The Changing Security Dynamics of the Middle East and North Africa

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The security dynamics of the Middle East and North Africa have changed radically over the last decade and will continue to change for the foreseeable future. What appeared to be a relatively stable pattern of national security developments and outside support before the political upheavals that began in 2011, has become the scene of three major civil wars in Libya, Syria, and Yemen. Major shifts have taken place in the political stability and security structure of Algeria and Egypt. The Lebanese Hezbollah has emerged as a major non-state military actor, and the government of Lebanon has virtually collapsed. The rise of ISIS led to further major conflicts in Iraq, alongside a major new competition between the U.S. and Iran for military influence in that country. The Iranian-Arab arms race sharply intensified and led to a new pattern of clashes and missile strikes.

Major changes have also taken place in the military and internal security forces of most MENA countries, with a shift away from modernizing and expanding conventional military forces and their major weapons to a focus on counterextremism, counterterrorism, and internal security. At the same time, the patterns of local alliances have changed, and MENA states have shifted to a focus on missiles and precision guided weapons as well as on a wide range of other developments in military technology and tactics. Gray area operations and hybrid warfare have become an additional focus, as has the support of rebel and other separatist factions in neighboring states.

The patterns of outside military support and security assistance have also continued to evolve, along with the nature of the security and security forces of each MENA nation. Outside military support and security assistance aid has long been critical to the survival and security of a number of MENA states. Enhancing national security and winning given conflicts have been key motives, but so have enhancing regional influence, serving ideological goals, securing the position of ruling elites, and using such support to gain power for a given national government. The rhetoric of security partnerships and alliances tends to be consistently altruistic, but the reality is often self-seeking.

Over the last decade, the military ties between the MENA region and outside states have helped lead to wars and/or made them far more intense. Even when outside support has helped recipient nations to improve their security and protect their populations, its real cost has increasingly come at the price of a given country’s economic development and advances in civil society.

Some MENA countries have spent so much on their military and other security forces that it has come at the cost of civil development. Others have used their ties with outside states to create repressive regimes or support regimes that are dominated by their military and security forces. The nations that provide security assistance have provided such support knowing these costs, and in ways that helped to create a favorable regime – sometimes at the cost of “assisting” the creation and outcome of a civil war.

In the past, outside military support has sometimes played a major role in negotiating and securing a peace, such as U.S. aid to Egypt and Jordan, which played a major role in their peace with Israel. At the same time, the history of such assistance has also been shaped by a history of major and minor wars between regional states. These have included a long series of struggles for full independence from colonial powers, major Arab-Israeli conflicts, and major conflicts in the Persian/Arab Gulf through limited and local conflicts as well as civil wars. They have also
increasingly involved supporting struggles between governments and non-state actors – players that now have sectarian, ethnic, and extremist military forces.

The current security dynamics of the MENA region have also been driven by direct military intervention and the active support of national military forces in Libya, Syria, and Iraq – and the history of these nations involve receiving outside military aid, arms, advisors, and power projection for a wide range of reasons, but many have had little to do with enhancing security and stability. MENA states have used outside support to intimidate, deter, or defeat their neighbors; to gain outside political and military support; to enhance their prestige and status; to secure the position of a given ruler or a regime; to win the support from a nation’s military and security forces in maintaining its rule; and to intimidate or defeat a given internal faction.

They have also become the scene of outside support to non-state actors, rebel factions, and opposing sides in civil wars. The goal of most such assistance has not been to bring security or stability, but to defeat an existing regime, gain power by aiding the winner, and/or displace or weaken the influence of other outside powers. It can also have a major ideological dimension: to defeat or support extremist Islamist movements.
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Less, Rather Than More, Security

The end result has often been to create less, rather than more, security and stability. At the beginning of the Arab Spring in 2011, the U.S. and its major European security partners clearly dominated security assistance in the MENA region, both in terms of military presence and arms sales. Russia had only a token military presence, and China’s role as an arms seller had diminished while its emerging status as a major global military power had not emerged as a possible factor that could reshape security assistance in the region. Cooperation between outside and regional powers also seemed to be defeating violent extremist and terrorist movements.

Most MENA nations were at peace, and they seemed to be relatively stable. North African countries were at peace. The Arab-Israeli conflicts were limited to low-level clashes between Israel and the Palestinians. Egypt acted as a stable major regional power. Iraq’s Islamic extremists seemed to be defeated. Iran was a weak military power dependent on low grade and dated weapons. The other Arab Gulf states appeared to be unified in a Gulf Cooperation Council (GCC). Yemen still seemed stable. Military spending and arms purchases were high by global standards, but they were only a limited to moderate burden on local economies.

Today, none of those things are true. The MENA region has become a fragmented mess. There are ongoing civil wars in Libya, Syria, and Yemen. The Libyan civil war is the only major ongoing war in North Africa, but it has torn the country apart – and a wide range of outside powers have divided to support each side, intensifying the conflict. Algeria and Tunisia seem to have made some progress towards reform, but they remain unstable and could still be the scene of additional civil conflicts.

The era of major Arab-Israeli conflicts still seems to be over, but Israel still clashes with the Palestinians in Gaza as well as with the Lebanese Hezbollah, Syria, and Iran. There is some risk of more serious wars between Israel and the Lebanese Hezbollah or Iran, and increasingly ones that could involve major missile forces. Progress in the Israeli-Palestinian conflict towards a two-state solution has largely ended. Both Israel and Egypt continue to arm themselves, and Egypt faces internal security challenges and low-level Islamist threats in the Sinai Peninsula. Lebanon’s government and economy have collapsed, and the Hezbollah has emerged as a serious independent force. Jordan still seems largely stable, but it does face major economic challenges.

Outside military intervention and support have helped to trigger or intensify major civil wars – and major civil wars, the fighting between internal factions, and the rise of violent internal Islamist movements have crippled the development of four major MENA states.

Iraq still faces a threat from ISIS. It has deep sectarian and ethnic divisions, is under pressure from Iran and Turkey, cannot afford its current security efforts, and has an increasingly uncertain major security partner in the United States. Outside military intervention has led to two major struggles against Islamic extremists since 2003. The resulting defeat of an ISIS effort to create a proto-state or “caliphate” has not brought unity or effective governance.

In the case of Libya, it has led outside powers to support competing factions in an ongoing combat. The fall of Qaddafi has split the country into warring factions, and it has led outside powers to support Libya’s two major competing factions and intensify their ongoing combat.

In the case of Syria, it has led to Russian, Iranian and Hezbollah intervention in support of a ruthless authoritarian regime while other outside powers support different rebel factions. The
Assad regime has survived at the cost of a massive civil conflict that has involved most of the nation’s population and territory.

In the case of a desperately poor Yemen, the fall of Salah has divided the country into warring factions dominated by the Houthis with a rival government in exile that has won limited internal support. Outside regional powers dominate the fighting. Iran has backed the Houthis while Saudi Arabia and the UAE, have actively supported the government with U.S. targeting and refueling support and arms flows – creating a major humanitarian crisis.

The Southern Gulf Arab states and the U.S. now arm and prepare for a major war with Iran. At the same time, these Arab Gulf states have been divided by a Saudi, UAE, Bahraini, Egyptian-led boycott of Qatar. The Gulf Cooperation Council has become even more of a military fiction. Saudi Arabia and the UAE are deeply involved in a brutal civil war in Yemen.

The Broad Changes in the Role of Outside Powers

The analysis that follows tracks these changes on a country-by-country basis from Morocco to Iran. It also shows, however, that the roles of major outside powers like the United States, Major European States – like the United Kingdom, France, Germany, and Italy – Russia, and China are also changing, as well as the nature of outside military support to every MENA state. In broad terms, the role of the U.S. and Europe seems to be diminishing, while the role of Russia is rising, and China may expand its role as part of its emergence as a global superpower and its efforts to secure its access to Gulf oil and gas exports.

The U.S. is emerging from a series of conflicts in Iraq, which became the equivalent of a “long war,” and one that lasted from the U.S. invasion in 2003 to what seems to be the final break-up of the ISIS “caliphate” in 2020. The data on arms transfers provided later in this analysis show that the U.S. continues to be the region’s largest source of arms transfers.

These transfers now focus on U.S. opposition to Iran and its support of the southern Arab Gulf states in building up their forces to counter Iran. The U.S. is attempting to use economic sanctions to put “maximum pressure” on Iran, and it has given sanctions and arms transfers priority over the Joint Comprehensive Plan of Action (JCPOA) to end Iran’s weapons program. The 5+1 (China, France, Germany, Russia, the United Kingdom, and the United States) have signed this agreement with Iran on July 14, 2015, which was endorsed by the UN Security Council in Resolution 2231 on July 20, 2015.

The Trump Administration effectively withdrew the U.S. from the JCPOA in 2017 – in part due to its broad opposition to the policies of the previous Obama Administration and also because of the limits and gaps in the agreement. As a result, the future of nuclear proliferation in the region – and the future transfer of nuclear technology and weapons as a form of security assistance as well as the future creation of any new U.S. form of “extended deterrence” – is uncertain.

At the same time, however, the U.S. is reevaluating its military presence and power projection role in the region, and particularly its strategic partnerships in Iraq and the Persian/Arab Gulf. It is doing so partly as a result of the “war fatigue” caused by its “long wars” in Iraq and Afghanistan, the diminishing U.S. dependence on petroleum exports, the new strategic focus on the threat from Russia and China that the U.S. announced in 2017, and the efforts to limit U.S. defense expenditures.
European powers have played a significant role in U.S. led coalitions, and France and the United Kingdom still maintain bases in the UAE and Oman. European states also remain a major source of arms transfers. However, they now deploy limited military forces and advisory teams even in the states they do supply. British and French power projection capabilities have also eroded since the First Gulf War in 1991, and the future level of European power projection and security assistance in the region is uncertain.

Russia has reemerged as a major source of security assistance in a number of countries. The data on arms transfers provided later in this analysis show that Russia has again become a key source of regional arms transfers to countries like Algeria, Libya, Egypt, Syria, and Iraq. Russia has also deployed significant military land combat forces in Syria as well as Russian combat airpower – including long range bombers – which have played a key role in the Syrian civil war.

Russia is also playing a growing role in the civil war in Libya. It has deployed its Wagner Group – a supposedly commercial force of mercenaries created and controlled by the Russian government – in supporting the pro-Hifter forces in Libya, has joined the UAE in quietly airlifting in major arms shipments, and has started to deploy MiG-29 and Su-24 fighters in a direct combat support role in 2020. It has sold advanced S-300 air defense systems to Iran and S-400 systems to Turkey, and it is actively marketing advanced weaponry to many other MENA countries.

China is still a comparatively small source of arms transfers, and it has no bases or significant major military presence in MENA states. It is, however, emerging as a global superpower, and U.S. and Chinese military competition has intensified on a global basis. China is also starting to play a more significant security role in the Red Sea. It has acquired a naval/air base and port facilities in Djibouti. It is expanding its presence in the Indian Ocean and near the Horn of Africa and the Gulf. It is now manufacturing and deploying far more advanced weapons, and it may well become a much larger exporter of arms and related services and advisory support to the MENA region.

There is also the possibility that China may become a strategic partner of Iran. The full nature of Chinese and Iranian military relations is unclear. While North Korea is often seen as Iran’s key partner in developing more advanced missile systems, some U.S. experts feel that China has provided technology to help Iran develop ballistic missiles and drones – as well as anti-ship missiles.

Press reports also indicate that China is considering a 25-year – $400 billion – strategic partnership that might trade Chinese military assistance to Iran for Iranian exports of oil and gas. Iran’s foreign minister, Mohammad Javad Zarif, announced in September 2020 that this partnership was proposed by China’s leader, Xi Jinping, during his visit to Iran in June 2016, and later approved by President Hassan Rouhani’s cabinet in June 2020. Such reports indicate that China would both invest in the Iranian economy and support Iran’s security forces through joint training and military exercises, research and weapons development, and the sharing of intelligence to fight “the lopsided battle with terrorism, drug and human trafficking and cross-border crimes.”

Both China and Russia are also potential sources of major future transfers of arms and military technology to Iran. They both continue to market arms to the Arab Gulf states, but they have strongly opposed U.S. efforts to extend the broad UN embargo on arms exports to Iran – and they now seem ready to start the export of weapons. This Chinese and Russian opposition has interacted with a major split between the U.S. and Europe. France, Germany, Russia, and the United
Kingdom have all opposed U.S. efforts to “snapback” the UN sanctions on Iran that existed before the JCPOA, and they have sought to maintain the existing limits the JCPOA imposes on Iran.

The impact of peripheral outside nations is also changing. Turkey has added to the instability in Syria and the Gulf, as have the power struggles and internal fighting in Somalia and in the two Sudan’s.

**The Changing Military Dynamics of Regional Military Forces and the Role of Outside States**

Equally important – if less quantifiable – are the changes taking place in the military dynamics that shape the ways that MENA states develop their military forces and in the ways that outside states provide military support for MENA states. From roughly the end of the colonial era after World War II through the First Gulf War in 1991, MENA countries focused on developing conventional military forces and conventional wars.

Post-WWII security military development began largely as efforts to develop modern land, air, and naval forces for the first time. Military development then focused on actual war fighting in the case of the Arab-Israeli confrontational states through 1982, and then in the Persian/Arab Gulf states after the start of the Iran-Iraq War in 1980. Finally, the deployment of major outside combat forces for joint warfare and strategic partnerships with MENA countries occurred in liberating Kuwait, fighting in Iraq, and dealing with contingency plans of a major conflict with Iran.

**New Forms of Military Dynamics**

MENA military dynamics have since changed significantly since the first Gulf War in 1991, and outside support has gone far beyond arms sales and the support of conventional forces. As the analysis that follows shows, security assistance has taken on different forms in virtually every recipient country and has varied sharply by both the nation providing it and by the recipient, but several basic trends affect most of the region.

In many cases, these changes in military dynamics get limited public reporting. However, they include conducting multi-domain warfare; using advanced battle management; targeting and damaging assessment systems and IS&R systems; and finding ways to integrate national forces and take advantage of the kind of advanced capabilities available to states like the United States, Russia, and China. They involve a new focus on information warfare as well as on gray area and hybrid warfare. They also involve far more advanced battle management; cyberwarfare; secure communications systems; and a wide range of new forms of intelligence, surveillance, and reconnaissance support.

The United States, supported by several European states – has changed its role in supporting MENA country forces – as, in very different ways, have Russia and Turkey. The military support of MENA states can now include an active military presence, wartime train and assist efforts, and often direct war fighting support in the form of combat troops and covert support and intelligence activities. It can also include a wide range of different MENA countries to support arrangements for power projection like providing major basing facilities, prepositioning equipment, providing reserves of interoperable munitions and support facilities, providing strategic lift facilities, and providing direct host country support and finding of outside combat forces.
Outside military support now includes the deployment of military forces for actual warfighting to non-state actors and factions in civil wars, as well as to governments. It can take the form of deploying “volunteers” and mercenaries, covert forces, and train and assist units that operate forward in actual combat. Outside states like the U.S. and Russia provide combat air and missile support from bases in other countries. Air and missile strikes are being substituted for the deployment of land combat forces, as are train and assist cadres of Special Forces and other elite units that are embedded with a host country’s forward combat units.

A major military power like the United States can also compensate for the hollow character of a given MENA country’s efforts to create effective military alliances, interoperability, and joint warfare capability. They can provide battle management and IS&R capabilities that can greatly enhance the recipient’s warfighting as well as its interoperability with U.S., local, and outside forces.

**The Dominant U.S. Strategic Objective is Global Security, Not the MENA Region**

At the same time, any focus on “military dynamics” must be kept in perspective. The dominating U.S. strategic objective is partnership with friendly MENA states – and in checking the threats posed by extremism and states like Iran – as well as the global security of the United States. The U.S. must balance its interests in the MENA region against other critical priorities:

The broader threats from Russia and China; its need to restructure its strategic partnerships in NATO, Asia, as well as the MENA region; and the need to create a stable balanced nuclear deterrence and warfighting capability on a global level – while doing so in an affordable way in a world where COVID-19 had already created an increase in the projected U.S. budget deficit to $33 billion by September 2020.

Since 2017, the declared strategy of the United States has been to focus on the threats posed by China and Russia, as well as to ask its strategic partners throughout the world to increase their share of regional deterrent and defense efforts – or “burden sharing.” The choices the U.S. is making involve major efforts to end the U.S. military presence in Afghanistan and to minimize the U.S. military presence in Syria and Iraq. They potentially involve cuts in the overall U.S. presence in the MENA region, although this remains unclear, and they may be offset in any case by improvements in U.S. power projection capabilities – subject to what may be a major political debate over military spending in 2021.

In practice, U.S. strategic partnerships with MENA states are also subject to the same real-world country-by-country limits as are U.S. partnerships with NATO and Asian states. Each partner has its own priorities, national political structure, and approach to security. The U.S. has to adapt its efforts in dealing with any given country to the wish of its ruling elite and the character of its political regime. It can urge countries to spend more, but it can scarcely compel them. It must adapt to their priorities in reshaping and equipping their forces, accept the fact they often have different approaches to human rights and the rule of law, and make many compromises in the process.

At the same time, MENA strategic partners have reasons to be uncertain about the level of U.S. commitment to partnerships in the region, and they may push back when U.S. pressure affects their military and political priorities. Moreover, if the U.S. often has reasons to question MENA military priorities, MENA states also have reasons to question U.S. capabilities based on recent U.S. actions in Libya, Syria, Iraq, and Yemen.
**The Role of Other Outside Powers**

The U.S. also operates in a climate where – as is discussed in detail in the sections that follow – Russia is actively reasserting itself in the region – both in terms of arms sales and its role in key states like Libya, Egypt, Syria, Iraq, and Iran, in the Mediterranean, as well as in its efforts to expand its ties to the Arab Gulf states.

The U.S. has not yet fully addressed any of the longer-term impacts of these Russian efforts in its strategy and actions in the MENA region, but U.S. planners and analysts clearly recognize that a strategy focused on the Russian threat must address Russia’s conduct in the MENA region even if there is no current consensus on action at the political level.

The same is true in very different ways in dealing with China. China is just beginning to expand its strategic role in dealing with the MENA military, but it is emerging as a major global power, developing far more effective military systems that it can transfer and export, is now free of the UN arms embargo, and may be negotiating a major long-term strategic agreement with Iran.

In contrast, most European powers cannot project significant military capability without U.S. support and multi-domain warfare capabilities. They can sell effective arms and technology, but they often cannot properly support those equipment in the field. Britain and France are still committed to roles in the Persian-Arab Gulf, but these roles too are dependent in many ways on U.S. support, and their power projection capabilities are expected to remain in a period of long decline relative to the threats in the region. Neither NATO nor the EU have so far shown much capability to play a real-world military role, even in dealing with North Africa, much less the region.

Turkey, in contrast, has steadily increased its efforts in dealing with Syria and Iraq, in its ties to Qatar, and in its role supporting Islamist movements. In a totally different way, so has Israel by expanding its formal ties to more Arab states like Bahrain and the UAE, as well as its de facto ties to many other Arab states.

MENA states will make their own choices in response to these shifts, and they will again pursue these choices in light of their own individual strategic priorities. As is discussed in depth, they will also do so with far less unity than is the case with NATO, in spite of the very differences between NATO nations in every aspect of military development. As for Asia, there is no clear alliance structure that links America’s strategic partners, and even key neighboring states like Japan and South Korea, making it difficult to coordinate effectively.

**The Dominant Regional National Strategic Objective is Internal Security, Not Military Effectiveness**

It is equally important to point out that most MENA states have a dominating strategic objective other than military effectiveness: that objective being internal security and preservation of the regime. Many have steadily improved their capability to meet this objective over time, and as a response to the rise of Islamic extremism, factional challenges, and the broader kinds of popular uprisings that emerge after 2011 and the beginning of the Arab Spring. The exceptions are states that are now in some form of deeply divisive civil war – Libya, Syria, and Yemen – and states whose political systems have partially collapsed – Iraq and Lebanon.

This objective often has a dominating impact on the total security efforts of a given MENA state, but affects its internal security dynamics, rather than the dynamics of its actual military forces. In
most cases, this clear focus has led to significant increases in internal security spending, the role
and sometime size of paramilitary forces, security controls over the regular military, the expansion
of the Ministry of Interior’s role, and the changing role of the police and internal security units to
have some paramilitary character. It also has led to increases in the internal security role of special
forces and other key combat elements in the military that are effectively dedicated to internal
security missions.

With some exceptions, these efforts have tended to increase the repressive character of such forces,
often in ways that further limit any challenging form of dissent – even if they are peaceful or
focused on the rule of law, freedom of expression, and human rights. This level of repression
should not, however, be exaggerated. It affects both the threat from violent and extremist
movements, as well as from the kind of open political challenges that can lead to public
demonstrations and call for changes in the character of the regime. It often has little practical
impact on most citizens.

Many of the details on these changes in national internal security efforts and dynamics are unclear.
Much of the unclassified reporting is highly uncertain and tends to try to apply Western standards
to different systems without providing a detailed analysis of the internal security challenges a given
regime is attempting to meet – challenges which do vary sharply by country. The cost, size, and
character of internal security forces – and their interaction with a given nation’s legal and justice
system – receives relatively little detailed study – although the U.S. State Department Country
Reports on Human Rights Practices have provided considerable detail over the years.2

The Search for Strategy: Military Dynamics versus Internal Security Dynamics

The end result is in some ways equivalent to a game of three-dimensional chess, but one with no
fixed rules, no limits to the number of players, and no limits to the number of boards at play. The
problem also is not a lack of strategy per se, but it is rather the fact that there are so many
conflicting or parallel strategies – many within the same country – and the region-wide “game”
has become too broad for any credible group of such strategies to become highly effective.

At the same time, this does not mean forces are not improving and that key strategic objectives
that drive the military dynamics of MENA country forces are not improving in many aspects of
military capability. The fact, however, that most nations’ primary objective is preservation of the
regime and its power becomes a problem – but here, many Arab states still recognize that this
objective is best met by finding strategic partners that can provide a given country with outside
protection against its most serious outside military threats, instead of building the most effective
national forces possible – an effort where most smaller MENA countries cannot build large enough
national forces on their own in any case.

Here, different problems tend to intervene. Prestige and status are often seen as strategic objectives
in their own right. Having the latest and best elite combat units and the “glitter factor” of some
elements of better or newer weapons are seen as a strategic goal. This version of the “game of
thrones” – or of Presidents, Prime Ministers and Field Marshalls – rarely meets the strategic
objective of dealing with worst-case military threats, but it does give a regime leverage and status
in dealing with its neighbors and its own internal factions – as well as helping to maintain the
loyalty of its own military.

It should be stressed that it can be a valid strategic objective even if it comes at the cost of overall
military effectiveness in more intense forms of war fighting. For example, using arms imports to
build ties with outside powers, offering them basing facilities, and building up intelligence and counterterrorism links may be more critical in ensuring outside support compared to increasing the effectiveness of national military forces.

Focusing on a key area of effectiveness like airpower and/or interoperability as well as the ability to support and arm outside forces – like the power projection forces of the U.S. – may also offer the most cost-effective and politically viable approach to national defense. At the same time, playing off the U.S. against Europe, Russia, or China may offer more advantages in a given case.

Accordingly, the following analysis of the shifts in MENA military dynamics needs to be kept in careful perspective. The country-by-country analysis that follows shows that only three MENA states have reasonably clear strategic objectives: Morocco, Tunisia, and Israel. Morocco and Tunisia face limited military threats and do not need to participate in the major arms races that affect most MENA states. Israel – in spite of an enduring peace – must preserve a dominant level of deterrence and warfighting capability to ensure that peace and to deal with the rising threat from Iran and non-state actors like the Hezbollah.

At least three other MENA states are failed states that are now so divided by civil war that they have no clear security national structure: Libya, Syria, and Yemen – and they are all caught up in civil wars that have no clear future path towards evolving a clear national military strategy. This is true of Syria even though it seems likely that the Assad faction will win. There is still no way to know what security structure will evolve, the future role of Iran and Hezbollah, the role of outside powers like Russia and Turkey, or the impact of Syria’s near economic collapse.

Iraq may add as a fifth state. It too is in a state of economic crisis, has a deeply divided security structure in which Popular Mobilization Forces play an independent role, and has uncertain links to Iran and an unstable set of ties to the U.S. It is unclear that it cannot unite its governance and security structures, create the economy it needs, or decide on some future force posture.

Lebanon may add as a sixth. Its national military has steadily improved in terms of border defense and low-level combat capability, but its politics are divided and in a state of near chaos, its economy is in collapse, its civil war may have ended but has left the nation divided on confessional lines, and the Hezbollah has emerged as a major military force whose non-state character cannot clearly be distinguish from the state.

More broadly, Algeria and Egypt are MENA states that have relatively stable security structures but are dominated to a high degree by their military, and they seem likely to give building up their military postures a high priority – each adapting in its own way to the changes in key aspects of the military dynamic described below. They do not, however, have any clear national strategy or set of goals beyond regime security and giving military forces a high priority.

Algeria’s only real threat is internal stability, and its emphasis on military forces is far more a product of its political history than any need for its current military force structure. Egypt – with the possible exception of future challenges from Libya and Ethiopia’s massive new dams across the Blue Nile – also lacks a clear strategic focus that justifies the scale of its military efforts. War with Israel is not a project, Egypt is not prepared for major power project as far as the Gulf, and the minor threat from extremists it faces in the Sinai is effectively an internal security issue.

The Southern Arab Gulf states – Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE – remain deeply divided, have serious and divisive national rivalries, pursue highly isolated and national strategies and force development efforts, and overspend on limited showpiece aspects of
their force posture. All have some effective combat elements, and the UAE in particular has successfully placed an emphasis on high standards of readiness for key combat elements. Yet, all the Arab Gulf states remain dependent on the United States to both provide the dominant combat forces and to coordinate their individual national efforts in the case of a major conflict with Iran – the only serious current potential threat that can unite them in a war. In practice, their feuds and actions like the boycott of Qatar have steadily increased their dependence on the U.S. in the case of a major clash or conflict with Iran in spite of massive spending on arms imports.

The force postures and military dynamics of the Arab Gulf states have limited real world interoperability, and the Gulf Cooperation Council is largely a military façade. They have done little to create common capabilities to respond effectively to any aspect of the Iranian threat from low level hybrid naval warfare in the Gulf to creating effective layered missile and air defenses to deter and defend against Iran’s growing conventional precision missile and UCAV strike capabilities.

Yet, Iran remains a weak military power in many wars, and its military forces are heavily dependent on obsolescent and combat worn weapons and equipment. Rhetoric aside, its strategic objectives mix a real effort to build up both its national military to deter any outside attack and to put pressure on its Arab neighbors by expanding its ties to Iraq, Syria, the Hezbollah in Lebanon and the Houthis in Yemen.

Iran’s Islamic Revolutionary Guards (IRGC) and regular military (Artesh) have creatively exploited the weaknesses in Arab military capabilities as well as the U.S. position in key countries like Iraq, but they, as of yet, has no access to major imports of modern offensive weapons, no clear future force posture, and uncertain future ties to Russia and China. It is also unclear what will happen to their current links in Syria, the Hezbollah, and possibly Iraq. There is no way to estimate which of the following changes in military dynamics that Iran will choose – or be able – to implement.

As for outside powers, it is unclear that the U.S. will fully maintain its present strategic posture in the region, and its recent posture towards playing an active role in Iraq, Syria, and Yemen has been erratic at best. European power projection capabilities and sustainability continue to shrink. Turkey plays an increasingly erratic role with some Islamist elements and the forces in Syria that attack Turkish targets in Northern Iraq.

Russia has returned to the region, but any strategy beyond a spoiler role and competition with the United States is unclear. China is selling more arms and may seek to play a more aggressive regional role, and some reports have emerged of a strategic partnership with Iran, but it plans remain unclear.

Forcing Improvements in Joint and Multi-Domain Warfare, C4I, IS&R, and Battle Management Systems

All that said, the changes in military technology as well as the ways that most advanced outside forces are developing are forcing MENA military forces to focus on new aspects of force development and to shift their priorities, insecurities, spending, and arms transfers. Many are realizing that the ability to manage joint warfare, use advanced sensors, and integrate their battle management is essential to the effective use of their major combat elements and often more important than acquiring more – or the most advanced – major combat platform – many of which
are becoming increasingly more vulnerable unless a nation has advanced joint warfare and battle management capabilities.

Several MENA states are acquiring a wide range of new multi-domain warfare; space capabilities; battle management; secure communications; and intelligence, surveillance, and reconnaissance (IS&R) systems – ones that can make critical differences in interoperability, joint warfare, and situational awareness. These systems can provide far more interoperability between national forces, as well as a given MENA nation’s ability to conduct more effective joint warfare.

**Lifecycle, Sustainment, and Combat Intensity**

Outside powers can also be provided in the form of advanced training aids, readiness indicators, and command post and field training exercises. This form of security assistance can range from advanced simulators to support in training for large-scale and high technology combat – providing capabilities, equipment, and experience that many recipient countries lack or are too small to develop on their own.

Supporting weapons and the full range of military technology and systems over their entire life cycle as well as during intense combat has become a critical part of security assistance. Weapons now need to be procured and supported on a life cycle basis, and the cost of such support and modifications over the life of a weapon – while rarely reported – can often exceed to original procurement cost of a system. The ongoing modification and improvement of weapons – sometimes called “multistage improvement programs” – has become more the rule than the exception, as there is a need for outside aid in maintaining complex systems and supporting them once they are engaged in combat.

Providing contractor or active military support of actual combat operations has become a steadily more important aspect of security assistance. It has become more critical since the 1967 Arab-Israeli conflict, where Israel was able to fly an average of three times as many combat sorties per aircraft overtime. Quick maintenance and rapid capabilities have become more important, as have advanced logistical and supply management systems and equipment.

**Ballistic Missiles, UCAVs, and New Long-Range Attack Systems**

Precision guided and “smart” missiles and UCAVs can increasingly inflict serious strategic damage to armor, ships, aircrafts, key military facilities, and civil economic and infrastructure facilities – capabilities linked to the need for far more complex and advanced missile and air defense systems than those currently deployed in the MENA region.

These changes are already beginning to lead to major future MENA buys of short, medium, and long-range precision strike systems – including systems designed to attack key land and naval targets and facilities. These buys include both ballistic missiles, unmanned aerial vehicles, and manportable, light vehicle-borne, and heavy systems.

These developments have already led arms transfers and outside military support to take on other new forms. North Korea and possibly China have provided significant technology transfer to Iran for its missile programs, and Iran has bought and reverse engineered advanced long-range attack drones. Iran has used missiles and drones in its own “security assistance” programs to the Lebanese Hezbollah and the Houthis in Yemen, as well as used its missiles and drones to directly attack Saudi oil facilities.
This new ability to use missiles to destroy high value point targets with precision conventional strikes is turning long-range ballistic missiles, cruise missiles, and drones from systems, which could only do random damage to area targets, to systems that can kill many of the most valuable civil and military point targets – effectively creating weapons of mass effectiveness that can be substituted to some degree for weapons of mass destruction.

At the same time, the impact of such longer-range systems would also be radically changed if Iran – or any Arab state – acquired nuclear, advanced biological, or fourth-generation chemical weapons.

**Missile Defense and “Layered” Artillery, Rocket, Missile, and Air Defense**

These advances in ballistic and cruise missiles, coupled to the proliferation of shorter-range rockets and artillery weapons are leading MENA countries both to buy more advanced air and missile defense systems and to examine new mixes of missile, air, and counter artillery-rocket defenses.

Israel, for example, has already deployed multi-layered defense systems to deal with artillery, rocket, air, and missile attacks. The U.S. Army is seeking to develop and deploy such systems for power projection, and other MENA and outside states seem certain to follow.

**Proliferating Other “Smart” Weapons**

Other “smart” weapons are coming to supplement or replacement major weapons platforms. These systems include some shorter-range systems like anti-armor guided weapons, manportable anti-air missiles, anti-ship missiles, and “smart mines.” However, they also include steadily rising mixes of new unmanned combat aerial vehicles (UCAVs), more accurate rockets, and missiles with precision conventional strike capabilities. They seem likely to lead to major future MENA buys of short, medium, and long-range precision strike systems, including systems designed to attack key land and naval targets and facilities. They too are leading some MENA countries to examine new mixes of missile and air defenses.

**Privileged Access to Advanced Weapons and Military Technology**

Assistance to national security forces – and to non-state actors – can include many forms of military aid, loans, and direct weapons and equipment transfers. It can take the form of privileged to advanced weapons and military technology. This includes the most advanced combat aircraft, as well as the full range of precision guided conventional weapons from manportable to long-range land and naval attack systems that can destroy high value targets anywhere in another country’s territory.

**Counterterrorism and Counterextremism**

Counterterrorism and counterextremist operations have become a key aspect of regional military dynamics. The al-Qaeda attacks on the World Trade Center and the Pentagon in the United States on September 2011 had catalyzed the United States to engage in a broad set of campaigns against foreign terrorist and extremist movements, but those groups also posed a growing threat to many Arab states, and particularly to Saudi Arabia.

While the threat from Iran has led to a focus on hybrid and conventional warfare, the threats of extremism and terrorism has led regional states to make major increases in their capability for counterterrorism and unconventional warfare and also to seek changes in security assistance in
order to help them radically improve the capability and strength of their paramilitary and internal security forces.

MENA countries have had to make major new investments in the training, equipment, and size of counterterrorism and internal security forces – and these efforts affect regular military forces, paramilitary forces, police forces, and many elements of the justice and national intelligence system of each MENA country. In many cases, such developments have had little public reporting – as has their cost and the level of outside security assistance. In some cases, human rights reporting, commercial reports on national police forces, and reports like the annual U.S. State Department report on terrorism provide more data than unclassified reporting on military forces.3

**New Forms of Paramilitary and Security Forces**

Major shifts in national forces and outside assistance have already been driven by the rise of extremist and terrorist movements, internal instability, and the need for new forms of internal security and paramilitary forces. Most MENA countries have already had to change the way in which they shape their paramilitary, internal security, police, and justice systems.

These shifts have improved counterextremism and counterterrorism, but often at the cost of repression and detentions. These measures sometimes breed more extremists and terrorists, or they radicalize those being detained. Some MENA countries need support from regional and outside powers to develop forces that are more effective, less repressive, and able to win more popular support.

**“Volunteers,” Mercenaries, Non-State Actors, Militias, and Other Proxies**

Russia has deployed state-controlled mercenaries called the Wagner force to Libya. Iran has deployed “volunteers” that include non-Iranian mercenaries and Iranian elements to Syria. Syria and Iran work with and arm the Lebanese Hezbollah. Iran arms the Houthis in Yemen and supports Popular Military Forces (PMFs) in Iraq. The U.S. and Arab states have funded, trained, and armed Syrian rebel groups. MENA countries and outside powers increasingly make use of proxies and non-state actors, while proxies and non-state actors increasingly make use of MENA countries and outside powers.

**Gray Area, Hybrid, and Low-Intensity Warfare**

Both MENA and outside states increasingly seek to develop options and capabilities to avoid major conventional wars and conduct operations that can achieve tactical and strategic benefits with limited risk. This can include the support of non-state actors – including terrorists and extremists – or funding, advising, and supporting factions in other countries civil wars. Conducting limited operations – like Iran’s recent operations against shipping and other targets in the Gulf, such as the missile strikes on Saudi Arabia – is one such example.

For all the efforts at counterterrorism, carefully focused low-level, covert, and political warfare have become as critical of an aspect to MENA military dynamics as the preparations for deterrence and defense in larger-scale and more direct forms of conflict.

**The Declining Need for Conventional Major Weapons and Warfighting**

One important impact of these military dynamics is that they cumulatively reduce the value of conventional armies, navies, and airpower that cannot operate without advanced targeting and
IS&R capabilities. As Saudi Arabia and the UAE learned in Yemen, fighting hybrid threats like the Houthis is very different from land-air war with Saddam’s conventional military forces.

The Arab Gulf navies have very mixed capability to deal with the very different threats posed by the IRGC naval forces. Major weapons platforms like tanks have become steadily more vulnerable to light, precision guided weapons. Mixtures of ballistic missiles and unmanned aerial combat vehicles (UCAVs or “drones”) can attack high value targets without winning any form of air supremacy, and the emergence of ISIS, the Houthis, Hezbollah, and Iraq’s PMFs show that even shaping the deployment of forces can have large-scale uncertainties. Yesterday’s “glitter factor” is losing much of its shine.

**Population Warfare**

The nature of war and violence in the MENA region also continues to change in ways that have a major human impact. Wars in the MENA region have always had an impact on the civil population. The wars that led to Israel’s creation as a state displaced numerous Palestinians and the 1967 war created a new set of such movements. The Lebanese civil war restructured the country’s political system, the Algerian civil war had a major impact on its citizens, and the Iran-Iraq War affected many Iraqi and Iranian civilian.

It was not until the 2003 invasion of Iraq and the creation of a war between the U.S. forces and the new Iraq government with Sunni extremist factions, however, that war led to major impacts on civilians – like the partition of Baghdad, major urban warfare in Western Iraq, the near destruction or exiled or religious minorities, and crippling damage to the Iraqi economy – problems repeated in the war against ISIS with even more serious urban warfare and cumulative economic impact on development.

Population warfare in the Syrian civil war has created even more civilian casualties, refugees, and IDPs. It has led to the systematic use of air and helicopter strikes on civilian populations and targets, the use of poison gas, and a long series of brutal urban battles against Syrian rebels. It also has created a series of rebel enclaves where civilians have often been targets, humanitarian aid has been blocked, medical facilities and infrastructure have been attacked, and the population has been forced to leave.

Some similar suffering has emerged as a result of the Libyan civil war, but so far has been limited. Yemen, however, has become an even worse case than Syria and far worse than Iraq. The Yemeni civil war has created a war where Saudi and UAE bombing, land forces fighting on the ground, the actions of the Houthis, and the proliferation of other tribal and extremist-led fighting have further crippled one of the poorest countries in the world.

None of these wars can be said to be a regional trend, but all have been caused and driven by sets of problems that do apply to other MENA countries. None have ended or have been replaced by a nation on a clear path towards stability, and other civil wars – fought to extremes – are at least possible. The impact of a full-scale war with Iran is all too real, and the growing numbers of precision-guided ballistic missiles and UCAVs creates a new risk of major attacks on critical civilian infrastructure, ranging from major petroleum facilities to war supplies like desalination plants.

These dynamics of military forces present a clear and unpredictable risk – as do the sectarian, ethnic, tribal, and ideological differences, as well as the efforts by leaders and elites to cling to
power – that can drive war to extremes, not including the ambitions and competitions between outside powers.

**Human Shields, Air Power, and Precision Strike**

The region’s military dynamics are also affected by the fact that extremist and terrorist factions – and a wide range of rebel groups – hide among the civil population and essentially use the population as human shields. This has led to the extensive use of precision air and missile strikes in areas where civilians are present, and there is often no clear military alternative to striking at targets that present a risk to civilians. Any effort to substitute ground forces and ground warfare will almost inevitably lead to far more serious civilian casualties and collateral damage.

A few countries like the U.S. can minimize the risks of civilian casualties and unnecessary collateral damage with a massive IS&R effort, but no current combination of technical and human intelligence can eliminate mistakes, and there often is no clear military alternative to targeting civilian areas. The fact the U.S. is steadily cutting back on its ground presence and train and assist efforts, as well as forward-deployed IS&R assets, is also reducing U.S. capability to target – levels of capability no MENA state or outside state now possesses.

So far, there is tendency to deny the reality of this dilemma, but it is a key military dynamic in the MENA region.

**Counterproliferation**

Finally, as has been touched upon earlier, the proliferation of weapons of mass destruction remains an issue and involves security assistance as well. This can take the form of security assistance in arms control, providing defenses, and extending deterrence. It also raises serious questions about efforts to provide MENA nations with nuclear power reactors and about the steadily widening scale of national biotechnology and chemical production facilities.

So far, the region faces only moderate near-term threats. Israel has long had nuclear armed missile systems. Iran is acquiring the capability to build and deploy a wide range of such missiles and drone systems, and it still has many elements of a nuclear weapons program. Iraq made extensive use of chemical weapons during the Iran-Iraq War, and the Assad regime in Syria has used chemical weapons repeatedly in the Syrian civil war while also attempting to covertly build a nuclear reactor that was destroyed by Israel in 2007. Israel and Egypt seem to have both a biological and chemical weapons development program, although those may be largely defensive in character.

Here, it should be noted that while international controls on nuclear technology remain significant – and the JCPOA has had a major impact on Iran’s efforts – countries like Pakistan are producing weapons at rates that could allow them to sell such weapons, and a number of Arab Gulf countries have shown an interest in nuclear power plants that could be a prelude to proliferation if Iran actively resumes its full nuclear weapons program. As for chemical weapons, Syria has used such weapons against its rebels and even its own population, Iran declared that it had chemical weapons when it joined the Chemical Weapons Convention, and Egypt and Israel may have such weapons.

There are no reliable data on biological weapons holdings and development efforts, but it seems likely that Egypt and Israel have explored such weapons at least as part of their biological defense efforts, and – like the technology needed for chemical weapons – most transfers do not require security assistance as they are now available through open commercial transactions. Iraq showed
during the Iran-Iraq War that the days in which effective controls existed on many key aspects of the technology and equipment used in biological and chemical weapons were already over.

**The Civil-Military Challenge**

In very different ways, the recent conflicts between MENA states, civil wars, and struggles against extremism have also created new needs for civil-military aid; recovery and reconstruction efforts; and dealing with the problems of civilian casualties, collateral damage, refugees, and internally displaced persons. The impact of such violence had a critical impact in Libya, Tunisia, Syria, Iraq, and Yemen. It also had the complex mix of long-standing political, civil, and economic problems, alongside the problem of corruption, which is described in detail in the UN’s Arab Development Reports, UN humanitarian aid reports, and sources like the IMF and World Bank.

The fighting and security problems in the MENA countries have interacted with both the impact of recent political upheavals like the “Arab Spring” and long-term structural problems like massive population growth. Military dynamics are reshaping both the ways that wars have to be fought as well as the nature of conflict termination efforts and postwar development. They also increasingly require major outside economic aid and loans, as well as major national reform efforts – if they are to bring a lasting end to conflicts and to sustain internal peace and stability.

Libya, Lebanon, Syria, Iraq, and Yemen are only the most serious cases in point. So far, however, massive national building exercises, like the U.S. effort in Iraq, have had very limited success, and most such aid, at best, buys time without addressing the major causes on instability and internal conflict.

The civil causes of MENA’s regional instability are addressed in depth in another Burke Chair report, entitled, *The Greater Middle East: From the “Arab Spring” to the “Axis of Failed States,”* August 24, 2020: [https://www.csis.org/analysis/greater-middle-east-arab-spring-axis-failed-states](https://www.csis.org/analysis/greater-middle-east-arab-spring-axis-failed-states).
The Challenges in Measuring the Changing Dynamics of MENA Country Forces and Outside Military Support

It is not easy to measure these changes in military and security forces by country or to put them in a strategic context. Many of these trends are not quantifiable, and many of the data that are quantifiable have dubious authenticity or are uncertain. MENA countries often politicize the data they provide on their own military and security forces, their arms imports, and the real cost of their efforts. In many cases, key official data are not reported.

Both MENA and outside powers provide limited details on counterterrorism activities and the steady build-up of paramilitary and security forces. Most unclassified MENA country reporting does not cover the growing efforts by the paramilitary and counterextremist/counterterrorist forces of the Ministries of the Interior as distinguished from the Ministries of Defense.

Reporting on Military Forces

There are important exceptions. Unclassified sources like some national white papers and the military balances issued by the International Institute of Strategic Studies (IISS) provide a range of comparable data on key aspects of military dynamics like force size and structure, total personnel, current military spending, current major weapons holdings, and some aspects of paramilitary and counterterrorism forces.

This study draws heavily upon the 2020 edition of the Military Balance of the International Institute of Strategic Studies (IISS) for much of the data it uses. It has proved broadly reliable over time, and the focus of this analysis is on dynamics—not the details of current forces. As the following country assessments show, these data do have considerable value in assessing military dynamics.

The IISS data also show that the U.S. and its major Western European allies have continued to dominate the supply of modern arms to Morocco, Tunisia, Egypt, Lebanon, Jordan, Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, the UAE, and Yemen.

It is clear from the other media sources that the U.S. and Western European military forces, internal security advisors, and contractors dominate outside military support to these countries, and that the U.S. and its European allies deployed and/or prepositioned at least some elements of active forces in Bahrain, Kuwait, Oman, Qatar, the UAE, and Yemen.

The IISS data for different years of its annual Military Balance also help illustrate the real-world impact of growing Russian arms imports by Egypt and a number of other MENA states, although Algeria and Syria are now the only Arab states that rely on on-going major transfers of Russian arms.

They show in tangible terms that current holdings of Chinese weapons remain limited, and that many such holdings are old to the point of obsolescence or of low to medium quality at best. As the following analysis shows, China is almost certain to have a far greater impact in the future, but that impact has not yet arrived.

Other sources report in depth by country. For example, the series of individual country reports sold by IHS Janes cover military and internal developments in each MENA country in detail. They seem to be the best unclassified or open source reports available, and they have moderate to high levels of reliability and substantial useful content.
The better sources do show the developing strength of national military and some paramilitary and security forces. The types of weapons shown also indicate which outside countries have supplied given MENA countries with major weapons. Even so, such reporting on military and other security forces, weapons holdings, military expenditures, and arms expenditures can have many gaps and differences.

However, force data tell only part of the story. Total military personnel – the focus of almost all media reporting – has never meant much in military history, given the number of times when the quality and experience of personnel, as well as strategy and tactics (and luck) proved far more important than relative numbers of soldiers.

For all the reasons outlined earlier, knowing weapons types and numbers reveals less and less about actual military capability for modern warfare. Most modern weapons platforms and complex military technologies and systems now cost as much to maintain and modify as they do to procure during their entire life cycle.

The conversion to the effective use of new combat systems and advanced weapons – and the new mixes of command and control, IS&R, and multi-domain warfare technology necessary to use them will take most MENA countries at least another half decade, even with proper funding of outside support. Maintaining readiness often then requires major new support efforts for the entire service life of the weapons and systems. Yet, some MENA countries still seem to be buying advanced arms or large number of weapons more for prestige purposes or their “glitter factor,” and are not funding the broader changes they need to make.

Military Industry, Major Maintenance, and Modernization Capability

The data on MENA country military industries are limited, as well as their real-world capability to develop, produce, modify, and overhaul major weapons and military equipment. Many claim to be developing effective military industries, and some are. However, some claims are exaggerated, and a number of facilities in the MENA region actually do little more than assemble outside parts and weapons or rely on foreign contractors to help provide major service support and install modifications.

Some so-called “offset” programs have been a major source of corruption and/or have done little more than tie a given country to a specific manufacturer and the assembling or servicing of its systems. Moreover, some MENA forces quietly depend on foreign personnel to sustain or even operate such systems in wartime.

Egypt, Israel, Jordan, Iran, Saudi Arabia, and the UAE are partial exceptions. Israel is the only country with a truly advanced military industrial base. Egypt can produce significant amounts of less advanced systems. Jordan has made some modifications to its systems. Saudi Arabia has created some real companies that can service a range of military systems. Iran has been forced to develop its own systems and modifications – including steadily more advanced missiles – by sanctions and other barriers to foreign arms sales.

Iran has made real progress in a number of areas – both in producing its own weapons and in creating its own upgrades and modernization base. It also, however, has issued a number of government video segments where its claimed success of its new systems – which have been revealed to be photoshopped – and it has made several claims to be producing major weapons that have not appeared in any numbers.
Paramilitary, Counterterrorism, and Internal Security Forces

There are far fewer data on MENA internal security, and counterterrorism/counterextremist forces – and the capability of military forces to support such missions – than on regular military forces. It is clear that such capabilities – along with regime security – have long been a priority of MENA states. It is equally clear that the rise of extremist threats has led to the expansion of such capabilities, substantial increases in funding, and new levels of training and equipment. It also has affected the legal systems of many MENA states.

Many countries have created new centers for such activities and new surveillance capabilities, and they have begun to deal with new extremist threats like the use of the Internet, information warfare, and even cyber threats. Others have relied more on repression. They are only limited data on such changes, however, although they have probably had as much of an impact in some countries as military modernization.

Dependence On, and Presence Of, Outside Powers

There are only limited reliable data on the size and character of most outside military and security efforts in MENA countries and only reliable metrics for most of these trends. Most Western countries, Russia, China, and other suppliers of outside assistance only provide limited data on their military presence, military activities, and levels of security assistance in MENA countries. They do not fully report on arms transfers; the level of effort to support a given MENA country’s forces; or their efforts to resupply, modify, and sustain weapons and forces in combat.

Many outside countries do not report accurately – if at all – on the size and role of military advisory teams; the scale of help in military training and exercises; or in developing and operating effective command and control, intelligence and surveillance, and joint warfare capabilities. Many provide little data on the deployment and employment of actual combat forces to MENA countries.

More broadly, the data on outside military presence, prepositioned equipment, intelligence sharing efforts, assistance to police and counterterrorism forces, the size of advisory/contractor teams, proliferation, and security related civil aid – have serious gaps and also are often highly uncertain. The same is true of direct outside aid in terms of active military forces, naval and air deployments, intelligence support, bases and facilities, the train and assist efforts that are embedded with local forces, as well as assessments of the ongoing fighting and military balance.

The United States does provide more transparency in some areas, particularly on U.S. arms transfers, forces, and key shifts in U.S. strategy and support of strategic partners. The U.S. Defense Manpower Data Center (DMDC) provides monthly reports on the total number of U.S. troops and contractors in foreign countries. USAID provides a Foreign Aid Explorer that reports on both military and civil aid by country. The Defense Security Cooperation Agency (DSCA) reports monthly to the U.S. Congress on each major arms sale to a foreign country, as well as on the total trends in the value of actual U.S. exports over time. These reports, however, only describe the details of individual sales requests, but the final sale and delivery can be different.

The U.S. also sometimes fails to provide full definitions of the data. For example, the U.S. provides data on overseas deployments of U.S. military personnel and defense contractors, but these data have gaps for security reasons, do not cover civil intelligence agencies, often do not report military personnel deployed for special missions, and may not reflect large numbers of military contractors that are not U.S. citizens or that are employed by the host country.
Data on the “Soft” Side of Security

Most countries do not provide full data on allocating or receiving the “softer” aspects of security assistance. Data on aid and loans are often missing or describe the authorized funds rather than actual spending. The data on the size, nature, and outside support of non-state actors, “rebel” forces, and extremist and terrorist forces can be particularly uncertain.

Humanitarian aid to deal with the consequences of war and civil violence is often ignored as a form of military support and security assistance. It is often vital, however, to ending a conflict or civil war, limiting a conflict’s impact, and contributing to conflict termination. The agencies of the United Nations do make a good effort to report on conflict related humanitarian needs, programs, and spending – a form of security assistance that has become critical in nations like Libya, Syria, Iraq, and Yemen over the last decade. Once again, however, there are serious gaps and inconsistencies in such data. The data provided by donor countries vary sharply, although some provide good online databases.
Military Spending as a Measure of Military Dynamics

There are two other major sources of data on military dynamics that allow direct comparisons of military dynamics: military spending and arms transfers. The analysis that follows makes extensive comparisons of military spending and defense budgets, but – as noted earlier – many MENA countries do not report accurately on military spending, and some do not even report total budgets.

The Uncertainties in Military Spending Data

The UN makes a useful effort to collect such data, but fully recognizes that it is limited. The UN describes the inputs to its military expenditure reporting as follows: “Since the UN General Assembly established the reporting system for military expenditures, known as the United Nations Instrument for Reporting Military Expenditures, a total of 126 UN Member States have submitted a report to the UN Secretary-General regularly or at least once. But only a minority of States report in any given year, and a small number of States consistently report every year. In addition, there are significant disparities in reporting by States among different regions.” For similar reasons, member country reporting to the United Nations on arms transfers is sometimes helpful in showing the number of major weapons transfers by major category, particularly by supplier country, but it too is often incomplete or politicized.

The World Bank also has a useful range of databases on military spending in dollars and in local currency, and as a percent of GDP. It also reports on total military personnel and such personnel as a percent of the labor force. However, the military spending and other military data shown in the World Bank and IMF reporting as well as in commercial data bases can be uncertain and differ from both national and other outside reporting. Media coverage is sporadic, and new reporting of a given country’s outside assistance efforts and security events ranges from excellent to rushed and wrong.

This report relies largely on military spending data provided by the U.S. government, the IISS, and SIPRI – which also rely largely on a MENA country’s official data, although several cases are flagged where the country clearly underreports. It also relies heavily on data in current dollars. This presents the problem that such data do not reflect the impact of inflation and tend to exaggerate the upward trend in national spending. This choice has been made because many of the data that do attempt to reflect the trend in constant prices involve additional uncertainties as to the conversion factors being used.

SIPRI Estimates of Military Spending in Constant Dollars

The report also, however, draws heavily on the Stockholm International Peace Research Institute (SIPRI). SIPRI provides a separate data set that attempts to cover all national military spending and major arms exports. It also provides an online database on military spending, arms transfers, and a collection of EU and national reports on arms transfers exports by the EU and a wide range of Western exporting countries.

The SIPRI estimates of total military spending by each MENA country for 2010-2019 in millions of constant U.S. dollars are shown in Figure One. These estimates make an interesting contrast to the U.S. WMEAT data – shown in the analyses of each subregion – and to the IISS data shown for each MENA country. They do still rely largely on official national reporting, and they have significant uncertainties. However, they do sometimes provide figures for spending in a region where countries routinely disguise their actual level of effort.
Most imports in the SIPRI data are provided in constant dollars, based on SIPRI estimates of directly comparable prices, that attempt to show the real trends of growth or cuts in arms transfer spending over time. They flag cases where the estimates in current dollars exaggerate the actual rise in spending and national effort, and they seem broadly correct in flagging several countries that have made major real increases in military spending in recent years.

Once again, however, these SIPRI data have some of the same problems as other such estimates, but SIPRI flags the cases where its data are most certain. The footnotes to Figure One provide a clear warning for all users and analysts on the kind of limits that exist in virtually any unclassified sources of MENA data, but they can only cover part of the issues and uncertainties involved.

It is clear that the trends in the cost of added internal security forces, military efforts, and major arms transfers are understated in the reporting by some countries that SIPRI draws upon. In many cases, the real trend in the size of national efforts is only apparent by examining the shifts in their actual level of military and internal security forces, their activity in given years, and the changes in the size and major weapons in their forces.\textsuperscript{10}
Figure One: Military Expenditures by MENA Country in Constant Dollars
(In constant 2018 US$ millions, from 1988-2019)

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Figures are in US $m., at constant 2018 prices and exchange rates, except for the last figure, which is in US$ millions. at 2019 prices and exchange rates. Figures in blue are SIPRI estimates. Figures in red indicate highly uncertain data.

**Source:** SIPRI Defense Expenditure Data Base.
[https://www.sipri.org/sites/default/files/Data%20for%20all%20countries%20from%201988--2019%20in%20constant%20%282018%29%20USD.pdf](https://www.sipri.org/sites/default/files/Data%20for%20all%20countries%20from%201988--2019%20in%20constant%20%282018%29%20USD.pdf).

**Notes:**

"." = data unavailable. "xxx" = country did not exist or was not independent during all or part of the year in question.

¶ Figures for these countries do not include spending on paramilitary forces.

1. The figures for Algeria are budget figures from 2004. In July 2006 the Algerian government issued supplementary budgets increasing the total expenditure by 35 per cent. It is not clear if any of these extra funds were allocated to the military.

2. The figures for Libya do not include spending on paramilitary forces. The figures for Libya up to 2008 do not include development expenditure, which in 2008 amounted to 1,000 million dinar. The figures from 1959-1982 are not necessarily compatible with those from 1997-2008. The figures from 1997-2008 are not necessarily comparable to those for 2012-2014. No information has been available since 2015.
3. Morocco has had multiple changes of financial year. Up to and including 1994, the financial year is from January to December. Financial year 1995 is a transitional 18-month year from January 1995 to June 1996. From 1996/97 to 1999/2000, the financial year is from July to June. Financial year 2000 is a transitional 6-month period from July-December 2000. From 2001 onwards, the financial year is from January to December. Military pensions are not included in Morocco’s military expenditure as the official figures are not publicly available. It should be noted that the rate of the implementation of the Angolan budget could vary considerably. Military expenditure for Angola (in constant US$) should be seen in the context of highly uncertain economic statistics due to the impact of war on the Angolan economy and more recently (since 2015) high levels of inflation. There are allocations of off-budget military spending through oil revenues in Angola, but there is a lack of concrete open source evidence to prove this.

4. The figure for Israel includes ‘miscellaneous security expenses’, a category which is not explained in the Israeli budget documents but is assumed to refer to expenditures for militarized intelligence services such as the Mossad.

5. The figures for Bahrain do not include extra budgetary spending on defense procurement.

6. The figures from 2012 are from the Iranian state budget documents and include spending on the Iranian Revolutionary Guard Corps (IRGC). Figures for earlier years are from the Iranian Central Bank, and most likely also include the IRGC. The figure for 2014 is an estimate based on the budget for Defence & Security and is particularly uncertain due to the war with the Islamic State in Iraq and the Levant (ISIL) that broke out during 2014.

7. The figures for Iraq do not include spending on the National Defence Council, the Office of the Chief of the Armed Forces or the Directorate of Disarmament and Integration of Militias, which totaled 308 and 314 billion dinars in 2011 and 2012 respectively. Military spending figures for Iraq do not include spending on paramilitary forces (Hashd al-Shaabi, or The Popular Mobilization Forces, formed in 2014).

8. Kuwait has had multiple changes of financial year. The financial years beginning in 1969 through 1973 are from July to June. The financial year beginning in 1974 is from April 1974 to March 1975 (thus overlapping with the previous financial year). Data is missing for the financial year beginning 1975. From 1976/77 to 1999/2000, the financial year is from July to June. Financial year 2000/2001 is a transitional 9-month period from July 2000 to March 2001. From 2001 onwards, the financial years are from April to March. It is not known if pensions are included.

9. Figures reported for Oman are for Defense and National Security. Military spending is estimated to be 75 per cent of this category.

10. The figures for Saudi Arabia are for ‘military sector and security’ from 2016 and for ‘defense and security’ before 2016. These figures are likely to include certain police forces or other security forces that are not paramilitary and these figures may therefore be an overestimate of Saudi Arabian military expenditure. Figures from 2016 are for actual spending. The Ministry of Finance has consistently reported significant overspending of the state budget before 2016, making it likely that ‘defense and security’ spending was also significantly higher than budgeted. However, no data has been released on actual spending on ‘defense and security’ before 2016. The figure for Saudi Arabia for 2015 includes 20 billion rials of additional spending on military operations in Yemen. The figures for Saudi Arabia may not include significant military aid that Saudi Arabia reportedly has provided to several countries in the Middle East.

11. The military expenditure of the UAE is uncertain. Data is available on the budget of the UAE federal Ministry of Defense (MOD). However, the UAE MOD has only administrative functions and its budget accounts for only a small proportion of total military spending. Until 2014, International Monetary Fund (IMF) reports provided figures on spending on ‘Abu Dhabi Federal Services’, which refers to government funding from the Emirate of Abu Dhabi that the IMF has described as mainly for military and security purposes. SIPRI estimates total military spending in the UAE 1997 to 2014 as 80 per cent of ‘Abu Dhabi Federal Services’ plus the budget of the MOD. No military spending information is available since 2014.

12, 13. The Republic of Yemen was formed in 1990 from the merger of the Yemen Arab Republic (North Yemen) and the People’s Democratic Republic of Yemen (South Yemen). North Yemen merged with South Yemen into the Republic of Yemen in 1990. Figures in the table for constant dollars are based on subsequent price and exchange rate data for the united Republic of Yemen and should be interpreted with caution.
Guesstimating the Data on Arms Transfers as a Measure of Military Dynamics: A Case Study in Uncertainty

In some ways, arms transfers should provide a better gross indicator of the scale of changes in military dynamics than the past and current shifts in weapons and force structure or even military expenditures. Most MENA countries are critically dependent on arms transfers, and most sources of such data include almost all dedicated military imports – not just major weapons imports.

There are a number of sources that attempt to provide directly comparable data on arms transfers. These data, however, serve as a case study in the problems in measuring military dynamics. Most such data are uncertain and unreliable, and many have a political or commercial character.

Some estimates promote given sales while others count possible sales agreements, rather than actual spending and equipment transfers. Others only attempt to cover what a given country declares, regardless of how honestly it reports. In many cases, MENA countries actually spend far more than their official budget would indicate. Some estimates of arms sales only show the estimated value of major weapons sales or transfers. They do not count security assistance spending on supporting such systems, trainings, and creating suitable operations and maintenance capabilities.

The Analytic Appendix to this Report

This analysis is accompanied by a separate analytical annex entitled, Analytic Appendix: Additional Data on Detailed Patterns in Arms Transfers, that can be located on the CSIS website. It provides a comparative assessment of the patterns in arms transfers from two key databases – the SIPRI list of arms transfers by all exporting countries and the WMEAT reporting on arms exports from the U.S., Western Europe, Russia, and China between 2012-2017 – to help users understand the full flow of arms transfers to given MENA countries. It also provides charts and graphic visuals to demonstrated trends by county and over a given time period.

It is important, however, to understand the limits of virtually all available arms transfer data. They not only help set the stage for understanding the problems in assessing military dynamics available, but they serve as an example that applies to virtually all international data – whether on the military, economic, demographic, or any other aspect of comparative quantitative analysis.

U.S. Government Reporting on Military Spending and Arms Transfers: WMEAT Data

The U.S. government has long issued unclassified estimates of global and MENA defense spending, arms transfers, and their impact on national trade and economies that are available on the Internet in order to provide a more accurate basis for understanding the current trends in terms of major weapons by supplier and recipient.

The U.S. State Department has previously issued written reports – and now maintains a computer database – called World Military Expenditures and Arms Transfers (WMEAT). The older written summary reports are still useful for historical purposes. The computer database provides annually updated information that covers an extended period of time by year, but whose entries lag two years behind the date of the published database. The current version is 2019, for example, but the annual data only extends to 2017.
These WMEAT data cover a wide range of military spending and arms transfer data, as well as a broad picture of the national economies that are impacted by a given country’s defense spending. As noted earlier, these entries are used to provide the trend data on total country-by-country defense spending for each subregion in this analysis. Other outside sources do provide more current data, but the WMEAT database still provides the most comprehensive and official U.S. picture of national and regional trends that is currently available.

There is also a useful narrative section on sources and methods on the website. However, this narrative makes it clear that the WMEAT database draws on a wide range of outside sources that are not always clearly cited, that have some data which are not directly comparable, and that other data are from sources that rely on unreliable national inputs.

The WMEAT database clearly needs additional resources and support from the State Department. It is potentially the most comprehensive and useful tool available for exploring a full range of data on the impact of military spending and arms transfers on national economies, but it is a data dump rather than an analytic tool.

It badly needs added software features that allow the user to easily make tailored mixes of data through quantitative and graph comparisons. It also needs to be tied to an annual written summary report with an explanation of how comparable the data are and the exact sources of data on military spending and arms transfers in non-NATO countries.

**Congressional Research Service (CRS) Data**

The Congressional Research Service (CRS) has provided another set of comparative reports called *Conventional Arms Transfers to Developing Nations* that are used in the country-by-country sections of this report. The CRS reports do provide direct comparisons of the trends in MENA countries – rather than comparisons of raw data – and are available in a number of sporadic versions that cover both new arms agreements and actual deliveries over a series of four-year periods, which cover all global weapons sales and transfers worth more than $50 million.

The most recent such CRS survey data cover 2008-2015. They are summarized by major exporting and importing country in *Figure Two* and *Figure Three*. The data on new agreements are particularly useful in showing current trends by major arms supplier because actual deliveries can lag behind the current trends in security assistance by three to five years. The three most recent U.S. reports cover the period from 2004 to 2015.

These data show that the U.S. remains the largest single source of weapons to countries in the MENA region through 2015, followed by major Western European states. Russia sells under half of the U.S. and Western European total, and it has recovered some of the market share since the major cuts in its sales following the break-up of the former Soviet Union (FSU). China, regardless of any future ambitions, remained a relatively small supplier.

These CRS reports estimate that:

- The U.S. share of all new arms sales agreements in the MENA/Near East region rose after the break-up of the FSU. They rose from $19.96 billion in 2004-2007 (30% of total sales) to $86.450 billion in 2008-2011 (75%), although they dropped to $54.659 in 2012-2015 (35%).
• America’s major Western European allies (the United Kingdom, France, Germany, and Italy) sold $23.10 billion in new agreements in 2004-2007 (35%), $13.20 billion in 2008-2011 (11.5%), and $41.00 billion in 2012-2016 (26.0%).

• Russians sales dropped sharply after the break-up of the FSU in 1991. They totaled only $16.30 billion in 2004-2007 (25%), $6.30 billion in 2008-2011 (5%), but rose back to $27.9 billion in 2008-2015 (18%).

• China could not offer competitive military weapons and services in most areas, and only countries with limited resources and/or without access to other suppliers bought from China. Chinese sales dropped from $2.60 billion in 2004-2007 (4%) to $1.50 billion in 2008-2011 (1.3%).

• A wide mix of other states (including many Eastern European states – selling now surplus Soviet bloc arms – North Korea, and Vietnam) sold $4.00 billion in 2004-2007 (6%), $6.40 billion in 2008-2011 (5.5%), and $3.5 billion in 2008-2011 (18.7%).
### Figure Two: Arms Transfer Agreements to MENA by Supplier
(In Millions of Current $U.S.)

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**Source:** Catherine A. Theohary, *Conventional Arms Transfers to Developing Nations, 2008-2015*, R44716, Table 6, December 19, 2016.

**Notes:**
- 0=data less than $50 million or nil. All data are rounded to the nearest
- a. Major West European category includes France, United Kingdom, Germany, and Italy totals as an aggregate figure.
### Figure Three: Arms Deliveries to MENA by Supplier
(In Millions of Current $U.S.)

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<th>Recipient Country</th>
<th>U.S.</th>
<th>Russia</th>
<th>China</th>
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<th>All Other European</th>
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**Source:** Catherine A. Theohary, *Conventional Arms Transfers to Developing Nations, 2008-2015*, R44716, Table 6, December 19, 2016.

**Notes:**
- 0=data less than $50 million or nil. All data are rounded to the nearest
- a. Major West European category includes France, United Kingdom, Germany, and Italy totals as an aggregate figure.
SIPRI Estimates of the Value and Nature of Arms Transfers

As is the case with military expenditures, SIPRI provides another useful effort to produce comparable data on the size of arms transfers, and one that is more current than U.S. government reporting. They are not, however, estimates of the actual cost of arms transfers. They are based on SIPRI estimates of the total number of major weapons delivered by major category as well as a standard cost for each type of weapon.

Like virtually all such sources, SIPRI does not have access to sensitive classified data from major intelligence sources, and it has to rely on unclassified efforts. Nevertheless, the broad trends in the SIPRI data broadly track with the U.S. government data shown earlier, and they are more up-to-date and provide a better picture of Russia’s return as a major supplier of arms and security assistance.

Figure Four shows the SIPRI estimate of the trends in arms transfers to the entire MENA region by major supplier between 1950 and 2016. It shows the rise and fall in arms transfers during given wars and crises, and it also demonstrates the relative impact of U.S., European, Russian and Chinese exports. The figures may not be comparable in real dollars, but the broad trends seem accurate in reflecting military dynamics.

These SIPRI data reflect the shifting levels of competition between the Former Soviet Union and the U.S. and Europe during the Cold War, as well as the impact of the direct Arab-Israeli wars, the Iran-Iraq War in 1980-1988, the first Gulf War in 1991, the invasion of Iraq in 2003, and the initial phases of the war against ISIS. The data also show the first elements of a possible recovery of Chinese arms exports.

In 2020, SIPRI’s estimates also covered the trends in weapons sales and supply by major weapons category through 2019. A SIPRI factsheet described the key trends for the top 40 importers in the world from 2010 to 2019. Two MENA states – Saudi Arabia and Egypt – were in the top five importers, and Algeria was ranked as 6th. Eight more states were in the MENA region and included Algeria. The SIPRI rankings for these countries and recent trends by major supplier are shown in Figure Five.
Figure Four: Trends in U.S., Western European, Russian, and Chinese Arms Transfer to the MENA Region: 1960-2016

Figure Five: Major Arms Transfers to Key MENA Countries by Major Supplier: 2010-2019

<table>
<thead>
<tr>
<th>Country</th>
<th>Global Ranking</th>
<th>Share of World Imports (%)</th>
<th>% Change 2010-2014 to 2015-2019</th>
<th>Three Main Suppliers and Percent of Sales</th>
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<td>US (29%), France (9.5%), Italy (14%)</td>
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</table>


SIPRI also provides a database that shows the annual level of estimated arms transfers to each MENA country by exporting country that is linked to a matching database on the total value of transfers of arms by major category of weapons. These data are shown in detail for each MENA country in the analytic appendix to this report. While they are both complex and uncertain – and also require careful attention to SIPRI’s definitions of TIV and weapons category – they provide one of the few comparable sources of data on the military dynamics of a region that is heavily dependent on outside arms transfers.

It should again be stressed, however, that the SIPRI estimates are based on standardized weapons prices and standardized weapons categories. Their sources are not defined, nor are the particular weapons, equipment, and standard prices involved. They also only cover major weapons and military equipment transfers – not total other equipment; contract and construction services; training, operations and maintenance support; and activities like train and assist and counterterrorism support.

They are usually still valid as broad indicators of the complexity of a given MENA nation’s dependence on outside arms, the overall size of its military modernization, the sharp shifts in country-to-country spending over time, and the ongoing reemergence of Russia as a major supplier. If anything, they underestimate the role of Russia because SIPRI does not make estimates for Syria, Libya, and Iran.
It is also striking that these data showed that the SIPRI factsheet from which they source also reported that SIPRI estimated a 61% increase in arms imports in the region from 2010-2014 to 2015-2019. SIPRI found that,\textsuperscript{19}

The Middle East accounted for 51 per cent of total US arms exports in 2015–19. US arms exports to the region increased by 79 per cent between 2010–14 and 2015–19. Saudi Arabia was the largest recipient of US arms in 2015–19 and accounted for 25 per cent of US arms exports, compared with 7.4 per cent in 2010–14.

…At the regional level, states in Asia and Oceania accounted for 57 per cent of Russian arms exports in 2015–19, the Middle East for 19 per cent, Africa for 17 per cent, Europe for 5.7 per cent and the Americas for 0.8 per cent.

…Russian exports of major arms to the Middle East increased by 30 per cent between 2010–14 and 2015–19. In 2015–19 Egypt and Iraq were the main recipients of Russian arms exports to the Middle East, accounting, respectively, for 49 and 29 per cent of Russian arms exports to the region. Deliveries to Iraq were up by 212 per cent on 2010–14, while those to Egypt were up by 191 per cent. Although Russian forces have been supporting the Syrian Government in the conflict in Syria since 2015, Russian arms deliveries to Syria fell by 87 per cent between 2010–14 and 2015–19, and it accounted for only 3.9 per cent of Russian arms exports to the Middle East and 0.7 per cent of total Russian arms exports in 2015–19.

…French arms exports to the Middle East were 363 per cent higher than in 2010–14. The region accounted for 52 per cent of French arms exports in 2015–19.

…China was the world’s fifth-largest arms exporter in 2015–19 and accounted for 5.5 per cent of total arms exports. After an increase of 133 per cent between 2005–2009 and 2010–14, Chinese arms exports grew by only 6.3 per cent between 2010–14 and 2015–19. In 2015–19 Asia and Oceania accounted for 74 per cent of Chinese arms exports, Africa for 16 per cent and the Middle East for 6.7 per cent.
Changing Stability and Nation-by-Nation Trends in Military Dynamics

In any case, broad regional trends can only explain a limited part of the MENA region’s military dynamics – and sometimes they do more to disguise than they do to explain. A full analysis of the key trends in military dynamics has to be made on a nation-by-nation and conflict-by-conflict basis.

The map of the entire MENA region shown in Figure Six shows that it is, at best, an artificial and awkward construct from a military and security perspective. It has never been cohesive in terms of politics, military development, security alliances, or economics, in spite of the fact that it is largely Arab and Islamic.

The long distances between given MENA states can be understood by one simple indicator. In practice, the MENA region is divided into three major sub-regions on three continents with distances that range up to 6,800 kilometers from Morocco to Iran’s border with Afghanistan. These subregions consist of North Africa (Morocco, Algeria, Tunisia, and Libya), the Arab-Israeli confrontational states (Egypt, Israel, Lebanon and Jordan), and the Persian/Arab Gulf (Iraq, Iran, Bahrain, Saudi Arabia, Kuwait, Qatar, Oman, the UAE, and Yemen).

There also are no clear boundary lines to the MENA region. Some other regional powers are sometimes included. Turkey has sometimes been listed as part of the MENA region. However, it was not seen as a significant regional actor from the end of the Turkish Empire until its intervention in dealing with Iraq’s Kurds after 2003, and also in dealing with the civil war in Syria after 2011. It now does play a direct security role in Syria, Iraq, Qatar, and Libya, but largely in a limited role as an outside power.

A few studies include the Gulf of Oman, the Northwestern end of the Indian Ocean, and the Horn of Africa, but their impact on the region consists largely of issues relating to outside naval access and the export of oil and gas. The threat from piracy, the formulation of the Combined Task Force 150 to deal with that threat, and the establishment a Maritime Security Area in 2008 had little to do with the behavior of MENA states. The same is true of the role played by Sudan, South Sudan, and the other Islamic states on the southern side of the Red Sea – although there have been some minor military incidents in the Red Sea and near the Bab el Mandeb and Socotra.

If there are two consistent trends to the military dynamics of the MENA region, one has been that every country in the region has a different approach to building up its security forces and seeking outside aid, weapons, and advisory and combat support. The second is that most of the region has been unstable and the subject of repeated wars and military build-ups since the end of World War II. As a result, most countries have seen repeated changes in the mix of threats, security partners, and the role of both outside and regional powers in every aspect of military operations.

As a result, any detailed analysis has to be based on the history of past conflicts, military developments, outside support, and security partnerships in given MENA countries; on a nation-by-nation analysis of the major sources of tension and planning for war; and on a detailed analysis of the situation – which is rapidly changing – in each MENA state.
Figure Six: Map of the MENA Region Countries
The Military Dynamics of the North African Sub-Region

Nation-by-nation analysis does not mean ignoring geography or the interactions with neighboring states. The interactions between MENA states become much clearer if one moves from Morocco in the West to Iran in the East, and if one also considers the interactions between MENA states in the process.

The nations in the North African subregion – Morocco, Algeria, Tunisia, and Libya – have scarcely been free of internal turmoil and fighting. However, they have had notably fewer major conflicts and military build-ups than the Arab-Israeli confrontation states and the Persian/Arab Gulf states.

The military forces of each North African country are summarized in Figure Seven. As is the case throughout the region, the forces differ sharply by country and do not reflect consistent trends in force mix, the emphasis placed on given military services, and the size of paramilitary and internal security forces. Both Morocco and Algeria have large – but very different – forces for countries of their size and economic resources. Libya’s civil war makes it impossible to estimate the size of current forces, and Tunisia is one of the few MENA states that has not been the subject of a major military build-up.

The figures that follow provide a broad perspective on sub-regional trends, but they do have important limits, particularly when compared with the data in the country-by-country assessments:

- The WMEAT estimates of comparative North African military spending in millions of current U.S. dollars are shown in Figure Eight. These data are uncertain in detail, but they are probably correct in showing that Algeria has spent a large amount of its annual oil wealth on military forces. Algeria clearly outspends Morocco and the other North African states. Tunisia’s spending levels are low, as is expected. The figures for Libya reflect a nation in a growing civil war and are highly uncertain even in terms of broad trends.

- The WMEAT estimates of comparative North African military spending as a percent of GDP are shown in Figure Nine. The data for Morocco and Tunisia seem broadly correct, but may not include some military and security spending. The data for Algeria are unexpectedly high, but also may not reflect its total spending and the indirect civil costs of its military forces. They are high enough to be a burden on its civil development.

- The WMEAT estimate of comparative spending on arms transfers is shown in Figure Ten. These data are somewhat speculative, but the trends seem broadly correct – with the exception of Algeria. Algeria is a major importer, and the figures shown are possible, but – as the country sections and analytic annex that follow show – almost all of the open source estimates of Algeria’s spending differ.
Figure Seven: MENA North African Military Forces in Early 2020

<table>
<thead>
<tr>
<th>Category</th>
<th>Morocco</th>
<th>Algeria</th>
<th>Tunisia</th>
<th>Libya</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defense Budget (US billions)</td>
<td>3.63</td>
<td>10.40</td>
<td>0.993</td>
<td>?</td>
</tr>
<tr>
<td>Active Military Personnel</td>
<td>195,800</td>
<td>130,000</td>
<td>35,800</td>
<td>?</td>
</tr>
<tr>
<td>Reserve Military Personnel</td>
<td>150,000</td>
<td>150,000</td>
<td>NA</td>
<td>?</td>
</tr>
</tbody>
</table>

**Land Forces**

<table>
<thead>
<tr>
<th>Category</th>
<th>Morocco</th>
<th>Algeria</th>
<th>Tunisia</th>
<th>Libya</th>
</tr>
</thead>
<tbody>
<tr>
<td>Army Active Personnel</td>
<td>175,000</td>
<td>110,000</td>
<td>27,000</td>
<td>?</td>
</tr>
<tr>
<td>Main Battle Tanks</td>
<td>602</td>
<td>1,467</td>
<td>84</td>
<td>?</td>
</tr>
<tr>
<td>(Modern Tanks)</td>
<td>222</td>
<td>572</td>
<td>54</td>
<td>?</td>
</tr>
<tr>
<td>Other Armored Fighting Vehicles (AFVs)</td>
<td>718</td>
<td>1,223</td>
<td>60</td>
<td>?</td>
</tr>
<tr>
<td>Armor Personnel Carriers (APCs)</td>
<td>1,225</td>
<td>1,007+</td>
<td>425+</td>
<td>?</td>
</tr>
<tr>
<td>Towed Artillery</td>
<td>118</td>
<td>393</td>
<td>115</td>
<td>?</td>
</tr>
<tr>
<td>Self-Propelled Artillery</td>
<td>357</td>
<td>224</td>
<td>0</td>
<td>?</td>
</tr>
<tr>
<td>Multiple Rocket Launchers</td>
<td>47</td>
<td>151</td>
<td>0</td>
<td>?</td>
</tr>
<tr>
<td>Surface-to-Surface Missile Launchers***</td>
<td>NA</td>
<td>4</td>
<td>0</td>
<td>?</td>
</tr>
<tr>
<td>Attack Helicopters</td>
<td>19</td>
<td>44</td>
<td>0</td>
<td>?</td>
</tr>
</tbody>
</table>

Note: Combat-capable fixed-wing trainers

**Naval Forces**

<table>
<thead>
<tr>
<th>Category</th>
<th>Morocco</th>
<th>Algeria</th>
<th>Tunisia</th>
<th>Libya</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navy Active Personnel</td>
<td>6,300</td>
<td>6,000</td>
<td>4,800</td>
<td>?</td>
</tr>
<tr>
<td>Marine Active Personnel</td>
<td>1,500</td>
<td>0</td>
<td>0</td>
<td>?</td>
</tr>
<tr>
<td>Tactical Conventional Submarines</td>
<td>0</td>
<td>6</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Submersibles</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Principal Surface Combatants</td>
<td>6</td>
<td>8</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Destroyers &amp; Frigates</td>
<td>6</td>
<td>8</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Corvettes</td>
<td>1</td>
<td>7</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Guided Missile Patrol Boats</td>
<td>4</td>
<td>16</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Other Patrol and Coastal Combatants</td>
<td>45</td>
<td>9</td>
<td>30</td>
<td>1</td>
</tr>
<tr>
<td>Amphibious Ships</td>
<td>4</td>
<td>3</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Landing Craft</td>
<td>2</td>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Mine Warfare0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Combat Capable Naval Aircraft</td>
<td>0</td>
<td>NA</td>
<td>0</td>
<td>?</td>
</tr>
<tr>
<td>ASW Helicopters</td>
<td>3</td>
<td>6?</td>
<td>0</td>
<td>?</td>
</tr>
</tbody>
</table>
### Air Forces

<table>
<thead>
<tr>
<th>Category</th>
<th>Morocco</th>
<th>Algeria</th>
<th>Tunisia</th>
<th>Libya</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Force Active Personnel</td>
<td>13,000</td>
<td>14,000</td>
<td>4,000</td>
<td>?</td>
</tr>
<tr>
<td>Total Combat Capable Aircraft</td>
<td>90</td>
<td>134</td>
<td>23</td>
<td>13</td>
</tr>
<tr>
<td>Fighter Ground Attack (FGA)</td>
<td>49</td>
<td>44</td>
<td>0?</td>
<td>2</td>
</tr>
<tr>
<td>Fighter</td>
<td>22</td>
<td>34</td>
<td>11</td>
<td>?</td>
</tr>
<tr>
<td>Attack</td>
<td>0</td>
<td>33</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>EW, IS&amp;R, ELINT</td>
<td>1</td>
<td>4</td>
<td>12</td>
<td>?</td>
</tr>
<tr>
<td>AE&amp;W</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>?</td>
</tr>
<tr>
<td>Tanker</td>
<td>2</td>
<td>6</td>
<td>0</td>
<td>?</td>
</tr>
<tr>
<td>Transport/Airlift</td>
<td>47</td>
<td>65</td>
<td>18</td>
<td>?</td>
</tr>
<tr>
<td>Transport Helicopters**</td>
<td>76</td>
<td>62</td>
<td>39</td>
<td>?</td>
</tr>
<tr>
<td>Other Helicopters**</td>
<td>14</td>
<td>176</td>
<td>45</td>
<td>?</td>
</tr>
<tr>
<td>Combat-Cable fixed-wing trainers</td>
<td>19</td>
<td>16</td>
<td>10+</td>
<td>?</td>
</tr>
</tbody>
</table>

### Air Defense Forces Personnel

<table>
<thead>
<tr>
<th>Category</th>
<th>Morocco</th>
<th>Algeria</th>
<th>Tunisia</th>
<th>Libya</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major Surface-to-Air Missile Launchers</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
</tbody>
</table>

### Paramilitary Forces

<table>
<thead>
<tr>
<th>Category</th>
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<th>Algeria</th>
<th>Tunisia</th>
<th>Libya</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gendarmes</td>
<td>20,000</td>
<td>20,000</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Coast Guard</td>
<td>?</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>National Security</td>
<td>16,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Republican Guard</td>
<td>-</td>
<td>1,200</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Legitimate Defense</td>
<td>-</td>
<td>60,000?</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>National Guard</td>
<td>-</td>
<td>-</td>
<td>12,000</td>
<td>-</td>
</tr>
</tbody>
</table>

* Personnel includes any Royal Guards and small independent combat elements.

** Total of Army, Air Force, IRGC.

***Numbers and types are very different in each source and changing. Purely nominal number.

Source: Adapted from relevant country sections of the IISS, *Military Balance, 2020*. 
Figure Eight: MENA North African Military Expenditures  
(in Millions of Current $US From 2012-2017)

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Morocco</td>
<td>2,980</td>
<td>3,410</td>
<td>3,460</td>
<td>3,270</td>
<td>3,330</td>
<td>3,490</td>
</tr>
<tr>
<td>Algeria</td>
<td>5,960</td>
<td>6,830</td>
<td>8,200</td>
<td>9,720</td>
<td>10,100</td>
<td>10,100</td>
</tr>
<tr>
<td>Tunisia</td>
<td>1,020</td>
<td>1,160</td>
<td>1,300</td>
<td>1,590</td>
<td>1,690</td>
<td>1,590</td>
</tr>
<tr>
<td>Libya</td>
<td>1,750</td>
<td>2,430</td>
<td>2,980</td>
<td>2,920</td>
<td>3,170</td>
<td>2,610</td>
</tr>
</tbody>
</table>

Figure Nine: Annual Military Expenditure as Percent of GDP for the Countries in the North African Sub-Region From 2012-2017

Figure Ten: Annual Arms Imports of the North African Sub-Region

Morocco

The IISS reporting on Morocco shows that the country currently has relatively well-equipped and supported security forces, with a mix of U.S. and French systems. It has a force of some 195,800 military personnel, with relatively modern armor and artillery, six major combat ships, and 90 combat capable aircraft. It has 50,000 additional paramilitary forces, as well as a coast guard.

Morocco’s modernization programs seem well balanced, but implementation has been relatively slow for funding reasons. Also, some of its weapons and equipment are aging. It has, however, made some advances in multi-domain and joint warfare capabilities, as well as in the development of more advanced capabilities that are interoperable with U.S. French, and other NATO forces. Training and readiness are good by regional standards. Its forces have participated in peacekeeping operations outside the country, and it deployed F-16s to the Saudi coalition forces fighting in Yemen during 2015 to 2019. It still deploys forces to deter a Polisario threat, but this threat is nominal to the point of being passive.21

Morocco acquired 222 U.S. M1A1 battle tanks during 2016-2018 from the U.S. Excess Defense Articles program. It is modernizing its Navy and expanding naval cooperation with Portugal. It is modernizing its F-16s and requesting F-16Vs, alongside seeking more attack helicopters and planning to phase out its aging F-5s. It is also examining options to modernize its surface-to-air missile forces.

The IISS reports military expenditures of some $3.6 billion in 2019, and that military spending only totaled 3.1% of the GDP. SIPRI reports $3.7 billion in current U.S. dollars for 2019, and that spending rose from $5.4 billion in constant 2018 U.S. dollars in 2010 to $9.6 billion in 2018. The U.S. and its European allies feel that Morocco is an important strategic partner in terms of the security of the Mediterranean, the operations against smuggling and human trafficking, and the fight against extremism.

The CRS reporting on arms transfers to Morocco in 2012-2015 listed the U.S. as Morocco’s only major military supplier with total transfers of $1.2 billion. The SIPRI arms transfer database shows transfers worth $1.23 billion between 2005 and 2019: $1.12 billion from the U.S., $110 million from France, and $4 million from the United Kingdom.

The detailed SIPRI data on arms transfers to Morocco during 2010-2019, that are provided in the Analytic Appendix, show that transfers totaled $4.473 billion. They came from 10 countries, and were dominated by the U.S. ($2.073 billion), France ($1.442 billion), the Netherlands ($524 million), and China ($289 million). Russia was not listed. The key spending areas affecting military capabilities and dynamics were modern and well-balanced, and they focused on aircraft, armor, missiles, sensors/satellites, and ships.22

Moroccan confrontation with the Polisario in its South and along its border with Algeria still shapes it military dynamics, but the risk of a serious conflict seems to have declined to token levels. Morocco has taken significant steps to reduce corruption and become more democratic over the years. It is still poor and developing, but it did not experience major political upheaval in the Arab Spring in 2011, does seem relatively stable, and is a nation where the risk of military coups has largely vanished.

The near-term military dynamics of all the states in the MENA region are driven by uncertainty; by the behavior of neighboring and outside states; and by the challenges posed by population
growth, economic development, and other civil factors limiting their stability. Its military dynamics, however, seem to be evolving in relatively stable ways.

Algeria

Algeria successfully forced France to give its independence in a popular civil war, but it then came under the control of a junta led by its rebel military forces. Algeria has since relied heavily on Russian weapons and military assistance, but it has not been a close strategic partner of Russia. The only major Algerian war was a long civil war between its ruling military junta and Islamist extremists during 1992-2004, which its military won ruthlessly and decisively.

Algeria did experience major political upheavals in 2019 and 2020, but it did not see a return of any major civil conflict and may be on the road to a broader domestic political reform. It is still, however, a state that reflects heavy military influence. Like Egypt, it is as much an “army with a country as a country with an army.”

Its military and security forces now focus heavily on internal security operations, where it cooperates with a number of outside states – including Tunisia. Algeria does not seem to receive major security assistance or rely heavily on outside military advisors and contractors – except for support in maintaining and modernizing some ships and combat aircraft. The U.S. State Department country report for 2019 indicates that Algeria has played a strong role in fighting terrorism, and that its operations have been relatively successful.

The IISS reports that Algeria has effective and well-equipped military forces by regional standards with some 130,000 active military personnel. Its forces have aging Russian armor and artillery, but they are well equipped with manportable and light missiles. They have six submarines, 15 frigates and corvettes, and large numbers of patrol boats. They have 130 Russian-made combat capable aircraft – largely Su-24s, MiG-29s, Su-30s, MiG-25s, and attack helicopters – and S-300 surface-to-air missiles. Algeria also has a large mix of 187,000 additional paramilitary forces, which include 150,00 light local militia and guards.

The IISS reports military expenditure of some $10.4 billion in 2019, and that its military spending totaled a high 6.0% of its GDP. SIPRI reports $3.7 billion in current dollars for 2019, and that spending rose from $5.4 billion in constant 2018 U.S. dollars in 2010 to $9.6 billion in 2018. The CRS reporting on arms transfers to Algeria in 2012-2015 listed Russia as Algeria’s major military supplier ($9 billion), followed by Western Europe ($4 billion), no transfers from the United States, and only $600 million from China – out of total transfers worth $13.9 billion.

The SIPRI arms transfer database shows very high levels of transfers worth $6.15 billion between 2005 and 2019: $4.13 billion from Russia, $797 million from China, $694 million from Germany, $177 million from Italy, and $103 million from Sweden. Other transfers from Denmark, France, Netherlands, South Africa, the UAE, U.K., and U.S. were well under $100 million each.

The detailed SIPRI data on arms transfers to Algeria during 2010-2019, that are provided in the Analytic Appendix, show that transfers were large and totaled $9.752 billion. They came from 15 countries, and they were dominated by Russia ($7.072 billion), China ($882 million), Germany ($715 million), and Italy ($395 million). The key spending areas affecting military capabilities and dynamics focused on aircraft, air defense systems, armor, missiles, and ships.

Like most of its neighbors, Algeria’s near-term military dynamics remain unstable. Political upheavals in 2019 and 2020 have changed its leadership and its political system to some degree.
These changes are unstable, however, and its military still forms the main power bloc in the country. It faces major development problems and its political stability remains uncertain. Algeria faces outside challenges like the Libyan civil war. It has to deal with some extremist challenges and must modernize many aspects of its military forces with limited resources. It seems likely to continue its dependence on Russian systems, but the U.S. has reached out to Algeria, and the Secretary of Defense Secretary Mark Esper met with Algerian President Abdelmadjid Tebboune in October 2020 – the first visit of a Pentagon chief to the North African country since 2006.

**Tunisia**

Tunisia has largely stood aside from the region’s military build-up and conflicts. It only became independent in 1956. It then became a one-party country under its first “president” Habib Bourguiba for 31 years until Zine El Abidine Ben Ali pushed him out of power in a coup. The country began to experience a major economic crisis in 2010, which led to riots and violence in January 2011 that drove Ben Ali out of power. A national unity government was formed, real elections were held, and the country has now elected two presidents and a real legislature. It is the only clear success to emerge from the “Arab Spring,” although its economy remains weak and its stability is unclear.

Its main security problems consist of violent extremists, with some elements of ISIS. It is, however, improving its counterterrorism operations and interagency efforts as well as its intelligence capabilities to deal with this threat, and it has received help from France, the U.S., and Algeria in doing so. Border security is an issue because of the civil war in Libya and instability in Algeria, alongside coastal security.

The IISS notes that Tunisia has been “Designated a major non-NATO ally by the US in 2015, Tunisia also benefits from defense and security cooperation with US AFRICOM and with France,” but that its military capability “is limited by the ageing equipment inventory, although Tunisia has been the recipient of surplus US systems, including armed utility helicopters.”

The IISS reports that Tunisia’s military and security forces now total 35,8000 active military personnel, plus 12,000 paramilitary personnel. Its Army is relatively small and equipped with older U.S. and French armor and U.S. towed artillery. Its small Navy has no major combat ships, just patrol boats. It has 25 combat capable aircraft – largely F-5s. It also has a lightly equipped 12,000 personnel national guard.

These forces now focus on internal security operations. They cooperate in counterterrorism activities with a number of outside states – including the United States. Tunisia is also a member of the Saudi-led Islamic Military Counter Terrorism Coalition. Its armed forces cooperate with the U.S. and other countries in multinational exercises, but they are small and equipped with older and relatively low-quality U.S. weapons and French ships.

The IISS reports military expenditure of only $993 million billion in 2019, and that its military spending only totaled 2.7% of its GDP. SIPRI reports $1.0 billion in current dollars for 2019, and that spending rose from $450 million in constant 2018 U.S. dollars in 2010 to $1.03 billion in 2018.

CRS reporting on arms transfers in 2012-2015 listed the U.S as Tunisia’s only major supplier with total arms sales of only $500 million.
The SIPRI arms transfer database shows transfers worth $320 million billion between 2005 and 2019: $153 million from the United States; $134 million from the Netherlands; and small amounts from France, Germany, Turkey, and the UAE. The detailed SIPRI data on arms transfers to Tunisia during 2010-2019, that are provided in the Analytic Appendix, show that total transfers were very small and totaled $416 million. They came from 7 countries and were dominated by the U.S. ($243 million) and the Netherlands ($395 million). China and Russia were not listed. The key spending areas affecting military capabilities and dynamics focused on aircraft and ships.

Tunisia’s near-term military dynamics are somewhat uncertain, and its location between Algeria and Libya poses outside strategic challenges. Like virtually every state in the MENA region, it also faces civil and economic challenges that have been made worse by the impact of the COVID-19 crisis. Tunisia however, made real progress towards political reform since 2011, and its military dynamics seem relatively stable. It signed a 10-year security agreement with the U.S. in early October 2020.

**Libya**

Libya is the wild card in the military dynamics of in North Africa. Since 2012, it has been a security tragedy that has transitioned from an incompetent authoritarian mess under Muammar Qaddafi – who ruled from 1969 to 2012 – to a divided state engaged in a bloody civil war.

Libya’s past military history has been one of major arms transfers that could not be transformed into effective military forces in spite of significant aid and deployment of some pilots and other operators from the Soviet Union. Qaddafi did attempt to create a major military build-up in Libya, to play an aggressive role in Chad, and to support radical non-state actors in Europe, but all with little success. His regional military ambitions had largely faded by 2001, and U.S. pressure helped lead him to give up his nuclear ambitions in 2003.

The fall and killing of Qaddafi in October 2011 had some encouragement from the U.S. and European powers, but it was driven by a wide range of domestic opposition elements. While an election was held in 2014, Qaddafi’s fall from power did not lead to any effective foreign or domestic efforts to bringing reform and unity. The end result was that a major civil war began between major factions in the East and West, although it involved some elements of ISIS until they were largely defeated.

The timelines of this war have been complex, as have the mix of Libyan factions involved, and the alignment of outside powers. As of the fall of 2020, the civil war was still dominated by two factions in the West and the East that each had the support of a wide range of competing outside nations. Both sides had so far shown little willingness to compromise in peace negotiations, and it was not possible to estimate what kind of power structure would emerge after any kind of decisive victory or successful peace negotiation.

The CRS map and graphic shown in **Figure Eleven** summarize the changing state of the Libyan civil conflict in the fall of 2020. One major faction consists of the House of Representatives/Council of Deputies faction and the Libyan National Army. It is based in Tobruk and Benghazi, and it controls northwestern Libya. It has recently been led by an ex-Libyan military officer, “Field Marshall” Khalifa Hifter (Haftar). The outside nations that have supported it include the UAE, Sudan, Qatar, Turkey, Ukraine, and Iran. This side made major gains in the summer of 2020, only to see them reversed in the early fall.
The other major faction consists of the more broadly recognized Government of the National Accord or Congress and the National Salvation Government based in Tripoli and the West. It was supported by a mix of other Libyan factions and tribal elements, as well as by outside support from nations like Egypt, Qatar, Turkey, and Russia.

As Cristopher Blanchard of CRS notes, however,27

On the surface, the conflict in Libya pits two primary factions and their various foreign and local backers against each other in what appears to be a straightforward contest for control over the capital and the organs of state power. However, beneath the surface, complicated local interests, foreign agendas, personal grudges, identity-based concerns, profit motives, and ideological rivalries shape political and security developments. Leading coalitions suffer from internal divisions and political legitimacy deficits stemming from the extended, fractious nature of the transition. Poor living conditions are fueling protests against the GNA and eastern leaders. Victory or surrender by either side could spur new fighting within their ranks. Outside powers have exploited these factors, frustrating mediation efforts.

The outside powers involved have their own disparate interests. Some seek regional power, some to play a spoiler role to put pressure on other outside states, some to serve ideological interests, some to block the flow of refugees, some to fight extremism, some because of Libya’s petroleum wealth, and some because of their interests in the Mediterranean and its energy resources. A number of outside nations like the United states have sought to play a peacemaking role. The broader mix of outside powers have participated in various peace negotiations, but they have continued to provide arms and support the fighting with different motives and agenda.

No outside power has provided decisive security assistance, but the UAE has provided major arms shipment to the Hifter faction. Turkey has provided mercenaries and “volunteers” to help the National Accord faction in the West, while Russia has deployed advanced combat aircraft, has sent major airlifts of arms, and has deployed elements of its Wagner Group of mercenaries.28

There are no reliable metrics on the constantly shifting size and nature of the forces on each side or the size of the outside “security assistance” they have received. The IISS does not report figures for military expenditures or percent of GDP. The CRS reporting on arms transfers in 2012-2015 did not show any major spending – although outside nations were arming every side of the civil war. The SIPRI arms transfer database does provide some data, but the national data are only from 2010-2015, and they seem extremely uncertain. The data on factional transfers after 2016 seem too preliminary to include in this analysis.

Libya’s near-term military dynamics seem likely to remain driven by civil conflict, unless some faction can win decisively and is then led by a leader strong enough to force internal order in the country. In spite of repeated peace conferences, the main impact of both the fighting between factions and outside assistance has only resulted in making the war worse.

At this point, there is no way to determine how and when the war will end, what kind of government and nation will emerge, and which providers of security assistance will then have the most influence. This could create serious security issues for Tunisia, Algeria, Egypt, and other powers. It also will interact with the growing security issues over the future control of energy resources in the Mediterranean.

As for the human costs, they had not come close to those of the civil wars in Syria, Iraq, and Yemen as of the fall of 2020, but they were steadily rising and had crippled the Libyan economy and made major cuts in services like electric power and health care. The World Food Programme estimated that at least 400,000 people were displaced by late 2019, that as little as 26% of the population still
had access to basic and safe sanitation facilities, and that some 3 million Libyan (55% being women and children) needed some form of humanitarian services.\textsuperscript{29}
Figure Eleven: The Libyan Civil War in the Fall of 2020

Major Factions

<table>
<thead>
<tr>
<th>Government of National Accord (GNA)</th>
<th>Libyan National Army/Libyan Arab Armed Forces Movement (LNA/LAAF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The U.N. Security Council and U.S. government have recognized the GNA as Libya’s legitimate interim governing authority pursuant to the December 2015 Libyan Political Agreement (LPA).</td>
<td>The LNA/LAAF is a coalition of militias, military personnel, and tribal fighters that has asserted control over eastern Libya since 2014. Launched as a movement to combat Islamist forces in Benghazi, the LNA attempted to seize Tripoli in a campaign from April 2019 to June 2020, with foreign military support. LNA leader Khalifa Haftar is a Qadhafi-era military defector and former U.S. intelligence partner.</td>
</tr>
<tr>
<td>The GNA’s eastern-Libya-based rivals have withheld recognition, and militias in western Libya have undermined GNA authority. However, some of these militias have fought alongside GNA forces against the Libyan National Army/Libyan Arab Armed Forces Movement (LNA/LAAF).</td>
<td>In April 2020, Haftar claimed a popular mandate for LNA rule, dismissing the LPA, but later backtracked and ordered his forces to retreat from northwestern Libya.</td>
</tr>
<tr>
<td>Leader: Prime Minister-designate FAYEZ AL SARJAJ</td>
<td>Leader: Field Marshal Khalifa Belqasim Haftar</td>
</tr>
<tr>
<td>Foreign Supporters: Turkey, Italy, Qatar</td>
<td>Foreign Supporters: United Arab Emirates, Russia, Egypt, Saudi Arabia, France, Jordan</td>
</tr>
</tbody>
</table>

Source: Prepared by CRS.

Areas of Influence

The Military Dynamics of the Arab-Israel Confrontation States

The major Arab-Israeli confrontation states include Israel, Egypt, Syria, and Jordan – although Lebanon is also part of the sub-region – and a summary picture of their current forces is shown in Figure Twelve. The level of military forces in Israel, Egypt, and Syria reflects the fact that these confrontation states fought major wars in 1948, 1956, 1966, 1967, 1970, and 1973. Israel and Egypt remain major military powers in spite of their peace. Jordan has limited its military build-up since its peace. Lebanon stood aside from most wars and never invested in large modern forces, but it did fight a long civil war and now has Hezbollah forces that rival its national military forces. Like Libya, Iraq, and Yemen; Syria’s current forces are deeply affected by the civil war, and its figures are highly uncertain.

The reporting, used to develop these data, mentions, but does not fully describe, many aspects of the modernization of given systems; the deployment of surface-to-surface missiles; the deployment and shifts in surface-to-air defenses; the growing numbers of UCAVs; the upgrading of smaller precision-guided weapons systems; and the growing role of advanced battle management, IS&R, and secure computer, digital data and communications systems. Israel, in particular, competes with even the most advanced outside powers in many areas of joint warfare, multidomain warfare, and IS&R capabilities.

There are no reliable data on chemical and biological weapons programs. The IISS does report that Israel has an active nuclear program. It states that Israel has 24 nuclear-armed Jericho IRBM missiles, and it has stored 7 Lance SRBMs. These data are very uncertain, as are estimates of the number, yield, and type of Israel’s nuclear holdings.

Other sources report that Israel has 150 Jericho-1 500-kilometer range, short-range ballistic missiles (SRBM), and 50 Jericho-2 medium-range ballistic missiles (MRBM). It also has had Jericho-3 Intercontinental Ballistic Missiles (ICBM) in service since 2011, which may share some design features with Israel’s Shavit satellite launch vehicle (SLV). It reports that the Jericho-2 is the probable focus of Israel’s nuclear armed forces, can target every country in the MENA region, and possesses an estimated 1,000 kg payload capacity. It also indicates that Israel’s advanced fighters have nuclear bombs, but it makes no estimate of the number, type, and yield of Israel’s nuclear weapons inventory.

It is also important to note that other major Arab states sometimes deploy forces. These included Iraq and smaller force elements from Saudi Arabia and several other Arab states. The role such forces played were limited, however, and – with the exception of the 1973 war – little effort was made to develop coordinated military efforts even by Egypt and Syria. One consistent aspect of the Arab forces is that they fought with both limited common prewar planning and limited coordination once combat began.

Outside powers played a major role in arming and supporting Israel and the Arab combatants from the late 1940s onwards, as well as in resupplying and aiding in wartime arms transfers. They normally did not play an active combat role. France and Britain did intervene against Egypt directly in the 1956 war, but most outside powers largely provided security assistance in the form of training, arms, and other military support in all the following conflicts.

The 1973 War marked a turning point. Egypt had already expelled its Russian military advisors in 1972, and the U.S. sponsored Egyptian and Israeli peace negotiations after the end of the 1973 war led to the Camp David Accords in 1978. Israel and Egypt signed a peace treaty that removed the
one Arab military power that posed a critical threat to Israel. Jordan had never sought to be actively involved in the 1967 War and did not fight in the 1973 conflict, and Jordan later did sign a peace with Israel in 1994. Syria and the other Arab states did not reach such an agreement, but Syria could not engage Israel on its own, and other Arab powers did not attempt to support Syria in a major coalition effort.

From the Camp David Accord onwards, Egypt and Jordan ceased to plan for a major war with Israel, and they came to focus on internal security and broader regional security issues. The “peace” however, was relative. Israel and its Arab neighbors still fought lesser conflicts that included the Lebanon War in 1982, two Intifadas in 1987-1993, another Lebanon War in 2006, fighting in Gaza in 2008-2009, and in many smaller clashes.

The Arab-Israeli arms race does remain a critical factor in the Levant, but not in North Africa or the Gulf. The Syrian civil war, and the role of outside powers in Syria have also reshaped much of the focus of security assistance even in the Levant. The Israeli-Hezbollah balance, the presence of Iranian and Hezbollah forces in Syria, the missile threat and potential future nuclear threat that Iran can pose to Israel, the confrontation between Israel and Hamas in the Gaza, and a complex mix of smaller and local Islamic extremist movements have largely replaced the older mix of Arab confrontation states.

Turkish tensions with both Syria and Israel have become a factor, as have Israel’s improving relations with a number of Arab states as well as shifts, like the Israeli-UAE establishment of formal diplomatic relations. At the same time, the virtual political and economic collapse of Lebanon and the internal stability of Egypt and Jordan as well as their continued commitment to peace are all possible wild cards.

The Figures that follow provide a broad perspective on sub-regional trends, but do have important limits, particularly when compared with the data in the country-by county assessments:

- The WMEAT estimates of comparative Arab-Israel confrontation states’ military spending in millions of current US dollars are shown in Figure Thirteen. Egypt clearly underreports its actual spending and ignores substantial aid, procurement, and internal security/paramilitary spending. The Israeli, Jordanian, and Lebanese data seem broadly correct, but do not include Hezbollah spending. The Syrian data reflect a nation involved in a civil war and seem dubious at best.

- The WMEAT estimates of comparative Arab-Israel confrontation states’ military spending as a percent of GDP are shown in Figure Fourteen. They reflect the same patterns as the data for total military expenditures. The figures for Egypt are clearly wrong. They at best ignore U.S. and other aid, as well as the large amounts of Egyptian military and internal security activity. If they were accurate, they would almost certainly be far higher and show that Egypt’s spending imposes a significant burden on its civil sector and development. The data on Syria cover a nation in a civil war and are speculative. Israel may not include all outside aid in its figures, but its military spending does not seem to face a major burden on its economy. The data for Lebanon seems reasonable, but do not include the Hezbollah. The data for Jordan do seem broadly accurate and impose at least a moderate burden on its civil sector and economy.

- The WMEAT estimate of comparative Arab-Israel confrontation state spending on arms transfers is shown in Figure Fifteen. Once again, sources differ sharply. The Israeli,
Lebanese, and Jordanian data may be broadly corrected. The Egyptian data may not fully count U.S. aid, but the sudden rise may reflect a major set of buys from Russia discussed in the country section. The Syrian data again have to been “guesstimates.”
Figure Twelve: MENA Arab-Israel Confrontation State Military Forces in Early 2020

<table>
<thead>
<tr>
<th>Category</th>
<th>Israel</th>
<th>Palestinian Authority*</th>
<th>Egypt</th>
<th>Jordan</th>
<th>Syria</th>
<th>Lebanon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defense Budget ($US billions)</td>
<td>19.3</td>
<td>-</td>
<td>3.35-4.65</td>
<td>1.69</td>
<td>ND</td>
<td>1.93</td>
</tr>
<tr>
<td>Total Active Military Personnel</td>
<td>169,500</td>
<td>-</td>
<td>438,500</td>
<td>100,500</td>
<td>ND</td>
<td>60,000</td>
</tr>
<tr>
<td>Total Reserve Military Personnel</td>
<td>465,000</td>
<td>-</td>
<td>479,000</td>
<td>65,000</td>
<td>ND</td>
<td>ND</td>
</tr>
</tbody>
</table>

**Land Forces**

<table>
<thead>
<tr>
<th>Category</th>
<th>Israel</th>
<th>Palestinian Authority*</th>
<th>Egypt</th>
<th>Jordan</th>
<th>Syria</th>
<th>Lebanon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Army Active Personnel</td>
<td>126,000</td>
<td>-</td>
<td>310,000</td>
<td>86,000</td>
<td>130,000?</td>
<td>56,600</td>
</tr>
<tr>
<td>Main Battle Tanks</td>
<td>490</td>
<td>-</td>
<td>2,480</td>
<td>282</td>
<td>?</td>
<td>334</td>
</tr>
<tr>
<td>(Modern Tanks)</td>
<td>490</td>
<td>-</td>
<td>1,130</td>
<td>182</td>
<td>?</td>
<td>0</td>
</tr>
<tr>
<td>Other Armored Fighting Vehicles (AFVs)</td>
<td>NA</td>
<td>-</td>
<td>1,102</td>
<td>880</td>
<td>?</td>
<td>103</td>
</tr>
<tr>
<td>Armor Personnel Carriers</td>
<td>1,338</td>
<td>-</td>
<td>5,177</td>
<td>879+</td>
<td>?</td>
<td>1,378</td>
</tr>
<tr>
<td>Towed Artillery</td>
<td>171</td>
<td>-</td>
<td>962</td>
<td>94</td>
<td>?</td>
<td>313</td>
</tr>
<tr>
<td>Self-Propelled Artillery</td>
<td>250</td>
<td>-</td>
<td>492</td>
<td>506</td>
<td>?</td>
<td>12</td>
</tr>
<tr>
<td>Multiple Rocket Launchers</td>
<td>30</td>
<td>-</td>
<td>450</td>
<td>16+</td>
<td>?</td>
<td>11</td>
</tr>
<tr>
<td>Surface-to-Surface Missiles***</td>
<td>24-31</td>
<td>-</td>
<td>42+</td>
<td>0</td>
<td>?</td>
<td>0</td>
</tr>
<tr>
<td>Attack Helicopters**</td>
<td>43</td>
<td>-</td>
<td>75</td>
<td>12</td>
<td>24</td>
<td>?</td>
</tr>
</tbody>
</table>

**Naval Forces**

<table>
<thead>
<tr>
<th>Category</th>
<th>Israel</th>
<th>Palestinian Authority*</th>
<th>Egypt</th>
<th>Jordan</th>
<th>Syria</th>
<th>Lebanon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navy Active Personnel</td>
<td>9,500</td>
<td>-</td>
<td>18,500</td>
<td>500</td>
<td>4,000</td>
<td>1,800</td>
</tr>
<tr>
<td>Marine Active Personnel/Commandos</td>
<td>300</td>
<td>-</td>
<td>NA</td>
<td>?</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Tactical Conventional Submarines</td>
<td>5</td>
<td>-</td>
<td>6</td>
<td>0</td>
<td>?</td>
<td>0</td>
</tr>
<tr>
<td>Submersibles</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Principal Surface Combatants</td>
<td>NA</td>
<td>-</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Destroyers &amp; Frigates</td>
<td>0</td>
<td>-</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Corvettes</td>
<td>3</td>
<td>-</td>
<td>7</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Guided Missile Patrol Boats</td>
<td>8</td>
<td>-</td>
<td>21</td>
<td>0</td>
<td>22</td>
<td>0</td>
</tr>
<tr>
<td>Other Patrol and Coastal Combatants</td>
<td>34</td>
<td>-</td>
<td>25</td>
<td>9</td>
<td>8</td>
<td>13</td>
</tr>
<tr>
<td>Amphibious Ships</td>
<td>0</td>
<td>-</td>
<td>5</td>
<td>0</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Landing Craft</td>
<td>3</td>
<td>-</td>
<td>15</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Mine Warfare</td>
<td>0</td>
<td>-</td>
<td>14</td>
<td>0</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>Combat Capable Naval Aircraft</td>
<td>0</td>
<td>-</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ASW Helicopters</td>
<td>7</td>
<td>-</td>
<td>10</td>
<td>0</td>
<td>10</td>
<td>0</td>
</tr>
</tbody>
</table>
### Air Forces

<table>
<thead>
<tr>
<th>Category</th>
<th>Israel</th>
<th>Palestinian</th>
<th>Egypt</th>
<th>Jordan</th>
<th>Syria</th>
<th>Lebanon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Force Active Personnel</td>
<td>34,000</td>
<td>-</td>
<td>30,000</td>
<td>14,000</td>
<td>15,000</td>
<td>1,600</td>
</tr>
<tr>
<td>Combat Capable Aircraft</td>
<td>354</td>
<td>-</td>
<td>584</td>
<td>57</td>
<td>236</td>
<td>9</td>
</tr>
<tr>
<td>Fighter Ground Attack (FGA)</td>
<td>266</td>
<td>-</td>
<td>319</td>
<td>47</td>
<td>118</td>
<td>0</td>
</tr>
<tr>
<td>Fighter</td>
<td>58</td>
<td>-</td>
<td>62</td>
<td>0</td>
<td>64</td>
<td>0</td>
</tr>
<tr>
<td>Attack</td>
<td>0</td>
<td>-</td>
<td>0</td>
<td>0</td>
<td>39</td>
<td>9?</td>
</tr>
<tr>
<td>EW, IS&amp;R, ELINT</td>
<td>10</td>
<td>-</td>
<td>14</td>
<td>10</td>
<td>0</td>
<td>3?</td>
</tr>
<tr>
<td>AE&amp;W</td>
<td>4</td>
<td>-</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Tanker</td>
<td>10</td>
<td>-</td>
<td>?</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Transport/Airlift</td>
<td>65</td>
<td>-</td>
<td>82</td>
<td>10</td>
<td>23</td>
<td>0</td>
</tr>
<tr>
<td>Transport Helicopters**</td>
<td>12</td>
<td>-</td>
<td>95</td>
<td>14</td>
<td>54</td>
<td>9</td>
</tr>
<tr>
<td>Other Helicopters**</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fixed-wing Combat Capable Trainers</td>
<td>?</td>
<td>-</td>
<td>191</td>
<td>0</td>
<td>?</td>
<td>NA</td>
</tr>
<tr>
<td>Long Range-Surface-to-Air Missile Launchers***</td>
<td>64+</td>
<td>-</td>
<td>612+</td>
<td>-</td>
<td>?</td>
<td>0</td>
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### Air Defense Command Personnel

<table>
<thead>
<tr>
<th>Category</th>
<th>Israel</th>
<th>Palestinian</th>
<th>Egypt</th>
<th>Jordan</th>
<th>Syria</th>
<th>Lebanon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Range-Surface-to-Air Missile Launchers***</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</table>

### Paramilitary Forces

<table>
<thead>
<tr>
<th>Category</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Border Police</td>
<td>8,000</td>
</tr>
<tr>
<td>Central Security Forces</td>
<td>325,000</td>
</tr>
<tr>
<td>National Guard</td>
<td>60,000</td>
</tr>
<tr>
<td>Gendarmerie</td>
<td>15,000</td>
</tr>
<tr>
<td>National Defense Force</td>
<td>50,000</td>
</tr>
<tr>
<td>Other Militias</td>
<td>50,000</td>
</tr>
<tr>
<td>Internal Security Forces (MOI)</td>
<td>20,000</td>
</tr>
</tbody>
</table>

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*IISS lists personnel as follows Palestinian Authority: Presidential Security 3,000, Special Forces 1,000, National Security Force 10,000, Preventive Security 4,000, Civil Defense 1,000, al Aqsa Brigades, and Hamas is listed as having 15,000-20,000 personnel.

**Total of Army, Air Force, IRGC.

***Numbers and types are very different and changing. Purely nominal number.

**Source:** Relevant country sections of the IISS, *Military Balance, 2020.*
Figure Thirteen: Annual Military Expenditure of the Countries in the Arab-Israel Confrontation States

(in Millions of Current $US From 2012-2017)

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</thead>
<tbody>
<tr>
<td>Israel</td>
<td>16,600</td>
<td>17,100</td>
<td>18,300</td>
<td>18,400</td>
<td>16,500</td>
<td>16,700</td>
</tr>
<tr>
<td>Egypt</td>
<td>2,960</td>
<td>3,040</td>
<td>3,310</td>
<td>3,620</td>
<td>3,700</td>
<td>3,350</td>
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<tr>
<td>Lebanon</td>
<td>1,830</td>
<td>1,990</td>
<td>2,350</td>
<td>2,270</td>
<td>2,650</td>
<td>2,440</td>
</tr>
<tr>
<td>Syria</td>
<td>1,330</td>
<td>1,410</td>
<td>1,120</td>
<td>1,080</td>
<td>1,010</td>
<td>1,040</td>
</tr>
<tr>
<td>Jordan</td>
<td>2,010</td>
<td>1,950</td>
<td>1,930</td>
<td>1,990</td>
<td>2,190</td>
<td>2,380</td>
</tr>
</tbody>
</table>

Figure Fourteen: Annual Military Expenditure as Percent of GDP for the Countries in the Arab-Israel Confrontation States From 2012-2017

<table>
<thead>
<tr>
<th>Year</th>
<th>Israel</th>
<th>Egypt</th>
<th>Lebanon</th>
<th>Syria</th>
<th>Jordan</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>6.0%</td>
<td>1.6%</td>
<td>4.0%</td>
<td>5.5%</td>
<td>6.0%</td>
</tr>
<tr>
<td>2013</td>
<td>5.9%</td>
<td>1.6%</td>
<td>4.1%</td>
<td>7.7%</td>
<td>5.6%</td>
</tr>
<tr>
<td>2014</td>
<td>5.9%</td>
<td>1.7%</td>
<td>4.7%</td>
<td>7.0%</td>
<td>5.3%</td>
</tr>
<tr>
<td>2015</td>
<td>5.8%</td>
<td>1.7%</td>
<td>4.5%</td>
<td>7.2%</td>
<td>5.2%</td>
</tr>
<tr>
<td>2016</td>
<td>4.9%</td>
<td>1.7%</td>
<td>5.1%</td>
<td>6.9%</td>
<td>5.6%</td>
</tr>
<tr>
<td>2017</td>
<td>4.7%</td>
<td>1.4%</td>
<td>4.6%</td>
<td>6.8%</td>
<td>5.8%</td>
</tr>
</tbody>
</table>

Figure Fifteen: Annual Arms Imports of the Arab-Israel Confrontation States

Israel

Israel has some of the most effective military forces in the world, and it has some of the most advanced military equipment. It does depend heavily on major financial and technical aid from the United States, but U.S. security assistance consists largely of monetary aid, arms transfers, and some forms of intelligence support and the research and development of projects. Israel also provides substantial security assistance to the U.S. in the form of tactical and warfighting data as well as regional intelligence, and it also seems to cooperate with the U.S. in some covert operations.

Israel is the only military power in the region with nuclear-armed missiles, and the only country that has created and deployed a relatively effective mix of layered defense systems against missile, rocket, air, and artillery attacks. It has a modern air force that can achieve local air superiority, carry out long-range precision conventional strikes, and has acquired the F-35 strike fighter. It has its own intelligence satellites and technology, and it can manufacture and modify many weapons without outside support. Its readiness and training standards are high and do not depend on outside support, and it has some of the most effective reserve forces in the world.

The U.S. aid that has helped Israel develop these forces has been massive. The U.S. States provided Israel $142.3 billion (in current, or non-inflation-adjusted, dollars) in bilateral assistance and missile defense funding between the end of World War II to 2020, most in the form of military assistance. The U.S. and Israeli governments signed a new 10-year Memorandum of Understanding (MOU) on military aid, covering FY2019 to FY2028.

Under the terms of the MOU, the United States promised to provide $38 billion in military aid ($33 billion in Foreign Military Financing grants plus $5 billion in missile defense appropriations) to Israel. In 2019, the U.S. appropriated $3.3 billion in Foreign Military Financing (FMF), of which $815.3 million was for off-shore procurement, plus $2 million in a homeland security grants, and $500 million more in missile defense – of which $70 million was for the Iron Dome, $187 million for David’s Sling, $80 million for Arrow 3, and $163 million for Arrow 2. The U.S. also is unlikely to alter this level of security assistance without major changes in the regional security situation. The U.S. Congress has long been committed to maintaining an Israel Quantitative Military Edge or QME. In 2008, it passed legislation defining the QME as, “the ability to counter and defeat any credible conventional military threat from any individual state or possible coalition of states or from non-state actors, while sustaining minimal damage and casualties, through the use of superior military means, possessed in sufficient quantity, including weapons, command, control, communication, intelligence, surveillance, and reconnaissance capabilities that in their technical characteristics are superior in capability to those of such other individual or possible coalition of states or non-state actors.”

As for Israel’s own military efforts, the IISS reported that it had 165,500 active military personnel in 2020, and one of the world most effective reserve systems with 465,000 reservists. It has very high readiness and modernization standards. It has nuclear-armed IRBM and nuclear bombs for its aircraft. It has advanced Israeli and U.S. armor and artillery, and it is well-equipped with other support and combat systems. Israel has 5 submarines, 3 corvettes, and 42 patrol boats. It has one of the most effective air forces in the world, with 354 U.S.-combat capable aircraft – including the F-35, attack helicopters, and a mix of Patriot and Israeli-made land-based air defense systems.
The IISS reports Israeli military expenditure of some $19.3 billion in 2019, and that military spending totaled a high 5.8% of its GDP. SIPRI reports $20.5 billion in current dollars for 2019, and that spending rose from $15.5 billion in constant 2018 U.S. dollars in 2010 to $20.1 billion in 2018.

The CRS reporting on arms transfers to Israel in 2012-2015 listed the U.S. as Israel’s major military supplier ($7 billion), followed by Western Europe ($2.2 billion) – out of total transfers worth $9.2 billion.

The SIPRI arms transfer database shows moderate to high levels of transfers worth $2.87 billion between 2005 and 2019: $2.24 billion from the U.S., $453 million from Germany, and $179 million from Italy. The detailed SIPRI data on arms transfers to Israel during 2010-2019, that are provided in the Analytic Appendix, show that arms transfers totaled $3.895 billion. They came from 4 countries and were dominated by the U.S. ($2,629 million), Germany ($1,001 million), and Italy ($255 million). China and Russia were not listed. The key spending areas affecting military capabilities and dynamics focused on aircraft, armor, engines, missiles, and ships. These figures do not reflect the impact of Israel’s own weapons production.

Israel’s near-term military dynamics seem likely to reflect current trends. The regional military balance shows no current indication that Israel will lose its Quantitative Military Edge, and there are no major political indicators that it will see any reduction in the level and quality of U.S. security assistance.

It will, however, have to continue to upgrade all of its major combat elements to stay ahead in counterterrorism – and the multi-layered air/missile defense, procurement, and exploitation of the stealth features of the F-35. Improving relations with Arab Gulf countries will help, and Israel recognizes that Iran, the Hezbollah, and any future Syria where Assad gains full control will continue to put pressure on Israel’s defenses and war fighting capabilities. The threat of Iranian nuclear proliferation also remains a potential “existential” threat.

Israel also faces the same challenges in fighting unconventional conflicts and in dealing with extremists and non-state actors, as the United States and other developed states. Deterring and defending against non-state actors and terrorists that can be sheltered in the civil population presents political and military challenges and can be extremely demanding in terms of minimizing civilian casualties and collateral damage.

Israel must also deal with hostile nations like Iran and the Assad regime in Syria that can train and arm non-state actors. Its current security – and the patterns in security assistance that shape this security – depend heavily on the stability of Egypt and Jordan and their commitment to peace, on Iran remaining a limited military power without nuclear weapons, and on Iraq avoiding any major future military commitment to Syria and/or Iran.

Much of the upgrading necessary to deal with these threats seems to be in progress – and as part of future plans now being considered by Israel’s Ministry of Defense. Israel has long sought to develop cutting edge military forces and an effective defense industrial base. It has made military mistakes, as all countries have, but seems to be the most advanced military power in the MENA region in attempting to fully integrate multi-domain warfare and the other ongoing advances listed earlier into its force structure. Its modernization plans – like the 2015 Gideon Plan – have resource limitations, but the 2020 edition of the IISS Military Balance notes that it is making advances in “force- protection, missile-defense and precision-strike capabilities.”
Israel has restructured its military and security forces to deal with the threats posed by Palestinian irregular forces and the risk of some new form of an Intifada. It also has made it clear that it has developed the equivalent of strategic bombing plans using a steadily advancing drone fleet and precision strikes to deal with Hezbollah’s missile attacks – plans that could cripple parts of Lebanon’s civil infrastructure.

It does face the economic challenges created by Covid-19, but an article by Yaakov Lappin in a journal issued by the Begin-Sadat Center for Strategic Studies (BESA) notes that it is examining a Momentum plan that calls for major shifts in land and air power to make advanced use of digital technology and artificial intelligence in order to make advances in multi-domain warfare, to restructure it armor, to create near real-time targeting and damage assessment capability for precision strikes, to fully exploit the new strike avionics of the F-35, and to “fast-track the evolution and deployment of new capabilities to deal with the “terror armies” that have risen up in Israel’s environment, and to enable Israel to better deal with the state backer of these terror armies: Iran.”

Like the U.S., Israel is still learning the pace and price of actually implementing such improvements and the form they should take. However, at least some elements of such plans – involving the use and deployment of the F-35, new precision strike systems, new uses of drones and AI, and improvements in missile and air defenses – are in progress.

**Palestinian Forces**

Palestinian military and security forces have long split into two elements of paramilitary and irregular forces: the roughly 25,000 personnel in various elements of the Palestinian Authority on the West Bank and some 15,000-20,000 personnel in the Izz al-Din Qassam Brigades of Hamas in Gaza. Arms and arms transfers to the Palestinian Authority are negligible. The Palestinian Authority Forces have small arms and some light armor. The Izz al-Din Qassam Brigades and other forces in Gaza have large numbers of rockets, light artillery, and other light weapons.

The prospects for a two-state solution that would create a Palestinian state have deteriorated over time, and U.S. aid to the Palestinian Authority has been cut sharply between FY2012 and FY2021. A serious debate took place over the scale of a possible Israeli annex of much of the West Bank in 2021.

Hamas, the Palestinian Islamic Jihad, and other armed groups have repeatedly attempted low level attacks on Israel, with more violent “Intifadas” in 2008, 2012, and 2014 – all of which have done further damage to the infrastructure and development of the Gaza.

The chronologies that describe the number of types of Palestinian attacks from the Gaza on Israel differ in detail, but make it clear that this threat continues, and it can sometimes saturate Israel’s Iron Dome and other defenses with limited success. So far, they do far more to provoke Israeli counterpressure against the Palestinians in Gaza than anything else, but they could lead to some new form of Intifada and would have a different impact if the Palestinians obtained even short-range precision UCAV or missile systems. The end response would probably be occupation by the IDF or some form of air attacks so crippling as to force the Palestinians to halt their attacks – both options would only add to the current level of tension.

The near-term military dynamics of both major Palestinian factions seem likely to remain equally negative. Other Arab states still provide some financial support, but only Iran and the Hezbollah seem willing to support the use of force – and more to harass Israel than to move towards any
peaceful solution. Egypt tightly controls the Gaza’s southern border. The current prospects include: Israel creating more presence on the ground, more low-level tension and incidents, and no real progress towards a full and stable peace or major increases in civil and economic development.

The end result not only has led to the steady growth of “facts on the ground” which have resulted in the steady expansion of the Israeli presence in the Jerusalem area and the West Bank, but it has also blocked opportunities towards a two-state solution and turned the Gaza into something approaching an isolated security enclave.

The U.S. has already sharply cut its security ties and aid to the Palestinian Authority, and recognized Jerusalem as Israel’s capital. The UAE and Bahrain established formal relations with Israel in September and October 2020 respectively, and senior members of the Saudi Royal Family have publicly criticized the Palestinians for their failures to move forward. At this point, the military dynamics of the Palestinians are to see outside support dropping sharply and to make their only option some new form of Intifada that will almost certainly make their situation worse.

**The Dynamics of “Peace”**

More broadly, however, many Arab regimes now have incentives to cooperate with Israel. For Egypt, these include stability in Sinai and freedom of action in dealing with other Arab powers. For the Gulf Arab states, they include having a silent ally in dealing with Iraq, considering Israel’s influence in Iraq, Syria, and Lebanon. These incentives have taken on a more formal structure with the UAE and Bahrain’s recognition of Israel and the open Saudi criticism of the Palestinians, but they have effectively recognized relationships that have exist for more than a decade. They represent some progress, but it is far from clear that they involve a major movement towards a full peace.

**Egypt**

Egypt has long been the major Arab military power, although some Arab Gulf powers now deploy smaller force elements with more advanced major weapons systems. While Egypt holds elections and has “presidents,” it has a long history of being governed by military leaders, and its military plays a major role in the government and economy of the country.

Senior military officers deposed King Farouk in 1952, and a cadre of senior military officers led by Gamal Abdel Nasser led the country from 1954 to 1970 – a period when Egypt was seen as the major power in the Arab world. Anwar Sadat – a former army officer – replaced Nasser in 1970 until his assassination in 1981. The former head of the Air Force, Hosni Mubarak, replaced Sadat from 1970 to 2011.

The political upheavals in Egypt that were part of the “Arab Spring” forced Mubarak out of office, and Egypt briefly created a new structure of government that was elected – headed by Mohammed Morsi, a leader of Moslem Brotherhood – into power. Morsi, however, was soon deposed by Egypt’s current ruler – Abdel Fattah Al-Sisi – in the equivalent of a military coup on July 3, 2013. For most of Egypt’s modern history, it has never been clear whether it was a country with an army or an army with a country.

Egypt began to replace its aging and limited inventory of British arms with Czech and Russian arms in 1955, after Nasser came to power. It then relied heavily on Russian advisors, aid, and loans. These Russian forces built up to high levels during the so-called “Canal” or “air defense
war” in 1969-1971, and some estimates put the Russian total at 5,500 military advisors and 11,000 personnel in technical support.36

This allowed Nasser to challenge Israel more directly, to play a major role in its attempts to create a Pan-Arabic unity, to challenge Israeli forces in the Sinai, and to intervene in the civil war in Yemen in 1962-1971. Russia, however, increasingly attempted to put political pressure on Egypt to serve it Russian interest, and Russian personnel often clashed with their Egypt counterparts and treated them as if the Russian were in charge.

Russia also refused to provide Egypt with modern attack aircraft as distinguished from SA-2 and SA-3 air defense missiles, fearing this could trigger a major war or confrontation with the United States at a time in which Sadat already seemed to have been planning for the 1973 war and for crossing the Suez Canal. Russia limited its transfers of fighters to the MIG-21, MIG-23, and SU-7, while the U.S. provided Israel with some 140 F-4 and Skyhawks.

These strategic and political tensions led Sadat to end Egypt’s reliance on Russia as a security partner in 1972. They also may have played a key role in Sadat’s decision to negotiate with Israel and the United States, as well as to turn to the U.S. for security assistance after the October War. The CRS reports that the U.S. had provided Egypt with over $84 billion in bilateral foreign aid (calculated in historical dollars – not adjusted for inflation) by 2020, with military and economic assistance increasing significantly after 1979. The President also requested $1.4 billion in bilateral assistance for FY2021 – almost all through the U.S. Foreign Military Financing (FMF) account to provide grant aid with which Egypt purchases and maintains U.S.-originating military equipment.37

This U.S. aid has helped Egypt to build-up and sustain very large and relatively effective military forces for a power its size and with its domestic economy, although Egypt has steadily increased on its own domestic spending and has long paid for most of the cost of its forces. It does have large elements of its order of battle that are of mixed effectiveness, but it has steadily improved training and readiness standards, maintains effectiveness units in each service, has improved its exercise and training efforts, and expanded its power projection capabilities and experience.

Its military-industrial base still has limited capability to produce advanced weapons and major platforms, but it does give Egypt the capability to support and sustain its forces in combat without early dependence on outside support and resupply. Its efforts in multi-domain warfare as well as advanced battle management and IS&R capabilities are still developing, but it has made increased use of UAVs while developing steadily better joint warfare capabilities. Some elements of its more elite internal security forces are highly effective. Its combat engineering capabilities are superior to those of most of its neighbors.

The IISS reports that Egypt had some 438,500 active military personnel in 2020, plus 479,000 reserves. Egyptian forces had a mix of modern U.S. and aging Russian armor and artillery, and they were well equipped with manportable and light missiles. They had six submarines; 17 destroyers; frigates and corvettes; and large numbers of patrol boats, mine warfare, and amphibious ships. They had 584 U.S., French, and Russian-made combat capable aircraft – ranging from F-16s to MiG-21s, attack helicopters, and S-300 and I-Hawk surface-to-air missiles. It also had 325,000 personnel in its Central Security Forces in the Ministry of the Interior, 60,000 personnel in its National Guard, and 12,000 border forces.
The CRS also reports, however, that U.S. aid is provided under annual legislation that includes conditions on the release of such funds. Successive U.S. Administrations have justified aid to Egypt as an investment in regional stability, built primarily on long-running cooperation with the Egyptian military and on sustaining the 1979 Egyptian-Israeli peace treaty. All U.S. military aid to Egypt finances the procurement of weapons systems and services from U.S. defense contractors. The political upheavals that ended in Sisi’s rise to power has led the U.S. Congress to consider linking aid to Egypt’s human rights policies and to consider making U.S. military support far more conditional.

The result was an Egyptian shift toward Russian and French arms. A CRS report on new arms agreements during 2012-2015 indicates that Egypt signed $9.0 billion worth of new agreements with Russia in 2012-2015, and only $1.3 billion with the U.S., while it signed $6.8 billion worth of agreements with the U.S. in 2008-2011 and only $500 million with Russia. Agreements with China remained low: $300 million in 2008-2011 and $400 million in 2012-2015.

Official U.S. State Department reports that estimates actual spending in current dollars on arms imports indicates that Egypt made the following buys of arms in current $US millions at different periods during 2012-2017:

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<tbody>
<tr>
<td>US</td>
<td>4,200</td>
<td>3,800</td>
<td>3,600</td>
<td>3,200</td>
</tr>
<tr>
<td>Major European</td>
<td>50</td>
<td>3,100</td>
<td>4,200</td>
<td>5,900</td>
</tr>
<tr>
<td>Russia</td>
<td>600</td>
<td>1,300</td>
<td>2,300</td>
<td>4,500</td>
</tr>
<tr>
<td>China</td>
<td>400</td>
<td>400</td>
<td>200</td>
<td>200</td>
</tr>
</tbody>
</table>

The CRS notes that, since 2014, Egypt and Russia have improved ties in a number of ways, including through arms deals. Reportedly, Egypt is upgrading its aging fleet of legacy Soviet MiG-21 aircraft to a fourth generation MiG-29M variant…Egypt also has purchased 46 standard Ka-52 Russian attack helicopters for its air force, in addition to reportedly purchasing the naval version of the Ka-52 for use on Egypt’s two French-procured Mistral-class helicopter dock vessels… Egypt has further purchased the S-300VM surface-to-air missile defense system from Russia…

Additionally, Egypt and Russia reportedly have expanded their cooperation on nuclear energy. In 2015, Egypt reached a deal with Russian state energy firm Rosatom to construct a 4,800-megawatt nuclear power plant in the Egyptian Mediterranean coastal town of Daba’a, 80 miles northwest of Cairo. Russia is lending Egypt $25 billion over 35 years to finance the construction and operation of the nuclear power plant (this is to cover 85% of the project’s total costs). The contract also commits Russia to supply the plant’s nuclear fuel for 60 years and store depleted nuclear fuel from the reactors.

As Egyptian and Russian foreign policies have become more closely aligned in conflict zones such as eastern Libya, bilateral military cooperation has expanded. Several years ago, one report had suggested that Russian Special Forces based out of an airbase in Egypt’s western desert (Sidi Barrani) were aiding General Haftar. In November 2017, Egypt and Russia signed a draft agreement governing the use of each other’s air space.

While Egyptian-Russian ties have grown warmer in recent years, they are not without complications. In the aftermath of an October 2015 terrorist attack against a Russian passenger jet departing from Sharm El Sheikh, tourism to Egypt from Russia, previously the country’s largest source of tourists, dropped significantly. Russian commercial aircraft have resumed direct flights to Cairo but not to Sharm El Sheikh. Egypt and Russia also engaged in a trade dispute in 2016 over Russian wheat imports. Egypt is the largest global importer of wheat, and the largest export market for Russian wheat.
At the same time, the CRS data also show that Egypt signed $9.4 billion agreements with major Western European powers in 2012-2015 versus $800 million in 2008-2011. The same CRS analysis mentioned earlier notes that recent French sales not only exceeded Russian transfers, but that the arms involved included:

- Four Gowind Corvettes (produced by Naval Group). This deal was signed in July 2014. As part of the French-Egyptian arrangement, some of the Corvette construction has taken place at the Alexandria Shipyard in Egypt.
- One FREMM multi-mission Frigate (produced by Naval Group). Named the Tahya Misr (Long Live Egypt), this vessel was delivered to Egypt in 2015. This ship has participated in an annual joint French-Egyptian naval exercise, known as Cleopatra.
- 24 Rafale multirole fighters (produced by Dassault Aviation). In 2018, French officials said that the United States would not permit France to export the SCALP air-launched land-attack cruise missile used on the Rafale to Egypt under the International Trade in Arms Regulation (ITAR) agreement. The United States may have been concerned over the transfer of sensitive technology to Egypt.
- Two Mistral-class Helicopter Carriers (produced by Naval Group). In fall 2015, France announced that it would sell Egypt two Mistral-class Landing Helicopter Dock (LHD) vessels (each carrier can carry 16 helicopters, 4 landing craft, and 13 tanks) for $1 billion. The LHDs were delivered in 2016.

Moreover, Egypt shifted back to buying arms from the United States. The SIPRI arms transfer data for 2015-2019, shows total transfers – measured in TIVs – of $8.40 billion, with Russia selling $2.87 billion, the U.S. selling $1.25 billion, France selling $2.95 billion, Germany selling $637 million, the UAE selling $222 million, Spain selling $144 million, and China selling $2 million. Finland, Italy, and South Korea also made small sales.

The detailed SIPRI data on arms transfers to Egypt during 2010-2019, provided in the Analytic Appendix to this report, show that transfers in TIVs had an estimated value totaling $11.087 billion. They came from at least 17 countries and were dominated by Russia ($3,857 million), France ($3,016 million), the U.S. ($2,629 million), Germany ($711 million), and Spain ($288 million). China only sold $81 million. The key spending areas affecting military capabilities and dynamics focused on aircraft, air defense systems, armor, engines, missiles, satellites and sensors, and ships. These figures do not reflect the impact of Egypt’s own weapons production.

Given these transfers, the IISS data on Egyptian military spending may be an underestimate that only includes Egyptian direct operating expenditures from the Egyptian budget not including aid, some arms transfers, and significant amounts of internal security spending. The IISS only reported $3.4 billion in 2019, which accounts to 1.54% of its GDP. SIPRI reported a similar $3.7 billion in current dollars for 2019, and that spending during 2010-2019 peaked at $4.2 billion in constant 2018 U.S. dollars in 2015 and dropped to as low as $3.1 billion in 2019.

In spite of these issues, Egypt’s near-term military dynamics may be very similar to its current situation. there does not seem to be any clear indications of a coming break between the U.S. and Egypt, but this history is a clear warning that providing large amounts of arms and other forms of military assistance may not give the supplier major leverage over the recipient, and the use of the word “partner” in the phrase “strategic partner” can mean exactly what it says.

Egypt’s role in the Arab-Israeli peace process gives it leverage as well, as does its control over the Suez Canal; its provision of air transit support; its potential value in dealing with Iran, Iraq, and Syria; its ability to help end the civil wars in Syria and Libya; and its dealing with terrorist/extremist threats like the current low-level extremist threat in the Sinai. The State Department Country Report on Terrorism notes that Egypt’s counterterrorism activities may
sometimes be repressive, but it also plays a useful role in regional and international efforts to deal with the extremist threat.

It should also be noted that Egypt has other security concerns. These include an extremist threat in the Sinai; its involvement in the Libyan civil war; its links to the Southern Arab Gulf states; its role in the Nile basin – including a major controversy with Ethiopia over a dam it is building on the Blue Nile – its relations with Sudan; its relations with Ethiopia; as well as its security interests in the future of Lebanon, Syria, Iraq, and the Red Sea states. These all tend to link Egypt and the United States.

**Lebanon**

Lebanon has not played a major role in any Arab-Israeli conflict other than the first Arab-Israeli War in 1948. It has, however, had long periods of instability, and it has fought a factional and sectarian civil war from 1975 to 1990. Israel invaded Lebanon to stop non-state actors and Syrian forces from threatening northern Israel in 2002, and Israel also fought a war against the Hezbollah in 2006.

Lebanon’s government and economy collapsed in 2020, largely because of massive mismanagement and corruption on the part of the leaders from all of Lebanon’s major political factions. It remained an unstable mess in the beginning of 2020, and no leader emerged with a convincing capability to bring unity and progress.

The IISS reports that these forces had some 60,000 active personnel in 2020. They were well-trained and organized by regional standards, but they were very lightly equipped. They had the equivalent of one heavy division’s worth of aging U.S. and Russian armor and artillery. The Navy has 13 patrol and coastal combatants, and the Air Force has light combat aircraft and armed helicopters. There is also a 20,000 personnel Internal Security Force.

These forces remained largely intact in late 2020, and they had steadily improved in unity and quality since the end of open fighting of the Lebanese civil war in 1990. They received limited, but useful security assistance from France, the United Kingdom, the United States, and Gulf states like the UAE and Saudi Arabia. Lebanon also had some support from an international peace keeping force called the UN Interim Force in Lebanon (UNIFIL).

Lebanon’s national military forces still play a constructive role and in stability and border security, and they have not intervened in politics or have engaged with the Hezbollah – a route to the return of a violent civil war. At the same time, they cannot secure the country against either independent actions by the Hezbollah – or from the intervention of Israel, Syria, or Turkey – and they also cannot secure Lebanon’s interests the Mediterranean.

They not only lack anything approaching a cohesive national political structure and leadership, they only have a moderate budget and forces for their current size, and one with no modern combat aircraft and larger ships. The IISS reports $1.9 billion in 2019, which composes 3.2% of its GDP. SIPRI reports $2.5 billion in current dollars for 2019, and that spending rose from $2.0 billion in constant 2018 U.S. dollars in 2010 to $2.4 billion in 2018.

Lebanon’s military forces have only had very small arms deliveries. The CRS estimates only $400 million worth in 2008-2011, with $200 million coming from the United States. They received $600 million worth in 2012-2015, with $500 million coming from the U.S., and $100 million from Russia.
SIPRI estimates the Lebanese forces received some $246 million in arms during 2015-2019, of which the U.S. provided $178 million, Brazil provided $32 million, and France provided $14 million. The detailed SIPRI data on arms transfers to Israel during 2010-2019, that are provided in the Analytic Appendix, show that transfers totaled only a small $371 billion. They came from 8 countries, and were dominated by the U.S. ($245 million), Jordan ($36 million), Brazil ($32 million), and France ($36 million). China and Russia were not listed. The key spending areas affecting military capabilities and dynamics focused on aircraft, air defense systems, armor, missiles, satellites and sensors, and ships.\(^{45}\)

The key military role in Lebanon, however, now is played by a non-state actor – the Hezbollah – a Shi’ite force with close ties to Iran that has supported the Assad forces in the Syrian civil war. The Hezbollah has received large numbers of missiles and other weapons from Iran, including precision guided ballistic missiles and unmanned drones that can reach deep into Israel.

The Hezbollah have become steadily larger and more effective over time, and they have fought well against IDF and Syrian rebel forces on some occasions. Estimates of their strength in 2020 were highly uncertain, but it was clear that they had large numbers of missiles and growing holdings of manportable precision guided weapons and artillery. Some Hezbollah units in Syria are reported to have Russian train and assist support.

SIPRI reports arms transfers of only $20 million to the Hezbollah during 2010-2019 – figures that are far too low.\(^{46}\) While some estimates of weapons transfers to the Hezbollah – like total missile numbers – seem exaggerated, it is clear that the Hezbollah has a steadily growing inventory of precision strike systems ranging from manportable to relatively long-range ballistic missiles and drones.

A study by Shaan Shaikh and Ian Williams of the CSIS Missile Defense Project notes that the Hezbollah, “held around 15,000 rockets and missiles on the eve of the 2006 Lebanon War, firing nearly 4,000 at Israel over the 34-day conflict. Hezbollah has since expanded its rocket force, today estimated at 130,000 rounds.” These numbers may be too high, but they cannot be ignored. They also developed in the summary graphic located in Figure Sixteen, which is an all too accurate warning of the range of different weapons the Hezbollah already has, and experts like Uzi Rubin feel the Hezbollah already has more accurate versions of missiles and drones.\(^{47}\) Some reports indicate that the Hezbollah may have Hezbollah 600 Fateh 110/M600 missiles, with a range of up to 300 km and “D’Al-Ficar” missiles with a range of up to 700 km.\(^{48}\)

Israeli and other chronologies of Hezbollah attacks reflect the fact that such attacks have sporadically continued since Israel’s War with the Hezbollah in 2006 – when it fired some 4,000-5000 rockets against Israel. Other reports indicate that the Hezbollah has deliberately deployed its missiles in civil areas in an effort to limit Israeli attacks on such sites. Press reports indicate that these include at least 28 civilian sites in Beirut alone. The end result may be to provide Israeli strategic bombing of Lebanon in response to any major Hezbollah attacks, and the level of risk of a far more serious war will increase steadily as the Hezbollah acquire more precision strike capability.\(^{49}\)

Lebanon’s near-term military dynamics are likely to remain unstable and self-destructive. At this point, Lebanon must be seen as a wild card in the region. It desperately needs more effective, honest, and united leadership, but it may not get them. It is unclear that its Army can challenge the Hezbollah, and the Hezbollah may receive growing support from Iran and Syria if the Assad forces
continue to win. Another war with Israel – involving far more serious air and long-range missile strikes is possible.

Figure Sixteen: Hezbollah Missile and Rocket Types


**Syria**

Like Libya, Iraq, and Yemen, Syria has shifted from a focus on the Arab-Israeli conflicts to becoming the center of a major civil conflict. Unlike these states, its past regime under Bashar al-Assad seems to be winning its civil war, mostly with help of Russia – its past major source of security assistance. The Syrian civil war has, however, become a major source of regional instability. The Assad faction has developed dependence on Iran and the Lebanese Hezbollah, as well as on Russia. It has used repression and attacks on its own civilians to win and alienate much of the population.

The war has had a devastating impact on the Syrian economy and civil development, and it has produced massive numbers of refugees and displaced persons. There is no clear source of the future aid to the Assad regime that would enable it to recover and build a stable future. The war has also had a major impact in increasing Hezbollah and Iranian influence in the region, increasing Syrian tension with Israel and Jordan, leading to clashes in the north with Turkey, and creating a U.S.-backed Kurdish-Arab enclave in Syria’s Northeast – whose future is increasingly uncertain.

The past history of the role of outside military support to Syria is an important prelude to understanding these developments. Syria has long obtained its security assistance from the Soviet Union and Russia. Syria’s leaders made their first major arms buys from the former Soviet Union...
in 1956. Since then, the Syrian military has always largely been equipped and supported by the former Soviet Union and then by Russia. Syria has also been under the control of a ruthless authoritarian regime led by the Assad family since Hafez al-Assad took power in 1971. His son Basher Hafez al-Assad succeeded him and took power in July 2000.

Russian arms and support allowed Syria to play a major role in the wars with Israel, particularly in 1973 and 1982. Syria could not stand alone against Israel, however, and Syria’s inability to pay for its arms led to a significant drop in Soviet support. Syria did, however, expand its role in Lebanon and played a major political and military role there from 1976 to 2005. Syria was also the only Arab power to aid Iran in the Iran-Iraq War. While both Hafez al-Assad and Saddam Hussein were supposedly Ba’ath socialists, their relations were hostile, and the Assad’s were Alawite and more willing to support a Shi’ite state like Iran.

The collapse of the former Soviet Union in December 1991 then led Russia to cut its involvement in the MENA region and to make even sharper cuts in its arms transfers, loans, and military assistance to Syria. This ensured that Syria could no longer compete with Israel in military quality or arms imports. Syria responded by developing a nuclear weapons program – evidently with North Korean support. However, Israel destroyed Syria’s attempt to develop a nuclear reactor and a nuclear weapons capability in September 2007.

Syria did not play a major military role in the region after its departure from Lebanon, and it did not receive major military assistance until the so-called “Arab Spring” began in 2011. This led to large popular protests and then violent political upheavals. Syria’s dictator – Bashar al-Assad – then had the option of allowing political reform and liberalization, but – as his father had done earlier – he ruthlessly suppressed the movements and voices calling for change. The end result was violent popular opposition by a wide range of factions and the start of one of the bloodiest civil wars in modern history – one that produced massive numbers of refugees, internally displaced persons, and casualties.

Many initially felt that Assad could not survive the rise of a wide range of rebel elements and forces. The rebel factions took control of much of Syria. However, they were fragmented and were deeply divided, and they even came to include a number of extremist elements like ISIS and movements affiliated with al Qaeda.

The U.S. was already engaged in Afghanistan and Iraq, and it decided not to intervene. Europe was equally indecisive – as it was in Libya – and Turkey and various outside Arab states backed different Syrian rebel factions with little effectiveness. These divisions helped ISIS emerge as a major threat in Eastern Syria and enabled them to take significant territory in Iraq, creating a “caliphate” or proto-state in 2013-2014. As a result, the U.S. created a coalition linked to the Iraqi central government and focused on the threat from ISIS.

The result – as of October 2002 – was a set of U.S.-supported Kurdish-Arab resistance forces that occupied enclaves in Northeastern Turkey, and that were challenged by Turkey because of their ties to Turkish and Iranian Kurds in the North, as well as by pro-Assad and Russian forces in the West and the South.

They have since seen steady cuts in U.S. support and train and assist personnel since the break-up of the IISS “caliphate,” and the level of future U.S. support was uncertain and tied to the development of an equally uncertain U.S. strategic partnership with Iraq. There was also a small moderate Arab resistance enclave in the Jordanian border area that never developed broad support.
As an analysis by Carla E. Humud and Christopher Blanchard of the of the Congressional Research Service notes:  

Since 2014, U.S. armed forces have partnered with a Kurdish militia known as the People’s Protection Units (YPG) to counter the Islamic State in Syria. In 2015, the YPG joined with other Syrian groups to form the Syrian Democratic Forces (SDF), comprising the SDF’s leading component. Turkey considers the YPG to be the Syrian branch of the PKK (Kurdistan Workers’ Party), a U.S.-designated terror group that has waged a decades-long insurgency in Turkey. Ankara has strongly objected to U.S. cooperation with the SDF. U.S. officials have acknowledged YPG-PKK ties, but generally consider the two groups distinct…

…Roughly 50% of the SDF is composed of ethnic Arab forces, according to U.S. officials; 15 this component sometimes is referred to as the Syrian Arab Coalition (SAC). In 2018, the U.S. military assessed that the SAC probably is unable to conduct counter-IS operations on its own without the support of the SDF’s primary component, the YPG…In 2018, the Defense Intelligence Agency (DIA) described the SAC as “a patchwork of Arab tribal militias, military councils, and former opposition groups recruited by the YPG initially as a ‘symbolic’ move to help attract western support and training”… In 2020, DIA assessed that the YPG maintains control over leadership and decision-making positions within the SDF and SDC-led institutions, demonstrating an “unwillingness to share power with Arabs, even in the Arab-majority regions of the northeast where Arab fighters probably represent a majority of the SDF’s front line forces…”

Following the October 2019 Turkish incursion into northern Syria, the U.S.-backed Syrian Democratic Forces (SDF) sought protection from the Assad government. U.S. Special Representative for Syria Engagement and the Special Envoy to the Global Coalition to Defeat ISIS Ambassador James Jeffrey stated that the SDF and the Assad government reached “an agreement in some areas to coordinate.” In December 2019, senior U.S. military officials acknowledged “dialogue” between the SDF and the Syrian military, but in 2020 have testified that U.S. forces continue to conduct combined operations with the SDF. U.S. officials have not publicly elaborated on the scale of coordination and/or dialogue between the Syrian military and the SDF, or on how this may impact U.S. interactions with, or funding for, the group…

The U.S. never effectively resisted the survival or the subsequent steady strengthening of pro-Assad forces, Iranian and Hezbollah intervention, Russian intervention, Turkish intervention, or the expansion of the role of pro-Iranian Popular Mobilization Forces (PMFs) into Syria. It did play a critical role in helping Iraq break-up of the ISIS “caliphate,” but it did not succeed in defeating ISS or Sunni Islamic extremism. Many ISIS fighters remained in Syria and Iraq, and sporadic ISIS attacks still occurred in both countries through October 2020. 51 A report by the Lead Inspector General of the Department notes, however, that the ISIS threat in Syria is now limited, 52

As in Iraq, ISIS stepped up attacks in Syria during Ramadan, although overall, the DIA said that ISIS monthly attack claims across Syria decreased this quarter compared to the previous quarter. USCENTCOM reported that a mid-May spike in attacks during ISIS’s most recent “Raid of Attrition” campaign was not sustained following the campaign and this demonstrated a limited ability to ramp up its operations for a brief period before dropping back to normal levels…

While ISIS continues to demonstrate the ability to surge attacks for periods, the DoD OIG saw no evidence this quarter that ISIS has the ability to retake or hold territory in the Combined Joint Operations Area. ISIS mounted a complex offensive this quarter and briefly occupied several Syrian regime positions in Homs province during an April 9 attack… The DoD OIG observed that this underscores the challenge of defeating ISIS when Coalition and partner forces have limited territorial reach, and ISIS has the ability to operate in parts of Syria under regime control.

…The DIA stated that it has not seen any significant or sustained increase in ISIS capabilities in pro-regime controlled areas this quarter, and ISIS attacks were “opportunistic,” targeting pro-regime forces convoys and checkpoints in eastern Homs province and in southwest Syria… ISIS elements remain capable only of operating in small cells and conducting asymmetric attacks, according to the DIA…

Citing media reporting, the DIA said that ISIS’s activities focused along a broad area of majority Sunni Arab territory in northern Syria. However, it said that ISIS does not have the capability it once had to “target Sunni tribes writ-large,” and that it fears reprisals…
It should also be noted that the various covert efforts of Qatar, Saudi Arabia, the UAE, and Turkey to support anti-Assad Arab factions focused on largely political and ideological goals and leaders – and were, if anything, even less successful.

Assad was able to regroup the Syrian military and to obtain substantial support from Iraq and the Lebanese Hezbollah. This allowed Assad to survive and make significant gains in his control of Western Syria. Assad also reached out to Russia – which had become far more active in challenging the U.S. and NATO after its intervention in Ukraine. Russia responded by suddenly deploying combat air forces, S-400 air and other missile defense forces, and some elements of ground forces to bases under Assad’s control in western Syria in September 2015 – resuming the FSU’s role as Syria’s major source of security assistance at the time Assad’s father was in power.

Russia claimed it only acted to prevent a takeover of Syria by ISIS, but Russian land and naval forces followed, and Russia then deployed special forces and elements of its Wagner Group’s state-controlled mercenaries. It steadily increased the combat role of Russian air units, including strategic bombers and carrier aircraft.

Its ground forces expanded to levels that may have been in excess of 5,000 troops – including small elements of special forces, mechanized forces, artillery, Wagner Group forces, and naval infantry. It also established training efforts, as well as some maintenance and combat support and it provided intelligence and targeting aid. These forces helped Assad and the pro-Assad forces make a steady series of territorial gains, and Russia declared in 2017 that its presence was going to be permanent.

In the process, Russia not only cooperated with Assad’s forces, but those of Iran and the Lebanese Hezbollah. It supported Assad’s hardline approach to repression and state terrorism, and it sent military advisors to help Syrian forces recover and rebuild. While Russia nominally supported peace negotiations from 2015 onwards, it continued to give Assad support in recovering the entire country – effectively isolating rebel forces to a small enclave in the Idlib area in 2019. This led to some confrontations with Turkish air and ground forces and some cases where Russia supported pro-Assad forces in areas where this produced civilian casualties. It also led to some encounters with U.S. and U.S.-backed Kurdish Arab forces in northeastern Syria in 2019 and 2020.

Figure Seventeen and Figure Eighteen show the impact of Russia’s deployments on the civil war in terms of changes in the areas of influence between January 2017 and May 2020, as well as some of the shifts in the role of key Syrian factions and other outside powers. The fighting not only led to a major return of Russian security assistance and military presence in the Middle East, it shifted the focus of Syrian military ties to Iran and the Hezbollah, and – in the process – helped further the focus of U.S., European, Israeli, and Arab Gulf state security assistance and force development against the potential Shi’ite axis formed by Iran, Syria, the Lebanese Hezbollah, and possibly Iraq in the future.

As for the details of outside military support of Assad and other factions in the civil war, most of the data on force size, structure, and the cost are missing or highly uncertain. Data are available on arms sales and weapons transfers, but those are suspect at best. Some estimates of Iranian aid run into the billions but may be far too high, and no reliable estimates exist of the remaining size of the regular Syrian forces or the outside forces and “volunteers.”

The data on the size and equipment of Syrian military factions and outside forces are uncertain. The IISS reported in 2020 that the pro-Assad forces were of mixed quality, but that the 4th Armored
Divison, the Republican Guard, the 5th Assault Forces, and the Special Forces were effective – and that Russia was helping other Syrian forces recover and rebuild. They had some 169,000 personnel, maintained a large holding of older Russian armor and artillery, and were well equipped with manportable and light arms. They had large holdings of Russian surface-to-air defenses, but their readiness status was mixed. The Navy had 31 corvette and patrol boats and 7 mine warfare ships whose active status was also unclear. The Air Force had some 236 older 130 Russian-made combat aircraft, and the air defense forces had S-300 surface-to-air missiles, as well as a now aging SA-2, SA-3, and SA-5 systems.

The IISS estimated that the rebel National Front for Liberation Forces in the area around Idlib had some 50,000 personnel. The Syrian Democratic Forces in the Kurdish-Arab enclave in the Northeast had some 50,000 as well.

There are no credible current data on Syrian security spending since 2011, or on the cost of foreign support and interventions. The CRS reports $1.6 billion in Russian new agreements, $400 million in Chinese new agreements, and $200 million from various European powers in 2008-2011 – before the start of the civil war. It reports only $500 million in Russian new agreements and $100 million in other European agreements during 2012-2015.

SIPRI reports a very different set of numbers. It estimates total major weapons transfers as being $2.20 billion for the entire period from the beginning of 2010 to the end of 2019. $1.994 billion came from Russia – mostly during 2010-2013. Another $186 million came from Iran, and only $20 million from China. Almost all of these transfers were air defense systems and missiles. It reports only $4 million in transfers to Syrian rebels, largely from Turkey’s support to the Islamic rebels in northwestern Syria and from the U.S. support to Kurdish and Arab rebels in the Northeast.53 Both sets of figures seem significantly too low.

Syria is still fighting its civil war. There were still cadres of largely Islamist rebels in Idlib in the Northwest in October 2020 that included rival Islamist elements like Hayat Thir a-Sham (HTS) and Hurras al-Din (HAD) and were partly backed by Turkey. There was a divided Kurdish and Arab enclave held by the Syrian Democratic Forces in the Northeast that was backed by the U.S., a divided Turkish-occupied enclave in the North, and a broadly scattered mix of ISIS fighters in both Syria and Iraq that continued sporadic low-level attacks.54

The Syrian forces loyal to Assad, Russian forces, the Hezbollah and Iranian “volunteers” seem likely to defeat the rebels in Idlib, however, and continuing U.S. support for the Kurdish-Arab enclave is uncertain. Syria’s near-term military dynamics do, however, seem likely to give the Assad regime control over the entire country. Turkey’s efforts to provide effective support to Islamic rebels in areas like Idlib seem likely to be defeated, and the U.S. role in supporting Kurdish and Arab rebels in the East do likely end in a U.S. withdrawal.

Given current trends, the Assad forces seem likely to take control of most or all of the country in 2021, with the possible exception of the Kurdish-Arab enclave. Assuming Assad survives, the end result is almost certain to be a Syria that is under a brutally repressive Assad regime whose acts of state terrorism during the civil war have almost certainly killed, injured, and displaced more people than the total acts of non-state terrorism in the world since 2001. At least half the Syrian population has every reason to resent and fear the Assad regime, some 384,000-586,100 had died by March 2020, and millions have been a refugee or internally displaced persons during the civil war. In early 2020, before new pressure on Idlib, the UN estimated that there were still at least 6.2 million internally displaced Syrians out of a remaining population of 19.4 million.55
In terms of outside relations, Syria is likely to remain dependent on Russia, Iran, and the Lebanese Hezbollah, but it will rebuild its military forces. It will also probably follow the example of the Hezbollah and Iran in deploying longer-range precision guided ballistic missiles, in creating hybrid warfare capabilities, and in building up its already strong internal security forces. It will continue to have tensions with Israel, Turkey, and most of its Arab neighbors.

It is far from clear how serious this tension will be, and how it will play out in terms of future clashes with Israel. Syria, however, seems almost certain to create new security problems and remain a lasting source of instability – and it will most likely serve as a Russian foothold in the region with a continuing Russian military presence. It could also significantly complicate any future U.S.-Arab Gulf war in the Gulf with Iran – particularly if the U.S. withdraws from Iraq.
Figure Seventeen: Factional Areas of Influence and Control on January 3, 2017


CRS uses area of influence data from IHS Conflict Monitor. All areas of influence approximate. Other sources include U.N. OCHA, Esri, and social media reports.

Note: U.S. military officials have acknowledged publicly that U.S. forces are operating in select areas of eastern Syria to train, advise, assist, and equip partner forces.
Figure Eighteen: Factional Areas of Influence and Control on May 25, 2020


CRS using area of influence data from IHS Conflict Monitor, last revised May 25, 2020. All areas of influence approximate and subject to change. Other sources include U.N. OCHA, Esri, and social media reports.

Note: U.S. military officials have acknowledged publicly that U.S. forces are operating in select areas of eastern Syria to train, advise, assist, and equip partner forces.
Jordan

Jordan played a reluctant role in the 1967 war with Israel, and one that cost its control of Jerusalem and the West Bank. It has since focused on development and internal security, although it has steadily modernized its forces and developed some of the most effective Special Forces in the world. The U.S. State Department also reports that it has effective counterterrorism forces, and it enforces a rule of law with limited repression.

The IISS estimates that Jordan had some 100,500 active military personnel in 2020, and 65,000 in reserves. These forces had an ageing mix of British and U.S. armor, some of which was in storage or being withdrawn. It had a large holding of artillery and good lighter equipment. It has a small navy of 9 patrol ships and two F-16AM/BM squadrons with 47 aircraft, plus some light AC-235 attack aircraft, some additional training aircraft, and 12 attack helicopters and UAVs. It has 40 MIM-104C Patriot PAC-2 and 24 MIM-23B Phase III I-Hawk surface-to-air missiles. There is also a 15,000 personnel Gendarmerie paramilitary force.

Jordan is no longer arming for war with Israel, and it is focusing on Special Forces and lighter, more mobile forces suited for deterrence of outside threats, border defense, internal security, and power projection – with a heavy emphasis on developing some of the region’s best Special Forces. It also has a strategic partnership with the U.S. and a good strategic relationship with Israel – providing it with an additional level of deterrent security.

While views differ on some aspects of its effectiveness, U.S. experts rate Jordanian forces as having good training and high effectiveness for their evolving missions – and as Jordan’s internal security efforts being effective. The IISS Summarizes Jordan’s capabilities as follows:

The Jordanian armed forces are structured to provide border security and an armored response to conventional threats. Their well-regarded operational capability belies their moderate size and ageing equipment inventory…The country has developed a bespoke special-forces training center and has hosted training for numerous state and non-state military forces. Personnel are well trained, particularly aircrew and special forces, who are highly regarded internationally. Jordanian forces are able to independently deploy regionally and have participated in ISAF operations in Afghanistan and in coalition air operations over Syria and Yemen…The Jordanian inventory largely comprises older systems. Although the state-owned King Abdullah II Design and Development Bureau (KADDB) has demonstrated a vehicle-upgrade capacity, the army has largely recapitalized its armored-vehicle fleet with second-hand armor from European countries…

The U.S. has been Jordan’s major source of security assistance, although European countries have also played a role. The IISS reports that Jordan spent $1.7 billion in military forces in 2019, which was a relatively high 4.62% of its GDP. SIPRI reports $2.0 billion in current dollars for 2019, and that spending is in constant 2018 U.S. dollars from 2010 to 2019, which ranged from $1.64 billion in 2013 to $2.0 billion in 2019.

The CRS reports that Jordan spent $1.7 billion on new arms transfers in 2008-2011 – $1.6 billion of which came from the U.S. – and that it spent $2.0 billion in 2012-2015 – $1.3 billion of which came from the U.S., $200 million from China, and $500 million from a variety of smaller European and other countries.

SIPRI provides a different picture for weapons transfers during 2015-2019. The total is $1.16 billion: $351 million from the U.S., $344 million from the Netherlands, $72 million from Italy, $63 million from Germany, $59 million from Switzerland, $51 million from the UAE, and $48 million from Israel. Small amounts came from Canada, China ($24 million), Poland, South Africa, and the United Kingdom.
The detailed SIPRI data on arms transfers to Israel during 2010-2019, that are provided in the Analytic Appendix, show that transfers totaled $1.906 billion. They came from 18 countries, and were dominated by the Netherlands ($604 million), U.S. ($511 million), Russia ($284 million), and Belgium ($103 million). China provided $27 million, and Israel provided $48 million. The key spending areas affecting military capabilities and dynamics focused on aircraft, air defense systems, armor, and missiles.\(^{57}\)

Jordan’s near-term military dynamics seem largely positive. Like Morocco and Oman, Jordan is one of the few MENA countries where almost all security assistance efforts since 1967 have actually gone to security and stability.
The Military Dynamics of the Persian/Arab Gulf Sub-Region

The Persian/Arab Gulf region includes Iran, Iraq, Bahrain, Kuwait, Saudi Arabia, the UAE, and Yemen. The military forces of each country are summarized in Figure Nineteen. These data provide a “snapshot” of the ongoing military building and the increasing internal security forces in each state – led in different ways by Iran, Saudi Arabia, and the UAE. Iraq’s force developments are in a state of flux driven by its internal instability, and Yemen is caught up in a major civil war. They clearly show that Iran is scarcely the “hegemon” of the region, even in weapons numbers.

Once again, they do not reflect the relative advances in joint and multi-domain warfare, IS&R, and C4I/battle management systems in each country, and they do not fully reflect the level of advances in surface-to-surface missile and UCAV attack systems, missile defenses, and in some aspects of lighter precision guided weapons. Iran has demonstrated that it has advanced long-range ballistic missiles and UCAV precision-strike capabilities. The Arab powers still generally rely on strike aircraft and air-delivered systems.

The data do not reflect the advantage the Arab Gulf powers gain through their strategic partnership with the U.S., and to some extent with Britain and France, in support form of the forward-based and power projection capabilities. They also have access to the purchase of many of the most advanced weapons and military technologies available, while Iran’s access to such purchase has been extremely limited or embargoed since the fall of the Shah in 1979.

They also do not reflect Iran’s ongoing nuclear and long-range missile programs or the military intentions of Arab Gulf states in acquiring nuclear power reactors. Iran is a declared chemical weapons state, but the chemical and biological weapons efforts of each other state are unknown.

The military developments and dynamics in the Gulf have led to some of the bloodiest wars in the MENA region’s history, none of which have brought any clear elements of future stability. The Gulf region has experienced a long series of minor clashes, conflicting territorial claims, and arms build-ups from the end of World War II to the fall of the Shah of Iran in 1979. These included a series of internal wars in Yemen – one with active Egyptian intervention. They also included the Dhofar rebellion in Oman, a Kurdish insurgency in Iraq, and various other low-level clashes and military coups.

The region then split in terms of U.S./West European and Russian influence and military assistance. Russia first became a major backer of South Yemen, and then of the new various factions that came to control Iraq after the fall of the Monarchy in Iraq in 1958. The U.S. and Britain provided most of the military support to the Southern Gulf Arab states and to the Shah’s regime in Iran. A major arms race also developed between Iraq and Iran after the fall of the Monarchy and after the return of the Shah to Iran in 1953. This arms race rapidly accelerated after the oil export income rose sharply in 1973.

The figures that follow provide a broad perspective on sub-regional trends, but do have important limits, particularly when compared with the data in the country-by-county assessments that follow.

- The WMEAT estimates of comparative Persian Arab/Gulf military spending in millions of current U.S. dollars are shown in Figure Twenty. Some data seem to reflect national reporting, which sometimes seems to deliberately understate the real level of spending. The Bahraini, Iraqi, Iranian, Omani, Saudi, and Emirati data may be broadly correct within the limits discussed for the other spending estimates provided later in the country sections, but
could significantly understate the coming impact of new arms agreements and total internal security spending,

- The WMEAT estimates of comparative Persian Arab/Gulf military spending as a percent of GDP are shown in Figure Twenty-One. As usual, these data differ significantly from the data in other sources. The broad trends in the data for Saudi Arabia and Oman seem broadly correct, but they may undercount the impact of some procurement and internal security spending. The data on Iran, Iraq, and Qatar seem significantly too low, and the data on UAE are far too low.

- The WMEAT estimate of comparative Persian Arab/Gulf spending on arms transfer is shown in Figure Twenty-Two. The broad trends may be correct, but the data are clearly different from the data in other sources. The Iranian and Qatari data also seem too low.
### Figure Nineteen: Persian/Arab Gulf Military Forces in Early 2020

<table>
<thead>
<tr>
<th>Category</th>
<th>Iran</th>
<th>Iraq</th>
<th>Bahrain</th>
<th>Kuwait</th>
<th>Saudi Arabia</th>
<th>UAE</th>
<th>Qatar</th>
<th>Oman</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defense Budget ($US billions)</td>
<td>17.4</td>
<td>20.5</td>
<td>1.51</td>
<td>1.93</td>
<td>78.4</td>
<td>?</td>
<td>?</td>
<td>3.45</td>
</tr>
<tr>
<td>Active Military &amp; IRGC Personnel</td>
<td>610,000</td>
<td>193,000</td>
<td>8,200</td>
<td>17,500</td>
<td>227,000</td>
<td>63,000</td>
<td>16,500</td>
<td>42,600</td>
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<tr>
<td>Reserve Military Personnel</td>
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<td>0</td>
<td>0</td>
<td>23,700</td>
<td>27,000</td>
<td>0</td>
<td>0</td>
<td>NA</td>
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</table>

#### Land Forces*

<table>
<thead>
<tr>
<th>Category</th>
<th>Iran</th>
<th>Iraq</th>
<th>Bahrain</th>
<th>Kuwait</th>
<th>Saudi Arabia</th>
<th>UAE</th>
<th>Qatar</th>
<th>Oman</th>
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</thead>
<tbody>
<tr>
<td>Army, IRGC and Saudi NG Active Personnel</td>
<td>540,000</td>
<td>180,000</td>
<td>6,200</td>
<td>13,000</td>
<td>148,000</td>
<td>44,000</td>
<td>12,000</td>
<td>2,500</td>
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<tr>
<td>Main Battle Tanks (Modern Tanks)</td>
<td>1,513+</td>
<td>391+</td>
<td>180</td>
<td>293</td>
<td>888</td>
<td>383</td>
<td>62</td>
<td>117</td>
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<tr>
<td>Other Armored Fighting Vehicles (AFVs)</td>
<td>725+</td>
<td>753+</td>
<td>89</td>
<td>492</td>
<td>1,947</td>
<td>553</td>
<td>138</td>
<td>273</td>
</tr>
<tr>
<td>Armored Personnel Carriers</td>
<td>640+</td>
<td>1,592+</td>
<td>303+</td>
<td>260</td>
<td>2,118</td>
<td>1,161</td>
<td>290</td>
<td>200</td>
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<tr>
<td>Self-Propelled Artillery</td>
<td>292</td>
<td>48+</td>
<td>82</td>
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#### Naval Forces*

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</tbody>
</table>

* Personnel includes all Iranian Islamic Revolutionary Guards (IRGC) forces and Saudi National Guard forces.

** Total of Army, Air Force, IRGC.

*** Numbers and types are very different and changing. Purely nominal number.

**** Omani Army includes Royal Guard Brigade.

***** Yemen is omitted. No credible data

**Figure Twenty: Annual Military Expenditure of the Countries in the Persian-Arab Gulf Sub-Region**

*(in Millions of Current $US From 2012-2017)*

<table>
<thead>
<tr>
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<td>9,090</td>
<td>11,300</td>
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<tr>
<td>Iraq</td>
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<td>7,530</td>
<td>7,270</td>
<td>13,100</td>
<td>11,000</td>
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<tr>
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<td>5,850</td>
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<td>1,360</td>
<td>1,520</td>
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**Note:** Data for the years of 2015-2017 in Yemen are unavailable

Figure Twenty-One: Annual Military Expenditure as Percent of GDP for the Countries in the Persian-Arab Gulf Sub-Region From 2012-2017

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<td>4.5%</td>
<td>7.8%</td>
<td>5.7%</td>
<td>6.0%</td>
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<td>5.0%</td>
<td>5.9%</td>
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<td>4.1%</td>
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<tr>
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<td>2.3%</td>
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<td>2.6%</td>
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<tr>
<td>Saudi Arabia</td>
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<td>10.7%</td>
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<td>10.8%</td>
<td>11.1%</td>
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<td>6.1%</td>
<td>5.8%</td>
<td>7.0%</td>
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<tr>
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</table>

**Note:** Data for the years of 2015-2017 in Yemen are unavailable

Figure Twenty-Two: Annual Arms Imports of the Persian-Arab Gulf Sub-Region

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The Impact of the Iran-Iraq War

The arms race had a major impact on the sub-region’s stability after the fall of the Shah in 1979. Iran came under a revolutionary theocracy controlled by the Ayatollah Khomeini. This led Saddam Hussein to launch an Iraqi invasion of Iran in 1980 – attempting to exploit the seemingly present turmoil in Iran’s military forces as well as the cut off from U.S. security and most European military aid and arms transfers after the beginning of the Iranian Embassy hostage crisis in November 1979. Saddam Hussein invaded Iran in order to counter the threat from Iran’s new revolutionary Shi’ite regime, and possibly to annex some of Iran’s Arab occupied and petroleum rich territory in its Southwest.

The Iraqi invasion fell far short of its goals as Iran restricted its military forces and created a large Islamic Revolutionary Guard, driving Iraqi forces out of Iran and then invading Iraq. A bloody Iran-Iraq War followed that came to include mass battles as well as the Iraqi use of chemical weapons and missile warfare.

The war led Iraq to find arms and military support from every source it could, including Russia and France. Iran’s access to arms was sharply limited by the U.S. and European embargo – which still applies to current arms transfers and all forms of military support to Iran. It was forced to get what arms it could – most were of low grade – from the Soviet bloc, China, Vietnam, and North Korea, and also by creating fronts to smuggle in arms from the U.S. and Europe.

The Iran-Iraq War ended in 1988 with a ceasefire with the borders of both nation’s intact. Iran had survived, and it created a large mix of regular and Revolutionary Guard forces while also developing a growing capability to make its own weapons, modifications, and maintenance efforts – although it emerged from the war equipped largely with older U.S. and British weapons, medium quality Soviet bloc systems, and mediocre Chinese equipment.

Iraq had been able to use outside aid, loans, and arms transfers to become a far more modern effective military power by 1987, and to drive Iran out of its territory. It also had made extensive use of poisonous gas, and it made serious progress in developing improved missiles and in acquiring nuclear weapons. Iran in turn was developing its own chemical weapons and missile forces as it had revived the Shah’s covert nuclear weapons program.

The Invasion of Kuwait and the First Gulf War

The ceasefire in the Iran-Iraq War soon proved to be the prelude to another serious conflict. Iraq faced a major economic crisis and owed massive debts to its neighbors. This led Saddam to launch another invasion in 1990 – this time to invade and conquer Kuwait. The reaction of other states was to create a U.S. and Saudi-led military coalition to liberate Kuwait that included U.S., European, other Arab Gulf, Egyptian, and Syrian forces. They prepared an invasion to liberate Kuwait that began with a massive air campaign against Iraqi targets in both Kuwait and Iraq on January 17, 1991. It was followed by a major land attack into Kuwait, which decisively defeated Iraqi forces and ended 42 days later with Iraq agreeing to UN and coalition terms on February 28, 1991.

Iraq’s invasion of Kuwait in 1990 had ended in the decisive defeat of Iraq’s conventional forces by the U.S. and Saudi-led coalition in the first Gulf War in 1991. A broad embargo on arms sales to Iran continued after the end of the U.S. Embassy hostage crisis and had left Iran with little access to modern weapons, while Iraq lost much of its modern military inventory and almost all of its access to advanced modern weapons after 1991.
At the same time, Iran faced a continuing embargo on the sale of most major weapons and other military equipment. To the extent a major military build-up continued in the Gulf, it took place in the Arab Gulf countries – Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE. Yemen ceased to be the center of a major arms race after the unification of North and South Yemen in 1990, and after the break-up of the former Soviet Union.

Combat during the First Gulf War had several other effects. It led to the destruction of most of Iraq’s long-range missiles, its chemical weapons, its programs to develop nuclear weapons, and its ability to make new major arms buys. Iraq kept its military forces and remained a major regional power, but Iraq was forced to continue UN inspections to find and destroy any remaining weapons of mass destruction. The settlement also called for reparations and placed Iraq under UN sanctions and controls over its petroleum export revenues. It also placed practical limits on its internal security efforts that led to the creation of a Kurdish security zone in its north.

The Aftermath of the First Gulf War

The First Gulf War also transformed the military dynamics of the region. U.S. forces stayed in the Gulf to enforce the agreement, and the U.S., Britain, and France became more active in encouraging the military build-up, modernization, training, and effectiveness of Southern Gulf forces. The U.S. also expanded its basing and naval facilities in Bahrain; made Saudi Arabia and the UAE major security partners; established a presence in Kuwait and helped it build up larger more effective forces; expanded military ties to Oman with contingency facilities there; and worked with Qatar to create a major U.S. airbase at Al Udeid that began operations in 1996, which is still the center of U.S. air operations in the region.

The war did surprisingly little, however, to create meaningful Arab security cooperation. A Gulf Cooperation Council (GCC) had been created as a reaction to the Iran-Iraq War in 1981, but did little to create standardization, interoperability, integrated battle management capabilities, and common training and exercises. Instead, Saudi Arabia and the UAE improved their cooperation at the policy level; Bahrain continued to follow the Saudi-led coalition during the First Gulf War; and Kuwait, Qatar, and Oman pursued their own military development – all relying far more on security assistance from the United States. Britain and France created a smaller portion of security assistance, contingency basing, and military training efforts that normally cooperated closely with the United States.

To some extent, this was predictable. Arab alliances and Pan-Arab unity have largely been matters of rhetoric, and they are mostly decoupled from reality. There was only limited Arab unity in any of the wars with Israel, and the Gulf Cooperation Council never played a major role in any conflict or effort at deterrence or the creation of integrated military forces, rather it has been divided by the Saudi-Emirati-Bahraini boycott of Qatar since June 2017.

The First Gulf War did, however, have three other important impacts:

- The war created a major arms race between Iran and the Southern Arab Gulf states – one that has continued ever since, created massive arms imports, and driven military spending to percentages of GDP that place serious burdens on most of the economies of the states involved. The United States, Russia, Europe, and increasingly China have all competed in supplying the MENA states, although it is the United States that deploys major combat forces in the region; has bases in Bahrain, the UAE, and Qatar; and provides the mixture of command and control and IS&R capabilities.
• The Southern Arab Gulf states still have a massive lead over Iran in such military spending and in the dollar value amount of arms transfers, but they are deeply divided and buy with minimal standardization and interoperability – and most of their forces lack a clear focus on real world mission capability. Saudi Arabia, the UAE, and Bahrain have openly split with Qatar, while Oman and Kuwait are standing aside. Saudi Arabia and the UAE are actively involved in a civil war in Yemen that has given Iran new opportunities to take advantage of the Houthis in Yemen and the geostrategic location in the Red Sea by demonstrating its increasing missile strike capabilities.

• The U.S. and European presence in Saudi Arabia as well as the Arab reliance on outside powers helped to catalyze opposition from Islamist extremists and the rise of movements like al Qaeda and ISIS. The burden of military spending also helped to limit civil and economic development and, instead, increased the causes of both moderate and extremist opposition.

\textit{The Second Gulf War and the Invasion of Iraq}

Once again, war proved to be the prelude to another conflict and a whole new set of security assistance issues. The fact that the U.S. and Saudi-led coalition forces did not drive Saddam from power led some American policymakers and Iraqi exiles to feel that the United States should remove Saddam and his cadre from power. At the same time, Iraqi resistance to the inspections of its possible missile, nuclear, chemical, and biological facilities led some U.S. and European analysts and experts to conclude that Saddam still had major covert programs and weapons assets.

The U.S. election of George W. Bush as President in 2000 brought a number of U.S. policymakers and analysts to office, who mostly advocated for U.S. military action to drive Saddam from power because they felt he was still concealing weapons of mass destruction. Some U.S. and allied intelligence analysis seemed to confirm this, and the U.S. won support from Britain, Poland, and other countries (although it was opposed by allies like France, Canada, Germany, New Zealand, and Saudi Arabia). The U.S. formed a new coalition and built up major land forces in Kuwait as well as an air presence in the Gulf. It launched an air campaign in March 2003, and President Bush announced the end of major combat operations on May 1, 2003.

This Second Gulf War destroyed Saddam Hussein’s regime and effectively disbanded Iraqi military forces – removing a key counterbalance and deterrent to Iran. It also produced a massive sudden victory that effectively made the U.S. the de facto occupier of Iraq, although the U.S. had made no real contingency plans for nation building or governing Iraq; for keeping U.S. forces in Iraq and developing a new government or security forces; or for helping to unify a country with deep divisions between its Shi’ites, Sunnis, Kurds, and other minorities. It effectively fought and won a major war with no security assistance or other plans for the future.

It is difficult to summarize the impact that these events – and more current developments – have had on individual Gulf states, but once again, security assistance has and will be driven more by the national differences between recipient countries rather than the regional differences or the differences between the states that supply security assistance.

\textit{Iran}

Iran is now the central focus of military and security assistance activity in the MENA region. It presents key challenges to the stability of Iraq and to the security of the Southern Arab Gulf states. U.S. and European security assistance to the Arab states is focused as much on Iran as it is on
extremism and terrorism – while the future role that Russia and China might have in providing arms and military support to Iran has now become a critical issue.

One again, it is important to understand the history of such security assistance. Iran has lacked any consistent major source of security assistance since the beginning of the U.S. Embassy hostage crisis. Most of its major arms are worn, gaining, and/or of mediocre quality – and a review of an unclassified report on its military forces and weapons shows that it is scarcely a “hegemon.”

Iran has, however, become the equivalent of a military theocracy in many ways in response to the Iraqi invasion in 1980, the Iran-Iraq War that followed in 1980-1988, the build-up of U.S. and Arab Gulf forces that occurred in liberating Kuwait in 1990-1991, the U.S. invasion of Iraq in 2003, and the ongoing U.S and Arab military build-up that still continues.

The initial tensions between the regular military forces (Artesh) and the Islamic Revolutionary Guards (IRGC) forces – that were created by the Khomeini regime after the fall of the Shah, in response to the Iraqi invasion – continue to some degree. However, it has now been 40 years and a major war since the fall of the Shah. These tensions now take the form of interservice rivalry, and the IRGC clearly is the force most closely tied to the leader and has the largest role in terms of ties to the Iranian economy. DIA estimates that the IRGC had 29% of the Iranian official military budget in 2019 versus only 12% for the Artesh. (Pensions consume another 34%, the Ministry of Defense and “other” consume 8%, and the law enforcement forces (LEF) consumes 17%).

Iran has developed effective combat forces, paramilitary, and security forces as a result of its experience in the Iran-Iraq War and its long confrontation with the U.S. and its Arab neighbors. It has steadily improved its military development and production capabilities for both new weapons and the modification and rehabilitation of its existing inventory.

These efforts have had some failures, but they also have had significant successes and changes on many of Iran’s military dynamics. Many of these changes are too complex and interactive to quickly summarize, but they are explored in a wide range of studies. They are also present in depth in unclassified form by the U.S. Defense Intelligence Agency (DIA) in *Iran Military Power, 2019*. This document summarizes Iran’s modernization goals as follows:

- **Missile**: Increase the accuracy, lethality, and production of ballistic and cruise missiles.
- **Air Defense**: Develop longer-range SAMs and improve short- and medium-range systems.
- **Air**: Develop advanced offensive and defensive air power.
- **Navy**: Attain regional and deterrent sea power.
- **Ground**: Strengthen ground combat and rapid-reaction capability.
- **EW/C4/IS&R**: Improve EW and C4ISR posture, including space-based capabilities.
- **Cyberspace**: Increase cyberspace presence and hold adversary infrastructure at risk.

The IISS reports that Iran had some 610,000 active military personnel in 2020, of which some 190,000 were members of the Islamic Revolutionary Guard (IRGC), plus 350,000 in reserves. Its land forces had a mix of aging and often combat worn U.S., British, and Russian armor and artillery, but it has massive numbers of towed tube multiple rocket launchers (MRL) weapons, and it is well equipped with increasingly more modern man-portable and lighter missiles.
The Navy and naval branch of the IRGC has 4 submarines, 13 submersibles, 7 corvettes, 78 missile patrol boats, 98 other patrol boats, mine warfare capabilities, 15 landings ships, and 13 landing crafts.

Iran had 333 U.S., French, Russian, and Chinese made combat capable aircraft. Many were aging and combat worn, and others were not operational in combat, but they did include still capable Su-24s, MiG-29s, F-14s and F4s. Iran was taking delivery on new S-300 PMU2 surface-to-air missiles, and it already has SA-5s, Hawks, SA-2s, and Tor-M1s.

Iran also had 40,000 to 60,000 paramilitary forces in its law enforcement forces, and some 600,000 mobilizable Basij Resistance Forces for internal security and to resist invading forces.

Iran has shown that it can be a major source of security assistance to forces like the Hezbollah in Lebanon and the Houthis in Yemen by effectively transferring and supporting them with systems like long range missiles. **Figure Fourteen** shows a map of Iran’s strategic influence in other regional states in 2020.

Special elements of its Revolutionary Guard like the Quds Force have been effective in supporting the Assad regime in Syria, popular mobilization forces (PMFs) in Iraq, and the Houthis in Yemen. At the same time, Iran is steadily improving its precision-guided conventional missile forces, its air defense systems like the Russian S-300, and its missile-naval-air warfare capabilities in the Gulf.

The open source data on Iran’s military expenditures and the size of its aid efforts in nations like Syria lack credibility. The IISS reports on $17.4 million in security spending in 2019, which accounts for 3.8% of its GDP. SIPRI reports its military spending was only $12.6 billion in current dollars for 2019, and that spending in constant 2018 U.S. dollars from 2010 to 2019 ranged from a low of $9.58 billion in 2019 to a high of $14.97 billion in 2010. Given the cost of its intervention in Syria and the region, its efforts to develop and produce major weapons systems, and its “black market” military imports, Iran’s recent spending could be in the $20 billion range or higher.

The DIA report on *Iranian Military Power* does list estimates of total military spending and spending as a percent of GDP that show such levels:

- The military expenditure as a percent of GDP figures for 2011-2018, and projected for 2019, are 3.9% for 2011, 4.6%, $19.9 billion for 2013, 3.8% for 2014, 4.3% for 2015, 4.1% for 2016, 5.3% for 2017, 6.1% for 2018, and 3.8% projected for 2019.

It should be stressed that these DIA figures are based on Iran’s official data, and do not reflect its real total spending. DIA also reports that:

Iran also distributes funding to its many partners and proxies, expenditures not fully accounted for in the official budget. Between 2012 and 2018, Iran provided more than $16 billion to the Syrian regime, Hizballah, Iraqi Shia militias, the Huthis, and Palestinian groups… Tehran has a variety of off-budget sources of funding, making it difficult to accurately estimate the true size and scope of Iranian defense spending. The supreme leader can authorize transfers to defense and security organizations from the National Development Fund, Iran’s reserve fund, as it reportedly has done to support military activities in Syria.

...Moreover, the IRGC runs numerous private companies—most notably the wide-ranging Khatemolanbia (“seal of the prophets”) Construction Head-quarters—and exploits its far-reaching political and social
influence to raise additional revenue. The IRGC and IRGC-QF can also gain extra income through smuggling and other illicit activities in the region…

Iran’s new 5-year national development plan, released in July 2017, emphasizes a broader range of conventional capabilities than past plans. The plan continues to prioritize missiles and naval forces, but it also emphasizes air power, including the first public reference to offensive air capabilities in an Iranian strategic document. The plan also provides new focus on electronic warfare (EW) capabilities…

Some of Iran’s claims about its military exercises and its weapons developments and production capabilities are also doubtful. However, Iran clearly has significant numbers of effective force and hybrid warfare capabilities. It also has demonstrated that its internal security forces can be ruthlessly effective, and Basij can be selectively used effectively for internal security purposes as well.

At a very different level, Iran has repeated demonstrated its capability to harass and attack Gulf shipping in exercise and actual attacks. Figure Twenty-Three shows Iran’s major ports, and it has been developing a steadily increasing mix of Revolutionary Guard, naval forces, anti-ship and land-attack missile forces, maritime patrol and combat aircraft with anti-ship missile capabilities, smart mine warfare, and other abilities to attack shipping and Gulf oil facilities. Figure Twenty-Four also shows the vulnerability of the Strait of Hormuz. Iran’s forces are deployed throughout the Gulf and the Gulf of Oman, and they regularly exercise rapid dispersal to many smaller sites.

Reporting by the U.S. Energy Information Agency (EIA) notes that, 65

The Strait of Hormuz is the world’s most important oil chokepoint because of the large volumes of oil that flow through the strait. In 2018, its daily oil flow averaged 21 million barrels per day (b/d), or the equivalent of about 21% of global petroleum liquids consumption… There are limited options to bypass the Strait of Hormuz. Only Saudi Arabia and the United Arab Emirates have pipelines that can ship crude oil outside the Persian Gulf and have the additional pipeline capacity to circumvent the Strait of Hormuz. At the end of 2018, the total available crude oil pipeline capacity from the two countries combined was estimated at 6.5 million b/d. In that year, 2.7 million b/d of crude oil moved through the pipelines, leaving about 3.8 million b/d of unused capacity that could have bypassed the strait.

The CRS and SIPRI data on arms transfers seem as uncertain as the defense spending data. The CRS reports $2.1 billion in new arms sales in 2004-2007 – of which $1.6 billion is from Russia, $300 million from China, and $200 million from smaller powers. It only reports $300 million in new arms agreements in 2008-2011 – all from smaller European and other states.

SIPRI reports $437 million in weapons transfers in 2015-2019 – $428 million from Russia and $9 million from China. The detailed SIPRI data on arms transfers to Iran during 2010-2019, that are provided in the Analytic Appendix, show that transfers only totaled $708 million over an entire decade. They came from 3 countries, and were dominated by Russia ($519 million), China ($174 million), Belarus ($284 million), and Belgium ($103 million). China provided $27 million, and Israel $15 million. The key spending areas affecting military capabilities and dynamics focused on air defense systems, missiles, and sensors. 66 These figures seem too low and seem to ignore substantial black-market imports that have helped Iran develop its military industries, its nuclear program, and some missile programs.

As has been noted earlier, these are critical issues. The Southern Gulf states have many key fixed military targets and some of the most expensive and critical point targets, which also consist of civil infrastructure, in the world – including desalination plants and electric power facilities. The status of the JCPOA is increasingly unclear, and the estimates of the “breakout” time Iran would need to fully develop and deploy nuclear weapons differ significantly, but sometimes they are as
low as one to two years. Iran also already has very long-range ballistic missiles, and it has shown that it can use ballistic and cruise missiles to conduct precision strikes on Saudi oil facilities and that it is willing to transfer such systems to the Hezbollah and Houthis. The future status of the JCPOA and Iran’s compliance is also a key uncertainty. Having nuclear weapons would significantly change the regional balance of power, and even having a technology and manufacturing base could allow Iran to rapidly recreate an active nuclear weapons program, giving Iran some strategic leverage.

Iran’s progress also has gone beyond the nuclear dimension to include “weapons of mass effectiveness.” Iran is developing and deploying steadily more advanced conventional precision strike capabilities to destroy critical military and civil targets. This was made clear in 2020 by the Iranian attack on Saudi oil facilities, as well as by its ability to transfer such weapons to third parties like the Hezbollah and the Houthis.

As noted earlier, once Iran has a large force of precision-guided missiles, it will be able to do serious damage to critical civil and military targets throughout the Gulf and in Israel – forcing its neighbors to need far more advanced and layered air and missile defenses. Moreover, Iran’s ability to affect the balance in the Gulf and wage hybrid warfare by providing the Hezbollah and Houthis – and potentially Syria and Iran – with more lethal missiles will steadily increase with time thus challenging the Arab Gulf and U.S. reliance on shorter-range conventional targets – like armored fighting vehicles/self-propelled artillery, fixed and rotary wing combat aircraft, and larger ships as well as long-range fixed targets.

Estimates of the size of Iran’s missile and UCAV forces, the holdings of given types, and their performance vary significantly or are often nominal estimates at best. Iran’s systems are also evolving rapidly, and most estimates lag behind Iran’s current deployments and developments. Figure Twenty-Five shows that Iran already has relatively long-range systems, and Figure Twenty-Six provides a snapshot of the existing diversity of Iran’s systems.

U.S. experts also believe that Iran still has ties to North Korea in developing missile technology – both in terms of liquid- and solid-state boosters and accuracy – and that it now has a considerable technical base of its own. North Korea is advancing more quickly than most experts estimated even a few years ago. The most recent edition of the DIA’s Iran Military Power describes Iran’s advances in detail in both its section on ballistic missiles and the annexes on its land, naval, and air forces. It notes that, Iran has the largest and most diverse ballistic missile arsenal in the Middle East, with a substantial inventory of close-range ballistic missiles (CRBMs), short-range ballistic missiles (SRBMs), and medium range ballistic missiles (MRBMs) that can strike targets in the region up to 2,000 kilometers from Iran’s borders, as far as Israel and southeastern Europe. Iran’s missile force—the Al-Ghadir Missile Command (AGMC), which falls under the control of the IRGC Aerospace Force (IRGCASF)—serves as a critical strategic deterrent and a key tool of Iranian power projection.

The AGMC periodically conducts highly publicized national-level exercises demonstrating the capabilities and readiness of the force, often as part of the IRGC’s NOBLE PROPHET series of exercises. In 2017, Iran for the first time used the name EQTEDAR-E VELAYAT for its major AGMC exercise. These show-of-force events typically include publicized missile launches and statements highlighting Iran’s missile capabilities and deterrent posture. Prior exercises have showcased launches against a mock U.S. airfield and naval targets...

Iran has also used its missiles in combat on several occasions in recent years. In June 2017 and October 2018, Iran launched SRBMs from western Iran in high-profile strikes against ISIS targets in Syria. Iran conducted both operations in direct response to terrorist attacks in Iran, although some officials noted the attacks were
also intended as a message to any of Iran’s potential adversaries… In September 2018, Iran launched SRBMs against Kurdish militant targets in Iraq, damaging the Kurdish Democratic Party of Iran (KDPI) headquarters…

Iran’s continued production of missiles and refinement of ballistic missile technology pose a growing threat to U.S. forces and allies in the Middle East. Tehran is also a major proliferator of ballistic missile technology to regional state actors and proxy groups. Although Iranian leaders emphasize self-reliance, Iran continues to depend on foreign suppliers for critical components and technology.

Iran has an extensive missile development program, and the size and sophistication of its missile force continues to grow despite decades of counterproliferation efforts aimed at curbing its advancement. Iran continues to attempt to increase the lethality, reliability, and accuracy of its missile force. In recent years, Iran has unveiled SRBMs with increasingly greater range and precision as well as MRBMs with claimed accuracy and warhead improvements. Iran is fielding an increasing number of theater ballistic missiles, improving its existing inventory, and developing technical capabilities that could enable it to produce an intercontinental ballistic missile (ICBM).

Iran’s near-term military dynamics seem likely to continue being driven by the Gulf arms race; pressure and sanctions from the U.S.; and its efforts to expand its influence in Lebanon, Syria, and Iraq. However, there are some important wild cards. Iran’s steadily deteriorating economic position and the brutal impact of Covid-19 could lead to more serious popular challenges to the regime.

Alternatively, Iran could make relatively quick improvements in its military capabilities if it had better access to arms imports. The expiration of some UN sanctions, the refusal of most P5+1 to support the U.S. in a “snapback” of nuclear sanctions, and the fact that the Security Council refused to extend the broader UN arms embargo on Iran in spite of U.S. efforts on October 18, 2020, may all combine to make this possible.

The proposed 25-year security agreement between China and Iran discussed earlier could be one path to major new arms and security assistance. Russian willingness to sell advanced arms could be another. Iran has previously sought the S-400 air-missile defense system. Iran is reported to have sent a general officer to Russia for a military technology conference in 2020, who showed an interest in the Russian Pantsir-S2 short-range air defense system, the T-90 main battle tank, and the Sukhoi Su-30 long-range multirole fighter jet.69 It is far from clear that the U.S. threats to sanction any individual or entity that assisted Iran’s weapons program will prevent a major future Chinese or Russian sales effort.70

Taken as whole, these factors seem likely to continue making Iran remain as the central focus of a military build-up by its Arab neighbors and the reason for U.S. military presence and security assistance activity in the region. The Arab states and Israel will have to deal with the increases in Iran’s ties to Syria and the Lebanese Hezbollah, Iran’s challenges to Israel, Iran’s missile forces, and the threat Iran poses to the Arab Gulf states.

However, the future U.S. role in providing the major real-world military forces opposing Iran in the Gulf – and as a de facto substitute for a meaningful military cooperation between the Southern Arab Gulf states – is also uncertain. The U.S. is still directly competing with Iran for influence, and it keeps adding unilateral sanction on Iran. So far, however, this form of “maximum pressure” on Iran has done more to impoverish Iran’s people than to change the behavior or character of the regime.

The U.S. is also sharply reducing its forces and overall presence in Iraq, and also doing so in the rest of the Gulf and the region in order to focus more on the global threat from Russia and China.
and to deal with its increasing budget deficits. As a result, the size, deterrent value, and warfighting role of the U.S. in dealing with Iran is becoming somewhat uncertain. This makes the potential growth of Iran’s strategic leverage in Iraq, Syria, and with the Hezbollah steadily more important – as well as the divisions between the Arab Gulf states that are described in the following country-by-country summaries.
Figure Twenty-Three: Iran’s Expanding Regional Influence

Figure Twenty-Four: Manor Iranian Ports and the Strait of Hormuz

Source: Created by CRS using data from the U.S. Department of State, ESRI, and GADM.

Source: CRS. Based on, and includes, map by Navy of the United Kingdom

Figure Twenty-Five: Illustrative Map of Iran’s Missile Ranges in 2019

Figure Twenty-Six: Iran’s Current Missile Types

Iraq remains a major wild card in its role on regional stability, its changing military dynamics, and its effects on the role of outside powers. The U.S. has fought the equivalent of two wars in Iraq since it invaded in 2003. One against Sunni extremists in the West during 2005-2011, and another against the ISIS “caliphate” from 2014 to 2020 – which now only significant elements of ISIS remain.

The U.S. invasion of Iraq in 2003 removed both Iraq’s political stability and its ability to act as an effective military counterbalance to Iran. The U.S. partially rebuilt Iraqi forces, and the U.S.-led coalition and the new Iraqi Army defeated Sunni Islamist rebel forces and elements of al Qaeda in the first war in 2005-2011. However, the U.S. failed at creating an effective new political system and government to unify the country. The U.S. also removed most of its combat forces in 2011 even though a stable government – and effective Iraqi national forces that could stand on their own – had not yet been created.

Iraq’s Prime Minister Maliki attempted to repress its Sunni population in the West, which opened the country to an invasion by ISIS – an even more extreme movement than al Qaeda. Many Iraqi security units collapsed, and ISIS was able to take over large portions of eastern Syria and western Iraq, including Mosul. These ISIS gains are shown in Figure Twenty-Seven.

The U.S. than redeployed U.S. and some coalition forces, and Iraq rebuilt many of its security forces between 2014-2020 – creating the strategic alignments shown in Figure Twenty-Eight. The U.S. negotiated a strategic partnership agreement with Iraq, but its future is unclear, and the U.S. may leave prematurely again. Iran now has a substantial security advisory force in Iraq, and it seems to actively support pro-Iranian Iraqi popular mobilization forces (PMFs) in attacks on U.S. facilities.

The overall effectiveness of its combat units is still mixed. Some elite land force units and its Counterterrorism Service were very effective in fighting ISIS, sometimes in intense urban combat and battles against well dispersed and effective ISIS forces in the field, but they did benefit from the direct support of U.S. train and assist forces. Iraq’s small F-16 force, its other attack aircraft, and its IS&R air units have improved but were heavily dependent on U.S. combat air strike and
IS&R support during the fighting against ISIS – and Kurdish Peshmerga and various Sunni and Shiite Popular Mobilization Forces played an important role in dealing with ISIS, though they now present challenges in creating integrated national forces.

The CRS Assessment of Iraqi forces, drawing on official U.S. military assessments, describes their effectiveness as follows:71

U.S. assessments of the Iraqi Security Forces (ISF) in 2020 have emphasized the “increasingly independent” nature of Iraqi operations, stating that Iraqi forces can now “handle most aspects of a counter-insurgency autonomously.” U.S. tactical assistance to Iraqi operations appears limited to joint special operations missions, intelligence sharing, and some combat air support. Iraqi commanders’ use of their own air assets for intelligence, surveillance, and reconnaissance (ISR) its Task Force-Iraq its Task Force-Iraq advising element to a smaller Military Advisor Group centrally located in and around Baghdad to advise Iraqi commanders on operational-level planning.

U.S. assessments in late 2019 had emphasized limitations in the will and capability of ISF units to “find and fix” targets or exploit intelligence without assistance from coalition partners…More recent assessments note increased ISF efforts to clear remote areas where IS fighters operate, but judge that “the ISF continued struggle to integrate the use of ISR and fires assets into their operations”… Similarly, U.S. assessments acknowledge the intelligence and reconnaissance capabilities of specialized Counterterrorism Service (CTS) units, but judge that “most CTS units” in early 2020 “were limited in their capacity to coordinate the maneuver of multiple subordinate elements in complex operations.” PMF units continue to conduct anti-IS operations in areas of eastern Iraq, and frequently suffer casualties in clashes with IS fighters and from IS attacks.

These conditions and trends suggest that while the capabilities of IS fighters remain limited at present, IS personnel and other armed groups could exploit persistent weaknesses in ISF and/or CTS/PMF capabilities to gradually reconstitute the IS threat to Iraq and neighboring countries. This may be particularly true with regard to remote areas of Iraq or under circumstances where security forces face additional crowd control or force-protection duties that divert personnel or limited ISR assets.

These are assessments that Iraqi forces require at least three to four more years of train and assist support to reorganize and train in order to deal with external threats involving heavy armor, air combat, and missile defense operations.
Figure Twenty-Seven: Islamic State Territorial Control in Syria and Iraq, 2015-2018


Figure Twenty-Eight: Zones of Influence and Bases with U.S. and Turkish Forces in Iraq on July 8, 2020


Notes: Areas of influence are approximate and subject to change.
The IISS notes that, “IS&RI assistance, suggesting continuing capability limitations in this area. Significant logistical shortcomings remain, including logistics support and intelligence integration. Internal political frictions, revived US–Iran tensions and efforts to rein in corruption add to concerns over the cohesion and reliability of the armed forces and associated PMU militias. The inventory comprises Soviet-era and Russian equipment combined with newer European- and US-sourced platforms, the latter including F-16 combat aircraft and attack helicopters. Barring military maintenance facilities, the Iraqi defense industry has only a limited ability to manufacture light weapons and ammunition.”

The IISS also reports that Iraq made very high national military expenditures of $20.47 billion in 2019, which accounted for a very high 9.1% of its GDP. The SIPRI military expenditure figures, however, seem far too low. They report only $7.6 billion in current dollars for 2019, and that spending in constant 2018 U.S. dollars from 2010 to 2019 ranged from $4.4 billion in 2010 to $7.7 billion in 2019. If the IISS figure is correct, it is too high for Iraq to sustain the civil spending it needs to achieve political stability and civil and economic development.

Moreover, there were still significant cadres of ISIS fighters scattered in the country. In spite of some claims by U.S. officials that ISIS has been broadly defeated, reporting to Congress by the Lead Inspector Generals of the Department of Defense (DOD), from the Department of State, and from the U.S. Agency for International Development all tell a different story.

These three Inspector Generals’ quarterly reports to Congress on Operation Inherent Resolve, and their unclassified reports draw on full access to the U.S. commands, U.S. embassies and their aid activity, and declassified assessments by the U.S. intelligence community. Their report for April 1, 2020-June 30, 2020 is the latest report at this writing. Key excerpts make it all too clear that ISIS is injured – but not defeated. So do the data in Figure Twenty-Nine, and media reporting through October 2020 makes it clear that the situation has not improved.

This quarter, ISIS temporarily increased the pace of its attacks in Iraq and Syria, which USCENTCOM attributed to the group’s typical escalation in Syria during the holy month of Ramadan (April 24 through May 23). CJTF-OIR said that in Iraq, this increase in attacks likely indicated an “opportunistic exploitation of a confluence of factors,” such as the ISF’s “preoccupation” with measures to contain COVID-19 in Iraq, as opposed to any “notable increase in [ISIS] capability.” CJTF-OIR stated that historical attack numbers, the complexity and consequences of the attacks, and the fact that ISIS was unable to sustain the increased tempo, “indicate that ISIS is not resurging.”

During the quarter, independent experts and researchers offered differing assessments of ISIS’s level of resurgence, with some saying the uptick in ISIS activity signified the group is growing stronger. One research organization’s assessment in May said that the spike in ISIS attacks in the first half of the quarter had “raised new fears about the revival of the group,” and appeared to be “early signs of an ISIS recovery.” The assessment said that the increase in attacks correlated with a weakening of sustained military pressure against the group in both countries. The report said that in Syria, ISIS benefited from the “chaos” that followed Turkey’s October 2019 incursion into Syria and the U.S. troop redeployment. In Iraq, ISIS benefited from sustained mass protests and the ensuing political paralysis. The report said that without renewed counter-ISIS operations, the group could gain a firm foothold that would allow it to carry out frequent, large-scale attacks in both countries.

Additionally, researchers claimed that ISIS was taking advantage of COVID-19 in both Iraq and Syria. One research institute analyst assessed that ISIS benefited from a security vacuum left by the various military forces reducing activity due to COVID-19... A counterterrorism researcher told the press that ISIS was indeed trying to make the most of the pandemic by unleashing a “wave of attacks” that also coincided with Ramadan.
Separately, the DIA reported that ISIS attacks may increase further if pressure on the group is reduced due to the pandemic or competing priorities of anti-ISIS forces... Another research institute analyst assessed that ISIS is quite well adapted for operating during the COVID-19 pandemic. Noting that ISIS units in Iraq and Syria are isolated and self-contained, the researcher characterized the group as “the ultimate doomsday preppers”... Small ISIS cells operating in non-permissive terrain, including remote desert and mountainous locales, have little risk of exposure to the virus, according to CJTF-OIR, which reported that it saw no indications that COVID-19 adversely affected ISIS this quarter...

... CJTF-OIR reported that the Iraqi government’s restrictions, including curfews, likely limited ISIS’s freedom of movement in urban or residential areas, but also likely allowed ISIS to move more freely and with less fear of detection or interdiction by the ISF in outlying areas where restrictions were less enforced, which enabled the group to conduct more attacks. Moreover, due to travel restrictions, ISIS may have more easily identified officials exempted from such restrictions as potential targets, CJTF-OIR said.

Other experts noted that unless the root causes of ISIS’s proliferation are addressed—such as ineffective governance and service delivery, lack of economic opportunity, and sectarian division—the group would continue to regenerate. In a collaborative report compiled by the Wilson Center, one research analyst said that ISIS poses a “growing threat” to the Iraqi government and security forces and to the SDF, and it will seize on the reduction of Coalition troops in Iraq to reestablish itself.

... In January 2020, the DIA reported that ISIS seeks to influence local Sunni populations by exploiting their grievances, including perceived political marginalization and neglect, reconstruction delays, and sectarian divisions. CJTF-OIR deputy commander Major General Alexander Grynkewich told reporters in January that to ensure the enduring defeat of ISIS, it is necessary to address “underlying conditions” like governance and corruption.”...Similarly, the DoS reported in 2019 that populations in both Iraq and Syria face high unemployment, insecurity, displacement, humanitarian crises, and a government failure to provide basic services. The DoS said that these security and socio-economic challenges in Iraq and Syria “leave ordinary civilians vulnerable to recruiting by ISIS and other extremists.”

USCENTCOM Commander General Kenneth McKenzie Jr., speaking at the Middle East Institute on June 10, said that the ISIS threat from Iraq and Syria was “not going to go away,” and that it was “only the result of direct pressure” that ISIS is being prevented from reasserting itself and attacking the United States and its allies. General McKenzie said he looked forward to a time when “local security forces are able to contain ISIS without significant external help.” He also stated that in areas of Syria under control of the Syrian regime and its Russian backers, the regime was failing to fix the lack of “basic human requirements” that allowed ISIS to rise in the first place, creating what he called a “plan for failure west of the Euphrates.”
Figure Twenty-Nine: Iraq – Reported Islamic State-Related Security Incidents with Fatalities, 2019 to Mid-2020 (Q1 & Q2)

The break-up of the “caliphate” also helped turn largely Shi’ite Popular Mobilization Forces (PMFs) into a significant set of potential threats. A number of these PMFs have ties to Iran and lack effective control by the Iraqi central government – whose forces may total from 40,000 fighters to over 100,000 personnel. These PMFs continue to shift names, allegiances, and structures, but the key PMFs have included Asa‘ib Ahl al-Haqq and the Badr Organization. They also include the Peace Companies (Mahdi Army), Kata‘ib Hezbollah, Kata‘ib Sayyid al-Shuhada, and Kata‘ib al-Imam Aliin.75

In theory, they report directly to the Prime Minister, and they are formally under the control of the Ministry of Interior’s Popular Mobilization Units directorate. The Shi’ite elements are also supposed to follow the 20 points limiting their use of violence as listed in the “Advice and Guidance to the Fighters on the Battlefields” issued by the Ayatollah Marja’ Ali al-Sistani.

In practice, some PMFs – like the Kata‘ib Hezbollah (KH) – have been trained by Iranians in the Al Quds Force and by elements of the Hezbollah. They remained closely tied to Iran and hostile to the United States after the break-up of the ISIS “caliphate.” These PMFs, Iraqi political factions that are hostile to the U.S. presence, and Iranian agents all became a growing active threat to a U.S. presence in Iraq after the break-up of the ISIS “caliphate,” and they began to conduct a low-level war of attrition against U.S. forces and diplomats in Iraq. They launched low-level attacks on the U.S. Embassy and on the U.S. forces based in Iraq facilities.

As Michael Knights notes, Iran’s role is supporting such PMFs has also changed and broadened since the break-up of the “caliphate:”76

“Kata‘ib Hezbollah was Iran’s most favored militant group in Iraq from its formation in the mid-2000s until the death of its founder Abu Mahdi al-Muhandis on January 3, 2020. Yet, the activities and influence of al-Muhandis and KH were not synonymous, as has been shown since his death. KH is still the engine room of anti-U.S. attacks in Iraq, but it is less politically agile and operates in a more hos-tile counterterrorism environment where deniability and secrecy have become more important again. The Islamic Revolutionary Guard Corps Quds Force is also leaning on a more diversified model in Iraq, drawing on non-KH factions like Saraya al-Jihad and Saraya al-Ashura, and engaging more directly with Iraq’s minorities, including Sunni communities and the Shi’a Kurdish Faylis and Turkmen. History may be repeating itself as Iran develops new smaller and more secure Iraqi cells that are reminiscent of the formation of Kata‘ib Hezbollah itself.”

In late 2019, the U.S. slowly became involved in a hybrid war with the more active pro-Iranian PMFs– and the U.S. often lacked a military response that did not produce Iraqi civilian casualties. This led to growing popular opposition to the U.S. presence in Iraq, U.S. withdrawals from a number of Iraqi military bases, and a growing U.S. political opposition to keeping U.S. forces in Iraq.

During most of this formative period, a divided and ineffective Iraqi central government could not respond effectively. A reform Prime Minister Mustafa Al Kadhimi and his government did come to power in May 2020. Kadhimi did try to use Iraqi forces to control these pro-Iranian PMFs, but his initial attempt failed, and the Iraqi government had found no effective response as of October 2020.77

More broadly, the quality of Iraqi government forces also remains mixed after the breakup of the ISIS “caliphate” – and there was no clear plan for their development after the breakup occurred. Iraqi forces sometimes fought well in the fighting against ISIS. However, Iraqi forces still have sharp differences in quality from unit to unit, and there are significant sectarian and ethnic divisions. Most remained heavily dependent on forward deployed U.S. train and assist units, U.S. Special Forces, and U.S. combat air strikes.
Iraq is only beginning the process of rebuilding a capability to deter and defend against nations like Iran. Iraq needs more modern aircraft, missiles, land weapons, and ships. A significant number of its existing major weapons are aging Soviet bloc types, which are mediocre and have uncertain sustainability in combat.

This means that both Iraq’s military and civil rebuilding will need significant outside aid, but this will be affected by the uncertain willingness of the U.S. to stay in Iraq. Many forces have already left, and the U.S. diplomatic presence has been sharply cut. U.S. concern with on-going attacks on U.S. forces and diplomats from pro-Iranian militias – that at one point almost threatened the close of the U.S. Embassy in Baghdad in October 2020.78

U.S. support for staying in Iraq will be affected by the cost of such an effort and the cumulative political strain and “war fatigue” fighting from 2003 to 2020. The human cost to the U.S. alone – ignoring allied forces and some 288,000 Iraqi security and civilian casualties – was 4,431 dead and 31,994 wounded during the first phase of the fighting after 2003, from March 19, 2003 to August 31, 2010. The U.S. shift to reliance on airpower and train and assist of Iraqi land forces in the fight against ISIS after that point from September 1, 2010 through October 12, 2013, added another 175 dead and 534 wounded.79

The dollar cost of U.S. outside assistance – involving U.S. combat forces – went far beyond security aid and involved major deployments of U.S. forces. Figure Twenty-Nine shows that this effort occurred at the same time the U.S. was fighting a similar war in Afghanistan, and both wars had massive costs. The annual budget cost to the U.S. from appropriations by the Department of Defense budget for Iraq peaked at $140 billion in FY2008, not considering civil aid or forces in non-DoD classified programs. Afghanistan peaked at $97 billion in FY2011. Total appropriations from the beginning of FY2001 to the end of FY2019 reached $768 billion.

These annual costs did drop over time, and the U.S. made major changes in its military intervention. When the U.S. returned combat forces in FY2015, Iraq had rebuilt its combat forces and raised popular mobilization forces (many with Iranian support). The U.S. could rely on far more limited numbers of Special Forces, Marines, and train and assist land forces working closely with Iraqi combat forces, advanced IS&R systems, and precision air strikes.

Figure Twenty-Nine shows the Department of Defense reported an annual cost for the new round of U.S. fighting war was estimated at $6 to $10 billion – although it states that the real cost that included all forms of civil and some forms of security aid was higher. A CRS estimate puts the total cost of OIR operations in Iraq and Syria from August 2014 to September 2019 at $40.5 billion. The cost of direct U.S. military aid to Iraqi forces during the fight against ISIS was also limited. The U.S. Congress authorized a total of some $6.5 billion for train and equip funding from FY2015 to FY2020.80

There are no credible ways to compare these U.S. costs to those of its other active combat interventions. It is worth noting, however, that the residual U.S. presence in Iraq and Syria was still planned to cost the U.S. Department of Defense $6.9 billion annually in the FY2021 budget request. The total additional cost of FY2021 appropriations to the Department of State and USAID was $1.1 billion.81

Iraq cannot build up the added deterrence and defense capabilities it needs against Iran without such aid from the United States. Iraq began to experience a deep economic crisis in 2018, and that has grown worse as a result of lower petroleum export revenues and COVID-19. The IISS reports
that Iraq made very high national military expenditures of $20.47 billion in 2019, and that Iraq consumed a very high 9.1% of its GDP. This spending level is far too high for Iraq to sustain and achieve political stability and civil and economic development, and it ignores the fact that Iraq has received substantial aid and loans.

Iraq has already invested heavily in new weapons, many of which it still has to pay for. The CRS reports $5.2 billion in new arms sales in 2004-2007 – of which $3.8 billion was from the U.S., $500 million from major European powers, $300 million from Russia, none from China, and $600 million from smaller powers.

The CRS reports a massive $23.9 billion in new arms agreements in 2008-2011 – at the height of the war against ISIS. These included $8.9 billion in new agreements with the U.S., $8.3 billion from Russia (Iraq is still largely equipped with Russian land weapons), $3.6 billion from other states, $800 million from China, $400 from Major Western European states, and $1.9 billion from all other European states.

SIPRI reports $4.96 billion in weapons transfers in 2015-2019 – $2.23 billion was from the U.S., $1.66 billion from Russia, $427 million from South Korea, $190 million from the Czech Republic, $170 million from Italy, $109 million from Bulgaria, and small transfers from other states— including $54 million from China.

The detailed SIPRI data on arms transfers to Iraq during 2010-2019, that are provided in the Analytic Appendix, show that transfers totaled a high $7,463 million over an entire decade. They came from at least 19 countries, and were dominated by the U.S. ($3,854 million), Russia ($2,197 million), South Korea ($427 million), and the Ukraine ($226 million). China provided $54 million worth and Iran $42 million. The key spending areas affecting military capabilities and dynamics focused on aircraft, air defense systems, armor, and missiles.82

The most serious single threat to Iraq’s security, however, is not the cost of rebuilding the forces Iraq needs to defend against outside threats, or continuing U.S. aid. It is whether the U.S. can create a stable security partnership with Iraq, or if Iran will succeed in using attacks against U.S. forces and facilities by pro-Iranian Iraqi Popular Mobilization Forces to drive the U.S. out of Iraq. The U.S. has again sharply cut its number of diplomats, its air and troop deployments, and withdrew from many of the bases shown in Figure Twenty-Eight in 2020.

Only 5,200 U.S. forces remained in Iraq in September 2020, and the U.S. announced that they would be cut to 3,000 by November 2020.83 Moreover, reports surfaced in September 2020 that the U.S. might close its embassy in Baghdad.84 Removing U.S. security assistance would probably be matched by European reductions. It would leave Iraqi forces largely dependent on Russia for such assistance, and it could create a real “strategic axis” between Iran, Iraq, Syria, and the Hezbollah in Lebanon.

At this point Iraq’s near-term military dynamics depend heavily on whether its current leaders – or some successors – can bring political stability and unity, focus on development, and minimize the threat from the remnants of ISIS, Popular Mobilization Forces, and Iran. This progress at best has even odds of success. So far, the Iraqi government has not been able to agree on any major aspect of reform or efforts to improve unity, and it has fallen far short of effective reconstruction in war damaged areas. The UN’s OHCA reported on October 1, 2020 that, 85

There are approximately 1.4 million IDPs in Iraq, out of 6 million persons displaced during the height of the conflict; more than 4.5 million people have returned to their communities, but return rates slowed
significantly during 2019. Of those who remain in displacement, over half have been displaced for more than four years.

In 2020, transitioning IDPs towards durable solutions remains at the top of the United Nations’ priorities in Iraq. But the ability for humanitarian actors to effectively operate is increasingly constricted, as political unrest, government gridlock, and the impact of COVID-19 makes the work of humanitarians more difficult than ever. Accessing people in need has become more challenging than at any other time since combat operations against ISIL...

Although efforts are underway to rebuild the country and jumpstart local economies, significant barriers to return endure, including security concerns; lack of social cohesion; issues related to documentation; lack of livelihoods and services; unexploded ordinance and destroyed or damaged housing. With protracted displacement expected to endure in the coming years, addressing the protection concerns of Iraq’s IDPs will remain a primary focus … Other challenges are also present, including protracted political deadlock and the delayed implementation of recovery and resilience activities. In parallel, Iraq is prone to a daunting set of environmental challenges and natural hazards.

The World Bank also made it clear in both its Systematic Country Diagnostic, and its May 2020 Overview that Iraq lacked the money to fund reconstruction and development,

Going forward, the economic outlook for Iraq is challenging. The collapse in international oil prices and other unfavorable global conditions, including disruptions caused by the spread of COVID-19, are expected to hit Iraq hard, leading to a 5% contraction in its economy in 2020. In the absence of significant reforms to boost private sector participation, it will be difficult to jump-start the economy; growth is projected to gradually revert to its low-base potential of 1.9-2.7% in 2021–2022. The budget rigidities, compounded over the past two years, are expected to have detrimental fiscal effects amidst weaker oil-related revenues. At US$30 an oil barrel and in the absence of planned consolidation measures, the budget deficit was projected to surge to a staggering 19% of GDP by end-2020. As a result, the GOI is expected to face a severe financing gap which could not only lead it to postpone vital infrastructure projects in service delivery sectors, as well as postponing human capital programs, but also reduces the country’s ability to respond to post-COVID-19 recovery needs.

Iran can be expected to continue to seek ways to drive the U.S. out of Iraq and increase its influence at U.S. expense – as well as maintain the Popular Mobilization Forces and increase its role in Iraq’s security forces. Much will depend on the U.S. showing that it can be a more effective and stable security partner – and so far, its reaction to attacks from the PMFs has been to bluster, retreat, and force cuts. As for Iraq, its internal challenges go beyond its weak and divided governance. There remains a serious threat of new clashes and tensions between its Sunnis, Shi’ites, and Arabs Kurds; of a major popular uprising; and/or of growing Iranian influence and its role in shaping Iraq’s security forces.
Figure Thirty: The Cost of U.S. Military Intervention in Iraq and Syria – Part One: Total Cost of Iraq War vs. Afghan Conflict in FY2001-FY2019
(Total War-related Obligations by Year Appropriated in $ U.S. Billions)

![Graph showing the cost of U.S. military intervention in Iraq and Syria](image)

**Source:** Department of Defense, Cost of War Report, September 30, 2019, p.12,
Figure Thirty: The Cost of U.S. Military Intervention in Iraq and Syria – Part Two: Cost of U.S. Aid FY2012 to FY2021
(Total Appropriated in $ U.S. Millions)

Table 1. Iraq Train and Equip Program: FY2015-FY2020 Appropriations and FY 2021 Request

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<td>1,618</td>
<td>715</td>
<td>630</td>
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<td>289.5 (FY17 CR)</td>
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<td>Fund (ITEF)</td>
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<td>446.4</td>
<td>1,269</td>
<td>850</td>
<td>745</td>
<td>650</td>
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<td>Fund (CTEF) – Iraq</td>
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<td>Allocation</td>
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<tr>
<td>Total</td>
<td>1,618</td>
<td>715</td>
<td>1,365.9</td>
<td>1,269</td>
<td>850</td>
<td>745</td>
<td>650</td>
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Source: Executive branch appropriations requests and appropriations legislation.

Table 2. U.S. Assistance to Iraq: Select Obligations, Allocations, and Requests

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<th>Account</th>
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<th>INCLE</th>
<th>NADR</th>
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<tr>
<td>FY2012 Obligated</td>
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<td>9.46</td>
<td>26.36</td>
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<td>61.24</td>
<td>11.20</td>
<td>18.32</td>
<td>18.11</td>
<td>1.47</td>
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<td>FY2015 Obligated</td>
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<td>50.28</td>
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<td>4.04</td>
<td>-</td>
<td>0.90</td>
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<td>FY2016 Obligated</td>
<td>250.00</td>
<td>116.45</td>
<td>-</td>
<td>38.31</td>
<td>0.03</td>
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<td>1.00</td>
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Sources: Obligations data derived from U.S. Overseas Loans and Grants (Greenbook), January 2017. FY2017-FY2021 data from joint explanatory statements and State Department Congressional Budget Justifications.


**Kuwait**

As **Figure Thirty-One** shows, Kuwait is the “strategic hinge” of the Gulf. It is located between Iraq and Saudi Arabia, near Iran, and at the opposite end of the Gulf from its entrance at the Strait of Hormuz. While it is small, it’s a major petroleum exporter, and – as the Iraqi invasion of Kuwait showed all too clearly – an attractive strategic target in an exposed position.

This position has made it heavily dependent on outside military support – not only for aid in developing its military forces but for assistance to deter its larger neighbors. Part of this support now comes from Saudi Arabia, but its main security partner since the end of the First Gulf War has been the United States.

Although Kuwait’s forces are well equipped and effective by regional standards, the IISS reported they only total some 17,500 personnel in 2019, and they had roughly a single division’s worth of armor and artillery – more weaponry than a force this size can properly support in combat – two modern fighter squadrons, as well as a small coast guard. Its Army only had 13,000 men and the equivalent of a division’s worth of armor and artillery. Its Navy only had 20 relatively small patrol boats, although 10 were armed with Exocet and sea Skua anti-ship missiles. It did, however, have a 6,000 personnel paramilitary National Guard and a 600 personnel Coast Guard.

Kuwait also has 37 F-18C/D fighters, 16 light Hawk Mk64, 16 Tucano combat-capable trainers, and 16 operational AH-64 and 13 SA342 attack helicopters, as well as 40 MIM-104D Patriot PAC-2 GEM, and 12 Aspide with Skyguard light air defense systems. It is also considering modernizing its forces with F/A-18E/F Super Hornet and Eurofighter Typhoons, more modern armor, which would significantly enhance its air-combat capabilities and land-based air/missile defenses. This emphasis on air combat assets both helps Kuwait achieve interoperability with the U.S. in using air power – its most rapidly deployable combat assets – and minimizes Kuwait’s need to immediately rely on defenses around built-up areas and population centers.

These forces do allow Kuwait to provide for its own internal security, and it could now put up a much better initial defense than when Iraq invaded Kuwait in 1990, but Kuwait would be immediately dependent on outside aid in the event of any full-scale Iranian or even Iraqi attack. Its strategic geography and proximity to Iran and Iraq also make it difficult for other Arab Gulf forces to deploy in an emergency, and the division between Gulf states that make effective collective Arab security efforts more mythical than real, also make Kuwait exceptionally dependent on its strategic partnership with the U.S. and on rapid U.S. power projection capability for both deterrence and defense.

The U.S. has recognized this vulnerability ever since the Iraqi invasion in 1990. In June 2020, the U.S. deployed some 2,000 troops and some 200 defense civilians in Kuwait as advisors to support U.S. power projection in an emergency. Its main capabilities, however, consisted of its 5th Fleet, U.S. air combat units in locations like Qatar, and its power protection capabilities – the same broader regional mix of forces that provided broader security assistance to all its security partners in the region.

While Kuwait has severe limits to the number of forces it can generate, it spends a great deal for its size. The IISS reports that Kuwait spent $6.4 billion on military forces in 2019, which accounted for a high 4.7% of its GDP. SIPRI reports its military spending was $7.7 billion in current dollars for 2019, and that spending in constant 2018 U.S. dollars from 2010 to 2019 ranged from $5.15 billion in 2010 to $7.71 billion in 2019.
The CRS reports that Kuwait spent $3.3 billion on new arms transfers in 2008-2011 – of which $2.4 billion was from the U.S., $600 million from Russia, $300 million from China, and $100 million from the smaller European states. Kuwait spent $4.7 billion on new arms sales in 2012-2015 – of which $4.4 billion was from the U.S., $200 million from major European powers, and $100 million from other states.

SIPRI reports $778 million worth of weapons transfers in 2015-2019 – of which $546 million was from the U.S., $74 million from France, $55 million from Switzerland, $48 million from Russia, and $37 million from the UAE. Kuwait also made small buys from Germany, Norway, and the United Kingdom.

The detailed SIPRI data on arms transfers to Kuwait during 2010-2019, that are provided in the Analytic Appendix, show that transfers totaled a low to moderate $1,733 million over an entire decade. They came from 11 countries and were dominated by the U.S. ($1,374 million), Russia ($149 million), France ($74 million), and Switzerland ($55 million). China did not provide transfers. The key spending areas affecting military capabilities and dynamics focused on aircraft, air defense systems, armor, and missiles.

Kuwait’s near-term military dynamics seem unlikely to undergo major changes unless the U.S. changes its security role in the Gulf. Kuwait’s current security position seems relatively secure given present U.S. capabilities in the region, but much depends on the U.S. staying in the Gulf and the future security situation in Iraq and Iran. The U.S. and Kuwait have detected Iranian backed intelligence efforts but not any active operations.

**Figure Thirty-One: Map of the Gulf Cooperation Council Countries**
**Bahrain**

Bahrain is an island that is almost as exposed strategically as Kuwait. It has been the subject of sporadic Iranian territorial claims ever since Britain ceased to play a major role in the Gulf. It also has a Sunni ruler and a native Shi’ite majority, which has created a long-running tension between its ruling elite and native population. This has led to Iranian training and arming of some Shi’ite opposition groups. It also has largely depleted its petroleum reserves, and, as a result, it depends on Saudi Arabia – for supplies from a largely Saudi field to support its refinery – as well as on its neighbors for support of its industries.

The IISS reports that its security forces are limited in size – only 8,200 personnel with 6,000 in its Army, 700 hundred in its Navy, and 1,500 in its Air Force – although they are relatively well equipped and effective. It also has a comparatively large paramilitary force: 9,000 personnel in its police; 2,000 in its national guard; and 260 in its coastguard. Saudi and some UAE internal security and military forces can quickly come to its aid in the event of any popular uprising or operation by Iran.

Its Army’s total weaponry is roughly equivalent to one light mechanized infantry division with an older generation of U.S. heavy weapons. Its Navy is well equipped for its size – with 1 missile frigate with Harpoon, 2 missile corvettes with Exocet, 4 missiles and 4 regular patrol boats, and 9 landing crafts. It has 20 F-16C/D which it is converting to F-16Vs, and it is also buying more F-16Vs – evidently to replace its 12 aging F-5E/Fs. It also has 28 AH-1E/F attack helicopters and 6 armed Hawk trainers. It seems to have order I-Hawk surface-to-air defense missiles, but it may be reconsidering the purchase of systems with more anti-missile defense capability.

Like Kuwait, Qatar, and the UAE, Bahrain has an exposed position in the Gulf and depends heavily on U.S. and Saudi support for its security. It has long had security ties to the U.S. and provides the U.S. with naval and air bases, as well as the headquarters of the U.S. 5th fleet. The U.K. also has a small facility in Bahrain. It regularly updates and modernizes its forces, but Bahrain only has some 8,200 personnel, about one light division’s worth of equipment, two F-16C/D squadrons, and one frigate.

The IISS reports that Bahrain spent $1.50 billion on military forces in 2019, which accounts for 3.9% of its GDP. SIPRI reports $1.4 billion in current dollars for 2019, and that spending in constant 2018 U.S. dollars from 2010 to 2019 ranged from $991 million in 2010 to $1.39 billion in 2019.

The CRS reports that Bahrain only spent $400 million on new arms agreements in 2008-2011, all from the U.S. It spent $500 million in 2012-2015 – of which $300 million was from the U.S., $100 million from Russia, and $100 million from major European powers.

SIPRI only reports $152 million worth of weapons transfers in 2015-2019 – of which $50 million was from the U.S., $31 million from Russia, $28 million from the U.K., $19 million from Turkey, $20 million from smaller powers, and $4 million from China.

The detailed SIPRI data on arms transfers to Bahrain during 2010-2019, that are provided in the Analytic Appendix, show that transfers totaled a low $354 million over an entire decade. They came from 11 countries, and were dominated by the U.S. ($178 million), Turkey ($58 million), Russia ($31 million), and U.K. ($28 million). China transferred only $4 million. The key spending areas affecting military capabilities and dynamics focused on aircraft, armor, and missiles.89
Bahrain’s near-term military dynamics also seem unlikely to undergo major changes unless the U.S. changes its security role in the Gulf. Its main current security challenges are “political relations between the predominantly Sunni-led government and Shia-majority opposition.” Bahrain has experienced some threats and low-level attacks by its own Shi’ites, and it has uncovered some covert arms transfers and training of small Shi’ite opposition elements by Iran. It cooperates closely with the U.S. in counterterrorism and security operations; however, it can also count on Saudi and Emirati support in the case of any internal security crisis. Bahrain may need political reform to reduce its sectarian tensions, but it seems to have effective security assistance, and its own internal security forces can be quickly reinforced by Saudi Arabia and the UAE.

**Qatar**

Qatar is one of the world’s leading exporters of liquefied natural gas (LNG), drawing on a massive offshore gas field in the Gulf that it shares with Iran. It is one of the world’s wealthiest countries in terms of per capita income and has done a better job of distributing this wealth and funding development than most regional states. It is a member of the GCC, but it has a long history of tensions over borders and rights to key reefs with its neighbors, such as Bahrain, Saudi Arabia, and the UAE.

Qatar has largely resolved theses territorial issues with Bahrain, but tensions have continued with Saudi Arabia and the UAE over Qatar’s support of the media network, Al Jazeera, for its criticism of Saudi and Emirati leaders, as well as over Qatar’s tolerance and support of Islamist political parties like the Moslem Brotherhood. Some of these differences seems to be little more than petty feuding between rival princes, but they have triggered the ongoing Saudi, Emirati, Bahraini, and Egyptian blockade of Qatar, which has led Qatar to become more dependent on the U.S. security presence at Al Udeid. It is also important to note that Kuwait has stood aside and attempted to act as a mediator, while Oman has ignored the blockade and increased its trade and air traffic with Qatar.

This illustrates a grim reality of security assistance in the Gulf. Like most Arab alliances, the Gulf Cooperation Council is more of an ambitious façade than a useful force. It has some very good staff and plans, but even a glance at the arms and equipment now deployed by Arab Gulf states shows the lack of interoperability and standardization. There is little real integration of key command and control, battle management, multi-domain and joint warfare systems, and force planning. This now makes Qatar and the other Arab Gulf states highly dependent on the U.S. in the event of any major conflict with Iran, although it also has Turkish advisors, Italian advisors for the Italian ships it is acquiring for its Navy, and British advisors for its purchase of a Typhoon Eurofighter squadron.

Qatar has a small force of some 16,500 military personnel, with some foreign personnel. Its 12,000-man Army and its Amiri Guard has roughly a light mechanized brigade’s worth of relatively modern German and French armor, artillery, and short-range ballistic missiles. Its small Navy and Coast Guard have only 2,500 personnel; 7 guided missile patrol boats; 4 other patrol boats; 11 coastal and light patrol boats; and 6 landing ships. Its Air Force is its best-equipped force. It has 33 combat aircraft, including 12 Mirage 2000s, 15 Rafale fixed wing combat aircraft, and AH-64 attack helicopters. It also has MIM-104 Patriot (PAC-2 and GEM-T/PAC-3) surface-to-air missiles that have some missile defense capability.

It is unclear that Qatar can properly man and support all of its forces in serious combat. The IISS notes that,
Qatar will need significant foreign help to integrate and operate its new capabilities… The country is also acquiring platforms with potentially significant power-projection capability. Qatar’s ambitious across-the-board re-equipment program includes significant purchases of combat aircraft. These procurements will, when combined, dramatically increase the size of the air force, and it is in terms of air capabilities that there are the most questions about Qatar’s ability to procure the necessary infrastructure, maintenance and personnel. Coastal-defense missiles are being acquired, while an AN/FPS-132 early-warning radar is being installed. Qatar currently has a limited indigenous defense-industrial capability, including in ship repair.

Qatar also has a small 5,000 personnel internal security force. It seems to be moderately effective, and Qatar so far has faced only limited threats.

Qatar has reacted to the boycott by stepping up and diversifying its arms buys, along with its security assistance from the U.S. and Europe. The scale of such efforts, however, is unclear. Qatar no longer reports on military spending and such spending as a percent of GDP, and the IISS and SIPRI do not provide data.

The CRS reports that Qatar spent $1.0 billion on new arms transfers in 2008-2011, all from the United States. The cost of new arms agreements leaped to $22.9 billion million in 2012-2015 – of which $9.9 billion was from the U.S., $12.1 billion from major European powers, $1.0 billion from other European powers, and $900 million from other states. This spending reflected Qatar’s decision to depend on a U.S. military presence, U.S. arms transfers, and U.S. power projection capabilities to provide security from Iran and from pressure by Saudi Arabia and the UAE.

SIPRI reports $4.9 billion worth of weapons transfers in 2015-2019, with a different pattern that may well reflect its search for political support after the Saudi-Emirati-Bahraini-Egyptian boycott. It bought $2.45 billion worth of arms from the U.S., $1.67 billion worth from France, $457 worth from Germany, and $118 million from China. It also took small deliveries of $88 million worth of arms from Switzerland; $62 million from Turkey; and deliveries worth less than $50 million from Italy, Pakistan, Russia, and the Ukraine.

The detailed SIPRI data on arms transfers to Qatar during 2010-2019, that are provided in the Analytic Appendix, raise additional question about what data are correct. They show that transfers totaled a high $5,619 million over an entire decade. They came from 11 countries, and were dominated by the U.S. ($2,884 million), France ($1.760 million), Germany ($457 million), and Switzerland ($118 million). Russia provide $12 million, and China provided $118 million. The key spending areas affecting military capabilities and dynamics focused on aircraft, air defense systems, armor, and missiles. Qatar has placed major now orders since the Saudi-UAE-Bahraini-Egyptian boycott, but actual deliveries are limited.

As is the case with some other smaller MENA countries, Qatar made some major arms buys from the U.S., and smaller arms buys from other countries, more for political reasons than for their military effectiveness military terms. Like other small powers, Qatar would require a major security partner like the United States or its Arab neighbors to fight a serious conflict with Iran or any other states. Given the boycott and the lack of a meaningful GCC military capability, the United States is Qatar’s only current option.

Qatar’s near-term security prospects seem likely to remain very similar to its present situation. Its new equipment buys seem designed more to win outside political support than to create its own actual deterrent and defense capabilities against Iran, Saudi Arabia, and the UAE. They make sense in political terms, but even with its efforts using conscription, Qatar is too small to generate an adequate force structure. It must rely on outside support, and its geography ensures that it will
become steadily more vulnerable to Iranian missile strikes unless it can develop effective missile defenses.

Efforts to end the blockade has made little real progress, Qatar has shown, however, that it can get support from the U.S., Oman, and Turkey while also operating its economy regardless of the blockade. Iran has not posed threats, and it has been deterred by the U.S. position in Al Udeid or its need for some more positive links to the Arab Gulf. As a result, the GCC will remain a largely ineffective military alliance, and Qatar and the other Southern Arab Gulf states will remain heavily dependent on support from the U.S. – if the U.S. retains a major military presence in the Gulf.

**Saudi Arabia**

Saudi Arabia has long been a close security partner of the United States and has relied heavily on U.S. military support and advisors, as well as assistance from France and the United Kingdom. It is the key to a successful U.S. power projection and U.S. ability to create an effective deterrent and warfighting capability in the Gulf – one that can include the other smaller Arab Gulf powers.

Saudi Arabia has also created some of the largest armed forces of any Arab Gulf state – 227,200 personnel in 2020 – and a relatively modern mix of land, air, and naval forces, alongside some aging Chinese medium range ballistic missiles. As such, it is the only Arab Gulf power large enough to challenge Iran, or that seriously attempts to deal with the two front threat posed by the Houthis in Yemen. The IISS reports that its forces included some 880 main battle tanks (including 370+ modern M-1A1/A2S; 1,060 other armored fighting vehicles (AFVs); 1,340 armored personnel carriers (APCs); 397 tube and multiple rocket launcher artillery weapons; and 35 AH-64 attack helicopters.

In addition, Saudi Arabia had a large and steadily better armed and mechanized 100,000 personnel National Guard, equipped with 887 light armored fighting vehicles (AFVs); 778 light armored personnel carriers (APCs); and 244 tube and multiple rocket launcher artillery weapons. While this force began as a tribal force, it had steadily modernized and reorganized to become an effective local defense and internal security force.

In addition, it had some 25,000 paramilitary forces, including steadily more effective internal security forces in its Ministry of the Interior. While it had not fully defeated extremist and terrorist threats like al Qaeda in the Arabian Peninsula (AQAP), it has achieved a steadily higher degree of effectiveness in internal security operations, and it succeeded in forcing AQAP to shift many of its operations to Yemen.

Its Air Force was well equipped with 429 combat aircraft including 217 F-15C/Ds and F-15SAAs, 79 Tornado IDS and GR1As, 5 E-3A AWACS, ELINT aircraft, and tankers and transports. Its land-based Air Defense Force had 108 long range MIM-104D/F Patriot (PAC-2 GEM and PAC-3) as well as 128 MIM-23B I-Hawk medium range surface-to-air missiles and a wide range of short-range air defense systems. Saudi Arabia also had the only longer-range missile force in the Arab Gulf. While this force was untested and more symbolic than real, it had 10 Chinese-made DF-3 (CH-SS-2) IRBMs, and DF-11 (CH-SS-5) MRBM conventionally armed ballistic missiles.

The Saudi Navy only had 13,500 personnel plus 3,000 marines, but it did have 3 missile destroyers, 4 missile frigates, 4 missile corvettes, 29 patrol boats, 3 mine warfare ships, and 5 landing crafts. This has made it one of the largest Arab navies.
At the same time, these forces had important limits. Saudi military forces have made major progress in developing effective conventional military forces, performed well during the First Gulf War relative to other Arab states, and improved their training and readiness standards over time. They are well equipped for conventional warfare, and they have many elements that operate effectively in a major war against Iran if they have U.S. support in battle management, war planning, intelligence, and targeting.

They still, however, have problems in conducting joint warfare and combined operations, as well as in planning and managing large-scale operations. It must now adapt to all of the changes in war fighting and weaponry discussed at the start of this analysis.

Moreover, a Saudi force that has focused on building up conventional airpower and heavy conventional land forces must now deal with the threat posed by Iranian and Houthi missiles and hybrid land forces that can use the population as shelter and fight on much of the same basis as the ISIS forces fought in Iraq and Syria. Land forces designed to fight the kind of conventional threat posed by Saddam Hussein’s Army and the conventional forces of Yemen must also fight Houthi forces that are the equivalent of ISIS land forces mixed with Yemen’s regular forces in both popular warfare and some of the most difficult terrain possible in the Saudi-Yemeni border area.

The Air Force, that was designed to win in air-to-air combat and to strike critical land military targets and infrastructure, must now have to deal with enemy forces that can shelter in the population, disperse in small elements, and exploit civil service and infrastructure as shelters and ways of controlling and influencing the population. Even the U.S., which has developed an extremely sophisticated IS&R and targeting structure dedicated to minimizing civil casualties and collateral damage in this kind of fighting – one no other country in the world can match – still has problems in avoiding civilian casualties. Meanwhile, Russian and pro-Assad air and attack helicopter forces in Syria have shown that they can deal with such targets with limited or no regard to civilian losses.

As the IISS notes, “The armed forces continue to gain combat experience from their involvement in the conflict in Yemen. However, the operation has exposed areas of comparative weakness and capability gaps, especially in the application of precision airpower, air–ground coordination and in logistics support, such as aerial refueling, while the cruise missile and UAV attacks on Saudi oil infrastructure in September 2019 exposed further capability weaknesses.”

The Navy, that was designed to fight other navies, must now deal with both the hybrid threat posed by the naval branch of Iran’s IRGC and must seek to blockade the western coast of Yemen.

As the U.S. found in Afghanistan and Iraq, meeting these challenges can be extremely difficult even for the most advanced and experienced conventional force – even for one that can fully commit to such a war, at least for a decade. It is easy to be critical of Saudi (and Emirati) forces for their performance in Yemen, but it is important to remember that the U.S. has not won in Afghanistan, fully defeated ISIS, or come to grips with the challenges posed by Iraq’s PMFs.

On that same note – the Syrian regular forces virtually collapsed before they got outside support from Iran, the Hezbollah, and Russia. They fought Syrian rebels by partly adopting their tactics and also by openly attacking large elements of the Syrian civil population. Egypt and Israel have faced their own challenges in fighting low-level threats of this kind. The Hezbollah has emerged as major force in Lebanon, and the competing factions in Libya have experienced many of the same challenges.
More broadly, the Saudi Army and Air Force needs to be more deployable on a national, rather than regional level. They need to train, organize, and equip for the kind of warfare against hybrid threats they already face from the Houthis. They are adapting away from forces better suited to fighting Saddam Hussein than today’s Iran, Houthis, or other unconventional threats – but this adaptation remains too slow.

The Saudi Navy is less modern in its combat readiness compared to the other Saudi services, and its efforts of preparation for warfare against Iranian forces in the Gulf and the emerging threats in the Red Sea seem less effective. Outside advisors have raised the need to modernize and improve the readiness of Saudi naval forces for the kind of threats they actually face for some years, but with only limited effect.

Saudi forces focused on air defense against Iranian combat air forces, but it now needs to develop effective counters to Iranian long-range missiles and UCAV systems – and this may require quicker deployment of advanced missile and layered air defense systems. It will need to modernize and improve its capability for multi-domain and joint warfare, and the Saudi experience in Yemen warns that it is not ready to fight hybrid warfare or major conflicts involving unconventional forces in populated areas.

Saudi counterterrorism and paramilitary forces have become steadily more effective – drawing on U.S. and European official and contractor aid, as well as their own experience. They do, however, remain too repressive and arbitrary by Western standards.

Saudi Arabia is a wealthy country, but the Saudi arms build-up against Iran, its participation in the Yemen civil war, and its politically driven arms buys from the U.S. have sharply raised its security costs. IISS reports that Saudi Arabia spent $78.4 billion on military forces in 2019, which is a very high 10.1% of its GDP. SIPRI reports Saudi military spending was $61.9 billion in current dollars for 2019, and that spending in constant 2018 U.S. dollars from 2010 to 2019 ranged from $54.7 billion in 2010 to $90.4 billion in 2015. This kind of spending puts serious pressure on its civil and development spending even in a petroleum rich country.

The CRS reports that Saudi Arabia spent $52.5 billion million on new arms transfers in 2008-2011 – of which $44.9 billion was from the U.S., $400 million from China, $6.0 billion from major European states, $1.1 billion from other European states, and $100 million from other powers. It spent $41.0 billion in 2012-2015 – of which $17.0 billion was from the U.S., $600 million from China, $7.2 billion from major European powers, $16.1 billion from other European powers, and $100 million from other states.

The SIPRI data also indicate that Saudi Arabia is deliberately buying from a wide range of countries in 2015-2019. Saudi Arabia bought $17.7 billion worth of weapons transfers in 2015-2019 – of which $13.0 billion was from the U.S., $2.2 billion from the U.K., $758 million from France, $293 million from Spain, $286 million from Canada, $280 million from Germany, $226 million from Italy, $186 million from Switzerland, $165 million from China, and $104 million from Turkey. It signed small new agreements under $50 million with Austria, Belgium, Finland, Georgia, Russia, Serbia, South Africa, South Korea, and Sweden. At least some of these seem to have been made as political gestures.

The detailed SIPRI data on arms transfers to Saudi Arabia during 2010-2019, that are provided in the Analytic Appendix, show that transfers totaled a very high $25,386 million over an entire decade. They came from 22 countries, and were dominated by the U.S. ($16,186 million), the U.K.
($4,794 million), France ($1,178 million), Spain ($685 million), and Germany ($585 million). China provided $1,675 million in transfers. The key spending areas affecting military capabilities and dynamics focused on aircraft, air defense systems, armor, missiles.95

Saudi Arabia’s near-term military dynamics may be all too similar to its present ones. Saudi Arabia can buy larger military and security forces than its Arab neighbors, and its internal security forces have become more effective — although partly at the cost of a limited degree of added repression. However, Saudi Arabia is still fighting in Yemen, and its military and security spending is so high that it has affected its ability to implement its economic development and reform plans.

Saudi Arabia also faces many of the same basic problems in its military dynamics as the smaller Arab Gulf states. The lack of real military integration and interoperability within the Gulf Cooperation Council sharply raises costs and increases vulnerability. More generally, this makes Saudi Arabia heavily dependent on the U.S. in the event of a serious war with Iran and in the case of any rapid changes in technology and tactics that would require major force changes. This may not be a liability in any practical sense, but it does make security assistance to Saudi Arabia a critical aspect of Gulf security.

United Arab Emirates (UAE)

The UAE has some of the most advanced military dynamics in the region. It is sometimes called the “Sparta of the Gulf” — although it is a title that implies a lack of simple comforts that scarcely includes a visit to even one good hotel, restaurant, or bar. It has close military ties to the United States, has a French base, and — like Saudi Arabia — and is a key U.S security partner in dealing with both Iran and other regional threats.

Partly because of the leadership of Mohammed bin Zayed bin Sultan Al Nahyan – the Crown Prince of Abu Dhabi and Deputy Supreme Commander of the UAE Armed Forces — it has developed some of the most effective combat units in the region.

The UAE maintains high readiness and training standards, has good maintenance and sustainability for most systems, and consistently procures some of the most modern technology and weapons available — often seeking to upgrade the systems it buys. Its Air Force and Army set what may well be the highest standards of any Arab Gulf state, and it receives praise from many of its outside security advisors. It is taking the lead in acquiring missile defenses, has developed limited amphibious and power projection capabilities, and its land combat forces adapted more quickly to operational and tactical movements in Yemen than the Saudi forces — although they had significant problems in dealing with the population and rival local factions.

At the same time, the UAE places too much emphasis on procuring the most advanced weapons and systems available, and it had a force of some 63,000 active personnel — many of foreign citizenship. The IISS reports that in 2020, the UAE has an army of 44,000 men and its major land weapons forces included some 383 main battle tanks; 554 other armored fighting vehicles; 1,161 APCs; 357 tube and multiple rocket launcher artillery weapons; and Scud B missiles. Much of this equipment was beginning to age, but the Army was experimenting with UAVs and examining possible approaches to multi-domain warfare.

Its Navy only had 2,500 personnel, but it had 1 missile destroyer, 10 missile corvettes, 20 missile patrol boats, 3 mine warfare ships, and 5 landing crafts. These ships were exceptionally well armed with missiles and modern combat systems. The UAE also demonstrated a limited amphibious capability in the war with Yemen, and it began to operate well outside the Gulf.
The UAE Air Force only had 4,500 personnel, but it was equipped with 156 modern combat aircraft, including 65 operational F-16E/Fs and Mirage 2000 RAD, 9DAD, and 9DAEs. It has modern IS&R and AC&W aircraft, and it was seeking an F-35 buy from the United States. Its land-based air defense included MIM-23B I-Hawk and MIM-104F Patriot PAC-3 long-range surface-to-air missiles – and the UAE was also procuring more advanced THAAD missile defenses.

It also had a 12,000 personnel Presidential Guard, alongside a 25,000 paramilitary forces. Many combat elements had high individual effectiveness, but the UAE’s forces had a very heavy weapons load for such a small force. The UAE’s planning, training, C4I, battle management, and IS&R capabilities were also best at the tactical level. Its performance in Yemen indicated it was overdependent of advisors and foreign elements that were best suited to conventional warfare. In practice, it faced many of the same challenges as Saudi Arabia, but it faced significant problems in meeting them with its limited force size. As the same time, many of these problems would not exist in fighting alongside the United States – where the key to success would be the competence of the UAE’s individual combat elements.

Also like Saudi Arabia, the UAE had unrealistic ambitions in terms of domestic military industries, and it faced many of the same challenges in modernizing its actual warfighting capabilities – as distinguished from buying the latest technology – but also the problems of doing so with a much smaller forces that had serious limits on its capability to operate independently in the face of a threat like Iran – or a threat in which size became critical as was the case in dealing with popular warfare in Yemen.

The UAE does not provide much transparency as to its military spending, but it now seems to be overspending. As is the case with Saudi Arabia, the UAE’s arms build-up against Iran and its participation in the Yemen war have sharply raised its security costs. The UAE no longer reports on military spending and such spending as a percent of its GDP, and the IISS and SIPRI do not report current data. It seems likely, however, that current spending is between $25 billion and $35 billion – and could be higher. The UAE is a relatively rich nation, but, once again, this kind of spending puts serious pressure on its civil and development spending even in a petroleum rich country.

The data involved are suspect. The CRS reports that the UAE spent $8.1 billion on new arms transfers in 2008-2011, all from the United States. It spent $500 million in 2012-2015 – of which $4.2 billion was from the U.S., $800 million from China, $900 million from major European powers, $2.0 billion from other European powers, and $200 million from other states.

SIPRI reports $4.98 billion worth of weapons transfers in 2015-2019 – of which $3.37 billion was from the U.S., $548 million from France, $167 million from the Netherlands, $120 million from Russia, $28 million from the U.K., $19 million from Turkey, $20 million from smaller powers, and $4 million from China. Some of these buys may reflect efforts to win political tolerance of its role in the war in Yemen.

The detailed SIPRI data on arms transfers to the UAE during 2010-2019, that are provided in the Analytic Appendix, show that transfers totaled a very high $11,094 million over an entire decade. They came from 21 countries, and were dominated by the U.S. ($6,947 million), France ($992 million), Russia ($822 million), and Italy ($454 million). China provided $122 million in transfers.
The key spending areas affecting military capabilities and dynamics focused on aircraft, air defense systems, armor, missiles, sensors, and ship.96

The UAE’s military dynamics are likely to be driven by the fact that it will continue to seek to become the most modern and effective Arab military power in the Southern Gulf, albeit a comparatively small one. It also may replace its role in Yemen with efforts to expand its military presence in other countries – more through open or covert aid than military presence.

As is the case with Saudi Arabia, the UAE will still need local security partners, not just security assistance. Once again, the lack of real military integration and interoperability within the Gulf Cooperation Council sharply raises costs, increases vulnerability, and makes the UAE heavily dependent on the U.S. in the event of a war with Iran, conflict with outside states, or any rapid changes in technology and tactics that would require major force changes.

**Oman**

Oman has a strategic position on the southern side of the strait of Hormuz, opposite of Iran, and with a long Indian Ocean coast. It has maintained close relations with the United Kingdom, which played a key role in helping it defeat the Dhofar Rebellion, but it has been an important security partner of the United States and has provided the U.S. with prepositioning and power projection facilities.

Oman has a moderately sized force structure for a state with its population and income. The IISS reports that it has of some 46,200 military personnel, alongside some foreign personnel. It has a 12,000-man army with relatively modern and advanced armor and artillery, but that has a mix of systems from a number of different countries that can be hard to support and sustain.

Its 4,200 personnel Navy has 3 frigates with Exocet, 2 missile corvettes with Exocet, 1 missile patrol boat, 7 other patrol boats, and 6 landing ships.

Its 5,000-personnel Air Force is its best-equipped force. It has 63 combat aircraft, including two F-16C/D Block 50 squadrons with 35 aircraft, plus 12 Typhoon Eurofighters, and 16 combat capable Hawk trainers. Oman also has some 6,400 Royal Forces with two special forces regiments; a 4,000 personnel tribal guard; and some 600 personnel in small paramilitary police elements. It is seeking more modern equipment, combat aircraft, and high-speed patrol boats and support vessels, but its ability to fund them in the near term is uncertain.

Oman has preserved its ties to British forces and relies heavily on British train and assist capabilities – and it recently signed a new training agreement with the U.K. in late 2018. It also works closely with the U.S. and has provided the U.S. with contingency facilities. It is expanding its port at Duqm on its Indian Ocean coast in ways that will improve its ability to support outside forces and more securely base its own ships. Duqm is roughly equidistant from the Strait of Hormuz and Oman’s border with Yemen.

Its facilities on Goat Island in its enclave on the southern coast of the Strait of Hormuz provides major surveillance and IS&R coverage of the Strait. At the same time, Oman seeks to preserve good relations with Iran, has participated in some joint exercise with Iran, and has distanced itself from Saudi Arabia and the UAE.

The IISS reports that Oman spent $8.97 billion on military forces in 2019, which accounted for a very high 11.7% of its GDP. SIPRI reports its military spending was $6.7 billion in current dollars for 2019, and that its spending in constant 2018 U.S. dollars from 2010 to 2019 ranged from $4.16
billion in 2010 to $9.18 billion in 2013. It is not clear from Oman’s force structure (42,600 personnel) and its modernization rate why Oman’s spending is this high. However, its forces are moderately effective, and it has a good overall level of internal security. It has worked closely with the U.S. and the U.K. on intelligence and counterterrorism, and the U.S. State Department reports that it has not had any recent terrorist incidents.\(^97\)

The CRS reports that Oman spent $3.3 billion on new arms transfers in 2008-2011 – of which $1.6 billion was from the U.S., and $1.7 billion was from major European powers. It spent $7.2 billion in 2012-2015 – of which $900 million was from the U.S., $4.40 billion from major European powers, $1.0 billion from other European powers, and 900 million from other countries.

SIPRI only reports $1.71 billion worth of weapons transfers in 2015-2019 – of which $770 million was from the United Kingdom – a long standing strategic partner – $229 million from the U.S.; $200 million from Norway; $143 million from Turkey; $138 million from Spain; $92 million from Singapore; and small buys under $50 million from Australia, Canada, Denmark, France, Germany, Italy, and the Netherlands.

The detailed SIPRI data on arms transfers to Oman during 2010-2019, that are provided in the Analytic Appendix, show that transfers totaled a low to moderate $1,733 million over an entire decade. They came from 11 countries, and were dominated by the U.S. ($1,374 million), Russia ($149 million), France ($74 million), and Switzerland ($55 million). China did not provide transfers. The key spending areas affecting military capabilities and dynamics focused on aircraft, air defense systems, armor, and missiles.\(^98\)

Oman’s near-term military dynamics are likely to continue to be driven by the following factors: Oman is a member of the Gulf Cooperation Council, but it tends to keep a distance from the other GCC states. It has kept up its ties to Qatar in spite of the Saudi-Emirati-Bahraini-Egyptian blockade, and it has distanced itself from Saudi and Emirati operations in Yemen. It has tried to maintain good relations with Iran, and it has helped the U.S. in its dialogue with Iran to prepare the JCPOA. Oman is not a wealthy petroleum state, however, and it has comparatively limited financial resources. Its military spending levels are an issue, as is the cost of security assistance.

**Yemen**

The Yemeni civil war has a long and complex history, and it is yet another tragic chapter in Yemen’s long history of internal battles and outside interference. The modern aspects of this history date back to a split in Yemen that Britain engineered in the 19th century to take control of the port of Aden. Marxist rebel forces then pushed Britain out of what became the People's Republic of Southern Yemen in 1967, and they turned to Russia as their main source of security assistance. The new regime then clashed with what became North Yemen that was supported by Oman, but the People’s Republic of Southern Yemen was so self-destructive that they unified with North Yemen in 1990.

The rest of Yemen became “North Yemen” and had its own civil conflicts. These included a civil war where military-led rebels succeeded in overthrowing the Imam of Yemen and created the Yemen Arab Republic in 1962. Ali Abdallah Salah came to power as President ruling a deeply divided nation – an experience he described as “dancing on the head of snakes.” Over time, he shifted to reliance on security assistance from the U.S. and Saudi Arabia, and he continued to lead after both Yemen unified – a “unity” that effectively added the South’s tensions to those of the North.
While Yemen developed a limited capacity to export oil, its overall economic development never kept up with its population growth, and tribal as well as north-south tensions continued. From 2004 onwards this included sporadic fighting with the Houthis, a Zaydi Shia Muslim minority, that eventually seized power over much of the country.

The resulting poverty, massive unemployment, corruption, and reliance on narcotics trafficking led to massive political demonstrations in 2011. Ones that forced Salah to step down and hold an uncontested election with no real nominating process in 2012. This “election” made Salah’s former vice president – Abdrabbuh Mansur Hadi – president of what became the Republic of Yemen government. This faction gained international recognition, but it did not create either effective governance or unity. The resulting struggles for power led to a complex series of events where the Houthis first joined with Salah, then killed him, and then took control of the capital. As a result, Hadi and his supporters left the country in 2015, the Republic of Yemen became a government in exile, and the remaining faction appealed to Saudi Arabia and the GCC for military intervention.

The end result was a civil war that was really driven by two outside powers: Saudi Arabia and the UAE. Saudi Arabia assembled a coalition somewhat optimistically called “Operation Decisive Storm.” Sources disagree how much of this effort came at the urging of the UAE, but it effectively was a Saudi-Emirati effort. The other members – Bahrain, Egypt, Jordan, Kuwait, Morocco, Qatar, Sudan, and Senegal played only a limited role. The actual size of the forces that remained loyal to the Hadi government were limited to forces of some three brigades from the 3rd and 4th military region, although there were some tribal elements and Salah loyalists present.

The resulting war has gone on since March 2015, further impoverishing and dividing one of the poorest countries in the world – and one with a population of nearly 30 million. It has caused many civilian casualties and refugees, and it has failed to achieve either peace or any decisive military results. It has both deeply divided the country and enabled Iran to support the Houthis by arming them with missile forces and UCAVs, and some reports indicate that the Houthis not only have the support of a significant part of the former Yemeni armed forces, but also some support from Syria, elements in Qatar, Russia, and North Korea.

The fighting has also provided some grim lessons about regional military dynamics. Neither Saudi nor Emirati forces proved to be particularly effective on the ground. This partly reflected both nations’ desire to limit ground forces and casualties. However, Saudi and UAE forces were trained largely for conventional warfare and while they could often win battles, they had serious problems in clearing and holding civilians. As the U.S. found in Afghanistan and Iraq, it takes local forces to win and hold control on the ground, and some form of effective governance with enough popularity to function is also necessary.

Many details regarding the fighting are uncertain, and some of the tactics used by the various sides are also controversial and uncertain. However, both Saudi Arabia and the UAE seem to have relied far too heavily on airpower to achieve shock effects, failed to develop cohesive land campaigns, and relied too heavily on foreign advisors.

The Saudi and UAE air forces lacked the ability to effectively target Houthi forces and separate them from the civil population. Saudi ground forces were conventional forces that could not defeat the Houthis in the areas near the Saudi border. The UAE’s forces were tactically effective but too small to expand far beyond Aden, while the Republic of Yemen forces were largely ineffective. Iran supplied the Houthis with missiles, UCAVs, and anti-ship missiles. Houthi missile and drone
attacks then had enough successes to force Saudi Arabia to redeploy significant elements of its air defense in 2019 – with mixed success.

Senior Saudi sources have stated that the Houthis fired some 300 missiles at targets in Saudi Arabia as of October 2020. As usual, sources differ sharply in detail. However, a detailed chronology in the Iran Primer that reports from 2015 to September 15, 2019, indicates that the Saudi statements may well be correct, and it is clear that the Houthis now have missiles and drones capable of precision strikes that can go relatively deep into Saudi Arabia.\(^{101}\)

Although the U.S. provided a range of assistance – such as naval support to a Saudi attempt to blockade Yemen’s main west coast ports, assistance to Saudi air refueling capability, a resupply of precision air weapons, and major technical help in improving Saudi and Emirati capability to target and manage the air battle – this did not enable them to win. Moreover, senior Saudi and Emirati decision makers seem to have overridden U.S. efforts to minimize civilian casualties and damage with the intent to force the Houthis to concede, although it did more to provoke than intimidate.

The fighting also freed various extremist groups and local factions – including some elements of AQAP and ISIS – to fight their own battles and help spread the war to other areas. Tensions rose between North and South Yemen. Efforts to block imports by Houthi areas added to civilian suffering and anger, and they restricted the delivery and allocation of aid, which increased the suffering as did the lack of medical and government services. The level of Saudi and Emirati coordination dropped, and UN reporting indicates that the Yemeni war may have overtaken the Syrian civil war in terms of many indicators of human suffering.\(^{102}\)

In the summer of 2019, the UAE unilaterally withdrew most of its forces from Yemen, claiming it was in response to a rise of an Iranian presence, but more in response to the cost of the war and its lack of progress. This led to new problems. The UAE had been Saudi Arabia’s primary partner in a coalition war against the Houthis. The UAE’s main partner in southern Yemen – the Southern Transitional Council (STC) – attempted to take Aden away from the Republic of Yemen forces. This led to a new crisis in spite of the attempts by Saudi Arabia and the UAE to mediate. The STC was the winner, the Houthis stayed in control of the North, and the Republic of Yemen effectively went into exile.

Figure Thirty-Two shows the situation in late 2019. So far, the Houthis have made more gains in 2020 than the Saudis. Iran has used the fighting as a cover to attack Saudi oil facilities with its own missiles and UAVs in 2020, new peace efforts have failed, and no clear end to the war is in sight. The war remains a humanitarian nightmare. Coupled with COVID-19 and the loss of major infrastructure and medical services, it threatens the lives of civilians in many areas.

There are few data on the present state and size of each side’s forces. IISS does not give data for defense spending or its percent of GDP. Arms transfer data are available but highly suspect.

The CRS reports that Yemen spent $800 million on new arms transfers in 2008-2011 – of which $300 million was from Russia, and the rest was from the U.S. It spent $500 million in 2012-2015 – of which $300 million was from the U.S., $100 million from Russia, $100 million from China, $300 million from major European powers, and $100 million from other powers. The CRS only reports new agreements worth $100 million with other European powers for 2012-2015.

SIPRI only reports $54 million worth of weapons transfers in 2015-2019 – of which $11 million was from the U.S., $39 million from the UAE, and $3 million from Saudi Arabia. The detailed
SIPRI data on arms transfers to Yemen during 2010-2019, that are provided in the Analytic Appendix, show that transfers totaled moderate to high $3,084 million over an entire decade. They came from 13 countries and were dominated by the U.K. ($1,204 million), U.S. ($772 million), France ($259 million), and Norway ($200 million). China and Russia did not provide transfers. The key spending areas affecting military capabilities and dynamics were well-balanced and focused on aircraft, air defense systems, missiles, sensors, and ships.103

A separate CRS analysis lists the following major arms transfers from Iran:104

- **Short-range Ballistic Missiles:** According to various sources, the Houthis have modified Iranian “Qiam” short-range ‘Scud’ missiles to boost their ranges in order to threaten Saudi cities, such as the capital Riyadh… In May 2018, the U.S. Department of the Treasury’s Office of Foreign Assets Control (OFAC) designated five Iranian individuals who have “provided ballistic missile-related technical expertise to Yemen’s Houthis, and who have transferred weapons not seen in Yemen prior to the current conflict, on behalf of the Islamic Revolutionary Guard Corps-Qods Force (IRGC-QF).”

- **UAVs:** Beginning in 2018, the Houthis began using UAVs to deliver and detonate explosive payloads against ROYG and Saudi targets. According to Jane’s Intelligence Weekly, Houthis UAV capabilities gained “increased support from Iran in terms of the supply of technology and military trainers dispatched to Yemen.” The U.N. Panel of Experts on Yemen reported in January 2019 that the panel “has traced the supply to the Houthis of unmanned aerial vehicles and a mixing machine for rocket fuel and found that individuals and entities of Iranian origin have funded the purchase.”

- **Surface-to-Air-Missiles (SAMs):** In February 2020, the U.S. Navy revealed that an intercepted Iranian weapons shipment to the Houthis contained a long-range air-breathing SAM that could loiter in a designated target area.

- **Anti-Ship Missiles, Drone Boats, and Sea Mines:** The Houthis have developed various anti-ship capabilities that can threaten Saudi-led coalition ships enforcing a maritime blockade against Yemen… In February 2020, CENTCOM discovered that in addition to the previously mentioned weapons seized by the U.S. Navy, Iran also had shipped Iranian “Noor” anti-ship cruise missiles (anti-ship missiles based on the Chinese C-802 missile) to the Houthis… The Houthis also have repeatedly built remote controlled Unmanned Surface Vessels (USVs) also known as Waterborne Improvised Explosive Devices (WBIEDs) using Iranian components.

Yemen’s near-term military dynamics are dismal, and the fight between the Saudi coalition/Hadi government and the Houthis is only part of the problem. Tribal and local elements are fighting in other parts of the country. Affiliates of the Islamic State of Iraq and the Levant (ISIL or ISIS) and Al Qaeda in the Arabian Peninsula (Ansar al Sharia) have active Islamist elements fighting in a number of locations. Supporters of a split that would again separate Yemen into northern and southern states called the Southern Movement or Southern Transitional Council occupy the areas around Northeast of Aden.

The UN reported in July 2020 that the number of active front lines in Yemen had grown to 43 from 33 in January, and that,105

“There is a real risk that these negotiations will slip away, and that Yemen will enter a new phase of prolonged escalation…The coming period will test parties’ political will to bring forward a breakthrough…Meanwhile, life for Yemenis has become more unforgiving, with all economic indicators pointing in the wrong direction. Rising food prices, a depreciating currency and lack of fuel have made it near impossible to survive. The military campaign against Ma’rib has had a profound humanitarian and economic impact, while aerial attacks in Al-Jawf and Hajjah have caused numerous civilian casualties. In Hudaydah, the Redeployment Coordination Committee overseeing the ceasefire and redeployment of forces from the port city are still not functioning.
…Hostilities have intensified across the country…The number of conflict incidents causing civilian harm increased in the second quarter of 2020, for the third quarter in a row… At the same time, there have been severe cuts to essential aid operations, which are “on the verge of collapse”.

The UN OCHA summarized the human impact of this fighting as follows in September 2020,\textsuperscript{106}

The humanitarian crisis in Yemen remains the worst in the world. Nearly four years of conflict and severe economic decline are driving the country to the brink of famine and exacerbating needs in all sectors. An estimated 80 per cent of the population – 24 million people – require some form of humanitarian or protection assistance, including 14.3 million who are in acute need. Severity of needs is deepening, with the number of people in acute need a staggering 27 per cent higher than last year. Two-thirds of all districts in the country are already pre-famine, and one-third face a convergence of multiple acute vulnerabilities.

The World Bank reported in My 2020 that,\textsuperscript{107}

An estimated 17.8 million people were without safe water and sanitation, and 19.7 million without adequate healthcare. As a result, Yemen has been grappling with mass outbreaks of preventable diseases, such as cholera, diphtheria, measles, and Dengue Fever. Waves of currency depreciations in 2018 and 2019 have created inflationary pressure that exacerbated the humanitarian crisis, and disruptions to public infrastructure and financial services have severely affected private sector activity.

More than 40\% of Yemeni households are estimated to have lost their primary source of income and, consequently, find it difficult to buy even the minimum amount of food. Poverty is worsening: Whereas before the crisis, it affected almost half the country’s population of about 29 million, now it affects an estimated three-quarters of it—71\% to 78\% of Yemenis. Women are more severely affected than men.

Economic and social prospects, both in 2020 and beyond, are uncertain, hinging critically on the political and security situation. Most recently, the compounded threats of continued conflict, the spread of COVID-19, extensive flooding, and locusts are pushing the country close to catastrophe.

At this point in time, it is unclear how the war will end, or what kind of governance and stability will emerge. What is clear is that the war has made Yemen’s already critical civil problems and crises far worse, and there is no clear plan or source of aid that can deal with the end result. Like Libya, Yemen, Syria, and possibly Iraq, “security assistance” can create lasting insecurity and suffering.
Figure Thirty-Two: The Major Factions in Yemen

Republic of Yemen Government (ROYG)
The internationally recognized government has been led by Abdu Rabu Mansour Hadi since 2012, when he was elected as caretaker president to replace President Ali Abdullah Saleh, who had been in power for 33 years. The Hadi government has been backed by the Saudi-led coalition since 2015.

Houthi Forces
The Houthi movement (also known as Ansar Allah or Partisans of God) is a predominantly Zaydi Shiite revivalist political and insurgent movement formed in the northern Yemeni governorate of Sa’dah under the leadership of members of the Houthi family. The group was allied with former President Ali Abdullah Saleh until 2017.

AQAP
AQAP has operated in Yemen since 2009 as a successor to previously active AQ members in the country, and has been most active in Yemen’s southern governorates. AQAP enjoys support from some inland tribes and has taken and held territory along Yemen’s southern coast with varying degrees of success. AQAP has attempted to carry out attacks in the United States and Europe.

Southern Transitional Council (STC)
A southern separatist force backed by the United Arab Emirates since the spring of 2017, the STC is led by Yemeni General Aidarious al Zubaidi, former governor of Aden. The STC and Hadi government have been at odds over the inclusion of Yemen’s main Sunni Islamist party (Al Islah) in Hadi’s government. In August 2019, the STC took control of Aden, Yemen’s interim capital.

Guessing at the Broader Future of MENA Security Dynamics

This complex mix of changes in national military dynamics, the competing role of outside powers, and the different character of every regional state now shape the military and security assistance dynamics throughout the MENA region. It does not lend itself to regional solutions, and it presents many challenges that will require step-by-step approaches to the problems affecting any given case. These security challenges will be compounded by a wide range of factors.

They include the deep internal civil problems exposed by the “Arab Spring” and in the UN’s Arab Development reports, the continuing rise of extremist movements and violent non-state actors, the new pressures created by COVID-19, the rising role of Russia and China, and the growing uncertainties about U.S. “war fatigue” and commitments to the region. At least in the near term, the practical limits of any effort to use security assistance more effectively will probably consist of the ability to keep things from getting worse, rather than the ability to make them better.

Key Challenges to MENA States

The MENA region has become a fragmented mess with active wars in Libya, Syria, and Yemen; Israel and the Hezbollah still experience ongoing clashes; and fighting is significant in Somalia. Algeria, Tunisia, Egypt, Syria, Lebanon, Iraq, and Sudan all remain unstable, have uncertain security structures, and rely on inconsistent outside security assistance.

The key challenges affecting individual region states, and their real needs for security, include:

- Dealing with the full global, regional, and national impact of Covid-19; the reduced demand for oil; and the reduced petroleum export income. The scale of this challenge cannot be predicted, but it is likely to put serious financial pressure on many states that have already failed to develop and meet the growing needs of their people. There is no military security without civil security.

- Shifting the focus of military dynamics from the present Arab-Iranian arms race to a more stable security structure that allows both sides to focus on development and civil needs and to reduce the threat of a major war that could cripple the states involved. Clearly tying joint security planning to an assessment of both civil and military priorities and needs.

- Ending the boycott and other divisions with the GCC states and creating an effective approach to regional security cooperation between the Arab Gulf states – including Iraq.

- Finding some way to make the JCPOA effective, limit the Iranian nuclear weapons program and the regional proliferation of CBRN weapons, or create some form of stable extended deterrence with the support of the United States. Ideally, shifting the U.S. emphasis on sanctions and maximum pressure on Iran to negotiating some broader and more stable security agreement.

- Preventing Iran or any other new state from acquiring nuclear weapons and deploying or using chemical and biological weapons.

- Providing cost-effective security assistance to helping MENA security partners develop multi-domain warfare capabilities, using advanced battle management, targeting and damaging assessment systems and IS&R systems, and finding ways to integrate national
forces and take advantage of the kind of advanced capabilities available to states like the United States, Russia, and China.

- Finding national and local approaches to limit the growing threat from precision-guided conventional missiles and unmanned aerial vehicles and creating effective missile and layered air defenses.

  Creating defenses and deterrents to protect shipping, and limiting the threat from unconventional naval warfare, anti-ship missiles, and smart mines.

- Reshaping U.S., European, and Arab security partnerships to focus on key mission priorities, rather than maximize the export income from arms sales and the “glitter factor” in receiving such transfers.

- Addressing the causes of extremism and terrorism as well as making increases in MENA state capability for counterterrorism and unconventional warfare. Seek changes outside to help them improve the capability and strength of their paramilitary and internal security forces as cost-effectively as possible.

- Finding a way to end the Libyan civil war, unite the country, and put it back on the path toward development.

- Developing a viable approach to the reconstruction of Syria and ending the level of repression and authoritarianism of the Assad regime.

- Finding a solution to governing Iraq and developing its security forces that can unite its Shi’ites, Sunnis, Kurds, and minorities in order to put it on the path to stable development.

- Developing a viable approach to ending the Yemeni civil war, the reconstruction of Syria, and ending the level of repression and authoritarianism of the Assad regime.

- Finding ways to give the Palestinians enough incentives to allow some form of “facts on the ground” that offer them major economic benefits and development, bringing them a viable level of unity and security, and offering some path to dignity and the elements of a “two-state solution” in turn for broad Arab acceptance of Israel and its security.

- Addressing the near disintegration of the Lebanese state and the rise of the Hezbollah in some way that will bring enough effective unity and governance for Lebanon to recover and make the Lebanese armed forces the key security force.

This is an easy list to make, but it is also an incredibly ambitious one. All of the military dynamics in the region make it clear that near-term progress will be extremely difficult and will often not occur or that some challenges will grow.

The most serious challenge of all, however, may be the broader civil challenge posed by the high levels of security spending, the role of the local military in politics, the repressive impact of many internal security efforts, and the inability to either address the causes of extremism and civil conflict or the divisions between regional states.

Even the wealthiest petroleum export states face major problems in civil development, coping with the impact of massive population increases, and dealing with reform and social change. They face growing demands from their own youth and the rest of their population. They also must deal with
religious extremists who seek to return to a past that never really existed with no credible options for developing a given country and meeting the needs of the present and the future.

National security is a vital need, but virtually all of the region’s national military dynamics and internal security efforts come at a major cost to the kind of civil development each country needs. At the same time, the evolution of regional military forces can lead to wars and extremism that can create even more civil casualties, refugees, and collateral damage. The prospect of another decade of security efforts like the one since 2011 poses a threat to the entire MENA region.

(The civil causes of MENA regional instability are addressed in depth in another Burke Chair report: The Greater Middle East: From the “Arab Spring” to the “Axis of Failed States,” August 24, 2020: https://www.csis.org/analysis/greater-middle-east-arab-spring-axis-failed-states.)

The Changing Role of Outside Powers

The role of outside powers is already changing radically, and it is likely to change even more as China emerges as more and more of a global power by seeking added security for its energy imports. The growing global competition between the major powers also raises serious questions as to whether they will focus on regional security and development or on the exploitation of regional tensions and rivalries.

- The U.S. does face serious political “war fatigue.” Its future strategy is partly dependent on the coming election, but the U.S. has been steadily reducing its active presence in the region, seeking to increase its arms sales, shifting the security burden to local powers and Europe, and focusing its national strategy on competition with China and Russia on a global level.

The U.S. is phasing out of Afghanistan, maintains an uncertain role in Iraq, plays an uncertain role in Yemen, chooses not to play a strong role in the Syrian civil war, and has largely avoiding security actions in Libya. Its role in fighting regional extremist forces in the MENA region, South Asia, and the rest of Africa is increasingly unclear – as are its train and assist deployments in supporting the Arab Gulf forces and its role against Iran.

One does, however, need to be careful about exaggerating these trends. The data in U.S. official reporting on the size of the U.S. military effort in each MENA country are classified for some countries and lag several months behind in others. The U.S. has not, however, announced force cuts in most of the MENA area, and the Department of Defense (DoD) announced the following totals for military and civilian personnel in June 2020:

If one ignores the rapidly shifting U.S. deployments in Iraq and Syria, the U.S. had the following total deployments in June 2020: Algeria 13; Bahrain (5th Fleet) 4,469; Djibouti 141; Egypt 295; Israel 119; Jordan 115; Kuwait 2,295; Lebanon 28; Libya 1; Morocco 33; Oman 25; Qatar (al Udeid) 632; Saudi Arabia 813; Tunisia 29; UAE 232; and Yemen 4 – with the total of 9,012. These numbers were actually slightly higher at the end of 2019, when U.S. deployments totaled 8,852; and it was marginally lower than in December 2018 at 9,044.
These numbers may seem small to those who have not looked at such data on what are largely permanent change of station (PCS) assignments in recent years, and they do not reflect any major cuts relative to past peacetime figures in recent years. They also do not include private U.S. defense contractors – numbers where accurate current public data do not seem to be available, but numbers which also seem to have increased significantly over the last five years. It is also important to note that press estimates indicate the total number of U.S. military and defense career civilian personnel in Iraq and Syria were well under 10,000 personnel at the start of 2020.

A number of senior military officers, defense exports, and political voices from both political parties have challenged President Trump’s emphasis on burden-sharing over effective alliances, calls for rapid overseas force reductions, and the emphasis on the National Strategy advanced in 2017 and 2018 which placed a focus on direct higher levels of combat with China and Russia.

Security of Defense Esper advanced some of these positions in announcing a new “Guidance for Development of Alliances and Partnerships (GDAP)” in a speech to the Atlantic Council on October 20, 2020. He called for plans to strengthen America’s alliances and strategic partnerships. “Our global constellation of allies and partners remain an enduring strength that our competitors and adversaries simply cannot match.” The Biden campaign has raised similar ideas as well.

The U.S. is also actively debating the extent to which it should increase in domestic energy production that limits its strategic interest in the MENA region, and it is grappling with how its security role in the Gulf impacts the global flow of petroleum and the stability of the U.S. and global economy.

There is a tendency for U.S. policymakers to concentrate solely on the reductions in U.S. petroleum import dependence. They have not addressed the critical importance of a stable flow of Gulf petroleum and LNG to the global economy or that U.S. imports of manufactured goods relies on this flow. U.S. strategic planning is also only beginning to consider the broader strategic impact on U.S. competition with an energy import-dependent China and the interaction between Russia’s petro-economy and its security relations with Gulf states like Saudi Arabia.

**Figure Thirty-Three** summarizes the key data on the flow of petroleum out of the Strait of Hormuz, and it shows that it now provides roughly 20% of the world’s total petroleum liquids consumption and dominates the supply of China and Asia. Chinese and Asian demand as well as their strategic dependence is also likely to grow in the near and mid-term. Although such estimates are now uncertain – given the impact of Covid-19 and shifts to alternative energy supplies – the U.S. Energy Information Administration’s (EIA) *International Energy Outlook* projects that this Chinese and Asian demand will steadily increase through 2050, and it will become steadily more important to the world’s manufacturing output and exports to the U.S. and global economy.

This will make the strategic value of the MENA region steadily greater in the process and have far more impact on the U.S. economy and GNP than America’s previous dependence on direct imports of petroleum. The U.S. GNP already is far more dependent on trade with Asian states dependent on the steady flow of Asian exports and imports than it has
ever been on direct petroleum imports, and the flow of Gulf oil directly out of the Gulf is as important to the Chinese economy as is its flow through the Strait of Malacca.

The U.S. Energy Information Agency also notes that:\textsuperscript{113}

Volumes of crude oil, condensate, and petroleum products transiting the Strait of Hormuz have been fairly stable since 2016, when international sanctions on Iran were lifted and Iran’s oil production and exports returned to pre-sanctions levels. Flows through the Strait of Hormuz in 2018 made up about one-third of total global seaborne traded oil. More than one-quarter of global liquefied natural gas trade also transited the Strait of Hormuz in 2018.

... EIA estimates that 76\% of the crude oil and condensate that moved through the Strait of Hormuz went to Asian markets in 2018. China, India, Japan, South Korea, and Singapore were the largest destinations for crude oil moving through the Strait of Hormuz to Asia, accounting for 65\% of all Hormuz crude oil and condensate flows in 2018.

... In 2018, the United States imported about 1.4 million b/d of crude oil and condensate from Persian Gulf countries through the Strait of Hormuz, accounting for about 18\% of total U.S. crude oil and condensate imports and 7\% of total U.S. petroleum liquids consumption.

When it comes to the United States, it is also worth noting just how much the U.S. depends on exports from nations highly dependent on Gulf petroleum exports. In the first six months of 2020 – in spite of Covid-19 and tensions with China – the U.S. got 17.7\% of its imports from China, 5.1\% from Japan, 3.3\% from Vietnam, 3.3\% from South Korea, 2.6\% from Taiwan, and 2.1\% from India – a total of 34.1\%.\textsuperscript{114} The percentages for technology and manufactured goods were much higher. The total value of such imports to the U.S. economy was far higher than that of imports from the Gulf, and the same Asian states consumed a total of 17.7\% of all U.S. exports. Energy independence is a uniquely self-centered myth.
Figure Thirty-Three: Gulf Petroleum and LNG Exports 2014-2018, and Growing Asian Demand Through 2050

Crude oil, condensate, and petroleum products transported through the Strait of Hormuz

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
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<tr>
<td>Total oil flows</td>
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<td>18.4</td>
<td>20.6</td>
<td>20.3</td>
<td>20.7</td>
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<td>through Strait of</td>
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<td>Hormuz</td>
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<tr>
<td>Crude and</td>
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<td>15.2</td>
<td>17.3</td>
<td>17.2</td>
<td>17.3</td>
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<tr>
<td>condensate</td>
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<tr>
<td>Petroleum</td>
<td>2.8</td>
<td>3.2</td>
<td>3.3</td>
<td>3.1</td>
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<tr>
<td>products</td>
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<tr>
<td>World maritime</td>
<td>56.4</td>
<td>58.9</td>
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<tr>
<td>World total</td>
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<td>95.9</td>
<td>96.9</td>
<td>98.5</td>
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<td>liquids consumption</td>
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<tr>
<td>LNG flows</td>
<td>4.0</td>
<td>4.2</td>
<td>4.2</td>
<td>4.1</td>
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<td>through Strait of</td>
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<td>Hormuz (Tcf per year)</td>
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Source: U.S. Energy Information Administration, based on Short-Term Energy Outlook (June 2019), ClipperData, Saudi Aramco bond prospectus, Saudi Aramco annual reports, Saudi Ports Authority, International Group of Liquefied Natural Gas Importers, and U.N. Conference on Trade and Development

Note: LNG is liquefied natural gas; Tcf is trillion cubic feet

World petroleum and other liquid fuels consumption nearly doubles in non-OECD regions in the Reference case—

OECD liquid fuels consumption

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<tr>
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<td>160</td>
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<tr>
<td>British thermal</td>
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Non-OECD liquid fuels consumption

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Natural gas consumption grows most in non-OECD Asian countries—

OECD natural gas consumption

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Non-OECD natural gas consumption

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• The role of Europe has diminished over time. European states still play an important diplomatic and political role in the region as well as in arms sales, and several – particularly the United Kingdom and France – have security presence and provide military support. No European power, however, now has major power projection capabilities or the mix of advanced combat forces; command and control; and intelligence, surveillance, and reconnaissance (IS&R) systems to provide the security assistance most regional powers aside from Israel and possibly Egypt need.

European powers also do not produce advanced longer-range air and missile defense systems, and they fall behind the U.S. and Russia in a number of military technologies. Their weapons are, however, often more cost-effective for MENA powers that do not have to project power or need long endurance outside of military bases. European combat ships are often good examples.

• Russia has established a major presence in Syria, has become a major arms seller to Egypt, and is playing a direct role in the Libyan civil war. It is increasing its train and assist role by introducing Russian proxy forces like the Wagner Group. It has sold modern S-300 air defenses to Iran and S-400 systems to Turkey, deployed major military assets and mercenary forces to Syria, and linked its presence in Syria to the redeployment of naval and air forces in the Mediterranean to put pressure on NATO.

At the same time, Russia is working with Saudi Arabia and other OPEC states to help support its petro-economy – which has become the driving force in the Russian economy and its ability to fund Russian forces – and it has offered nuclear power options to local powers. It has also tried to create a growing flow of arms transfers and contracts to a wider variety of Gulf states.

• The previous data have shown that China is still a relatively smaller supplier of arms to the MENA countries, and Figure Thirty-Four indicates that China has not yet emerged as a major global provider of arms transfers and related military support and services – lagging well behind the U.S., Russia, and Western Europe.

• China still plays only a limited role in arms transfers and in train and assist missions to Arab states and Iran, but it has started to produce far more attractive and modern weapons. It will soon have the ability to offer major bargains in a wide range of new missiles and other combat systems. Like Russia, it may have problems in balancing its relations with Iran and the Arab Gulf states, but they all may increasingly compete for China’s support – particularly if the U.S. security role in the Gulf continues to diminish and remain uncertain.

However, China has steadily expanded its economic presence in Gulf countries, especially the UAE. China is a major importer from Saudi Arabia. It has a strong commercial presence in Abu Dhabi that it is trying to expand. It also is reported to be seeking a 25-year strategic partnership with Iran – involving some $400 billion in investment and trade.\(^\text{115}\)

Chinese and U.S. dependence on Gulf petroleum and gas exports has been discussed earlier. Its recent imports are shown in Figure Thirty-Five. The revised 2020 estimates by the U.S. Energy Information Administration and other recent energy projections do show a sharp rise in China’s use of alternative energy sources over time. However, they still project rising Chinese demand to go well beyond 2030, and the Gulf’s petroleum exports are critical to many other Asian states. The U.S. may be questioning its future dependence
on Gulf oil, but China is not and has every reason to displace U.S. strategic influence in the Gulf if it can.

This helps to explain why China is also steadily expanding its power projection capabilities on a global level in the western parts of Indian Ocean and the Red Sea. China also has port deals with Pakistan and both a port facility and a naval base in Djibouti on the southeastern coast of the Red Sea. China is also expanding its regional presence in other areas in the Indian Ocean, and deploying anti-piracy forces near Somalia, and negotiating a potential strategic agreement with Iran.

• Turkey will continue to try to expand its regional influence in the MENA region and Mediterranean, and it will seek to block any ties between its Kurds and Kurds in Syria and Iraq. It will openly and covertly transfer arms, sometimes to support factions in given MENA countries and aid some Islamist causes and non-state actors seen as extremist by a number of Arab Gulf states.

Looking at these challenges, it is striking that one of the two most serious problems affecting outside powers is not is dealing with regional failures and challenges, or possible Russian and Chinese strategic ambitions. It is U.S. willingness to keep supporting its strategic partnership and to focus on actual partnership – rather than burden sharing and arms sales.

The other is a much broader challenge. Many of the efforts of outside power to support regional states have helped them deter or limit conflicts and deal with the threats of extremism and terrorism. They also, however, have played a critical role in bringing instability and civil war to states like Libya, Syria, Iraq, and Yemen. They have generally either been decoupled from efforts to bring civil development or to address the causes of extremism, or they have failed to make a successful major contribution to national building and development as distinguished from progress in a few selected areas.

By focusing on the security half of the problem, outside security efforts have often made the civil side of security more of a problem – even when they did help provide better military and internal security. This problem has been worse by the efforts of the U.S. or other arms exporters, who would rather maximize their sales instead of helping MENA states find the most cost-effective solution to dealing with their security problems.

More generally, it also raises the issue of what growing competition between the U.S. and its Western European partners and either China or Russia will do to both MENA states and the major outside competitors. There are unfortunate parallels to the competition between European colonial powers in the half century before World War I. In more modern game theory terms, it is unclear that the end result will actually benefit any outside player. It becomes a “game” in which “winning” ultimately consists of losing less than the other players.
**Figure Thirty-Four: SIPRI Trend Indicator Values (TIVs) of the Weapons Exported by the Top Ten Arms Exporting Countries: 2010-2019**

*(In $U.S. Current Millions)*

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**Notes:** A '0' indicates that the value of deliveries is less than 0.5m. Figures may not add up due to the conventions of rounding. For more information, see [http://www.sipri.org/databases/armstransfers/sources-and-methods/](http://www.sipri.org/databases/armstransfers/sources-and-methods/).

Figure Thirty-Five: China’s Dependence on Petroleum Imports in 2018 and 2019


16 SIPRI states it has developed a unique system to measure the volume of international transfers of major conventional weapons using a common unit, the trend-indicator value (TIV)….The TIV is based on the known unit production costs of a core set of weapons and is intended to represent the transfer of military resources rather than the financial value of the transfer. Weapons for which a production cost is not known are compared with core weapons based on: size and performance characteristics (weight, speed, range and payload); type of electronics, loading or unloading arrangements, engine, tracks or wheels, armament and materials; and the year in which the
A weapon was produced. A weapon that has been in service in another armed force is given a value 40 per cent of that of a new weapon. A used weapon that has been significantly refurbished or modified by the supplier before delivery is given a value of 66 per cent of that of a new weapon.

SIPRI calculates the volume of transfers to, from and between all parties using the TIV and the number of weapon systems or subsystems delivered in a given year. This data is intended to provide a common unit to allow the measurement of trends in the flow of arms to particular countries and regions over time. Therefore, the main priority is to ensure that the TIV system remains consistent over time, and that any changes introduced are backdated.

In cases where deliveries are identified but it is not possible to identify either the supplier or the recipient with an acceptable degree of certainty, transfers are registered as coming from 'unknown' suppliers or going to 'unknown' recipients. In cases where there is an arms transfer agreement for weapons that are produced by two or more cooperating countries, and if it is not clear which country will make the final delivery, the suppliers is listed as 'multiple'.

SIPRI TIV figures do not represent sales prices for arms transfers. They should therefore not be directly compared with gross domestic product (GDP), military expenditure, sales values or the financial value of export licenses in an attempt to measure the economic burden of arms imports or the economic benefits of exports. They are best used as the raw data for calculating trends in international arms transfers over periods of time, global percentages for suppliers and recipients, and percentages for the volume of transfers to or from particular states.


18 SIPRI did note that, “The war between the internationally recognized Libyan Government of National Accord (GNA) and the Libyan National Army (LNA) that started in 2014 continued in 2019. Both sides have received weapons from abroad in violation of the 2011 United Nations arms embargo on Libya, but no country has been sanctioned for this. Details about these arms deliveries are uncertain and the volume cannot be estimated. For example, in 2019 the GNA received an unknown number of armored vehicles and armed unmanned aerial vehicles (UAVs) from Turkey. In 2015–19 the LNA received armored vehicles from Jordan and the United Arab Emirates (UAE), combat helicopters from Belarus, supplied via the UAE, and combat aircraft from Egypt. Combat aircraft and armed UAVs originating from the UAE have been used in the fighting, including in 2019. It is unclear whether they are being operated by the UAE or whether the UAE has supplied them to the LNA. The UAE’s involvement in Libya is part of its assertive foreign policy, which also includes its military intervention in Yemen. In 2015–19 the UAE accounted for 3.4 per cent of global arms imports. It received major arms from a total of 17 countries in 2015–19 but the United States accounted for 68 per cent of its arms imports. In 2019, when foreign military involvement in Libya was condemned by the UN Security Council, the UAE had major arms import deals ongoing with Australia, Brazil, Canada, China, France, Russia, South Africa, Spain, Sweden, Turkey, the United Kingdom and the USA.”


The SIPRI data on total military expenditure for 2019 are the current dollar figures provided in https://www.sipri.org/databases/milex.


Covers the events between 2001-2019.


The actual size of U.S. arms transfers as reported by the DCSA are not available as the DCSA Factbook series was being revised at the time this report was written.


54 The Institute for the Study of War provides very good, regularly updated situation reports and maps at http://www.understandingwar.org/project/syria-situation-report.

“On September 19, virtually all US sanctions on Iran returned, including what became a temporary re-imposition of the UN arms embargo. Accordingly, the export of certain conventional arms to Iran is a violation of UN Security Council Resolution (UNSCR) 1929 and the procurement of any arms or related materiel from Iran is a violation of UNSCR 1747. The United States is prepared to use its domestic authorities to sanction any individual or entity that materially contributes to the supply, sale, or transfer of conventional arms to or from Iran, as well as those who provide technical training, financial support and services, and other assistance related to these arms... Providing arms to Iran will only aggravate tensions in the region, put more dangerous weapons into the hands of terrorist groups and proxies, and risk increasing threats to the security of Israel and other peaceful nations. For the past 10 years, countries have refrained from selling weapons to Iran under various UN measures. Any country that now challenges this prohibition will be very clearly choosing to fuel conflict and tension over promoting peace and security.”


“CJTF-OIR said that most commands within the ISF will not conduct operations to clear ISIS insurgents in mountainous and desert terrain without Coalition air cover, intelligence, surveillance, and reconnaissance (ISR), and coordination. Instead, ISF commands rely on the Coalition to monitor “points of interest” and collect ISR for them. Despite ongoing training, CJTF-OIR said that the ISF has not changed its level of reliance on Coalition forces for the last 9 months and that Iraqi commanders continue to request Coalition assets instead of utilizing their own systems.”


For detailed background papers on the evolution of this fighting and ongoing updates on the role of the PMFs see the work of Michael Knights of the *Washington Institute for Near East Policy (WINEP)*, and in the *CTC Sentinel*, For an update as of October 2020. His work in “Back into the Shadows? The Future of Kata’ib Hezbollah and Iran’s Other Proxies in Iraq,” *CTC Sentinel*, October 2020, pp. 1, https://ctc.usma.edu/wp-content/uploads/2020/10/CTC-SENTINEL-102020.pdf; was certainly one of the most authoritative analyses of the PMFs at that date.


104 Source: Jeremy M. Sharp, Yemen: Civil War and Regional Intervention, Congressional Research Service, RA3960, Updated April 23, 2020, pp. 8, 9, https://fas.org/sgp/crs/mideast/R43960.pdf; and Jeremy M. Sharp,


109 If one ignores the rapidly shifting U.S. deployments in Iraq and Syria, the U.S. had the following total deployments in December 2020: Algeria 10, Bahrain (5th Fleet) 4,571, Djibouti 115, Egypt 327, Israel 123, Jordan 88, Kuwait 2,058, Lebanon 31, Libya 2, Morocco 28, Oman 26, Qatar (al Udeid) 615, Saudi Arabia 594, Tunisia 30, UAE 230, and Yemen 4. Total 8,852. It had the following deployments in December 2018: Algeria 6, Bahrain (5th Fleet) 4,880, Djibouti 25, Egypt 313, Israel 75, Jordan 72, Kuwait 2,034, Lebanon 15, Libya 7, Morocco 21, Oman 22 Qatar (al Udeid) 579, Saudi Arabia 544, Tunisia 25, UAE 423, and Yemen 3. Total 9,044.


115 U.S. Census Bureau Foreign Trade data base, [https://www.census.gov/foreign-trade/balance/c0007.html](https://www.census.gov/foreign-trade/balance/c0007.html).