Iraqi Security Forces

- ❧ Sectarian, broken, unable to hold Jazeera

❧ *Peshmerga*

- ❧ Near-death experience, can defend Kurdistan, needs total reconstruction to face ISIS again
- ❧ A divided force, and PUK *peshmerga* far more effective than KDP

❧ YPG/PKK

- ❧ The only forces to consistently outperform ISIS in the field, but sorely limited in numbers, and not Iraqi

❧ Shi'i militias, *Asaib ahl-al Haq*, Peace Brigades, Badr, Iranian units

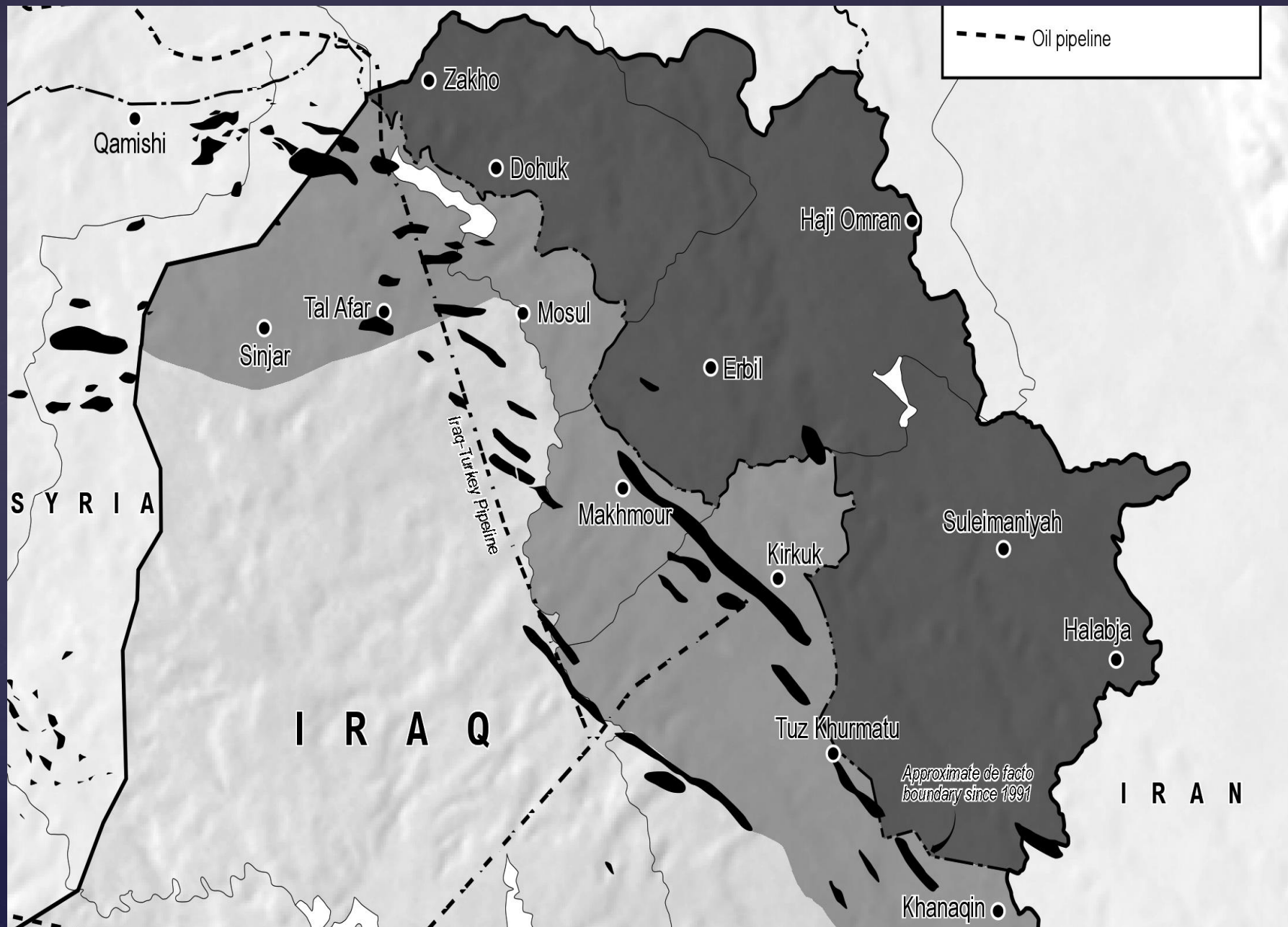
- ❧ *AAH* has shown capability, but as divisive as ISIS?

Who can oppose the Islamic State 'on the ground'?

The Kurdistan Region

- ⌘ A harrowing 2014 – a ‘near death’ experience at hands of ISIS
- ⌘ But, several subsequent positive developments:
 - ⌘ Kurds now have control of nearly all the territory they realistically wanted (disputed territories)
 - ⌘ Alignment of KRG with Western powers
 - ⌘ Further alignment with Turkey
 - ⌘ A suspension of hostilities with the Abadi government

Context





The frontline

- ⌘ June 11, Kurds took all areas they saw as 'disputed'
- ⌘ A new 1050km frontline
- ⌘ *Peshmerga* has new role – fit for purpose?
- ⌘ Flashpoints: Sinjar, Hamdaniyya, Jalawla
- ⌘ An IS(IS) – KR recognition?
- ⌘ Where are the threats?
 - ⌘ The long history of Kurdish *jihadists*
 - ⌘ The internal fractiousness of Kurdish political life

The Expanded Kurdistan Region of 2014

- ⌘ Cohesive on paper, divided in practice
- ⌘ After Mosul – complacent
- ⌘ Near death in August
- ⌘ Questions about KDP and Barzani hegemony
- ⌘ Reliance on PYD, PKK, KDPI, US air
- ⌘ Performance of the PUK
- ⌘ Questions about KDP economic plans
 - ⌘ Budget questions
 - ⌘ Oil export issues
 - ⌘ A deal on Kirkuk with the Government of Iraq?

The Near Death Experience

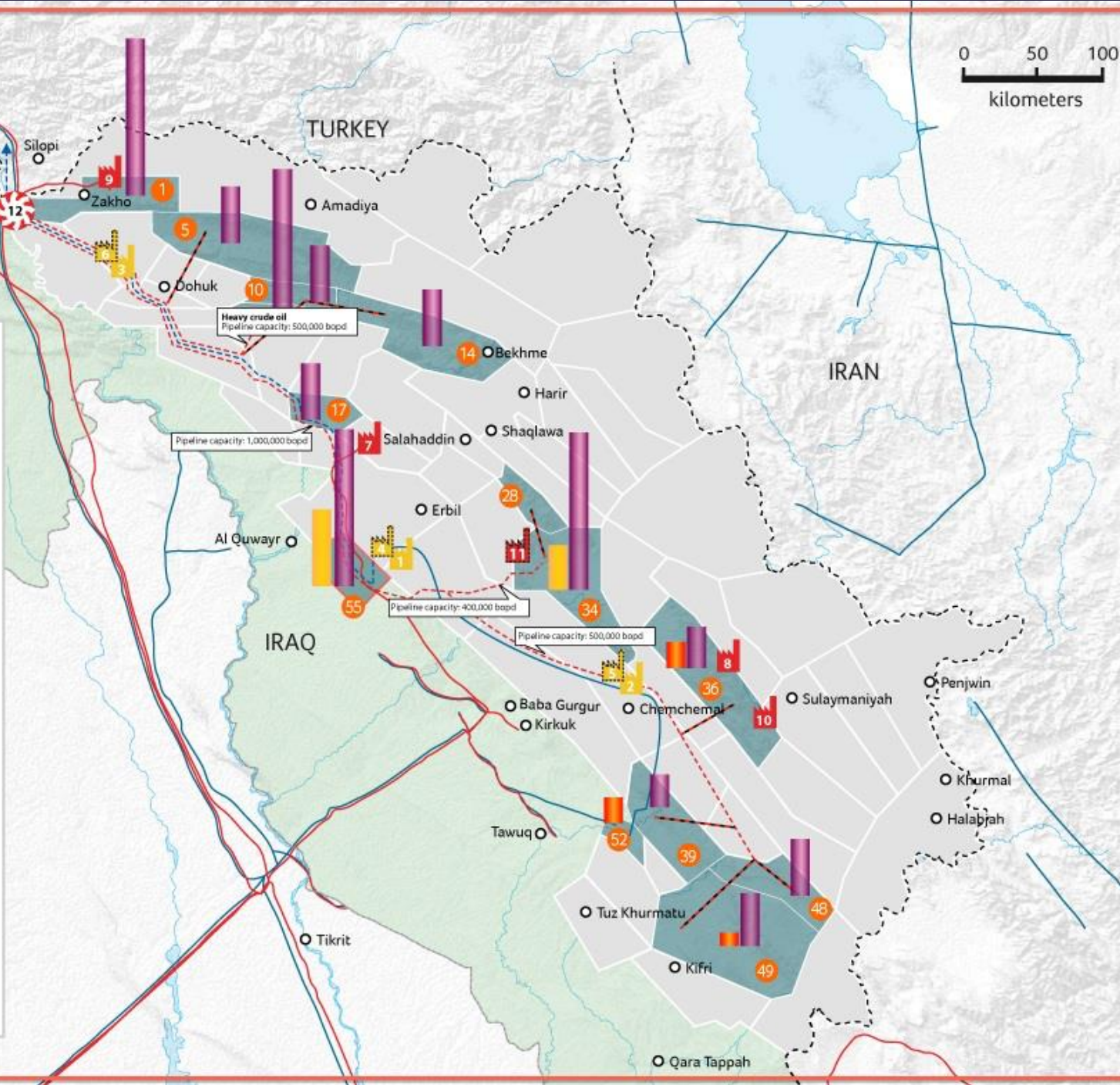
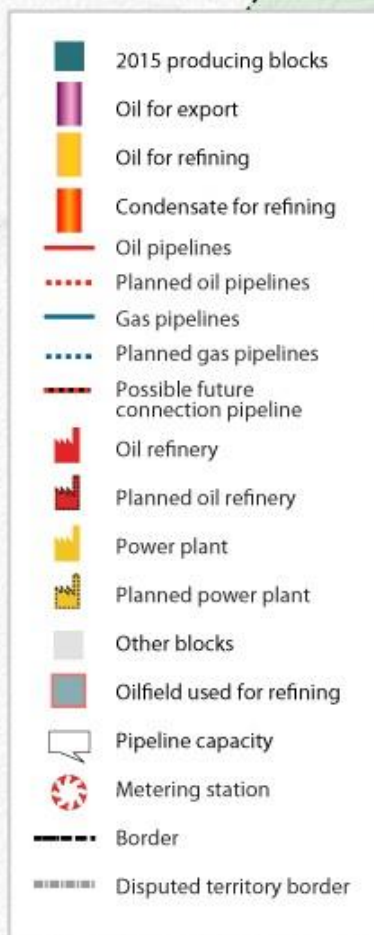
- ⌘ A transitional democracy?
 - ⌘ KDP, PUK, Gorran, Islamists, minorities
- ⌘ A Sultanistic system?
- ⌘ The Presidential stand-off
- ⌘ Scenarios:
 - ⌘ Barzani continuation, 2 years
 - ⌘ Drive to independence
 - ⌘ A possible Erbil-Suleimani split?
 - ⌘ What happens to Kirkuk

Stability?

- ⌘ A dependent economy, on Baghdad
- ⌘ KRG trying to secure economic independence
- ⌘ Erbil-Baghdad deal not working
- ⌘ KRG has debts of est. \$25 billion
- ⌘ KRG has operating costs of app. \$1.5 billion per month – a very much swollen public sector
- ⌘ Producing IOCs receiving limited payments - \$75 million in September allocated
- ⌘ Producing IOCs have problems; non-producing are waiting

Economy

0 50 100
kilometers



- ⌘ KDP has terrible relations; PUK has good relations
- ⌘ PM Abadi and President Barzani have each other by the throat, but both also need each other
- ⌘ Baghdad's position to oil and gas in KRI complicated by KRI position to Kirkuk
- ⌘ Abadi may be under pressure to jettison the Kurds from his own parties

Relations with Baghdad

- ⌘ Presidential stand-off and economic stalling have seen the KRI weaken
- ⌘ Economic life has slowed drastically
- ⌘ People leaving
- ⌘ Questions of how to supply frontline forces against ISIS
- ⌘ US and UK mediation, but no one budging

The current mess

- ⌘ Dominance of the Shi'is; dominance of Iran
- ⌘ Sectarianisation of security and of government
- ⌘ Mosul – so what? Kurdistan - good riddance?
- ⌘ But what about Kirkuk?
- ⌘ Question the role of Iran – why would Tehran really want to see a successful Iraqi state, producing more oil than Iran, and with links to the West that would create problems? Never has made sense to me...

Baghdad-Basra





⌘ Or what should we be brave enough to acknowledge?

- ⌘ Iranian hegemony in Baghdad-Basra

 - ⌘ Sectarianisation of security

- ⌘ IS being a social movement with durability

 - ⌘ Only Western and Russian intervention, in Iraq and Syria respectively, will remove the immediate threat

 - ⌘ Would you join IS? (if you happened to live in Nineveh?) Yes, you would...

- ⌘ Kurdistan being a political reality

 - ⌘ Kurdistan does have a long-term relationship with Turkey, and oil is getting to market

- ⌘ Iraqi integrity a historical story

What can we be certain about?

- ⌘ Islamic State internal workings and how it will be transformed by success/failure
- ⌘ Political economy of IS
- ⌘ Turkish intentions to the Kurds, and to IS
- ⌘ Iranian intentions to everyone
- ⌘ The possibility of catastrophic game changers – assassinations, shrine destruction, terror attacks
- ⌘ Western policy – is there one? A snowball? Boots on Ground? Unintended consequences?
- ⌘ Impact on West of an IS attack in Europe/US
 - ⌘ IS moves fast, and in unexpected ways
 - ⌘ Since 2011, IS has had a strategy and a vision
 - ⌘ Since 2003, Western powers have not

What is uncertain?

- ⌘ I don't have a scenario for Iraq; but I do for the 3 regions
 - ⌘ Continued divergent trajectories
 - ⌘ IS – Pariah (Somalia)
 - ⌘ KRG – sort of accepted (Taiwan)
 - ⌘ Baghdad-Basra – *de jure* rump
 - ⌘ Ganging up on IS
 - ⌘ Erbil and Baghdad-Basra pushed into alliance, including oil
 - ⌘ West engages fully, establishing safe haven (Mosul?)
 - ⌘ Islamic State continues to march
 - ⌘ Attacks Baghdad and holy cities
 - ⌘ Black flags in Jordan and Lebanon
 - ⌘ Rampant attacks across Europe
 - ⌘ Middle East landscape chaotic sectarian/ethnic wars

Scenarios for Iraq, 5-10 years