



Paris, Sharm el-Sheikh, and the Resurrection of Old Europe

JOHN MAULDIN | November 18, 2015

On several occasions in the last few years I have mentioned the anti-immigration pressures that are spreading in Europe, and a few months ago I talked about how the refugee crisis was sparking more concern. I have also engaged my friend George Friedman, one of the truly world-class thought leaders on geopolitics, in numerous discussions on those issues.

A couple days after the Paris attacks, I picked up the phone to talk over the situation with George, and we had a very animated conversation for the next 20 minutes. I didn't particularly like what I heard about the difficulties of dealing realistically with ISIS. The more I read – and the more I listen to people like George who have worked these issues for decades – the more uncomfortable I become. The simple truth is that we as a culture need to face reality.

I asked George if he would pour his thoughts into a short essay that I could send out as an *Outside the Box*, and he agreed.

Just a quick quote from his piece, which I just received:

Once it has been established that this implicit right [by nation states instead of the entire EU to protect their borders] can be used and the basic boundaries inside of Europe are the old European borders, we have entered a new Europe, or rather the old one. It is not clear when or if the border checkpoints will come down. After all, the war with the jihadists has created a permanent threat. Since there is no one to negotiate with, and no final blow that will end the war, when should the borders be opened again? What IS created, without intending it, is the fragmentation of Europe, with each state protecting itself. When will Europe decide it no longer needs checkpoints at the borders? When is it safe? And, if it is not safe, how do the borders come down?

You cannot control the movement of people without controlling the movement of goods. Whatever the rules at the moment, the nation-state has reasserted its right to determine what vehicles enter. Once that principle is in place, the foundation of Maastricht does not disappear. The agreement is still there, but the claim to ultimate authority is not in Brussels or Strasbourg, but in Madrid and Budapest and Berlin. This causes more than delays at the border, it essentially creates a new mindset.

This is a very thought-provoking piece with a very different take from anything else I have read. Which is what you expect from George.

I am back in Dallas after a quick trip to Detroit. I am rereading Andy Kessler's boffo little book called [How We Got Here](#). It is part of the research for my own book on the emerging "age of transformation," along with other books on the history of innovation. It's a rather humorous telling of how we got from the Industrial Revolution to today's technological marvels. The amount of research that went into it is mind-numbing, and it's a book I recommend to everyone.

And for those of you who have offered to help me with the research on the new book, please be patient for another week or so, as we have had so much response that it's a lot of work just to get the organization organized on our end!

On a personal note, I am finding it hard to reconcile the general optimism of the book I'm writing (*Investing in an Age of Transformation*), which in general lays out a positive view of the future (with a few dark spots here and there, to be sure), with the trepidation I feel about the continued fundamental conflicts between cultures, with all the implications those conflicts have for so many areas of our lives, and all the suffering and death they entail.

But it is time to hit the send button to get this out. Have a great week.

Your thinking hard about the future of Europe analyst,



John Mauldin, Editor
Outside the Box

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By George Friedman

The attacks in Paris last Friday night were part of a long-term pattern of occasional terrorist attacks by jihadists on targets in Europe. In the European context, this stood out for two reasons. First, the scale of the attack was substantially larger than other attacks in recent years, both in the number of participants and the number of casualties. Second, it was different in the level of sophistication and planning. Securing weapons and explosives, gathering at least three teams, identifying the targets and the manner in which these targets were to be attacked involved fairly complex logistics, intelligence and above all coordination. Most impressive was their counter-intelligence and security. There were at least seven attackers and additional support personnel to secure weapons, gather information and help them hide out in preparation for the attack. No one detected them.

The large majority of attacks are detected and disrupted prior to execution by European and American intelligence services, using information, communications intercepts and the other tools available to them. No one detected this group, indicating that the group, or at least its leaders, were aware of the methods used to identify attacks and evaded them. Lone wolves evade detection being lone wolves. These attacks required coordination and support. Their communications, movement and surveillance should have been detected. They weren't. That means there was a degree of training that could only be obtained through a more sophisticated group like Islamic State (IS).

It is noteworthy that IS took credit for the attacks in Paris because up until recently, such attacks have not been directly ordered by IS. Terrorist attacks on Europe or the United States designed to create maximum casualties were the modus operandi of al-Qaida. IS has generally focused on taking and holding ground in Syria and Iraq, leaving terror attacks to self-actuated lone wolves. IS was capable of terror attacks but their focus was on creating the caliphate, a territory ruled under their interpretation of Sharia, rather than on carrying out terror attacks.

That apparently has changed. The attack on Paris was part of a cluster of strategic terror attacks including the downing of the Russian airliner at Sharm el-Sheikh (which yielded more deaths than Paris) and the attack in Beirut. The planning for the attacks, assuming that explosives and weapons had been secured, probably began no later than Oct. 1, 2015.

When we go back to the days surrounding Oct. 1, there are two things that stand out. First, the French began bombing targets in Syria on Sept. 27 and the Russians started bombing Syria on Sept. 30. IS was not particularly damaged by these events, but it was clear that forces were gathering against them. IS needed to do two things. The first was to demonstrate to their own troops that they would not simply be bombed without response. This was critical to morale. Second, they had to demonstrate to France, Russia and anyone else planning to get into the Syria game, that it does not come without cost. They were not afraid of Russia and France moving against them in response. They were already moving against them. IS wanted to start shaping French and Russian public opinion. Certainly, the first response would be rage but jihadists have learned that the rage dies down in the West and so does the appetite for war. IS needed to demonstrate its reach, speed and deadliness. What followed was the downing of the Russian airliner at Sharm el-Sheikh and the Paris attacks. Most of the operators would have been in Europe already, as well as in the Sinai, if not working at the airport. But the actions took place in a broader European context.

The wave of immigration that has swept into Europe from the Islamic world in general, but particularly the more recent stream of refugees from Syria, has created a political crisis in Europe and one that was particularly raucous prior to Oct. 1. Charges were being levelled by Germany against Central European countries for refusing to accept refugees. In turn, those countries charged that Germany was demanding that small countries transform their national character with the overwhelming numbers of refugees housed there. In addition, these countries, particularly Hungary, argued that among the genuine refugees there would be members of terrorist groups and that it was impossible to screen them out.

Had Europe been functioning as an integrated entity, a European security force would have been dispatched to Greece at the beginning of the migration, to impose whatever policy on which the EU had decided. Instead, there was no European policy, nor was there any force to support the Greeks, who clearly lacked the resources to handle the situation themselves. Instead, the major countries first condemned the Greeks for their failure, then the Macedonians as the crisis went north, then the Hungarians for building a fence, but not the Austrians who announced they would build a fence after the migrants left Hungary. Between the financial crisis and the refugee crisis, Europe had become increasingly fragmented. Decisions were being made by nation-states themselves, with no one being in a position to speak for Europe, let alone decide for it.

From IS's point of view, this provided two opportunities. Tactically, it gave them an opportunity to insert agents into Europe in the midst of migration. But this was a secondary issue, since IS could insert operatives at somewhat a greater risk if they wanted. However, there was a much more significant problem and opportunity for IS.

First, the mass migration from Syria did not show itself at this level during the first phase of the Syrian civil war, when IS was not yet involved. It showed itself when IS became operational. As such, this posed a political problem for the group. The refugees were overwhelmingly Sunni, and IS presented itself as the guarantor of Sunni rights. The fact that they were fleeing IS affirmed the sense in other parts of its territory that IS represented a threat not only to Shiites, Kurds and others, but also to Sunnis. Ultimately, this represented a threat to IS's power because if the Sunni base saw IS as a threat, then IS would become unsustainable.

That was the strategic threat of the migrants. There was also a strategic opportunity in two ways. First, Europeans for the most part were not eager to receive large numbers of refugees, and the reception for refugees that made it to Europe was often unwelcoming, particularly as displayed on TV. The ability to demonstrate to the Muslim masses that the Europeans were now hostile not only to the principles of Islam, but to Muslims themselves, would potentially position IS as the defenders of Islam or at least the Sunnis. IS had been careful, in the midst of a rigorous interpretation and implementation of Sharia in areas under its control, to also create a system of social services that provided at least a safety net to Sunnis. Fleeing the IS safety net for Europe, Muslims now discovered how despised they were. From IS's point of view, the more hostile the greeting to the migrants, the more solid their position. The chaotic arguments in Europe supported their position.

In late October, the atmosphere began to shift, or at least the intensity. Europe remained united, but the decision by Angela Merkel to very aggressively champion the case for sanctuary in Europe for the refugees not only created a battle with some European countries and the European right, but it also began to shift the center of gravity of European positions toward the idea that some sort of sanctuary had to be granted. This shift did not particularly please IS, since a more hostile stance satisfied its needs better.

Whether this was the reasoning that led to the attack in Paris is something we do not know. We do know that a passport for a Syrian refugee was found on one of the attackers. The French authorities have also said that the passport is a fake. Clearly, the organizer of the attack had to know that the passport would be found. Once found, authorities would believe him to be a refugee. Care could have been taken to exclude refugees, or at least take greater steps to hide identities. Instead, the fact that he may have been a Syrian refugee, or at least was holding the passport of one, was discovered in hours. Whoever organized this attack was not careless and he undoubtedly knew the consequences of a Syrian refugee being among the attackers. This was obvious to anyone in Europe or elsewhere. Nevertheless, the attacks went forward, knowing that the attackers would be killed and identified.

Therefore, IS, or the subgroup in command of this operation, had to know that the consequence of this attack would not only be increased hostility to IS, but intense re-examination, in the context of legitimate fear, of the policy of admitting Syrian refugees into Europe. In the most extreme case, the refugees would be either placed in camps under careful guard until their identities and links could be determined, which would take a long time, or alternatively, a program or simple ad hoc expulsion of the refugees would take place. In either case, a process of potential radicalization, one with plenty of historical enmity from which to develop, would begin that would both paint the Europeans as an enemy, clarifying sides, or create a base for recruiting troops for IS. There was only upside in this for the Islamic State.

The point that made this strategy attractive is that once the dead IS operative holding a Syrian passport was found, any reasonable European assumption would have to be that there were more. Given the numbers of dead and wounded, the presence of even a handful of such operatives would be cause for serious alarm. Given the fact that the operation was undertaken without any detection of movements or communications, it followed that the ability to discriminate between harmless refugees and IS operatives was uncertain. Considering this logic, any European not frightened was out of touch with reality.

It may all be an accident, but if it is an accident, it is a remarkable one. With this attack and its threats for more, IS has struck at the heart of Europe's sense of security and regardless of what they do, the Europeans will be alienating huge numbers of people who not only have no where to go, but also have no way to get there in any reasonable time frame. What comes out of this is something Europe hasn't seen for a long time: camps, carefully guarded, with interrogation. The refugees must be brought under control from the European point of view. That requires them to be confined. But how do you confine several million people?

It also had an effect that was likely not anticipated by IS, and which poses only tactical problems for them, but which dramatically changes how Europe works. European countries, one after the other, revived their border controls, effectively negating the principle that the EU is about the free flow of goods, money and people. Money still flows, but goods and people must now face a hurdle at some of Europe's old borders.

I have long made the claim that the transnational nature of Europe cannot be sustained. The divergent economic interests of EU countries, some with unemployment over 20 percent, some with it under 5 percent, meant that it was impossible for all of them to live not only under the same monetary regime, but under the same trade regime, which we cannot call free trade with agriculture, among other things, being protected. This would lead to a focus on national interest and on a resurrected nation-state.

This was the fundamental problem of Europe and the migration crisis simply irritated the situation further, with some nation-states insisting that it was up to them to make decisions on refugees in their own interest. The response of Europe to the Paris attacks brought together all of these matters, and Europe only responded when some nations decided to use their national borders as walls to protect them from terrorists.

It is important to notice that this was not the EU creating checkpoints independent of national borders to trap terrorists or block them. The EU wasn't built for that. Rather, it was the individual nation-states, reasserting their own rights and obligations to secure their own borders that acted. Despite all the rhetoric of a united Europe, the ultimate right of national sovereignty and the right of national self-defense was never removed.

Once it has been established that this implicit right can be used and the basic boundaries inside of Europe are the old European borders, we have entered a new Europe, or rather the old one. It is not clear when or if the border checkpoints will come down. After all, the war with the jihadists has created a permanent threat. Since there is no one to negotiate with, and no final blow that will end the war, when should the borders be opened again? What IS created, without intending it, is the fragmentation of Europe, with each state protecting itself. When will Europe decide it no longer needs checkpoints at the borders? When is it safe? And, if it is not safe, how do the borders come down?

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This started as a counter to Russian and French airstrikes. It has culminated in unintended and unanticipated consequences, as is the norm. An airstrike in Syria, attacks in Paris, and the borders are back. Only to stop terrorists, of course. But that “of course” is dripping with historical irony.

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