

The background of the entire page is a photograph showing a row of flagpoles with various national flags, including the United Arab Emirates, Jordan, and Iraq, set against a backdrop of a city and mountains under a cloudy sky. The flags are flying in the wind. The flagpoles are tall and white, and the flags are in various colors like red, green, white, black, and blue.

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The Changing Security Dynamics of the MENA Region

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Photo: JOSEPH EID/AFP/Getty Images

The Changing Security Dynamics of the MENA Region

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. At the beginning of 2011, most MENA nations were at peace and seemed to be relatively stable. North African countries were at peace under authoritarian leaders. The Arab-Israeli conflicts had been limited to clashes between Israel and the Palestinians. Egypt acted as a stable major regional power.

Iran was a large but relatively weak military power dependent on low-grade and dated weapons. Iraq's Islamic extremists seemed to be defeated. The Southern Arab Gulf states appeared to be unified in a Gulf Cooperation Council (GCC). Yemen was poor and could not meet the needs of many of its people, but it 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. Regional rivalries, extremism, and the series of political uprisings and conflicts that were once called the "Arab Spring" have turned the MENA region into a fragmented mess. What appeared to be a relatively stable pattern of national security developments in the period before the political upheavals that began in 2011, has now become the scene of local power struggles; internal conflicts; new battles with extremist movements; and major civil wars in Iran, Libya, Syria, and Yemen.

Instead of a shift towards democracy, many regimes have become more repressive and authoritarian. Civil wars and instability have become as serious of a challenge to the MENA region's security and stability as military threats, extremism, and terrorism. Efforts at reforming governance and the economy have fallen far short of the needs of most states. The Covid-19 crisis has made things worse, and a number of regimes have gone on with serious arms races at a time when such arms races have become even more unaffordable while their people have even greater needs for effective governance with freedom from corruption, for economic development, and for decent jobs and incomes.

Yet, military threats and extremism have also grown – as shown in **Figure One**, which lists the extremist/terrorist threats of each MENA country. Iran has emerged as a far more serious military threat in the Gulf. The U.S. invasion of Iraq in 2003 as well as its fight to defeat extremists and end factional struggles in Iraq that seemed to be ending in 2011, have led to two decades of direct U.S. participation in active combat and combat support of partner forces. While it resulted in the break-up of the ISIS "caliphate" in Iraq, it has left significant ISIS fighters in place while empowering pro-Iranian Popular Mobilization Forces, creating serious uncertainties as to whether Iraq will end up as a U.S. strategic partner or under Iranian influence.

Non-state actors like the Hezbollah, Iraqi Popular Mobilization Forces (PMFs), and the Houthis have become significant threats while the U.S. used security assistance – and newly created Security Force Assistance Brigades – to create its own non-state actors in Syria. Other powers like Russia have provided support, combat troops, and mercenaries to support non-state actors in Libya and Syria. More broadly, Iran, the Assad forces in Syria, the Lebanese Hezbollah, the pro-Iranian Popular Mobilization Forces in Iraq, and the Houthis in Yemen have created a coalition of hostile powers that threaten both U.S. interest and U.S. strategic partners.

There have been important changes in the role of outside powers. The U.S. faces challenges to its security relations with each state in the Middle East and North Africa as well as from nations

outside the MENA region. The U.S. still is the major outside power in the region, and its European partners remain active in the Mediterranean as well as in North Africa. Britain and France still play a role in the Gulf, but their roles have been tentative, and their power projection capabilities have continued to slowly decline.

The U.S. commitment to the region has been undermined by “long wars” and the need to meet the challenge from China in Asia. Key strategic partners like Britain and France still play a role in the Gulf, but their roles are more tentative, and their power projection capabilities have continued to slowly decline.

Russia, however, has reasserted itself as a major power and competitor, and it is now playing a major security role in Libya and Syria as well as increasing its share of regional arms transfers. China is emerging as the second ranking global power and as a potential competitor in the MENA region, and there are reports that China may play a major security role in Iran. Turkey is playing a more active military role in Libya, Syria, and Iraq, and one that does more to rival U.S. efforts than support them.

At the same time, the military and security forces of every country in the Middle East and North Africa continue to change in size, structure, and force posture. Their current force size and structure by service – as reported in the 2021 edition of the *IISS Military Balance* – is shown in **Figure Two, Figure Three, Figure Four, and Figure Five**. These figures show just how different the forces of each MENA state are in size, weapons holdings, and the relative size of each military service and paramilitary forces. However, these figures only show a summary of the force strength in terms of total personnel and major weapons holding.

They do not, however, reflect the lack of sustainability and the ability to operate away from major bases in many countries. They do not show the level of dependence on foreign advisors and contractors or the dependence on foreign soldiers. They do not reflect each nation’s different needs for force modernization and the lack of effective command, control, communication, and computer (C4) and advanced intelligence, surveillance, and reconnaissance (IS&R) capability. They do not reflect the extent to which given countries are seeking to create effective joint warfare capability or all-domain warfare capability.

The end result is that many MENA nations with large military and internal security budgets – and that are making massive arms buys – have limited actual warfighting and internal security capabilities, are poorly prepared to deal with the changing nature of the warfighting threats in the region, and are highly dependent on outside powers.

This means major changes will take place in the military and internal security forces of MENA countries and in every aspect of outside support and security assistance. Moreover, while many MENA countries still spend massive amounts of money on modernizing and expanding their military forces and their major weapons, they have also greatly expanded their focus on counterextremism, counterterrorism, and internal security. As a result, their dependence on the U.S., Russia, China, and other outside forces will steadily increase and continue to do so indefinitely into the future.

Improving force quality has become more important than force numbers or acquiring more major weapons systems. Each MENA country must also develop its own approach to creating new systems of command and control, battle management, secure communications, and dependence on

space systems. Each must find some way to take advantage of the advances in military software and use of artificial intelligence.

Some of these military changes will be destabilizing unless they are carefully managed and coordinated, and these challenges are further compounded by shifts to other new forms of warfare. Israel continues to improve nuclear and precision strike systems. Israel, Egypt, Syria, and Iran all retain chemical weapons capabilities, and they at least have the capacity to develop biological weapons.

Several MENA states already have – or seek to acquire – advanced ballistic and UCAV or cruise missiles. Others seek to acquire a wide-range of precision guided weapons, integrated mixes of land-based air and missile defenses, and a wide-range of other developments in military technology and tactics. These systems have already begun to present new threats to neighboring states, require major shifts in military structures, and can increase the risk of uncontrolled escalation unless they are carefully controlled.

At the same time, gray area operations, hybrid warfare, and extremist/terrorist threats are added sources of change. So are the threats posed by the support of rebel factions by neighboring and outside states. These changes mean that MENA states must continue to restructure their intelligence, counterterrorism, counterextremism, and counterinsurgency forces to deal with different kinds of threats.

This analysis focuses on these new security dynamics and on the role the U.S. and its European security partners must play in the MENA region. The U.S. is currently the leading outside power and source of military support for MENA states, except for the Russian presence in Syria. However, the roles of Russia and China are expanding. There are only three major outside powers – the U.S., Russia, and China – that can provide the full range of capabilities needed to help create the MENA forces that can operate at these levels and that are the ones the U.S. and its European partners must compete against.

It is clear that America's regional security partners – Morocco, Tunisia, Egypt, Israel, Jordan, Kuwait, Bahrain, Oman, Qatar, Saudi Arabia, and the UAE – will all need new forms of support from the U.S. in modernizing their forces. This is particularly true of U.S. train and assist efforts and the role played by U.S. commands and fleets in the MENA region. They will play a key role in helping partners to execute new forms of warfare and internal security operations, in providing active support when conducting peacetime exercises and operations, and in supporting advanced operations and interoperability if combat occurs.

These changes in regional, military, and internal security dynamics will radically increase the cost and complexity of military and security forces. They involve efforts that many MENA countries are too small or too poor to deploy and afford on their own, particularly in the middle of the Covid-19 crisis and at a time when far too many regions suffer from weak or failed governance and corruption.

At the same time, military and internal security forces are only part of the security dynamics of the MENA region. This analysis shows that many MENA states already face equal or greater challenges in providing effective civil security and stability. These include achieving workable levels of political consensus, quality of governance, freedom from corruption, economic

development, and equity in income, jobs, and business opportunities. The threat from outside powers and extremists is at least matched by self-inflicted civil wounds.

Hard trade-offs have to be made between military and civil efforts, and the civil efforts will often need to be given priority. The failed governance and high levels of corruption in many MENA states – displayed in **Figure Six and Figure Seven** – affect the military as well as civilian aspects of government. So do the idiosyncratic impact of various rulers and ruling elites as well as a broad regional over-reliance on repressive or authoritarian internal security measures.

The civil upheavals, civil wars, and rise of extremism that have taken place since 2011 are the beginning and not the end. They are all warnings that military and civil challenges cannot be separated and that a more integrated approach is needed. Military reform cannot be accomplished in most MENA countries without controlling military spending and without civil reform. Changes in military dynamics alone cannot bring security or stability. The security dynamics of the MENA region must be addressed at both the military and civil levels.

Table of Contents

THE CHANGING DYNAMICS OF MENA SECURITY BY SUBREGION AND COUNTRY	8
<i>Figure One: Summary of Extremist/Terrorist Threats in the MENA Region</i>	<i>9</i>
THE NORTH AFRICAN SUBREGION	11
Morocco	11
Algeria	13
Tunisia	15
Libya	17
<i>Figure Two: The North African Military Balance - I</i>	<i>21</i>
<i>Figure Two: The North African Military Balance - II</i>	<i>22</i>
THE GREATER LEVANT SUBREGION	23
Israel	23
Egypt	27
Jordan	31
Lebanon	33
Syria	36
<i>Figure Three: The Greater Levant Military Balance - I</i>	<i>40</i>
<i>Figure Three: The Greater Levant Military Balance - II</i>	<i>41</i>
THE PERSIAN-ARAB GULF SUBREGION	42
Iran	42
Iraq	46
THE SOUTHERN ARAB GULF STATES: BAHRAIN, KUWAIT, OMAN, QATAR, SAUDI ARABIA, AND THE UAE	51
The Gulf Cooperation Council: Facade or Farce?	51
The Impact of Military Geography	52
Divided Forces Are A Self-Inflicted Wound	52
Saudi Arabia	53
The UAE	56
Kuwait	58
Bahrain	60
Qatar	61
Oman	63
The Changing Role of Russia and China	65
<i>Figure Four: The Total Gulf Military Balance - I</i>	<i>66</i>
<i>Figure Four: The Total Gulf Military Balance - II</i>	<i>67</i>
<i>Figure Five: The Arab Gulf State Military Balance - I</i>	<i>68</i>
<i>Figure Five: The Arab Gulf State Military Balance - II</i>	<i>69</i>
AN EMERGING RED SEA SUBREGION?	70
THE CHANGING MILITARY DYNAMICS OF REGIONAL MILITARY FORCES AND ROLE OF OUTSIDE STATES	74
NEW FORMS OF MILITARY DYNAMICS	74
THE DOMINANT REGIONAL NATIONAL STRATEGIC OBJECTIVE IS OFTEN REGIME SURVIVAL AND INTERNAL SECURITY, NOT NATIONAL DEFENSE AND MILITARY EFFECTIVENESS	75
FORCING IMPROVEMENTS IN JOINT AND MULTI-DOMAIN WARFARE, C ⁴ I, IS&R, AND BATTLE MANAGEMENT SYSTEMS	76
LIFECYCLE, SUSTAINMENT, AND COMBAT INTENSITY	77
BALLISTIC MISSILES, UCAVs, AND NEW LONG-RANGE ATTACK SYSTEMS	77
MISSILE DEFENSE AND “LAYERED” ARTILLERY, ROCKET, MISSILE, AND AIR DEFENSE	78
PROLIFERATING OTHER “SMART” WEAPONS	78
PRIVILEGED ACCESS TO ADVANCED WEAPONS AND MILITARY TECHNOLOGY	79
THE DECLINING NEED FOR CONVENTIONAL MAJOR WEAPONS AND WARFIGHTING	79
COUNTERTERRORISM AND COUNTEREXTREMISM	79
NEW FORMS OF PARAMILITARY AND SECURITY FORCES	80
“VOLUNTEERS,” MERCENARIES, NON-STATE ACTORS, MILITIAS, AND OTHER PROXIES	80

GRAY AREA, HYBRID, AND LOW-INTENSITY WARFARE.....	81
CYBER, INTERNAL SECURITY, AND INFORMATION OPERATIONS AND WARFARE.....	81
POPULATION WARFARE.....	81
HUMAN SHIELDS, AIR POWER, AND PRECISION STRIKE.....	82
COUNTERPROLIFERATION.....	83
NEW FORMS OF OUTSIDE MILITARY SUPPORT.....	84
THE CIVIL-MILITARY CHALLENGE.....	85
KEY CHALLENGES TO MENA STATES.....	86
<i>Figure Six: World Bank MENA Governance Ratings: 2019 - I</i>	90
<i>Figure Six: World Bank MENA Governance Ratings: 2019 - II</i>	91
<i>Figure Six: World Bank MENA Governance Ratings: 2019 - III</i>	92
<i>Figure Six: World Bank MENA Governance Ratings: 2019 - IV</i>	93
<i>Figure Seven: Transparency International 2020 MENA Corruption Ratings</i>	94
CHANGES IN THE ROLE OF OUTSIDE POWERS.....	95
<i>Figure Eight: Value of Arms Transfers to the MENA Region from Major Suppliers in 2012-2017 - I</i>	97
<i>Figure Eight: Value of Arms Transfers to the MENA Region from Major Suppliers in 2012-2017 - II</i>	98
THE CHANGING ROLE AND IMPACT OF THE UNITED STATES.....	99
Changes in the Mix of U.S. Efforts.....	99
The Road to Hell in Strategy is Paved With.....	100
Shifts in U.S. Presence.....	101
<i>Figure Nine: U.S. Military and Defense Civilian Deployed in the MENA Region: June 31, 2018 versus December 31, 2020 - I</i>	103
Trends in the Volume of U.S. Arms Sales.....	105
<i>Figure Ten: U.S. Military Sales to the MENA Region: FY1950-FY2020</i>	106
<i>(in \$U.S. Millions)</i>	106
Shaping the Future.....	107
Burden Sharing as the Enemy of Security and Stability.....	108
The MENA Region Remains a Vital Strategic Interest.....	110
Shifting the U.S. Focus to Real Security Partnerships and an Equal Focus on the Civil Aspects of Security.....	111
THE CHANGING ROLE AND IMPACT OF EUROPEAN STATES.....	111
THE CHANGING ROLE OF RUSSIA.....	112
THE CHANGING ROLE OF CHINA.....	113
THE CHANGING ROLE OF TURKEY.....	116
THE UNCERTAIN FUTURE OF MENA MILITARY DYNAMICS.....	117

The Changing Dynamics of MENA Security by Subregion and Country

There are no clear regional patterns in the changes in MENA military and internal security forces, in the role the U.S. plays in security assistance and forging security partnerships, or in the role that other outside powers play in shaping MENA country forces and conflicts. Every MENA country largely pursues its own individual course of military and security force development with a high degree of independence. Each has different levels of U.S. strategic ties and levels of military support that range from limited aid to the deployment of major deterrent and warfighting capabilities or the support of civil conflicts and non-state actors.

The security developments in the MENA region can, however, be broadly divided into three major subregions and the interactions between the states within them. These subregions include: North Africa, the Greater Levant, and the Persian/Arab Gulf. Each illustrates the range of different national problems and requirements that now drive the military dynamics of the region; U.S. security assistance efforts; and the shifting role of Europe, Russia, and China.

At the same time, it should be noted that the overall level of security and stability in each subregion of the MENA region has dropped in recent years and that internal and civil sides of security in the MENA region have become steadily more problematic. If one looks across the region, the shifts and upheavals in political stability since 2011 have led to the rise of major internal conflicts; growing levels of outside intervention; and serious problems in civil conflict, political tension, governance, and economic development.

Algeria, Libya, Tunisia, Syria, Lebanon, Iraq, Iran, and Yemen have all faced major problems in national unity or major periods of civil war. Algeria, Egypt, and all of the Gulf states have spent a significant portion of their budgets and economies to build up their military and internal security forces – or on war – that has come at a serious cost to adequate civil and economic development. Since the beginning of 2020, the Covid-19 crisis has made this situation much worse in at least half the states in the MENA region. Furthermore, many MENA states that have focused on internal security have created more repressive regimes in the process.

The resulting balance of military build-up, war, and civil development has reduced – not enhanced – the security and stability of the region. The same is true of the role of outside states. In many ways, each military build-up has undermined deterrence or increased the potential cost of war, and made the term “security assistance” something of an oxymoron.

**Figure One: Summary of Key Extremist/Terrorist Threats
in the MENA Region, 2021- I**

Region	Threat
North Africa	
Morocco	<ul style="list-style-type: none"> • Al Qaeda in the Islamic Maghreb • Islamic State
Algeria	<ul style="list-style-type: none"> • Algiers • Al Qaeda in the Islamic Maghreb • Jund al-Khilafah (JAK-A): Islamic State
Libya	<ul style="list-style-type: none"> • Al Qaeda in the Islamic Maghreb • Ansar al-Sharia in Benghazi (AAS-B) • Ansar al-Sharia in Dernah (AAS-D) • Islamic State-Libya
Tunisia	<ul style="list-style-type: none"> • Al Qaeda in the Islamic Maghreb • Islamic State
Greater Levant	
Egypt	<ul style="list-style-type: none"> • Islamic State-Sinai Province (IS-SP) • Harakat Sawa'd Misr (HASM) • Liwa al-Thawra • Harket Elmokawma Elsha'biya
Israel	<ul style="list-style-type: none"> • Hamas • Palestinian Islamic Jihad • Lebanese Hizb'allah
Jordan	<ul style="list-style-type: none"> • Al Qaeda in the Islamic Maghreb • Islamic State
Lebanon	<ul style="list-style-type: none"> • Hizb'allah • ISIS, al-Nusrah Front (ANF) • Hamas • Abdullah Azzam Brigades (AAB)
Syria	<ul style="list-style-type: none"> • Hizb'allah • ISIS, al-Nusrah Front (ANF) • Jabhat Fateh al-Sham • Hayat Tahrir al-Sham • Jaish al-Islam • Failaq al-Rahman or the al-Rahman Legion

Figure One: Summary of Key Extremist/Terrorist Threats in the MENA Region, 2021- II

Persian/Arab Gulf

Iran	• Abdullah Azzam Brigades
Iraq	• Al Qaeda in the Arabian Peninsula
	• Islamic State
Bahrain	• Saraya al-Mukhtar (SM)
Kuwait	• Islamic State
Oman	
Qatar	• Al Qaeda in the Arabian Peninsula
Saudi Arabia	• Al Qaeda in the Arabian Peninsula
	• Islamic State
UAE	• Al Qaeda in the Arabian Peninsula
Yemen	• Al Qaeda in Yemen (AQY)
Turkey	• Islamic State
	• Kurdistan People's Congress (also Kongra Gel, KGK; and Kurdistan Workers' Party, PKK)
	• Revolutionary People's Liberation Party/Front (DHKP/C)
	• Al-Nusrah Front (ANF)
	• Hay'at Tahrir al-Sham (HTS)
	• Al Qaeda

Data collected by CSIS Burke Chair.

The North African Subregion

If one looks at the North African subregion, Morocco and – to a lesser degree – Tunisia, are America’s security partners in North Africa, as well as the states where European partners play a major role in supporting their forces and security.

Morocco

Morocco has made progress in developing its military security forces and in encouraging economic reform as well as internal stability, but it still faces major challenges from poverty, in limiting repression by its internal security forces, and in meeting a limited challenge from its Polisario rebels based in Algeria in the southern areas that Morocco has effectively annexed from the former Spanish Sahara.¹ Morocco has, however, effectively rooted out Al Qaeda and ISIS insurgents in the country, following the Casablanca bombings in May 2003, March 2007, and April 2007; as well as the killing of two tourists in December 2018.²

Morocco engaged in the Western Sahara War from 1973 to 1991 with the Polisario Front, a former Spanish colony, over the annexation of the Western Sahara by Morocco. The conflict concluded in a ceasefire in 1991, but tensions remained. The Polisario Front declared themselves as a sovereign nation of the Sahrawi Arab Democratic Republic (SADR), but Morocco has refused to recognize their legitimacy. In October of 2020, Sahrawi demonstrators and refugees gathered in the village of Guerguerat located near Mauritania, prompting Moroccan troops to amass in the village. In November 2020, SADR declared war on Morocco and sporadic firing has continued up until March 2021.³

As **Figure Two** shows, Morocco has a large force structure for a country with its present economic resources, growing population, and development challenges. It should be noted that the data in this Figure – and in Figure Three, Figure Four, and Figure Five that follow – are taken from the IISS *Military Balance* for 2021. This is one of the best and most reliable public or “open source” references for such data. There are, however, major uncertainties in all such estimates of force numbers, and they do not reflect force effectiveness, readiness, or sustainability and often are based on past inventories rather than actual current operational holdings,

Figure Eight and **Figure Ten** show that Morocco has not made massive new arms purchases or that it has bought equipment which it cannot afford or support. Once again, however, it should be noted that all sources for such numbers have major uncertainties – as do the sources on military, paramilitary, and internal security spending as percentages of GDP. The data in **Figure Eight** and **Figure Ten** are, however, drawn from official U.S. government estimates and have at least as much credibility as any source available. They are also made in terms of actual spending. SIPRI provides a notable effort to make truly comparable estimates of spending on actual weapons, but these are not estimates of current arms spending per se.

As is the case with every country that follows, the quality and effectiveness of Morocco’s military forces do vary sharply by unit and force element. Many of its major weapons are aging U.S. and French systems, and Morocco faces major problems in funding modernization and making a transition to joint all-domain warfare and the other shifts in military capability described in the following chapter.

The military expenditure data in **Figure Two**, and the data on military spending as a percentage of GDP figures are uncertain for Morocco as they are for all MENA states. Many MENA countries

deliberately underreport their actual level of actual spending, and they do not include spending on some military, paramilitary or internal security forces. Some also underreport the cost of arms imports, investments in military industries and contract services, and other activities.

The differences between the IISS data, the SIPRI data, and other sources are illustrated in **Figure Two** and in the other figures covering each country, in which other sources often provide different data. The IISS data on Morocco do seem at least broadly accurate, however, and the stated 5.31% of GDP is a serious economic strain for a country with so many civil and development needs.

To some extent, Morocco is forced to spend at high levels because of the potential threat from Algeria and Algeria's support of the remaining Polisario rebels. This is an example – an example of the kind of regional tensions that seriously leads to arms races and conflicts that undermine civil progress in far too many MENA countries – in a region where studies like the UN's *Arab Development Reports* have long warned that governance is weak and development is failing to create enough jobs and properly raise living standards.⁴

Figure Six provides a comparison of the World Bank's quality of governance estimates for all the countries in the MENA region, and **Figure Seven** provides a different Transparency International estimate of the level of corruption. Such estimates are controversial, but they seem to be broadly accurate and show that Morocco has made only moderate progress in governance and fighting corruption. The World Bank does report that Morocco has made more progress in economic reform. The World Bank also reports that Morocco still faces major challenges in economic growth, meeting civil needs, and creating civil stability:⁵

On the economic front, the COVID-19 shock has pushed the Moroccan economy abruptly into a severe recession—the first recession since 1995. Economic output contracted by 13.8% in the second quarter, primarily as a result of the lockdown but also because of a sharp reduction in exports caused by the disruption of global value chains, collapse of tourism receipts, and a fall in remittances. The shocks to supply and demand triggered by the pandemic have been compounded by the underperformance of the agricultural sector as a result of an unusually dry winter.

The COVID shock is leading to an amplification of Morocco's twin deficits, thus increasing the country's financing needs. The fiscal consolidation efforts undertaken by the authorities in recent years have been discontinued as current expenditure on health and social protection have had to be increased substantially to respond to the pandemic. Recession has resulted in a shortfall of tax revenues, mainly from customs duties, goods and services, income and profits—all of which will increase the budget deficit. On the external front, Morocco's open economy is highly exposed to international shocks and especially to adverse developments in the eurozone area. During the first half of 2020, a sharp decrease—in remittances (-8.1%), tourism (-33.2%), and exports (-18.3%)—has had an adverse impact on the country's current account.

Real GDP is projected to contract by 6.3% in 2020, primarily due to the COVID-19 pandemic but also to poor rain. In turn, the fiscal deficit is projected to widen to 7.6% of GDP in 2020 which, together with the recession, will result in a substantial increase in the debt-to-GDP ratio. Finally, the decline in exports, tourism receipts, and remittances could increase the current account deficit to 9.9% of GDP. In line with the rest of the world, the Moroccan economy is expected to rebound in 2021, something that should help contain the budget and current account deficits. The pace and length of recovery are, however, subject to a high degree of uncertainty, related to the epidemiological evolution of the pandemic and the future performance of Morocco's main trading partners.

This highlights the common problem in much of the MENA region. Morocco does need to deter Polisario attacks and deal with pressure from Algeria, but its current level of military and internal security activity is sufficiently large and costly to present serious problems for its civil security and stability. As is the case with many MENA countries, it cannot presently afford many of its

modernization and force development plans without major outside aid or damaging its civil development and stability.

As for counterterrorism and counterextremism, Morocco's efforts have been relatively effective. Morocco's political system and internal security forces are also less repressive than those of many other MENA states. However, the latest U.S. State Department *Country Report on Human Rights* does note that some of these efforts have produced a repressive character and may be counterproductive,⁶

Morocco is a constitutional monarchy with a parliamentary national legislative system under which ultimate authority rests with King Mohammed VI, who presides over the Council of Ministers. The king shares executive authority with Head of Government (prime minister) Saadeddine El Othmani. According to the constitution, the king appoints the head of government from the political party with the most seats in parliament and approves members of the government nominated by the head of government. International and domestic observers judged the 2016 parliamentary elections credible and relatively free from irregularities.

The security apparatus includes several police and paramilitary organizations with overlapping authority. The National Police Force manages internal law enforcement in cities and reports to the Ministry of Interior. The Auxiliary Forces also report to the Ministry of Interior and support gendarmes and police. The Royal Gendarmerie, which reports to the Administration of National Defense, is responsible for law enforcement in rural regions and on national highways. The judicial police (investigative) branches of both the Royal Gendarmerie and the National Police report to the royal prosecutor and have the power to arrest individuals. Civilian authorities maintained effective control over security forces.

Significant human rights issues included: allegations of torture by some members of the security forces, although the government condemned the practice and made efforts to investigate and address any reports; allegations that there were political prisoners; undue limits on freedom of expression, including criminalization of libel and certain content that criticized Islam, the monarchy, and the government's position regarding territorial integrity; limits on freedom of assembly and association; corruption; and criminalization of lesbian, gay, bisexual, transgender, or intersex (LGBTI) conduct...There were few examples of investigations or prosecutions of human rights abuses by officials, whether in the security services or elsewhere in the government, which contributed to the widespread perception of impunity.

These problems affect all internal security efforts and are more serious in the areas Morocco has annexed in the former Spanish Sahara as well as in its dealing with the now relatively small elements of the Polisario rebels that are based in Algeria and have Algerian support. Morocco's efforts are, however, less repressive than many such efforts in the MENA and far less violent and repressive than in the countries where major civil conflicts or open battles with extremists take place.

Algeria

The Algerian military effectively hijacked the Algerian Revolution in 1962, after Algeria won independence from France, and the Algerian military has dominated the country ever since. The military has experienced its own coups and fought a bloody civil war – or “dirty war” – against Islamist rebels from December 1991 to February 2002. Its armed forces have since spent far more on the military and security than the country can afford and seriously limited its civil development. They have provoked terrorism and extremism, and they have long mismanaged the nation's development. As a result, Algeria is more of an “army with a country,” than a “country with an army.”

Algeria has seen new popular challenges to its ruling military junta since 2012, and new uprisings in 2020 have led to some increases in the civil role in government. However, the Algerian military

still remained largely in power in early 2021, and it still controlled enough of the government to sustain large forces and high levels of military spending.

Algeria now has a bloated force structure to deal with the threats it faces. Its army, navy, and air force have 130,000 active personnel, and it has an additional 150,000 reserves and 187,200 paramilitary personnel. Algerian forces are moderately well trained, but they depend heavily on conscripts while Algerian combat units vary sharply in effectiveness. Algeria is just beginning to develop the kind of more advanced approaches to joint all-domain warfare that are addressed in the next section of this analysis.

Figure Two displays this inflated force structure, which is heavily dependent on weapons whose ages are reaching the point where Algeria will need major modernization efforts. **Figure Eight** shows that Russia has long been Algeria's main supplier of arms, although Algeria remains an independent power and has recently made major buys from Europe.

Like most MENA countries, it is spending more on military development than it can really afford. **Figure Two** shows the IISS estimates its spending to be 6.73% of its GDP on military forces, and this may be a significant undercount if the cost of its arms buys and internal security forces were fully included.

Algeria also faces major economic challenges. The World Bank reported in October 2020 that,⁷

Algeria's long-term growth performance is slowing down, driven by a shrinking hydrocarbon sector, a winded public-led growth model, and an underdeveloped private sector. Between 2010 and 2016, GDP growth averaged 3.3 percent, before falling to an average of 1.1 percent after 2017, when GDP per capita growth turned negative. Faced with underinvestment, the hydrocarbon sector shrank by 2.1 percent yearly since 2010, and rising domestic consumption cut into export volumes, which fell by 2.8 percent yearly on average. At the mercy of oil price movements, current account and budget deficits averaged 13 and 11 percent of GDP since the 2014 oil shock.

...The small, low-productivity and mostly informal private sector struggles to take over as the new growth engine, facing red tape, limited access to credit and land, a significant skill gap or the omnipresence of state-owned enterprises...The COVID-19 pandemic and concurrent crash in oil prices endangered a fragile economic environment. As in most countries, lockdown measures to curb contagion have impacted entire sectors. Labor-intensive and informal service and construction sectors are particularly affected, putting the livelihoods of vulnerable segments of the population at risk.

...The COVID-19 pandemic and concurrent crash in oil prices endangered Algeria's vulnerable macroeconomic environment, and the new authorities are now grappling with a multifaceted crisis. Swift lockdown measures have helped slow down the pandemic, severely affecting activity in the meantime. The sharp fall in global hydrocarbon prices and demand added to the sector's difficulties, cutting further into the hydrocarbon rent. Therefore, swift action to curb the twin deficits and structural reforms to foster private-led growth have only become more urgent.

In 2019, protracted social mobilization and a lengthy political transition increased economic uncertainty and discouraged activity. Consumption slowed, as did investment, albeit more markedly. Correspondingly, growth moderated in construction, agriculture and commercial services. While nonhydrocarbon GDP growth moderated, to 2.4%, hydrocarbon GDP shrunk by 4.9%. A new Hydrocarbon Law with improved terms for investors was published, seeking to revive investment. Meanwhile, restrictions on foreign investment were lifted in non-strategic sectors. The current account deficit stabilized, as imports tracked lower domestic spending and import restriction policies, canceling the effect of lower hydrocarbon prices.

A significant contraction of the Algerian economy is expected for 2020 as a result of the COVID-19 pandemic, with large uncertainties as to the duration of the sanitary and economic crises. Lockdown measures will generate sharp falls in aggregate demand components, and the effect of economic uncertainty could be protracted. External and fiscal deficits will rise, with the fall in hydrocarbon revenues only partly

counterbalanced by falling imports and public investment, respectively, and by currency devaluation. Inflation should remain subdued until demand starts recovering. A partial recovery in 2021 and 2022 is predicated upon a partial recovery in demand, in hydrocarbon production and exports, and on a set of structural reforms that restore confidence and foster private sector investment.

Figure Six and **Figure Seven** do not fully reflect some recent reform efforts, but they warn that Algerian governance is relatively ineffective, that real economic reform is badly needed, and that corruption is high. The most recent U.S. State Department *Country Report on Human Rights* indicates that its internal security forces and government have made reforms in recent years and that they are now less repressive than is the case in many other MENA countries.⁸

Algeria is a multiparty republic whose president, the head of state, is elected by popular vote for a five-year term. The president has the constitutional authority to appoint and dismiss cabinet members and the prime minister, who is the head of government. A 2016 constitutional revision requires the president to consult with the parliamentary majority before appointing the prime minister. Presidential elections took place in 2014, and voters re-elected President Abdelaziz Bouteflika for a fourth term. Following Bouteflika's April 2 resignation, the country twice postponed elections during the year. Elections on December 12 resulted in Abdelmadjid Tebboune's election. Presidential term limits, which were eliminated in 2008, were reintroduced in the 2016 revision of the constitution and limit the president to two five-year terms. Elections for the lower chamber of parliament were held in 2017 and did not result in significant changes in the composition of the government. Foreign observers characterized the 2017 legislative elections as largely well organized and conducted without significant problems on election day but noted a lack of transparency in vote-counting procedures.

The 130,000-member National Gendarmerie, which performs police functions outside of urban areas under the auspices of the Ministry of National Defense, and the approximately 200,000-member DGSN or national police, organized under the Ministry of Interior, share responsibility for maintaining law and order. The army is responsible for external security, guarding the country's borders, and has some domestic security responsibilities. Civilian authorities generally maintained effective control over the security forces.

Since February 22, citizens have held weekly nationwide protests, demanding political change. The scale and geographic spread of protests were the largest since the end of the country's civil war in 2002. Despite sporadic clashes with protestors and occasional use of tear gas and rubber bullets, government forces exhibited restraint with only one death reported.

Significant human rights issues included: reports of one unlawful or arbitrary killing; arbitrary detention; political prisoners; lack of judicial independence and impartiality; unlawful interference with privacy; laws prohibiting certain forms of expression, as well as criminal defamation laws; limits on freedom of the press; site blocking; restrictions on the freedom of assembly and association including of religious groups; refoulement of refugees to a country where they would face a threat to their life or freedom; corruption; trafficking in persons; the criminalization of consensual same sex sexual conduct and security force sexual abuse of lesbian, gay, bisexual, transgender, and intersex (LGBTI) persons.

The government took steps to investigate, prosecute, or punish public officials who committed violations, especially corruption. Impunity for police and security officials remained a problem, but the government provided information on actions taken against officials accused of wrongdoing.

Tunisia

Tunisia has avoided military confrontations with its neighbors, and it reached political compromises between its moderate factions after its uprisings in 2012 that have avoided civil war. It has not faced serious military threats and outside challenges since. Tunisia has relatively small, affordable, and moderately effective military forces that meet its security needs.

Its army has some 27,000 uniformed personnel, but only 5,000 are regulars while the rest are conscripts with moderate to limited training. It has only limited and aging heavy armor and

artillery. Its small navy is under 5,000 personnel and armed with a mix of large and small patrol boats, only three of which have missiles. Its 4,000 personnel air force has only one squadron of aging F-5 combat aircraft. The Ministry of Interior does have a lightly armed 12,000 personnel National Guard.

Tunisia does have significant train and assist support from France, the U.S., and other elements of NATO, but the IISS reporting indicates that this support has not yet led to major weapons transfers. **Figure Eight** and **Figure Ten** only show comparatively moderate recent arms buys, although these buys still are expensive for Tunisia.

Tunisia's main challenges in dealing with security and stability are civil and internal. **Figure Six** and **Figure Seven** show that Tunisia remains politically and militarily unstable as a result of the political upheavals that began in 2012, and it could still be the scene of civil conflicts. The World Bank reports that its governance and levels of corruption are good for the MENA region.

Nevertheless, Tunisia has only made limited progress in making badly needed economic reforms and meeting the employment and civil needs of its people.⁹ Tunisia may be spending less on military forces as a percent of GDP than most of the MENA countries, but it now combines uncertain governance with a very weak economy, and its civil reforms to date have not offset the massive impact of the Covid-19 crisis. The World Bank summarizes Tunisia's economic challenges as follows:¹⁰

A new government led by Hichem Mechichi was sworn in on September 2nd. In his speech before Parliament the day of the confidence vote, Prime Minister Mechichi said his priority is to help address the economic and social situation—stop the bleeding of public finances, start talks with lenders, and begin reform programs, including for public companies and subsidies.

Yet since its inauguration, the government has yet to present a clear strategy to address Tunisia's deep economic and financial challenges, even when the country has reached unprecedented budget deficit levels and deteriorating public services. While the COVID-19 crisis has aggravated the situation, economic resilience had been drained by several years of indecisive public policies and a growing protectionist stance.

... The COVID-19 pandemic is having a heavier impact than previously anticipated. The lock-down simultaneously suppressed domestic supply and demand, contracting GDP by 21% (year-over-year) in the second quarter. At the same time, reduced external demand and travel restrictions lowered tourism receipts by 47% and reduced exports of mechanic and electric industry and textiles (Tunisia's main manufacturing exports) by 27% by (year-over-year) as of mid-2020.

Other factors are affecting growth this year. The country suffered from further political upheaval as Elyes Fakhfakh's recently-formed government fell, which added more uncertainty, and worker disruptions are affecting mining output. Taken together, these factors are contributing to an expected 9% contraction in 2020, down from the first Covid forecast of -4%. In this context, unemployment increased from 15% to 18% in the second quarter of the year, a level last reached in the time of the 2011 revolution.

Poverty and vulnerability are expected to grow and invert a trend observed in the last years of fast poverty reduction. According to a series of telephone interviews conducted by INS and the World Bank, there is evidence that pandemic has modified eating habits. Poorer households have reduced quantities consumed or started consuming less preferred foods. To cope with rising food prices or to make up for jobs losses, households drew on their savings, received help or borrowed money from relatives and deferred payment of their obligations. In 2020, extreme poverty—measured using the international poverty line of living on US\$1.90 per-day—will still be below 1%; however, poverty measured with the US\$3.20 per-day line will increase by about 1.3 percentage points, from 2.9% to 4.2%. Additionally, the percentage of the population that is “vulnerable” to fall into poverty is expected to increase in 2020. Using an expenditure threshold of US\$ 5.50 per-day, the number of poor and of those vulnerable to poverty is expected to increase from 16.6% to 22% of the total population.

The U.S. State Department *Country Report on Human Rights* states that Tunisia's internal security forces have made some progress towards reform, but they are still somewhat repressive.¹¹

Tunisia is a constitutional republic with a multiparty, unicameral parliamentary system and a president with powers specified in the constitution. During the year the country held parliamentary and presidential elections in the first transition of power since its first democratic elections in 2014. On October 6, the country held open and competitive parliamentary elections that resulted in the Nahda Party winning a plurality of the votes, granting the party the opportunity to form a new government. President Kais Saied, an independent candidate without a political party, came to office on October 23 after winning the country's second democratic presidential elections. On July 25, President Caïd Essebsi died of natural causes and power transferred to Speaker of Parliament Mohamed Ennaceur as acting president for the three months prior to the election of President Saied on October 13.

The Ministry of Interior holds legal authority and responsibility for law enforcement. The ministry oversees the National Police, which has primary responsibility for law enforcement in the major cities, and the National Guard (gendarmerie), which oversees border security and patrols smaller towns and rural areas. Civilian authorities maintained effective control over the security forces.

Significant human rights issues included reports of unlawful or arbitrary killings, primarily by terrorist groups; allegations of torture by government agents, which reportedly decreased during the year; arbitrary arrests and detentions of suspects under antiterrorism or emergency laws; undue restrictions on freedom of expression and the press, including criminalization of libel; corruption, although the government took steps to combat it; societal violence and threats of violence targeting lesbian, gay, bisexual, transgender, and intersex (LGBTI) persons; and criminalization of consensual same-sex sexual conduct that resulted in arrests and abuse by security forces.

The government took steps to investigate officials who allegedly committed abuses, but investigations into police, security force, and detention center abuses lacked transparency and frequently encountered long delays and procedural obstacles.

Libya

Libya is a failed state in virtually every aspect, including its military and internal security development, its politics and governance, and the development of its economy and civil society. It never had an effective and well-organized structure of government under its former dictator, Qaddafi, who ruled from 1961 to 2011. Qaddafi spent large amounts of Libya's oil wealth on an ineffective military build-up, failed military adventures, and the support of outside terrorists with little real effectiveness.

Since the fall and death of Qaddafi in 2011, Libya has steadily divided into competing and then hostile factions. It also is a country where the U.S. has not played a coherent role in security assistance since the assassination of the U.S. ambassador and other U.S. officials in 2012. This has helped to plunge the country into a state of civil war that began in 2014, and that turned Libya into a divided, violent mess.

Control of Libya is now divided into warring factions that are supported by a wide mix of different outside powers, which now occupy some 10 military bases. While peace negotiations have made some progress, they may well fail to end its civil war and create a stable outcome. Fighting may well go on between at least four factions, including three major factions.

The first party is the General National Accord (GNA), which is led by Prime Minister Fayez al-Serraj. The GNA's forces are composed of a mix of changing militias and seem to number some 30,000 troops, but they are not bound by loyalty to the GNA but are rather anti-LNA.¹²

The second party is the House of Representatives (HoR) – a government which is based in Eastern Libya and Benghazi. They refuse to recognize the legitimacy of the GNA because they were installed by the international community.¹³ The HoR lends its support to third party, the LNA but have little control over their leader, Hiftar.

These forces in eastern Libya, are centered around the Libyan National Army (LNA), led by General Khalifa Hifter (Haftar). They have been supported by air strikes from Egypt and the UAE. They have also received extensive support from both Russian and Syrian mercenaries – and possibly from small elements of U.S. commercial mercenaries. Egypt has provided fighter jets, armed drones, and surface-to-air missiles. Over 330 Russian flights provided arms and drones while Russian and Syrian mercenaries have fought during the 18-months before early February 2020.

These forces too keep changing and evolving. According to some estimates, however, the LNA has a total of some 25,000 troops, but its full-time “regular militia” is only composed of about 7,000 troops and eight combat ready aircraft – however, LNA claims it is composed of 85,000 troops.¹⁴

The fourth smaller faction is the government of the GNC in western Libya, which is led by the Muslim Brotherhood, backed by an Islamist coalition known as “Libya Dawn” and other militias.

There are no credible detailed estimates of the weapons held by each faction or of their force structure – names and the nature of their affiliation can also change over time – but they draw largely on Russian equipment and the arms purchases made during the Qaddafi era. The Libyan forces in the major factions are estimated to be supported by some 20,000 mercenaries as well as Russian, Syrian, Turkish, Chadian, Sudanese, and other military advisors. Russia and Turkey are also competing for bases, oil and gas facilities, as well as influence for any future national government.¹⁵

The GNA has received large amounts of aid from Qatar and Turkey as well as some from the Sudan. Turkey has provided combat ships; an airlift with at least 145 flights in 2020; armed drones; armored troop carriers; surface-to-air missiles and anti-aircraft guns; some helicopter support; and extensive electronic and electronic warfare equipment, including jammers and air combat aids – as well as help in improving airbases.

Peace negotiations continue, as do efforts to create lasting ceasefires. The patterns of violence now seem so engrained, however, that it is unclear that a peace can be stable enough to avoid creating new forms of violence that make “peace” an extension of war by other means. So do the almost universal factionalism and corruption of the different factional and local security forces and the failed levels of governance reflected in **Figure Six** and **Figure Seven**.¹⁶

The impact of this fighting has not halted economic activity, but its impacts on the economy and civil stability have been so serious that they are difficult to calculate. The World Bank summarized them as follows in October 2020,¹⁷

The attack on Tripoli in early 2019 and the blockade of Libya’s major oil ports and terminals in January 2020 have together caused the most serious political, economic, and humanitarian crises Libya has faced since 2011. Libya’s economy was already slowing in 2019 with real GDP growth falling sharply to 2.5% from what seemed a promisingly steady recovery with record growth of 20.8% (on average) in 2017–2018. But,

as military confrontation escalated in 2019/2020, oil production decreased—from 1.2 million bpd in December 2019 to 0.1 million bpd in April 2020—choking the country's economic lifeline.

The Libyan economy has now been hit by four, overlapping shocks: an intensifying conflict, which suffocates economic activity; the closure of oil fields, which puts its major income-generating activity largely on hold; decreasing oil prices, which reduce income from surviving oil fields; and the COVID-19 pandemic, which further threatens the economy, with almost 3,500 cases and 75 deaths confirmed by August 2020...the dramatic drop seen since 2014 in foreign direct investments to Libya had also contributed to pressure on foreign reserves. Libya needs political resolution before economic reforms can be implemented to initiate private sector-driven growth and the generation of new jobs—the country's only path toward sustainable, shared prosperity.

...Prompted by weak macroeconomic fundamentals, the lack of oil exports and decline of global oil prices, and restrictions on the sale of foreign currency imposed by the CBL, the Libyan dinar lost 54% of its value on the parallel market in the first half of 2020, reaching LYD/ US\$6.17 in September 2020.

...The 2020 budget shows a huge deficit, due to high, rigid expenditure in a context of domestic and global health and economic crises, resulting in shocks to oil supply and demand. On March 20, the GNA adopted a budget for 2020 with an underlying deficit of LYD 29.2 billion (19.3 billion for Tripoli and 9.9 billion for Beyda), representing 90.6% of GDP, the country's highest deficit ever. The budget estimated LYD 19.2 billion in total revenue for 2020 (59.5% of GDP), almost a third of last year's share. Only LYD 6 billion is expected to come from the proceeds of oil, less than fifth of what they were in 2019. Projections for non-oil revenue (LYD 3.2 billion) seem overly optimistic given the dire political, social, and economic context and weak administration of customs and tax revenues. Public finances are expected to improve slightly but the inflexibility of current expenditure and volatility of oil revenue place the country's overall fiscal stance under severe stress.

Internal security is repressive and driven by Libya's factions and civil war. The U.S. *Country Report on Human Rights* for Libya summarized the situation in Libya as follows:¹⁸

Libya's Government of National Accord (GNA) is a transitional government, created by the 2015 Libyan Political Agreement. The 2011 Constitutional Declaration envisions a parliamentary democracy that allows for the exercise of political, civil, and judicial rights. Citizens elected an interim legislature, the Libyan House of Representatives (HoR), in free and fair elections in 2014. The country is in a state of civil conflict. The GNA, headed by Libyan prime minister Fayez al-Sarraj, governed only a limited portion of the country. Parallel, unrecognized institutions in eastern Libya, especially those aligned with the self-styled "Libyan National Army" (LNA) led by General Khalifa Haftar, continued to challenge the authority of the GNA.

During the year the GNA had limited effective control over security forces, and these forces consisted of a mix of semi-regular units, tribal nonstate armed groups, and civilian volunteers. The national police force, which reports to the Ministry of Interior, has official responsibility for internal security. The armed forces under the Ministry of Defense have the primary mission for external defense, but they also supported Ministry of Interior forces on internal security matters. Civilian authorities had only nominal control of police and the security apparatus, and security-related police work generally fell to disparate informal armed groups, which received salaries from the government and exercised law enforcement functions without formal training or supervision and with varying degrees of accountability.

Conflict heightened during the year among GNA-aligned armed nonstate armed groups and other nonstate actors. The LNA exercised varying levels of control over the majority of Libyan territory at various points during the year. Informal nonstate armed groups filled security vacuums across the country, although several in the west aligned with the GNA as a means of accessing state resources. ISIS-Libya attempted to maintain a presence, although limited, primarily in the southwestern desert region. The UN and international partners were leading efforts to broker a cessation of hostilities in Tripoli and urged stakeholders to return to a UN-mediated political process.

Significant human rights issues included arbitrary and unlawful killings, including of politicians and members of civil society, by armed groups including some aligned with the GNA and the LNA, criminal gangs, and ISIS-Libya; forced disappearances; torture perpetrated by armed groups on all sides; arbitrary

arrest and detention; harsh and life-threatening conditions in prison and detention facilities, some of which were outside government control; political prisoners held by nonstate actors; unlawful interference with privacy, often by nonstate actors; undue restrictions on free expression and the press, including violence against journalists and criminalization of political expression; widespread corruption; trafficking in persons; threats of violence against ethnic minorities and foreigners; criminalization of same-sex sexual orientation; and use of forced labor.

Impunity from prosecution was a severe and pervasive problem. Divisions between political and security apparatuses in the west and east, a security vacuum in the south, and the presence of terrorist groups in some areas of the country severely inhibited the government's ability to investigate or prosecute abuses. The government took limited steps to investigate abuses; however, constraints on the government's reach and resources, as well as political considerations, reduced its ability or willingness to prosecute and punish those who committed such abuses. Although bodies such as the Ministry of Justice and the Office of the Attorney General issued arrest warrants and opened prosecutions of abuses, limited policing capacity and fears of retribution prevented orders from being carried out.

Peace negotiations do seem to offer some hope for some form of "peace of exhaustion" where the major factions will agree to some compromise. As is the case in far too many MENA states, however, the legacy of deep internal political divisions, failed governance and development, and the impact of civil conflict may make any peace settlement little more than a pause in Libya's military development. Every increase in military and internal security forces has the net impact of making things worse, and far too many outside powers now add to Libya's problems by pursuing their own interests.

Figure Two: The North African Military Balance - I

Category	Morocco	Algeria	Libya**	Tunisia
Actual Military Expenditures (\$US billions)	-	-		
IISS	6.0	9.9	nk	1.1
SIPRI	3.721	10.3	nk	1.0
As % of GDP				
IISS	5.31	6.73	nk	3.02
SIPRI	3.10	6.00	nk	2.60
Active Military Personnel	195,800	130,000	**	35,800
Reserve Military Personnel	150,000	150,000		0
Land Forces				
Active Personnel	175,000	110,000	**	27,000
Guard/National Guard	1,500	1,200		12,000
Reserve Personnel	150,000	150,000		0
Armor				
Main Battle Tanks	656	1,495		84
Other Armored Fighting Vehicles (AFVs)	718	1,142		108
Armored Personnel Carriers	1,225	1,107+		425+
Total Artillery (Including mortars)	2,319	1,127		276
Towed	118	393		115
Self-Propelled	357	224		0
MRLs	47	180		0
Naval Forces				
Active Personnel	7,800	6,000?	**	4,800
Coast Guard Forces	-	500?		?
Tactical Conventional Submarines	0	6		0
Submersibles	0	?		0
Principal Surface Combatants				
Missile	6	5		0
Other	1	3		0
Patrol and Coastal Combatants				
Missile	0	16		0
Other	22	29		16
Coastal/Small	27	62		30
Mine Warfare	0	1		0
Amphibious Ships	3	4		0
Landing Craft	2	3		0
Maritime Patrol/ASW Aircraft	0	6-9		0
ASW Helicopters	3	0		0
MCM Helicopters	0	0		0
Marine Active Personnel	1,500	0		0

Figure Two: The North African Military Balance - II

Category	Morocco	Algeria	Libya**	Tunisia
Air Force/Air Defense Forces				
Active Personnel	13,000	14,000	**	4,000
Guard Forces	-	-		-
Combat Capable Aircraft	90	133		23
Fighter Ground Attack (FGA)	49	43		0
Fighter	22	34		11
Attack	0	33		3
Combat capable trainers	19	16		9
EW, IS&R, ELINT, SIGINT	1	7		12
AE&W	0	0		0
Tanker	2	6		0
Transport/Airlift	47	65		18
Combat/Attack helicopters*	7-19	44		0
Other helicopters*	98	180		92
Surface-to-Air Missile Launch Units *****				
Major	18	SA300		0
0				
Short Range	12	SA-3/SA-6		0
Surface-to-Surface Missile Launch units				
MRBM/IRBM	0	0		0
SRBM	0	12		0
GLCM CSIR	0	?		0
GLCM ISR	?	?		0
Paramilitary Personnel				
Gendarmerie	20,000	20,000	-	12,000***
Force Auxillaire	30,000	-		-
Customs/Coast Guard	-	-		-
National Security	-	16,000		-
Legitimate Defense Groups reserve	-	150,000		-

*Includes holdings of land, naval, air and other forces.

** Only rough estimates of personnel and equipment types for each major side are available, with no meaningful estimates of equipment numbers.

*** Manning and equipment included in totals for military services.

Source: Adapted from Relevant country sections of the IISS, *Military Balance*, 2021.

The Greater Levant Subregion

The U.S. security partners in the greater Levant subregion include Egypt, Israel, and Jordan, each of which is highly independent and purses its own security interests. Israel is a close U.S. security partner and has the most advanced military forces in the MENA region, but it is heavily dependent on U.S. security assistance.

Israel

Israel is a strong, modern military power and has one of the few developed economies in the region. It relies heavily on mobilization, has cut its force size over time to enhance force quality, and its military forces are some of the most modern and effective in the world. It is the only nuclear power in the Middle East, and one of the few capable of deploying advanced chemical and biological weapons, although its actual holdings are unclear.

Figure Three can only show limited aspects of Israel's real-world military strengths. Israel has a "qualitative edge" over the other powers in the MENA region, and it emphasizes force quality over force quantity. It is deploying advanced, layered anti-missile and anti-rocket defenses, is in possession of the F-35 stealth fighter, and is the only MENA power currently capable of developing its own advanced approach to joint all-domain warfare – although Egypt, Iran, Saudi Arabia, and the UAE are seeking to acquire such capabilities. Its Gideon Plan in 2015 and a new multi-year Tnuva Plan outline continued advances in these areas.

Israel is the only MENA country with a high technology base and with a seriously competitive military-industrial base in global terms – although Egypt, Iran, Saudi Arabia, the UAE and several other MENA states are all developing military industries. Israel has developed its own nuclear weapons, long-range ballistic missiles, anti-ballistic missile and rocket defense systems, as well as a wide range of advanced conventional weapons – including aircraft and armored weapons. It has major military industries, and it can draw on the most advanced U.S. technology and arms, plus significant U.S. military aid that it can allocate relatively freely.

At the same time, the cost of these developments does put a major burden on the Israeli economy, and U.S. aid plays a critical role in its military efforts. A November 2020 report by the Congressional Research Service notes that,¹⁹

Israel is the largest cumulative recipient of U.S. foreign assistance since World War II. Successive Administrations, working with Congress, have provided Israel with significant assistance in light of robust domestic U.S. support for Israel and its security; shared strategic goals in the Middle East; a mutual commitment to democratic values; and historical ties dating from U.S. support for the creation of Israel in 1948. To date, the United States has provided Israel \$146 billion (current, or noninflation-adjusted, dollars) in bilateral assistance and missile defense funding. At present, almost all U.S. bilateral aid to Israel is in the form of military assistance, although from 1971 to 2007, Israel also received significant economic assistance.

In 2016, the U.S. and Israeli governments signed their third 10-year Memorandum of Understanding (MOU) on military aid, covering FY2019 to FY2028. Under the terms of the MOU, the United States pledged to provide—subject to congressional appropriation—\$38 billion in military aid (\$33 billion in Foreign Military Financing grants plus \$5 billion in missile defense appropriations) to Israel. This MOU followed a previous \$30 billion 10-year agreement, which ran through FY2018.

Israel is the first international operator of the F-35 Joint Strike Fighter, the Department of Defense's fifth-generation stealth aircraft, considered to be the most technologically advanced fighter jet ever made. To date, Israel has purchased 50 F-35s in three separate contracts, funded with U.S. assistance.

For FY2021, the Trump Administration requested \$3.3 billion in FMF for Israel and \$500 million in missile defense aid to mark the second year of the MOU. The Administration also requested \$5 million in Migration and Refugee Assistance humanitarian funding for migrants to Israel.

- H.R. 7608—State, Foreign Operations, Agriculture, Rural Development, Interior, Environment, Military Construction, and Veterans Affairs Appropriations Act, 2021 (which passed the House in July 2020) would, among other things, provide \$3.3 billion in Foreign Military Financing (FMF) for Israel.
- H.R. 7617—The Defense, Commerce, Justice, Science, Energy and Water Development, Financial Services and General Government, Labor, Health and Human Services, Education, Transportation, Housing, and Urban Development Appropriations Act, 2021 (which passed the House in July 2020) would provide \$500 million in joint U.S.-Israeli missile defense cooperation (of which \$73 million for Iron Dome, \$177 million for David's Sling, \$77 million for Arrow III, and \$173 million for Arrow II).

Israel also faces growing military uncertainties because of changes in Turkey's alignments; the growing Russian role in Syria; instability in Lebanon; and the increasing links between the Hezbollah, Syria, and Iran – as well as from the deployment of precision-guided conventionally armed missiles and drones alongside Iran's potential acquisition of nuclear weapons. Israel, Syria, and Egypt may have inventories of chemical weapons. Their development of, and holdings of, biological weapons are unclear.

Figure Six and **Figure Seven** reflect Israel's recent political instability – and its growing predilection for annual elections – but they still show a high level of government effectiveness and limited levels of corruption. Israel is also the only MENA state with a relatively advanced economy that is not dependent on petroleum product exports.

Israel has improved relations with its Arab neighbors in the Gulf – and was openly recognized by Bahrain, the UAE, Sudan, and Morocco in 2020. However, Israel is deeply divided politically, and there no longer is any clear path towards a full peace with the Palestinians. The Palestinian movement seems hopelessly divided. The U.S. has moved its Embassy to Jerusalem, the support for a “two state” solution is unclear, and Israel's future policies towards annexing more of the West Bank remain unclear.

Israel's internal security operations generally follow the rule of law, but they can be repressive. The U.S. State Department *Country Report on Human Rights* notes problems on both the part of the government and the Palestinians. The report summarizes Israel's internal security situation as follows,²⁰

Under the authority of the prime minister, the Israeli Security Agency (ISA) combats terrorism and espionage in Israel, the West Bank, and Gaza. The national police, including the border police and the immigration police, are under the authority of the Ministry of Public Security. The Israeli Defense Forces (IDF) is responsible for external security but also has some domestic security responsibilities and reports to the Ministry of Defense. ISA forces operating in the West Bank and East Jerusalem fall under the IDF for operations and operational debriefing. Civilian authorities maintained effective control over the security services.

Significant human rights issues included: reports of unlawful or arbitrary killings, including targeted killings of Israeli civilians and soldiers; arbitrary detention; restrictions on non-Israelis residing in Jerusalem including arbitrary or unlawful interference with privacy, family, and home; and significant restrictions on freedom of movement.

The government took steps to prosecute and punish officials who committed abuses within Israel regardless of rank or seniority.

The report provides a long list of Israeli actions that it describes as violent repression and sometimes killings of Palestinians. It also notes, however, that,

... this report contains data drawn from foreign government officials; victims of alleged human rights violations and abuses; academic and congressional studies; and reports from the press, international organizations, and nongovernmental organizations (NGOs) concerned with human rights. In the context of the Israeli-Palestinian conflict, some of those sources have been accused of harboring political motivations. The Department of State assesses external reporting carefully but does not conduct independent investigations in all cases. We have sought and received input from the government of Israel and we have noted responses where applicable.

Israel also faces internal threats from a deeply divided Palestinian movement split between a weak and corrupt Palestinian Authority in the West Bank and Hamas in Gaza. It does not face a serious internal challenge today from the Palestinian Authority, but it does face challenges from rocket, artillery, and potential infiltration from the Gaza.

The 2021 edition of the IISS *Military Balance* notes that,²¹

Each organization controls its own security forces, principally the National Security Forces (NSF) in the West Bank and the Izz al-Din al-Qassam Brigades in Gaza. Both have generally proved effective at maintaining internal security in their respective territories. The Palestinian Authority has received support from the EU, Jordan and the US. NSF battalions, as well as the Presidential Guard and Civil Police, conduct US-funded internal-security training at the Jordanian International Police Training Center.

A small number of Izz al-Din al-Qassam Brigades personnel are claimed by Israel to have received military training in Iran and Syria. None of the Palestinian security organizations conduct external military deployments, and they lack a formal military-logistics structure. Both Hamas and the Palestinian Authority lack heavy military equipment, although the former has retained a substantial arsenal of improvised rocket and mortar capabilities, as well as some portable guided weapons. No formal defense industry exists, although Hamas is able to acquire light or improvised weapons, either smuggled into Gaza or of local construction.

The Palestinian Authority has scheduled elections for May 2021 which could give the Palestinian movement more unity and more effectiveness, but any such prospect remains uncertain. The divisions between the Palestinian Authority in the West Bank and Hamas and other hardline Islamist movements in Gaza have now lasted since 2007. The quality of Palestinian Authority leadership and governance has slowly deteriorated over time, and Hamas has focused on confronting Israel and has never developed effective patterns of civil development and governance.

The U.S. State Department *Country Report on Human Rights* notes that,

The Palestinian Authority (PA) basic law provides for an elected president and legislative council. There have been no national elections in the West Bank and Gaza since 2006. President Mahmoud Abbas has remained in office despite the expiration of his four-year term in 2009. The Palestinian Legislative Council (PLC) has not functioned since 2007, and the PA Constitutional Court dissolved it in 2018. President Abbas called in September for the PA to organize PLC elections within six months, but elections did not take place by year's end. The PA head of government is Prime Minister Mohammad Shtayyeh. President Abbas is also chairman of the Palestine Liberation Organization and general commander of the Fatah movement.

Six PA security forces (PASF) agencies operate in the West Bank, and the PA maintained effective civilian control. Several are under PA Ministry of Interior operational control and follow the prime minister's guidance. The Palestinian Civil Police have primary responsibility for civil and community policing. The National Security Force conducts gendarmerie-style security operations in circumstances that exceed the capabilities of the civil police. The Military Intelligence Agency handles intelligence and criminal matters involving PASF personnel, including accusations of abuse and corruption. The General Intelligence Service

is responsible for external intelligence gathering and operations. The Preventive Security Organization (PSO) is responsible for internal intelligence gathering and investigations related to internal security cases, including political dissent. The Presidential Guard protects facilities and provides dignitary protection.

In Gaza the terrorist organization Hamas exercised de facto authority. The security apparatus of the Hamas de facto government in Gaza largely mirrored the West Bank. Internal security included civil police, guards and protection security, an internal intelligence-gathering and investigative entity (similar to the PSO in the West Bank), and civil defense. National security included the national security forces, military justice, military police, medical services, and the prison authority. The “Islamic Resistance Movement”—a group with some affiliation to the Hamas political movement—maintained a large military wing in Gaza, named the Izz ad-din al-Qassam Brigades. In some instances the Hamas de facto “civilian” authorities utilized the Hamas movement’s military wing to crack down on internal dissent.

The government of Israel maintained a West Bank security presence through the Israeli Defense Force (IDF), the Israeli Security Agency, the Israeli National Police, and the Border Guard. Israel maintained effective civilian control of its security forces throughout the West Bank and Gaza.

West Bank Palestinian population centers mostly fall into Area A, as defined by the Oslo-era agreements. The PA has formal responsibility for security in Area A, but Israeli security forces (ISF) regularly conducted security operations there, at times without coordinating with the PASF. The PA and Israel maintain joint security control of Area B in the West Bank. Israel retains full security control of Area C and has designated the majority of Area C land as either closed military zones or settlement zoning areas.

Significant human rights issues included:

With respect to the PA: reports of unlawful or arbitrary killings, torture, and arbitrary detention by authorities; holding political prisoners and detainees, including as reprisal for participation in foreign investment conferences; significant problems with the independence of the judiciary; arbitrary or unlawful interference with privacy; restrictions on free expression, the press, and the internet, including violence, threats of violence, unjustified arrests and prosecutions against journalists, censorship, and site blocking; substantial interference with the rights of peaceful assembly and freedom of association, including harassment of nongovernmental organizations (NGOs); restrictions on political participation, as the PA has not held a national election since 2006; acts of corruption; violence and threats of violence motivated by anti-Semitism; violence and threats of violence targeting lesbian, gay, bisexual, transgender, and intersex (LGBTI) persons; and reports of forced child labor.

With respect to Israeli authorities: reports of unlawful or arbitrary killings, including allegations that deaths of Palestinians in the course of Israeli military operations were due to unnecessary or disproportionate use of force; reports of torture; reports of arbitrary detention; arbitrary or unlawful interference with privacy; restrictions on free expression, the press, and the internet, including violence, threats of violence, unjustified arrests and prosecutions against journalists, censorship, and site blocking; substantial interference with the rights of peaceful assembly and freedom of association, including harassment of NGOs; and significant restrictions on freedom of movement, including the requirement of exit permits.

With respect to Hamas: reports of unlawful or arbitrary killings, systematic torture, and arbitrary detention by Hamas officials; political prisoners; arbitrary or unlawful interference with privacy; restrictions on free expression, the press, and the internet, including violence, threats of violence, unjustified arrests and prosecutions against journalists, censorship, site blocking, and the existence of criminal libel laws; substantial interference with the rights of peaceful assembly and freedom of association; restrictions on political participation, as there has been no national election since 2006; acts of corruption; violence and threats of violence motivated by anti-Semitism; unlawful recruitment and use of child soldiers; violence and threats of violence targeting LGBTI persons; the criminalization of consensual same-sex sexual conduct between adults; and forced or compulsory child labor.

With respect to Palestinian civilians: five reports of unlawful or arbitrary killings, and violence and threats of violence motivated by anti-Semitism.

With respect to Israeli civilians: two reports of unlawful or arbitrary killing of Palestinian residents of the West Bank.

The PA took some steps to address impunity or reduce abuses, but there were criticisms that senior officials made comments glorifying violence in some cases and inappropriately influenced investigations and disciplinary actions related to abuses. Israeli authorities operating in the West Bank took steps to address impunity or reduce abuses, but there were criticisms they did not adequately pursue investigations and disciplinary actions related to abuses. There were no legal or independent institutions capable of holding the Hamas de facto authority in Gaza accountable.

While these comments seem valid, it should be noted that Israel has steadily moved away from a “two state” solution that would give the Palestinians a full government, and it has created more settlements and facts on the ground. The challenge both sides face is the equivalent of low-level gray area warfare.

Egypt

Like Algeria, Egypt is another MENA nation where the “army has a country,” rather than the “country has an army.” **Figure Three** shows that it has a vast force structure for a country that no longer faces a major threat from Israel or other regional powers. While such numbers are always nominal and uncertain, the IISS estimates that it has 438,500 active military personnel; 479,000 reserves; and 479,000 paramilitary forces. Egypt clearly has not cut back its force structure to take a full dividend from its peace with Israel or to reflect current threats, and these numbers may reflect more of an effort to use such assignments to indoctrinate and control its civil population than meet real-world military needs.

These force numbers also disguise large elements of military, internal security, and paramilitary forces which can really only be justified as elements of state control by the armed forces. They may provide jobs of a kind, and an uncertain basis for developing the loyalty of those involved, but they are too badly trained and equipped to have more than marginal value.

Much of the older equipment shown in **Figure Three** is probably in storage or only marginally operational and could not be sustained in effective maneuver or power projection warfare, although Egypt has many highly effective combat units as well.

As for its status as a security partner, Egypt occupies a critical geographic position in the MENA region, controls the Suez Canal, is both a Mediterranean and Red Sea Power, and is critical to maintaining an Arab-Israeli peace. It has been a critical staging point for U.S. power projection in the past, and the transit through the Suez Canal is a critical chokepoint in limit naval power projection.

For all its limits, it is the one Arab state that can project large amounts of military power, and it plays a role in many regional Arab alliances, but most such alliances are more facades that, at most, deploy token forces than real combinations of effective power projection capability. Egypt does remain a major U.S. partner, but it has shown that it can turn to France and Russia when the U.S. attempts to put pressure on Egypt for political reform by limiting arms transfers and aid. This experience illustrates the limits to U.S. leverage in pushing any MENA regime towards reform and change.

The Camp David Peace Accords, Egypt’s status in the Arab world, and U.S. power projection needs all make Egypt a critical U.S. strategic partner. The resulting levels of U.S. aid have played a major role in enabling Egypt to maintain such large forces. As **Figure Eight** and **Figure Ten** show, Egypt continued to make massive arms buys up to at least the beginning of the Covid-19 crisis.

It is unclear how many of these purchases are reflected in Egypt's official statistics on military spending, which seem to sharply understate actual Egypt spending and the burden on the GDP while ignoring the impact of U.S. aid – possibly to limit public concern over Egyptian military versus civil spending. The 1.20% to 1.49% figures for military spending as a percent of GDP shown in **Figure Three** seems far too low unless they do not include U.S. aid, some aspects of foreign arms buys, some paramilitary and internal security costs, and some costs for its military industries.²²

Egypt does now get less real value from U.S. aid, since it has not increased with inflation. However, the amounts are still massive. A Congressional Research Service (CRS) report notes that,²³

Since 1946, the United States has provided Egypt with over \$84 billion in bilateral foreign aid (calculated in historical dollars—not adjusted for inflation), with military and economic assistance increasing significantly after 1979. Annual appropriations legislation includes several conditions governing the release of these 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.

Egypt received over \$1.4 billion in security aid from FY2016 to FY2020 – of which \$1.3 annually was allocated to procurement

For FY2021, the President is requesting a total of \$1.4 billion in bilateral assistance for Egypt. Nearly all of the U.S. funds for Egypt come from the Foreign Military Financing (FMF) account and provide grant aid with which Egypt purchases and maintains U.S.-origin military equipment.

The CRS report also notes, however, that, Russia, France, and other states have come to dominate Egyptian arms buys since 2015, and that arms buys from the U.S. have been relatively limited in 2017. The problem with such data is that they seem to be a misinterpretation of the SIPRI data, which confuses SIPRI estimates of the value of weapons transfers in constant prices with estimates of actual arms sales in real dollars.²⁴

As the Coronavirus Disease 2019 (COVID-19) pandemic continues to spread throughout Egypt, the economy is facing a downturn due to the loss of tourism, private sector investment, foreign remittances, and Suez Canal revenue. To date, Egypt's economic downturn has not outwardly affected the stability of the Egyptian government, led by Egyptian President Abdel Fattah al Sisi. To minimize economic damage from COVID-19 countermeasures, the Egyptian government has enacted stimulus packages and borrowed \$2.7 billion from the International Monetary Fund. President Sisi has maintained stability during the pandemic by continuing to use emergency powers and broad legal authority granted to the executive by parliament to suppress opposition.

Beyond the United States, President Sisi has broadened Egypt's international base of support to include several key partners, including the Arab Gulf states, Israel, Russia, China, France, and Italy.

In April 2019, Egyptian voters approved constitutional amendments that extend Sisi's current term until 2024 and permit him to run for a third term, potentially keeping him in office until 2030.

This lack of credible spending data on Egypt's military and internal security spending, its burden on Egypt's GDP, and the real-world value of arms sales all have serious implications for Egypt's future stability and civil development. As recent World Bank reporting notes, Egypt faces massive problems in economic development and in financing its civil stability.²⁵

The disruptions caused by the COVID-19 pandemic started in Egypt in March 2020, and has since interrupted a period of macroeconomic stability, characterized by relatively high growth, improved fiscal accounts, and a comfortable level of foreign reserves. The pandemic hit as longstanding challenges continued to persist, notably the government's elevated debt-to-GDP ratio (despite its significant reduction in recent years), sluggish revenue-mobilization, and a budget structure unfavorable to the nature of the crisis, with limited allocation scheduled for key sectors such as health and education, limited job-creation in the formal sector, and the below-potential performance of non-oil merchandise exports and non-oil FDI.

Economic activity slowed with social distancing measures and the temporary suspension of air traffic. The Purchasing Managers' Index (PMI) declined to 38.3 during the period April to June 2020, its lowest level on record, indicating a large contraction in non-oil private sector activity. The number of employed individuals declined by 2.7 million during the same period, pushing unemployment to 9.6% from 7.7% the previous quarter, with job losses, especially among informal workers, reported mainly in retail and wholesale trade, manufacturing, tourism, transport and construction.

The government allocated an emergency response package worth LE100 billion (1.7% of GDP) to augment health expenditure, scale-up social protection, and provide financial relief for individuals and businesses. Key measures included a one-off monetary grant to irregular workers and the expansion of existing cash transfer programs. Forbearance measures were introduced in the form of delayed tax filing and loan repayments, in addition to subsidized credit for targeted sectors. The Central Bank of Egypt slashed policy rates by a cumulative 350 basis-points since March 2020 to ease liquidity.

...Foreign reserves dropped sharply due to large-scale capital outflows at the outset of the COVID-19 crisis, in addition to the drop in tourism, Suez Canal revenues, and merchandise exports. Egypt has mobilized external financing, including a US\$2.8 billion stopgap loan, issued under the IMF's Rapid Financing Instrument; a US\$5.2 billion Stand-by Arrangement (of which the first US\$2 billion tranche was disbursed); and a US\$5 billion sovereign Eurobond, a US\$0.75 billion sovereign Green-bond, and US\$2 billion loan from a UAE-led commercial bank consortium.

...Growth, expected to have remained positive, declined from 5.6% in fiscal year 2019 to 3.5% in fiscal year 2020. Under a scenario that the pandemic will persist through early-2021, growth is projected to decline further to 2.3% in fiscal year 2021 before rebounding in fiscal year 2022. Private consumption in the near-term is expected to remain constrained; household incomes are affected by a combination of the economic downturn, increased joblessness, and salary cuts. Subsequently, poverty is forecast to increase, particularly in urban areas. And, since high-skilled, formal sector jobs were relatively shielded (whereas informal ones were adversely impacted by the crisis), inequality is also expected to rise.

While remittances may initially react countercyclically (as expats increase one-off transfers), they are expected to eventually decline, notably with the economic downturn in Gulf countries.

...The recent trend in fiscal consolidation is also expected to be temporarily disrupted. The budget deficit is estimated to have widened to LE476.8 billion, equivalent to 8.2% of the projected GDP in fiscal year 2020, up from 8.1% of GDP in fiscal year 2019. This was mainly driven by the decline in the tax-to-GDP ratio and exacerbated by economic contraction and postponed tax payments. Subsequently, government debt is projected to increase (from the already elevated 90.2% of GDP at end-fiscal year 2019), before starting to moderate once again as fiscal consolidation is resumed by fiscal year 2022. The multi-dimensional health and economic crisis caused by the pandemic underscores the importance of advancing both the human capital agenda and the country's crucial need to strengthen social protection. A second wave of pending reforms, designed to unleash private sector activity and address Egypt's long-standing structural challenges, is crucial to create better employment opportunities and improve livelihoods

The governance and corruption rankings in **Figure Five** and **Figure Six** indicate that Egypt's government is relatively ineffective and corrupt. Some other reports are more positive and indicate that the government has made real efforts to serve its people's economic interests.

Egypt's popular uprisings in 2011 have failed to bring lasting new elements of democracy and civil rights. Its authoritarian military government is now led by Abdel Fattah el-Sisi. Egypt faces

security challenges from the fighting in Libya and extremist elements in the Sinai, and some aspects of its internal security efforts are almost certainly counterproductive and do more to encourage future upheavals, terrorism, and extremism than it attempts to fight.

The U.S. State Department *Country Report on Human Rights* notes that,²⁶

According to its constitution, Egypt is a republic governed by an elected president and unicameral legislature. Presidential elections were held in March 2018. Challengers to the incumbent President Abdel Fattah al-Sisi pulled out ahead of the election, citing personal decisions, political pressure, legal troubles, and unfair competition; in some cases they were arrested for alleged violations of candidacy rules. Domestic and international organizations expressed concern that government limitations on association, assembly, and expression severely constrained broad participation in the political process. Domestic and international observers concluded that government authorities professionally administered parliamentary elections in 2015 in accordance with the country's laws, while also expressing concern about restrictions on freedom of peaceful assembly, association, and expression and their negative effect on the political climate surrounding the elections.

The Interior Ministry supervises law enforcement and internal security, including the Public Police, the Central Security Force (CSF), the National Security Sector (NSS), and Customs and Immigration. The Public Police are responsible for law enforcement nationwide. The CSF protects infrastructure and is responsible for crowd control. The NSS is responsible for internal security threats and counterterrorism along with other Egyptian security services. The armed forces report to the minister of defense and are responsible for external defense, but they also have a mandate to "assist" police in protecting vital infrastructure during a state of emergency. Military personnel were granted full arrest authority in 2011 but normally only use this authority during states of emergency and "periods of significant turmoil." Defense forces operate in the Sinai as part of a broader national counterterrorism operation with general detention authority. The Border Guard Forces, under the Ministry of Defense, are responsible for border control. Civilian authorities maintained effective control over the security forces.

In April the country held a national referendum that approved new constitutional amendments, which among other outcomes extended President Sisi's current term from four years to six years and allowed the president to run for a third six-year term in 2024. Domestic and international press reported multiple violations of the elections law by the government in the referendum process, including arrests of opponents. The State Council blocked all legal challenges to the referendum and amendments.

President Sisi requested that parliament approve a nationwide state of emergency (SOE) after the 2017 terrorist attack on Coptic churches. Since then, the government has requested, and parliament has renewed, SOEs with one- or two-day gaps between every two SOE periods to meet the legal requirement that SOEs may only be renewed once. In North Sinai, a partial SOE has been in effect since 2014. The government regularly renews that SOE every three months and has imposed partial curfews on parts of North Sinai.

Significant human rights issues included: unlawful or arbitrary killings, including extrajudicial killings by the government or its agents and terrorist groups; forced disappearance; torture; arbitrary detention; harsh and life-threatening prison conditions; political prisoners; arbitrary or unlawful interference with privacy; the worst forms of restrictions on free expression, the press, and the internet, including arrests or prosecutions against journalists, censorship, site blocking, and the existence of unenforced criminal libel; substantial interference with the rights of peaceful assembly and freedom of association, such as overly restrictive laws governing civil society organizations; restrictions on political participation; violence involving religious minorities; violence targeting lesbian, gay, bisexual, transgender, and intersex (LGBTI) persons; use of the law to arbitrarily arrest and prosecute LGBTI persons; and forced or compulsory child labor.

The government inconsistently punished or prosecuted officials who committed abuses, whether in the security services or elsewhere in government. In most cases the government did not comprehensively investigate allegations of human rights abuses, including most incidents of violence by security forces, contributing to an environment of impunity.

Attacks by terrorist organizations caused arbitrary and unlawful deprivation of life. Terrorist groups conducted deadly attacks on government, civilian, and security targets throughout the country, including

places of worship. Authorities investigated terrorist attacks and prosecuted alleged perpetrators. Terrorists and other armed groups abducted civilians in North Sinai, some of whom they beheaded. There were incidents of societal sectarian violence against Coptic Christian Egyptians.

Jordan

Figure Two shows that Jordan has taken advantage of the peace dividend made possible by the peace between Israel and Egypt, Syria, and Jordan. It has cut its major armored weapons and artillery, cut back on its air strength, and has sought to sell surplus and older military equipment rather than expanded its force structure. It has concentrated its force development efforts on its military strengths like Special Forces and on effective internal security forces.

Jordan also has focused more on readiness, training, and sustainability than most MENA states. It has not attempted to radically expand or modernize its holdings of major weapons, sometimes buying used weapons from other states.

Jordan has been a close strategic partner of the U.S. as well as the Arab Gulf states, and it has supported the U.S. in both attempts to support moderate rebel forces against Assad and in the fight against ISIS. **Figure Eight** and **Figure Ten** show that it has remained dependent on the United States for most arms, but that its purchases have been limited by MENA standards.

A CRS report notes that,²⁷

The United States has provided economic and military aid to Jordan since 1951 and 1957, respectively. Total bilateral U.S. aid (overseen by the Departments of State and Defense) to Jordan through FY2018 amounted to approximately \$22 billion. Jordan also has received over one billion dollars in additional military aid since FY2014 channeled through the Defense Department's various security assistance accounts. Currently, Jordan is the third-largest recipient of annual U.S. foreign aid globally, after Afghanistan and Israel.

Jordan received \$1.274 billion in U.S. economic and military aid in FY2016, \$1.319 billion in FY2017, \$1.525 billion in FY2018, \$1.525 billion in FY2019, and \$1,650 in FY2020 – and the request for FY2021 was \$1,275 billion. Unlike Israel and Egypt, only about a third of this aid was military compared to economic. It has used its recent military aid to “purchase new equipment (e.g., precision-guided munitions and night vision) or to sustain previous acquisitions (e.g., Blackhawk helicopters and AT-802 fixed-wing aircraft). FMF grants have enabled the Royal Jordanian Air Force to procure munitions for its F-16 fighter aircraft and a fleet of 28 UH-60 Blackhawk helicopters. In the last five years, excess U.S. defense articles provided to Jordan include three AH-1 Cobra Helicopters, 45 Mine-Resistant Ambush Protected vehicles (MRAPs), and M577A3 Tracked Command Post Carriers.”²⁸

The end result is an effective force structure to meet internal threats and most low to medium level outside threats. Jordan would need U.S. and Arab Gulf state aid, however, if Iran was able to become a dominant influence in Iraq, and it may face a threat from Syria if Assad can finally regain control over all of Syria.

It also faces strong civil economic pressures to limit military spending. Jordan has suffered from the impact of the Covid-19 crisis, and it is one of the poorer states in the MENA region. The World Bank reports, however, that it also has made more serious reform and adjustment efforts than most other MENA states:²⁹

Jordan has done well at minimizing the health impact of the COVID-19 crisis. Soon after the outbreak, the Government of Jordan announced a first set of measures and incentives to address immediate liquidity and cost of financing concerns for various sectors/businesses, and measures to protect vulnerable households.

Nevertheless, domestic lockdowns, the global economic slowdown, trade disruptions, and the suspension of international travel are likely to have a sizable impact on the Jordanian economy. The unprecedented economic shock of COVID-19 has exacerbated existing structural weaknesses in the economy and unresolved social challenges and put pressure on country's fragile macroeconomic stance.

Key challenges to Jordan's outlook include the prolonged decline in economic activity from domestic lockdowns, which could escalate high unemployment levels. The speed of economic recovery in the medium-term largely depends on the evolution of the pandemic and whether reforms are put into effect... These reforms are anchored in the Five-Year Reform Matrix that Jordan developed in collaboration with the World Bank and other development partners. The Matrix lays the foundations for sustainable, inclusive growth that can deliver on agendas involving jobs, youth, and gender. These medium-term reforms aim to make Jordan's economy more efficient and reorient it toward export-led growth by creating a better business and investment environment. During the pandemic, reforms to support productivity and strengthen digitalization for the economy have been particularly useful.

Jordan's economic growth slowed to 1.3% in the first quarter of 2020, reflecting only partially the impact of COVID-19 pandemic.... Meanwhile, labor market indicators for the second quarter of 2020 reflect the significant disruptions of the COVID-19 crisis. The already elevated unemployment rate has risen to 23% in Q2-2020 compared to 19.3% in Q1-2020, while the labor force participation rate dropped by 0.4% during this period.

...At the fiscal level, the pandemic is exacerbating the fiscal deficit, as revenue collection has subsided given the economic slowdown and domestic lockdown measures. Although the government has created savings—by curtailing the public sector wage bill—pandemic-related spending pressures and recurrent spending rigidities are limiting Jordan's ability to confine the deficit. As a result, the overall central government's fiscal deficit (including grants and the use of cash) widened to 4% of GDP during the first five months of 2020, almost twice as high as during the same period in 2019. The sharp deterioration in government finances, together with the slowdown in economic growth, has elevated levels of public debt in central government (including debt holdings of the Social Security Investment Fund) to 105.3% of forecasted GDP at end-May 2020. In the medium-term, the fiscal stance is expected to improve once economic activity gradually recovers.

As for the external sector, the current account deficit (including grants) narrowed by 6.3% year-on-year during Q1-2020. For Q2-2020, an initial build-up of external sector pressure was alleviated: exports and imports returned to positive growth in June following contractions in April and May 2020. Remittance inflows, on the other hand, remained negative...

Jordan has made some civil reforms and remains relatively stable. Its military and internal security forces are effective and can meet its internal security needs. It does not face major security challenges, and it could probably count on U.S. diplomatic and power projection assistance if such threats emerged.

Jordan has relatively effective internal security forces, but the U.S. State Department does report that it has sometimes taken a repressive approach to internal security. The *Country Report on Human Rights* notes that,³⁰

The Hashemite Kingdom of Jordan is a constitutional monarchy ruled by King Abdullah II bin Hussein. The constitution grants the king ultimate executive and legislative authority. The multiparty parliament consists of the 65-member Senate (Majlis al-Ayan) appointed by the king and a 130-member popularly elected House of Representatives (Majlis al-Nuwwab). Elections for the House of Representatives occur approximately every four years and last took place in 2016. International observers deemed the elections organized, inclusive, credible, and technically well run.

The Public Security Directorate (PSD) has responsibility for law enforcement and reports to the Ministry of Interior. The PSD, General Intelligence Directorate (GID), gendarmerie, and Civil Defense Directorate share responsibility for maintaining internal security. The gendarmerie and Civil Defense Directorate report to the Ministry of Interior, while the GID reports directly to the king. The armed forces report to the Ministry of

Defense and are responsible for external security, although they also have a support role for internal security. Civilian authorities maintained effective control over the security forces.

Significant human rights issues included: allegations of torture by security officials; arbitrary arrest and detention, including of activists and journalists; infringements on citizens' privacy rights; restrictions on free expression and the press, including criminalization of libel, censorship, and internet site blocking; restrictions on freedom of association and assembly; incidents of official corruption; "honor" killings of women; violence against lesbian, gay, bisexual, transgender, and intersex (LGBTI) persons; and conditions amounting to forced labor in some sectors.

Impunity remained widespread, although the government took limited, nontransparent steps to investigate, prosecute, and punish officials who committed abuses. Information on the outcomes of these actions was not publicly available for all cases.

Lebanon

The Lebanese government's military forces have improved over time and have helped to limit the threat from ISIS and extremism. They have benefited from U.S. and French assistance as well as from UN efforts, but they are relatively light mechanized forces – with minimal air and naval elements as well as aging land weapons. As the total force numbers in **Figure Three** show, Lebanon's military forces only total a nominal 60,000 military personnel; its Navy has only 1,800; and its Air Force only has 1,600. It is unclear how real the 20,000 paramilitary personnel reported by the IISS really are. The report is better suited for border security missions and for dealing with extremist elements and internal threats rather than serious combat.

These military capabilities may meet its current needs as long as it has no serious outside threats, but Lebanon faces far more serious potential threats. They include the prospect of another war between Israel and the Hezbollah, Syrian intervention in Lebanese affairs backed by Russia, and a broader war with Iran that might come to involve Lebanon.

Lebanon has one of the most divided governments in the world, and one that **Figure Six** and **Figure Seven** show are only capable of extremely poor levels of governance and that are extremely corrupt. The Lebanese government faces serious problems in dealing with Lebanon's sectarian division, the threat or reality of Syrian interference, and the fact that Iran's support of the Hezbollah has created a separate Shiite military force that is now equipped with armed drones and precision-guided ballistic missiles.

The U.S. State Department *Country Report on Terrorism* describes the threat posed by Hezbollah and other non-state actors as follows:

Terrorist groups operating in Lebanon included Hizballah, ISIS, Hamas, and the Abdullah Azzam Brigades. Of these, the Lebanon-based and Iran-backed terrorist group Hizballah remained the most capable. In August 2019, Israel publicly released information about Hizballah's efforts to produce precision-guided missiles (PGMs) within Lebanon. Hizballah announced that the group possessed enough PGMs for a confrontation with Israel but denied that it was developing PGM factories in Lebanon. Between December 2018 and January 2019, Israel uncovered and destroyed multiple tunnels dug by Hizballah under the border into Israel that could have been used for terrorist attacks.

Despite the Lebanese government's official policy of disassociation from regional conflicts, Hizballah continued its military role in Iraq, Syria, and Yemen, in collaboration with the Iranian regime. Separately, Lebanon's 12 Palestinian refugee camps remained largely outside the control of Lebanese security forces and posed a security threat because of the potential for militant recruitment and terrorist infiltration. In addition, several individuals on the FBI's most wanted list or listed by the State or Treasury Departments as Specially Designated Global Terrorists reportedly remained in Lebanon.

...The LAF, ISF, the Directorate of General Security (DGS), and the General Directorate of State Security were the primary government agencies responsible for counterterrorism. Although cooperation among the services was inconsistent, they took steps to improve information sharing and were receptive to additional capacity building and reforms. Structural limitations in the justice system remained a barrier for conducting trials for terrorism cases in a timely manner.

The LAF held primary responsibility for securing Lebanon's land and maritime borders, while DGS and Customs were responsible for official points of entry. The LAF improved its ability to control Lebanon's land border with Syria through the Land Border Security Project funded by the United States, the UK, and Canada. This project resulted in greater control of the border and the arrest of ISIS members entering Lebanon from Syria. In February, the LAF arrested a Palestinian affiliated with the al-Nusrah Front for his role in fighting taking place inside the Ein el-Hilweh Refugee Camp.

...The presence of Hizballah in the Lebanese government was an impediment to effective host government action against terrorist incidents. For instance, the government took no action to hold Hizballah accountable for its rocket attack on Israel in September or the cross-border tunnels, and prevented the UN Interim Force in Lebanon from fully investigating these incidents by failing to provide access to the areas where these incidents occurred. In international fora, Lebanon argued that acts taken against what it characterized as "foreign occupation" are not terrorism, in an attempt to justify Hizballah's violence against Israel.

As for internal security, Lebanon is somewhat unique in the fact that its problems are not government repression but government incompetence. The State Department *Country Report on Human Rights* notes that,³¹

The Internal Security Forces (ISF), under the Ministry of Interior, are responsible for law enforcement, while the Directorate of General Security (DGS), also under the Ministry of Interior, is responsible for border control but also exercises some domestic security responsibilities. The Lebanese Armed Forces (LAF), under the Ministry of Defense, are responsible for external security but authorized to arrest and detain suspects on national security grounds; they also arrested alleged drug traffickers, managed protests, enforced building codes related to refugee shelters, and intervened to prevent violence between rival political factions. The General Directorate of State Security (GDSS), reporting to the prime minister through the Higher Defense Council, is responsible for investigating espionage and other national security issues. Civilian authorities maintained control over the government's armed forces and other security forces, although Palestinian security and militia forces, the designated foreign terrorist organization (FTO) Hizballah, and other extremist elements operated outside the direction or control of government officials.

The Syrian conflict affected the country economically and socially. Over the past several years, the Syrian conflict has generated an influx of more than one million refugees and strained the country's already weak infrastructure and ability to deliver social services.

Significant human rights issues included: arbitrary or unlawful killings by nonstate actors; allegations of torture by security forces; excessive periods of pretrial detention by security forces; undue and increasing restrictions on freedoms of speech and press, including laws criminalizing libel and a number of forms of expression; high-level and widespread official corruption; criminalization of lesbian, gay, bisexual, transgender, and intersex (LGBTI) status or conduct; and forced or compulsory child labor.

Although the legal structure provides for prosecution and punishment of officials who committed human rights abuses, enforcement remained a problem, and government officials enjoyed a measure of impunity for human rights abuses, including evading or influencing judicial processes.

More broadly, the political structure, government, and economy of Lebanon have virtually collapsed over the last two years. Sectarian divisions, governance, and corruption are all critical problems. **Figures Two** and **Figure Three** show that the Lebanese government is one of the most corrupt and ineffective governments in the world, and the World Bank reported in October 2020 that:³²

For almost a year, Lebanon has been assailed by compounded crises—specifically, an economic and financial crisis, followed by COVID-19, and lastly the explosion at the Port of Beirut (PoB). In October 2019, the economy plunged into a financial crisis brought about by a sudden stop in capital inflows, which precipitated systemic failures across the banking sector and debt sector, as well as effecting the exchange rate. Subsequently, on March 7, 2020, the Government defaulted on the redemption of a US\$1.2 billion Eurobond, marking Lebanon's first-ever sovereign default. Then, on March 18, the Government declared a State of General Mobilization, imposing a lockdown to counter COVID-19 that included the closure of the borders (air, sea, and land) and of public and private institutions. Lastly, on August 4, 2020, a massive explosion rocked the Port of Beirut, destroying much of the port and severely damaging dense residential and commercial areas within a 1- to 2-mile radius of it.

Beyond the human tragedy, the economic impact of the explosion has implications at the national level, despite the explosion's geographical concentration. This adds to long-term structural vulnerabilities that include low-grade infrastructure—a dysfunctional electricity sector, water supply shortages, inadequate solid waste and wastewater management—public financial mismanagement, large macroeconomic imbalances, and deteriorating social indicators.

... the value of damage from the explosion was in the range of US\$3.8 to 4.6 billion, with losses to financial flows of US\$2.9 to US\$3.5 billion. The impact is particularly severe in key sectors vital for growth, including finance, housing, tourism, and commerce. Through to the end of 2021, the costs of recovery and reconstruction are expected to total US\$1.8 to \$2.2 billion. Apart from losses in economic activity, Lebanon can expect lower fiscal revenues, higher inflation, and a further rise in poverty. Trade disruptions are also possible, which would raise transaction costs and further impede growth.

...Building a better Lebanon will require swift and decisive action, particularly on reform. In the immediate term, Lebanon needs to adopt and implement a credible, comprehensive, and coordinated macro-financial stability strategy, within a medium-term macro-fiscal framework. This strategy would be based on: (i) a debt restructuring program aimed at achieving debt sustainability over the medium-term; (ii) a comprehensive restructuring of the financial sector toward regaining the solvency of the banking sector; (iii) a new monetary policy framework aimed at regaining confidence in the exchange rate and its stability; (iv) a phased fiscal adjustment aimed at regaining confidence in fiscal policy; (v) growth enhancing reforms; and (vi) enhanced social protection.

Over the medium-term, Lebanon will have to prioritize building better institutions, good governance, and a better business environment, alongside physical reconstruction. However, given Lebanon's state of insolvency (sovereign, banking system) and its lack of sufficient foreign exchange reserves, international aid and private investment will be essential for a comprehensive recovery and reconstruction. The extent and speed to which aid and investments are mobilized will depend on whether the authorities and the Lebanese Parliament can act swiftly on enacting much needed fiscal, financial, social, and governance reforms. Without reforms, there can be no sustainable recovery and reconstruction, and the social and economic situation will continue to worsen.

In many ways, the corruption, division, and failures of the Lebanese government are at least as serious a threat as any military conflict. If Algeria and Egypt are cases where "armies have a country," Lebanon is a case where the Army lacks a meaningful government. In a crisis, it would have to depend on outside U.S., French, and other support. The World Bank summarizes its growing economy weaknesses as follows:³³

Lebanon's failures in governance and sectarian differences have left the Hezbollah as the dominant military force in a deeply divided country, and one with strong links to Iran and Syria as well as its own major missile forces. It is far from clear how any new government of Lebanon can achieve a level of unity, honesty, and effectiveness to bring economic reform, much less create an effective security structure that unites the country's divided factions.

Lebanon's military forces do receive U.S. aid, but the Hezbollah has become the dominant military force and has ties to Iran as well as lesser ties to Syria. Russia is the dominant outside power in

Syria, although Iran is a key regional partner – as is the Hezbollah. Turkey also now occupies part of Syria's northern border areas. Once again, China does not yet play a significant security role in any country in the subregion.

Syria

Syria is still fighting one of the most destructive civil wars in modern history. This war has been going on since 2012, and the Assad regime has survived by becoming steadily more repressive and authoritarian, through the ruthless use of force against his own population and the use of state terrorism – and by turning to Iran, Russia, and the Hezbollah for military and financial support.

The data in **Figure Three** for Syria are highly uncertain, and the pro-Assad forces no longer have anything approaching the cohesive structure that the Syrian military had at the beginning of the civil war. The 2021 edition of the IISS *Military Balance* from which these data are taken describes them as follows,³⁴

The protracted civil war has significantly depleted the combat capabilities of the Syrian armed forces and transformed them into an irregularly structured militia-style organization focused on internal security. There is no published defense doctrine or white paper, the conflict instead dictating ad hoc requirements.

There still are effective land and air units, but overall readiness, training, and sustainability are highly uncertain, and the Assad regime depends heavily on Russian support, Iranian support, and the Hezbollah. The IISS highlights the fact that a few units like the 4th Armored Division, Republican Guard, Special Forces (including Tiger Forces), and brigades assigned to the 5th Assault Corps are now the core of the land forces. Most combat units are badly under strength, with only an estimated 500–1,000 personnel in formations that claim to be the equivalent of brigades and regiments, although Russia is seeking to rebuild and reequip additional units, and Iran and the Hezbollah have aided some units and militias with limited success.³⁵

The Syrian Navy has decayed to limited levels of effectiveness, and some naval personnel have been shifted to the Army. Years of war have sharply cut the capability of Syria's air force to use its remaining fixed wing and helicopter forces – although they now have extensive experience in striking rebel targets and populations. The IISS estimates that only 30% to 40% of the forces shown in **Figure Three** are operational, although once again, Russia has evidently helped to restore and improve some levels of capability.³⁶

The pro-Assad forces could only have recovered control over most of Syria's populated areas and territory with the support of Iran and the Hezbollah, and especially of Russia. Russia intervened in the Syrian Civil War in September 2015, and it declared that it would establish a lasting presence in December 2017.

Estimates of the size and cost of the Russian presence are highly uncertain. Some estimates indicate that total Russian personnel on the ground, including civilians and volunteers, may not have exceed 5,000 and may have been less than 4,000 by 2018 – with about 2,000 mercenaries organized to fight as a battalion tactical group.³⁷ However, by the end of troop rotations in 2017, the Chief of the General Staff of the Russian Armed Forces Valery Gerasimov stated that 48,000 troops had rotated through Syria – and a later defense video suggests the number rose to 63,000 by 2018.³⁸ **Figure Ten** also shows that the U.S. State Department estimates that Syria received \$4.6 billion worth of arms transfers between 2012 and 2017.

Russian air units have played a critical role. Russia has carried out air strikes in support of the Assad forces, including strikes on civilians and civilian facilities in the rebel-held urban areas. Some estimates indicated that Russia only maintained 30-50 combat aircraft and 16-40 helicopters during some periods. Other estimates indicate, however, that Russian planes and helicopters flew more than 28,000 missions in Syria and attacked approximately 90,000 targets while Russian UAVs flew over 14,000 sorties.³⁹

A Wikipedia article on Russian forces in Syria notes that,⁴⁰

In early January 2017, the Chief of the General Staff of the Russian Armed Forces Valery Gerasimov said that, overall, the Russian Air Force had carried out 19,160 combat missions and delivered 71,000 strikes on "the infrastructure of terrorists". At the end of December 2017, the Russian defense minister said that the Russian military had eliminated several thousand terrorists while 48,000 Russian service-members had "gained combat experience" during the Russian operation in Syria.

The UK-based pro-opposition Syrian Observatory for Human Rights (SOHR) stated that between the initiation of the intervention in September 2015 and end of February 2016, Russian air strikes killed at least 1,700 civilians, including more than 200 children. The Syrian Network for Human Rights (SNHR) and the Violations Documentation Centre (VDC) put the number higher, at over 2,000; SNHR's report stated that Russian attacks have killed more civilians than either the Islamic State or the Syrian Army. Weapons used included unguided bombs, cluster bombs, incendiaries similar to white phosphorus and thermobaric weapons. By the end of September 2017, the SOHR stated that Russian airstrikes killed around 5,703 civilians, about a quarter of them children, along with 4,258 ISIL fighters and 3,893 militants from the al-Nusra Front and other rebel forces.

U.S. experts feel the data on strikes heavily targeting civilians are roughly correct and note that Russia has since played a critical role in supporting pro-Assad forces; in carrying out air strikes; in supporting land combat operations; in equipping pro-Assad forces; and in train and assist roles, including the training and assistance of mercenaries and volunteers to attack civil targets. In the first four years of its campaign in Syria, some estimates indicate that Russia was responsible for 8,289 civilian deaths, with nearly 2,000 of them under the age of 18.⁴¹ These deaths were the result of targeted bombings on civilian infrastructure including hospitals, schools, and IDP camps.

The current military landscape in Syria does not provide exact numbers, but Pro-Assad forces in 2016 was about 90,000 personnel, support by 4,000-8,000 Hezbollah fighters, and 5,000-10,000 Iraqi Shia militias.⁴²

It is clear that Russia has deployed Tu-95, Tu-160, and Tu-22 bombers; a combat aircraft like the Su-24, Su-25, Su-34, Su-35, Su-57, MiG-29K, IL-20; and precision-guided air weapons. In the process, Russia has acquired lasting rights to the use of Hmeimim Airport as well as a Syrian naval base. Russian has made extensive use of Syrian bases to airlift forces and weapons to Libya.

Russia has also deployed Kalibr and other naval cruise missiles from surface ships and submarines, S-300 and S-400 land-based air and missile defenses, T-90 main battle tanks, other armor, and artillery. On January 3, 2019, the Russian MoD announced that 68,000 Russian troops had now participated in Russia's intervention. Other land elements of Russian power projection include military police; special forces; Wagner Group mercenaries; and members of the GRU, FSB, and SVR intelligence services.

Additional air support has come from Russian air bases in Russia and from a wide range of Russian security elements, including the Black Sea and Caspian Fleets as well as the naval forces in the Mediterranean and near Latakia. As a result, Syria has become the one major set of Russian bases

and military forces in the MENA region. It not only has played a major active role in the Syrian Civil War, but one in confronting U.S.-backed and Turkish forces.

Syria has also had extensive support from Iran in terms of arms, funds, the Al Quds forces, and volunteers – as well as support from the Lebanese Hezbollah. Experts differ on the levels of coordination between Iranian and Russian security assistance efforts as well as the effectiveness of Iranian training efforts, but the combination of Russian, Iranian, and Hezbollah support has given the Assad regime control of most of Syria, aside from Turkish occupied areas in the North, a small and shrinking rebel enclave in Idlib, U.S. supported Kurdish/Arab in northeast Syria, and small Arab rebel enclaves near the Jordanian border.

At present, rebel forces have been reduced to a presence largely in the northwestern part of Syria and around enclaves in the area around Idlib that has many pro-rebel civilians, some extremist cadres, and a mix of relatively weak forces that depend heavily on urban warfare and Turkish support.

As is the case with estimates of all the rebel and non-state actor forces in the MENA region, numbers, equipment, and effectiveness are uncertain. Reporting on their details change over time, along with names and the details of given groups and their affiliations.. The IISS reports that key elements include the Syrian National Army, which now includes forces of the National Front for Liberation. These have a mix of land weapons acquired largely from Syrian military forces, and the IISS estimates their strength at 70,000 personnel – an estimate that now may be far too high if it is intended to be trained and effective fighters.⁴³

There also are Islamist extremist forces that include Hayat Tahrir at Sham (HTS) that the IISS indicate may have some 15,000 troops using captured land weapons and the Guardians of Religion (4,000), which is affiliated with Al Qaeda and operates in Idlib.⁴⁴

A totally separate mix of U.S.-supported Kurdish and Arab forces has a separate zone in northeastern Syria, and another small enclave of U.S. supported forces exist near the Jordanian border. The current strength and levels of U.S. support for such forces are unclear, but they have been well-organized and fought effectively in the past. At present, however, Turkey has occupied enclaves along much of Syria's northern border. It loosely supports the rebel forces in the Northwest, but it sees the Arab-Kurdish forces in the Northeast as a threat.

The pro-Assad forces seem to be slowly winning a war of attrition against the rebel forces in Idlib and western Syria, and it may recover control of the entire country. At the same time, it is unclear that Assad can win any kind of victory that brings lasting stability; how an Alawite leader that represents a minority, which at most is 15% of the population, can win popular support in a country where 74% of the population is Sunni and has often been the target of repression and killings; or how he can prevent new outbreaks of violence.

Similar questions emerge as to what kind of Syrian forces and economy can emerge out of a war that will be “won” largely through violent repression and the creation of millions of refugees and IDPs.

Figure Six and **Figure Seven** show that the Assad regime has one of the worst levels of governance and that it is one of the most corrupt governments in the world. The Syrian economy has virtually collapsed, however, and Assad still faces challenges from rebel forces in its

Northwest and a Kurdish-Arab coalition in its Northeast – as well as pressure from Turkey on Syria's northern border.

One thing is clear. Syria will require massive Russian or other outside military aid to rebuilding anything like its past military capabilities, and its dependence on Russia, the Hezbollah, Iran, and increasing factionalized pro-Assad forces raises question about the unity of any “victorious” Assad military. The World Bank provides the following warning about the civil impact of the fighting on Syria's population, economy, and capability to establish effective governance:⁴⁵

Now moving into its tenth year, the conflict in Syria has inflicted an almost unimaginable degree of devastation and loss on the Syrian people and their economy. More than 400,000 deaths have been directly attributed to the conflict so far, with millions more non-lethal casualties known to have occurred. More than half the country's pre-conflict population (of almost 21 million) has been displaced—one of the largest displacements of people since World War II—and, partly as a result, by 2017, economic activity in Syria had shrunk by more than 60% compared to what it had been in 2010.

The social and economic impact of the conflict is also large—and growing. A lack of sustained access to health care, education, housing, and food have exacerbated the effects of the conflict and pushed millions of people into unemployment and poverty. With a severely degraded healthcare system, Syrians remain extremely vulnerable to additional shocks, such as the COVID-19 outbreak still unfolding.

In addition, a deepening economic and political crisis in neighboring Lebanon and the introduction of the Caesar Law have further restrained Syria's external economic ties, leading to fuel shortages, price hikes, and a rapid depreciation in local currency.

The World Bank also warned that the extent of these problems affected regional stability and security as well, and it raised critical problems in providing effective security assistance in the civil sector:⁴⁶

...the Syrian conflict broke down bilateral and transit trade routes, destabilized the region, and led to the largest displacement crisis since the Second World War. As a result, Syria's neighbors faced the combination of a decrease in economic activity, deterioration in labor markets, and increase in poverty that would have overwhelmed even the world's most advanced economies.

...a number of persistent structural weaknesses in the region, including low or deteriorating institutional resilience, reduced the effectiveness of the mitigation policies put into place to deal with the impact of the Syrian crisis. Short-termism in policymaking propagated the shocks caused by the Syrian conflict, leading to costly and ineffective services, lost economic opportunities, and underfunded programs. The report advocated a fundamental shift from short-term mitigation policies to a medium-term regional strategy that would address structural problems. As countries in the Mashreq look toward recovery, policies are needed that take into account the region's interconnectedness and seek to provide better prospects for people. An approach that addresses cross-boundary issues—including migration, trade, and infrastructure—will require local, regional, and international commitments.

As for internal security, the Assad regime's forces have largely been the forces of state terrorism rather than internal security forces per se, and the Syrian military and pro-Assad forces have probably killed or injured more civilians over the last ten years than all of the world's violent extremists and terrorists combined. Estimates of casualties in a war where it is often impossible to distinguish civilians from fighters are too uncertain to have much individual credibility but ranged from 207,000 to more than 380,000 by late 2020. These figures do not include the UNHCR estimates that the fighting had driven some 5.6 million Syrian refugees out of the country by early 2021, created 6.6 million more internally displaced persons, and 13.1 million people at need.⁴⁷

Figure Three: The Greater Levant Military Balance - I

Category	Israel	Egypt	Jordan	Lebanon	Syria-Assad
Actual Military Expenditures (\$US billions)					
IISS	16.6	4.1	1.7	1.9	n.k.
SIPRI	20.4	3.7	2.0	2.5	n.k.
As % of GDP					
IISS	5.22	1.49	4.87	10.52	n.k.
SIPRI	5.30	1.20	4.70	4.20	n.k.
Active Military Personnel	169,500	438,500	100,500	60,000	169,000
Reserve Military Personnel	465,000	479,000	65,000	0	0
Land Forces					
Active Personnel	126,000	310,000	86,000	56,600	130,000
Reserve Personnel	400,000	375,000	65,000	0	0
Armor					
Main Battle Tanks	490*	2,480	266	334	***
Other Armored Fighting Vehicles (AFVs)	?*	1,102	800	111	***
Armored Personnel Carriers	1,380*	5,244+	923+	1,378	***
Total Artillery (Including mortars)	530	4,468	1,893+	641	***
Towed	171*	962	94	313	***
Self-Propelled	250*	492+	506	12	***
MRLs	30*	450	16+	11	***
Naval Forces and Coast Guard					
Active Personnel	7,000	10,500	500	1,800	4,000
Reserve Personnel	10,000	14,000	0	0	0
Tactical Conventional Submarines	5	7	0	0	0
Submersibles	?	?	0	0	0
Principal Surface Combatants					
Missile	3	15	0	0	0
Other	0	2	0	0	1
Patrol and Coastal Combatants					
Missile	8	34	0	0	22
Other	34	19	2	1	0
Coastal/Small	?	85	7	12	8
Mine Warfare	0	14	0	0	7
Amphibious Ships	0	4	0	0	3
Landing Craft	3	15	0	2	?
Maritime Patrol/ASW Aircraft	-	4	0	0	0
ASW Helicopters	7	0	0	0	10
MCM Helicopters	0	0	0	0	0
Naval Commando/Marine Active Personnel	300	0	?	0	0

Figure Three: The Greater Levant Military Balance - II

Category	Israel	Egypt	Jordan	Lebanon	Syria-Assad
Air Force/Air Defense Forces					
Active Personnel	34,000	30,000	14,000	1,600	35,000
Reserve Personnel	55,000	90,000	0	0	0
Airfield Defense Personnel					
Active	3,000	0	0	0	0
Reserve	15,000	0	0	0	0
Combat Capable Aircraft	334	585	57	9	184
Fighter Ground Attack (FGA)	304	320	47	0	79
Fighter	0	62	0	0	55
Attack	0	0	2?	0	30
Combat capable trainers	30	191	12?	6	20
EW, IS&R, ELINT, SIGINT	10	14	10	3	0
AE&W	4	7	0	0	0
Tanker	10	0?	0	0	0
Transport/Airlift	65	82	49	0	23
Combat/Attack helicopters**	43	88+	12	5-8	20+
ISR/ELINT/intel helicopters	12	14	0	0	0
Other helicopters**	80	113?	63	39	50+
Surface-to-Air Missile Launch Units					
Major	40+	612+	24	0	SA-5, SA-20
Short Range	?	180+	?	0	SA-2,SA-3,SA-6
Surface-to-Surface Missile Launch units					
MRBM/IRBM	24?	0	0	0	0
SRBM	7?	42+	0	0	Scud/Fateh/SS-21
GLCM/CSIR	?	?	0	0	?
GLCM/ISR	?	?	?	0	?
Paramilitary Personnel	8,000	397,000	15,000	20,000	100,000
Gendarmerie	0	0	15,000	0	0
Border Police/Guards	8,000	12,000	0	0	0
Central Security	0	325,000	0	0	0
National Guard	0	60,000	0	0	0
Internal Security Force	0	0	0	20,000	0
National Defense Force	0	0	0	0	50,000
Other Militias	0	0	0	0	50,000

**Includes holdings of both land and air forces.

*** Only rough estimates of personnel and equipment types for each major side are available, with no meaningful estimates of equipment numbers.

Note: These totals only include the data provided. Nk = "Not known."

Source: Adapted from relevant country sections of the IISS, *Military Balance*, 2021.

The Persian-Arab Gulf Subregion

The security dynamics of the Persian and Arab Gulf subregion are currently dominated by the tensions between Iran and a combination of its Arab Gulf neighbors, U.S. forward deployed and power projection forces, and the power projection capabilities of key European powers like France and Britain. They are shaped by the struggle that each MENA country in the subregion faces in dealing with threats to its internal security like Islamist extremism and by the uncertainty surrounding Iraq's future political unity and strategic alignments with outside powers.

As is the case with the other subregions, Gulf security dynamics are also shaped by the role of outside powers – particularly the United States. The U.S. has long established security partnerships with Bahrain, Oman, Qatar, Saudi Arabia, and the UAE. Each of these Arab Gulf states remains highly independent, pursues its own security interests, and develops its own forces in its own ways. Each has ties to other outside powers, and Russia and China may both gain far more influence in the future.

At present, however, the U.S. plays a key role in aiding the Arab Gulf states to deter and defend against Iran and in dealing with extremism. The U.S. naval command in Bahrain; the U.S. air command in Qatar; and the U.S. advisory and contract teams in Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE all play a key role in supporting each nation's security efforts and providing aid in training, sustainability, operations, and interoperability in different forms that are tailored to each country's own approach to developing its security forces.

The security dynamics of the Persian and Arab Gulf subregion have a special meaning because the Gulf has a major impact on the global economy. While North African countries like Algeria and Libya are major exporters of petroleum, the Gulf region alone provides some 20% of the world's petroleum exports, and it is a critical part of Asia's energy supply. It not only affects key importers, it affects the Asian supply of manufactured goods to the entire world.

Iran

Iran is ruled by a militant branch of its Shi'ite faith, and it has pursued an Islamic Revolution and the expansion of Iranian power and influence along the lines set forth by the Ayatollah Khomeini since 1979. It is important to note that although it is often seen today as an aggressive power, it was the victim of an Iraqi invasion in 1979 that triggered what was then the bloodiest war in modern MENA history, has faced continuing sanctions and military pressure from the United States, and has been in an arms race with the Arab Southern Gulf states for decades.

While Iran's elections, "green" uprisings, and more recent popular demonstrations have sometimes challenged its theocratic regime, the regime has changed the electoral system to deny potential challengers the ability to run, has steadily improved the scale and effectiveness of its internal security forces, has developed strong ties to its armed forces and Islamic Revolutionary Guards Corps, and currently seems relatively secure.

Iran still relies heavily on aging military equipment with uncertain operational status and sustainability in combat. It now, however, is very much a major military power by regional standards. For all of the reasons shown in **Figure Four** and **Figure Five**, Iran has become a major potential threat to its Arab neighbors. It already poses a major missile and hybrid warfare threat to the Gulf subregion and to Israel. It is a declared chemical weapons state, may have some biological weapons, and has a potential breakout capability to deploy nuclear weapons.

As is the case with every MENA state, force tables like **Figure Four** cannot display the wide range of conventional weapons types Iran now depends upon, their age and level of wear, and their uncertain levels of modernization. In many cases, its major land weapons are not fully operational and cannot be used for sustained maneuver or combat. Significant numbers of its combat aircraft are not fully operational, although experts differ over the seriousness of such problems. It cannot display the extent to which the combat units using these weapons vary sharply in organization, size, readiness, and real-world fighting capability in spite of their formal titles.

At the same time, the military expenditure and percent of GDP data for Iran in **Figure Four** are as uncertain as the data for Egypt in **Figure Three**. **Figure Four** also cannot display the internal tensions between given services and force elements like those that remain between the regular forces and the Islamic Revolutionary Guards Corps (as well as within each element).

As is the case with most MENA states, the equipment totals shown in **Figure Four** largely reflect total inventories, and it can grossly exaggerate holdings of operational weapons or ones that can sustain maneuver and actual combat. At the same time, they count major weapons systems. They do not highlight the many areas where Iran has developed its own military upgrades and modifications, and they do not reflect the pace of force modernization in many other areas like smaller precision guided anti-armor, anti-air, and anti-ship missiles; “smart” mines; or armed and reconnaissance drones.

While many of Iran’s conventional military forces are now badly worn and date back to the time of the Shah or the Iran-Iraq War, Iran does, however, have a steadily growing family of precision-guided ballistic missiles and UAVs/drones as well as highly capable irregular naval/air/missile forces in the Gulf region and the Gulf of Oman. Over the last half decade, these development have eroded the advantage that the U.S. and Arab Gulf states have in air power and have given Iran both significant conventional strategic strike power and added capability to threaten maritime, naval, economic, and infrastructure targets. Iran has also steadily expanded its regional influence as well as its strong ties to the Hezbollah in Lebanon, the Assad regime in Syria, and the Houthis in Yemen.

Iran does not have major power projection capabilities, although its links to Syria, current transit capabilities through Iraq, ties to the Hezbollah in Lebanon, and ties to the Houthis in Yemen have given it growing capabilities outside the Gulf subregion. Iran does, however, have a wide range of capabilities for hybrid warfare in the Gulf, is expanding its military deployments along its entire coast in the Gulf and its coast on the Gulf of Oman, is exporting arms to key non-state actors, and is giving Iran a rising level of naval activity in the western Indian Ocean and near Yemen.

Also, the real-world data on the size of Iran’s military spending and security aid to other countries are extremely questionable. It is clear that Iran has developed or improved many of these capabilities in spite of something approaching economic warfare with the United States. U.S. efforts to force Iran to change its behavior – and possibly change its regime – by withdrawing from the JCPOA nuclear agreement in May 2018, and imposing “maximum pressure” through sanctions and through the build-up of U.S. and Arab Gulf forces have had these major economic effects reported by the World Bank,⁴⁸

Iran’s real GDP contracted by 6.8% in 2019/20; in addition, the oil sector shrank by 38.7%. Non-oil GDP grew by 1.1%, driven by agriculture and manufacturing as exchange rate depreciation made domestic production more competitive. Expenditure-side components of 2019/20 GDP declined. The decline in GDP continued in Q1/2020/21 as COVID-19 border closures and containment measures in March and April

contributed to GDP contracting by 3.5% (year-on-year), a modest contraction compared to many other countries. In contrast to past recessions, services were much more impacted; a reflection of the huge impact COVID-19 has had on service sectors around the globe. Higher government consumption expenditure in Q1 partly offset the contraction of other sectors.

The economic situation led to a deterioration in labor force participation and employment rates. Employment had increased by 1.8% to reach 24.3 million in 2019/20, before falling by 1.5 million (y-o-y) in Q1/2020/21 as COVID-19 led to a decline across all sectors. ... Unemployment rates in 2019/20 and Q1/2020/21 fell to 10.7% and 9.8%, respectively. Recession and COVID-19 have made gender gaps in the labor market worse, with only 14% of (working age) women working in 2019/20, down 0.6 percentage points from the previous year.

The fiscal deficit-to-GDP ratio deteriorated in 2019/20 as oil revenues fell to 2.2% of GDP. Current expenditure grew faster, due to a higher wage bill and transfers. The government resorted to issuing bonds and selling assets to compensate for smaller oil revenues and a lower tax base...The current account surplus declined as trade restrictions led to real net exports falling by 26.9%. Oil exports fell below 0.7mbpd in 2019, after the end of US sanction waivers for major importers of Iran's oil in April. Import contractions were large (38.1%) due to the rationing of foreign exchange reserves and US secondary sanctions on banking transactions related to trade with Iran. The contraction of non-oil trade accelerated to 30% (y-o-y, nominal) in April to August 2020, due to COVID-19 and expansion of the list of goods subject to import prohibition.

Inflationary pressures were high in 2019/20, resurging in the first five months of 2020/21 as the Iranian rial depreciated. Inflation increased by 10 percentage points to 41.2% in 2019/20, due to inflationary expectations and higher cost push factors, including higher trade costs and a sharp exchange rate depreciation of 45.7%. Inflation was led by the cost of food and household rent, disproportionately impacting low-income deciles. In tandem with the trend in the exchange rate, inflation jumped to 6.4% (month-on-month) in July 2020, a 21-month high.

Poverty in Iran—measuring in the World Bank's upper-middle-income threshold of US\$5.5 per day (2011 PPP)—fell between 2009 and 2013 by 5 percentage points to about 8%, before increasing in 2017 to 10.9%. There are stark urban/rural differences, with much higher poverty headcount rates of about 27% in rural areas, compared to about 6% in urban areas. Inequality, measured by the Gini index in per capita expenditure, fell sharply between 2009 and 2013—from 42.0 points to 37.4 points—but increased to 40.8 points in 2017.

High inflation, increased gasoline prices in 2019, economic slowdown, and the economic shock caused by COVID-19 have given rise to concerns about household welfare and poverty. In the short-term, the fall in labor market incomes alone may lead to a 7-percentage point increase in poverty. There is an expectation of regional differences in rising poverty levels, as well as the likelihood that households self-employed in the service sector, will be being more severely affected. And though government cash transfers, which were instrumental to reducing poverty during the period 2009 to 2013 can partly help compensate for lost earnings, their mitigation impact is hindered by high inflation continuing to erode the real value of the benefits.

The government's fiscal constraints may limit its scope for a wider response to the economic crisis, but the better targeting of cash transfers can help reduce their fiscal cost. Fiscal pressures are projected to increase because of the higher issuance of bonds and the increasing cost of COVID-19 in 2020/21. Government revenues are projected to reach a trough in 2020/21, before improving amid a moderate recovery of the economy overall. Inflationary pressure is expected to remain high due to economic uncertainty and economic recovery pressures.

So far, however, sanctions and “maximum pressure” have only produced limited and containable popular protests, have not succeeded in forcing the regime to make concessions, and have not kept Iran from increasing its military capabilities and regional influence. The U.S. State Department describes this situation as follows,⁴⁹

The Islamic Republic of Iran is an authoritarian theocratic republic with a Shia Islamic political system based on *velayat-e faqih* (guardianship of the jurist). Shia clergy, most notably the *rahbar* (supreme leader), and political leaders vetted by the clergy dominate key power structures. The supreme leader is the head of state. The members of the Assembly of Experts are nominally directly elected in popular elections. The assembly

selects and may dismiss the supreme leader. The candidates for the Assembly of Experts, however, are vetted by the Guardian Council (see below) and are therefore selected indirectly by the supreme leader himself. Ayatollah Ali Khamenei has held the position since 1989. He has direct or indirect control over the legislative and executive branches of government through unelected councils under his authority. The supreme leader holds constitutional authority over the judiciary, government-run media, and other key institutions. While mechanisms for popular election exist for the president, who is head of government, and for the Islamic Consultative Assembly (parliament or *majles*), the unelected Guardian Council vets candidates, routinely disqualifying them based on political or other considerations, and controls the election process. The supreme leader appoints half of the 12-member Guardian Council, while the head of the judiciary (who is appointed by the supreme leader) appoints the other half. Parliamentary elections held in 2016 and presidential elections held in 2017 were not considered free and fair.

The supreme leader holds ultimate authority over all security agencies. Several agencies share responsibility for law enforcement and maintaining order, including the Ministry of Intelligence and Security and law enforcement forces under the Interior Ministry, which report to the president, and the Islamic Revolutionary Guard Corps (IRGC), which reports directly to the supreme leader. The Basij, a volunteer paramilitary group with local organizations across the country, sometimes acted as an auxiliary law enforcement unit subordinate to IRGC ground forces. The IRGC and the national army, or “Artesh,” provided external defense. Civilian authorities maintained effective control over the security forces.

In response to widespread protests that began November 15 after a fuel price increase, the government blocked almost all international and local internet connections for most of a week, and security forces used lethal force to end the protests, killing approximately 1,500 persons and detaining 8,600, according to international media reports. There was no indication government entities were pursuing independent or impartial investigations into protester deaths.

Significant human rights issues included executions for crimes not meeting the international legal standard of “most serious crimes” and without fair trials of individuals, including juvenile offenders; numerous reports of unlawful or arbitrary killings, forced disappearance, and torture by government agents, as well as systematic use of arbitrary detention and imprisonment; harsh and life-threatening prison conditions; hundreds of political prisoners; unlawful interference with privacy; significant problems with independence of the judiciary, particularly the revolutionary courts; severe restrictions on free expression, the press, and the internet, including violence, threats of violence, and unjustified arrests and prosecutions against journalists, censorship, site blocking, and criminalization of libel; substantial interference with the rights of peaceful assembly and freedom of association, such as overly restrictive nongovernmental organization (NGO) laws; severe restrictions of religious freedom; restrictions on political participation through arbitrary candidate vetting; widespread corruption at all levels of government; unlawful recruitment of child soldiers by government actors to support the Assad regime in Syria; trafficking in persons; violence against ethnic minorities; harsh governmental restrictions on the rights of women and minorities; crimes involving violence or threats of violence targeting lesbian, gay, bisexual, transgender, and intersex (LGBTI) persons; criminalization of LGBTI status or conduct; and outlawing of independent trade unions.

Despite repeated calls from the international community, including the United Nations, the government effectively took no steps to investigate, prosecute, punish, or otherwise hold accountable officials who committed these abuses, many of which were perpetrated as a matter of government policy. This included abuses and numerous suspicious deaths in custody from previous years. Impunity remained pervasive throughout all levels of the government and security forces.

Government officials materially contributed to human rights abuses in Syria, through their military support for Syrian President Bashar Assad and Hizballah forces; in Iraq, through aid to pro-Iran militia groups; and in Yemen, through support for Houthi rebels, who targeted civilians and civilian infrastructure in Yemen and Saudi Arabia.

The Russian arms sales shown in **Figure Eight** reflect major transfers of advanced surface-to-air missile systems to Iran. Moreover, the UN sanctions on many arms transfers to Iran have expired, and – as discussed in depth later in this analysis – Russia and China may become major future arms sellers.

At the time of this writing, there is only an uncertain prospect that the Biden administration can work with its European partners to negotiate an Iranian return to the nuclear agreement. Since the U.S. withdrew from the JCPOA in May 2018, Iran has deployed more advanced nuclear centrifuges and new nuclear facilities, greatly improved its missile and hybrid warfare capabilities, and established links to the ruling Houthi faction in Yemen that have created a major new missile threat to Saudi Arabia and aided in the expansion of Iranian influence at the southern entrance to the Red Sea.

Iraq

Iraq's military dynamics are still very much in transition. Iraq is trying to rebuild its central government's military and internal security forces to the point where these forces can deal with extremism, achieve a functional level of national unity, and deter outside threat and pressure. So far, it has only had limited to moderate success. The force numbers shown in **Figure Four** are low by Iranian standards, and many count major weapons that are not operational or sustainable in combat.

Only limited elements of Iraq's current forces – like its elite Counterterrorism Service – are fully effective and would be sustainable in any serious form of combat. Its navy is little more than a coastal police, much of its Air Force – including its F-16s – has limited combat status, and it can do a much better job of supporting and sustaining the portions of its Russian supplied land-force equipment than other imports.

Iraq does have some highly capable force elements, but it badly needs outside support to develop its overall forces, and its dependence on complex new U.S. systems and aging/worn Russian systems present major problems – particularly after major cuts in U.S. train and assist efforts and contract support of key weapons systems.

A wide-range of reporting – including the quarterly reports to Congress by the Lead Inspector General of the U.S. Department of Defense – show that the defeat of the ISIS “caliphate” has not prevented ongoing attacks by the remnants of ISIS's forces.⁵⁰ It also has not united Iraq, and it has not led to any Iraqi economic recovery. Instead, it has led to a major new competition between the U.S. and Iran for military influence in Iraq.

The U.S. repeatedly talked about a lasting strategic partnership with Iraq during the Obama and Trump administrations, but the U.S. did not create a longer-term structure for such a partnership. The U.S. did provide the Iraqi government with critical U.S. military ground and air support – as well as advisory support and arms to Iraqi military operations against ISIS after 2014, when ISIS conquered parts of Iraq and eastern Syria to establish a proto-state or “caliphate.”

Once the ISIS “caliphate” was broken up, the U.S. did not react decisively to help fully defeat the large remnants of ISIS fighters that still survived or implement major efforts to create effective national Iraqi military forces. It also did not implement plans to deal with Iraq's weak, divided, and corrupt governance; sectarian and ethnic factions; and massive civil problems.

The U.S. left most of its joint basing facilities in Iraq in 2020 and has stated that it reduced its active military presence in both Iraq and eastern Syria to a nominal 2,500 personnel in January 2021. U.S. arms transfers to the Iraqi Army and Air Force remained limited and produced only limited successes while creating growing problems in support and sustainment. Russia became

Iraq's major arms supplier in operational terms, and Iran seemed to be on the path to becoming the major outside presence in Iraq, although Turkey has a major influence in its North.

A CRS report in December 2020 described these changes in the U.S. position at the end of the Trump administration as follows,⁵¹

The Trump Administration reportedly has threatened to close the U.S. Embassy in Baghdad if Iraqi authorities do not act more comprehensively against groups threatening U.S. personnel and facilities, and in December 2020 began reducing the number of U.S. citizen personnel in Iraq. Staff reductions and facility closures could limit U.S. diplomatic, consular, and assistance activities, and some observers argue such steps could lower retaliation risks from any U.S. military strikes against hostile Iran-aligned armed groups.

...The Trump Administration's approach to Iraq has sought to promote Iraqi unity and stability, prevent an IS resurgence, and limit Iranian influence in Iraq. Iraqi activists' calls for improved governance, reliable local services, more trustworthy and capable security forces, and greater economic opportunity broadly correspond to stated U.S. goals. During the peak period of unrest from October 2019 to March 2020, U.S. officials advocated for protestors' rights to demonstrate and express themselves, while urging Iraqi leaders to respond seriously to protestors' demands and to prevent attacks against unarmed demonstrators.

Iraqi and U.S. leaders have engaged in a high-level strategic dialogue in 2020 to renew shared understandings about bilateral security cooperation and U.S. assistance. Meeting in August, Iraqi and U.S. officials endorsed continued security cooperation, including a U.S. military presence. U.S. Central Command subsequently announced that U.S. force levels in Iraq would decline from 5,200 to 3,000, and in November, President Trump directed a further drawdown to 2,500 by January 2021.

The drawdowns reflect U.S. assessments that Iraq's security forces increasingly are capable of independent operations against the remnants of the Islamic State group. U.S. forces have consolidated on fewer Iraqi facilities, and in 2020 returned a number of facilities used for operations and training to full Iraqi control. U.S. military remain in Iraq pursuant to a 2014 exchange of diplomatic notes under the 2008 bilateral Strategic Framework Agreement. The U.S. Consulate in Basra remains closed due to security concerns. The U.S. Consulate in Erbil remains operational.

Congress has authorized U.S. train and equip programs for Iraq through December 2020, including aid to KRG forces, and has appropriated defense funding for the train and equip programs through September 2021. Since 2014, Congress has appropriated more than \$6.5 billion for train and equip programs for Iraqis. The FY2021 National Defense Authorization Act conference report would authorize \$322.5 million of the Administration's requested \$645 million for train and equip efforts under Iraq-specific authorities extended through 2021, with the rest (\$322.5 million) authorized for Iraq under 10 U.S.C. 333.

The United States provides foreign aid in Iraq in support of de-mining programs, public sector financial management reform, U.N.-coordinated stabilization, and other goals. The U.S. government has obligated more than \$365 million for stabilization of liberated areas of Iraq since 2016, including funds for religious and ethnic minority communities. Congress allocated \$451.6 million for U.S. foreign aid programs in Iraq in FY2020. The Trump Administration has requested \$124.5 million for FY2021. The United States is the top humanitarian funding donor for Iraq and provided more than \$345 million in humanitarian aid for Iraq in FY2020, including more than \$47 million for COVID-19 programs. Nearly 1.3 million Iraqis remain internally displaced and many more remain in need of aid.

Many experts feel that the U.S. withdrew too many parts of its train and assist effort after the break-up of the ISIS "caliphate." As was the case in Vietnam – and again in Iraq in 2011 – the U.S. has not helped Iraq create an effective or self-sustainable logistics system, a capability to repair and maintain U.S. and European supplied equipment, or create an effective intelligence system to replace U.S. IS&R assets as they were withdrawn. The U.S. also failed to help Iraq acquire, operate, and maintain an effective land-based surface-to-air missile defense system to replace the remnants of its former Russian system.

The U.S. has also sharply cut its presence in Iraq without helping Iraq deal with many of the ethnic and sectarian problems in the Iraqi armed forces, the lack of any unity and effective control over the Popular Mobilization Forces – many with ties to Iran or their own independent goals – and without dealing with the serious problems in governance corruption reflected in **Figure Six** and **Figure Seven**.

More broadly, Iran is actively competing with the U.S. for influence in Iraq – a competition that could create an axis of Shiite influence that extends from Iran through Iraq, Syria, Lebanon, as well as to Yemen. The U.S. has worked with the government of Iraq to defeat the efforts of ISIS to dominate Iraq and eastern Syria – effectively “winning” a second war against extremism in 2015-2018 that matches its victories between 2005-2011.

The Biden administration does seem to have made forging a more stable strategic partnership with Iraq a priority, but Iraq’s future status is increasingly uncertain. The U.S. has still not laid out any clear plans to create lasting security partnerships since it helped defeat the “caliphate” in 2017-2018, to address the weak and corrupt governance problems, to rectify Iraq’s Kurdish and Sunni minorities lack of trust in the central government, and to mitigate the divisions in the Shi’ite Popular Mobilization Forces’ (PMFs) and their loyalty to the central government, factional leaders, and Iran.

Once again, the legacy of war, failed and corrupt governance, and “security assistance” has been to create major civil problems in security and stability. The World Bank warns that,⁵²

Iraq is in a fragile situation. The drop in oil prices and COVID-19 pandemic are placing unprecedented strains on its economy. A precarious political situation, weak healthcare system, ineffective social safety nets, rampant corruption, and dilapidated service delivery, all amplify this fragility and have fueled large-scale protests across the country.

While the new Government of Iraq (GoI) has been asserting its grip on security and illegal weapons and, in response to the protests, has announced a date for new parliamentary elections, it has been struggling to deal with the economic challenges it faces. Pre-existing conditions—its heavy dependence on oil, dominance of the state in economic activities, and a poor business environment—as well as budget rigidities, have combined to limit the government’s capacity to respond to the COVID-19 outbreak and to offer a stimulus package to restart the economy.

Faced with this multifaceted crisis, growth is expected to contract by 9.5% in 2020, Iraq’s worst annual performance since 2003. Oil-GDP is expected to contract by 12% (capped by the OPEC+ agreement) while non-oil-GDP is expected to contract by 5% with sectors like religious tourism affected by COVID-19 measures. Subdued domestic demand and the depreciation of the currencies of Iraq’s main trading partners have kept inflation in check at less than 1% in 2020.

The key challenge for Iraq will be to navigate this multi-dimensional crisis. The OPEC+ agreement, coupled with global recession, mean its prospects are on the downside, underscoring the importance of creating fiscal space for human capital, economic diversification, and job creation. Even with a recovery in oil prices, Iraq will need to undertake many reforms to rebuild fiscal space by cutting distortionary and inefficient spending and strengthening the medium-term orientation of macroeconomic policies. A failure to narrow the twin deficits and a rapid build-up in government debt would divert more resources away from productive investment and further reduce foreign exchange reserves and the economy’s resilience to shocks.

As such, the outlook for Iraq will depend on global oil markets, the capacity of the Iraqi healthcare system to respond to COVID-19, and its economic reform process. If conditions ease, growth is projected to gradually return to 2 to 7.3% in 2021–2022, with the non-oil economy projected to bounce back to an average of 4%. In the absence of public wage bill and pension reforms, the fiscal deficit is projected to remain sizeable, averaging 12% of GDP in 2021–2022 amidst a modest recovery in oil prices. Consequently, Iraq’s debt-to-GDP ratio is projected to remain elevated.

The current crises are likely to worsen the welfare of Iraqi households. After years of conflict and displacement, many are already vulnerable, and the pandemic will further test their resilience. While the disruption in supply chains will increase basic prices, household labor and non-labor incomes are likely to decrease due to the economic slowdown and reduced remittances. Many households, especially those in the informal private sector, may lose all their income, compelling them to exhaust their savings and resort to other coping mechanisms.

In the absence of a significant government response, these short-term effects, coupled with reduced access to education, healthcare, and other services will have lasting impacts on the ability of households either to escape poverty or remain above it. Projections suggest that poverty could increase by 7 to 14 percentage points, meaning that 2.7 to 5.5 million more Iraqis could become poor due to the COVID-19 pandemic, in addition to the existing 6.9 million poor, pre-COVID.

As for internal security, the survival of many ISIS fighters; Iraq's economic crisis; the corruption and incompetence of many elements of its governance, sectarian, and ethnic divisions; and Iran's efforts to create its own pro-Iranian elements all create major problems. The U.S. State Department *Country Report on Human Rights* took a relatively tolerant approach to describing the situation, but was scarcely favorable,⁵³

Iraq is a constitutional parliamentary republic. The 2018 parliamentary elections, while imperfect, generally met international standards of free and fair elections and led to the peaceful transition of power from Prime Minister Haider al-Abadi to Adil Abd al-Mahdi. On December 1, in response to protesters' demands for significant changes to the political system, Abd al-Mahdi submitted his resignation, which the Iraqi Council of Representatives (COR) accepted. As of December 17, Abd al-Mahdi continued to serve in a caretaker capacity while the COR worked to identify a replacement in accordance with the Iraqi constitution.

Numerous domestic security forces operated throughout the country. The regular armed forces and domestic law enforcement bodies generally maintained order within the country, although some armed groups operated outside of government control. Iraqi Security Forces (ISF) consist of administratively organized forces within the Ministries of Interior and Defense, and the Counterterrorism Service.

The Ministry of Interior is responsible for domestic law enforcement and maintenance of order; it oversees the Federal Police, Provincial Police, Facilities Protection Service, Civil Defense, and Department of Border Enforcement. Energy police, under the Ministry of Oil, are responsible for providing infrastructure protection.

Conventional military forces under the Ministry of Defense are responsible for the defense of the country but also carry out counterterrorism and internal security operations in conjunction with the Ministry of Interior. The Counterterrorism Service reports directly to the prime minister and oversees the Counterterrorism Command, an organization that includes three brigades of special operations forces. The National Security Service (NSS) intelligence agency reports directly to the prime minister.

The Popular Mobilization Forces (PMF), a state-sponsored umbrella military organization composed of approximately 60 militia groups, operated throughout the country. Most PMF units were Shia Arab, reflecting the demographics of the country, while Sunni Arab, Yazidi, Christian, and other minority PMF units generally operated within or near their home regions. All PMF units officially report to the national security advisor and are under the authority of the prime minister, but several units in practice were also responsive to Iran and Iran's Islamic Revolutionary Guard Corps.

The two main Kurdish political parties, the Kurdistan Democratic Party (KDP) and the Patriotic Union of Kurdistan (PUK), each maintained an independent security apparatus. Under the federal constitution, the Kurdistan Regional Government (KRG) has the right to maintain internal security forces, but the PUK and KDP separately controlled additional Peshmerga units. The constitution also allows for a centralized, separate Asayish internal security service; however, KDP and PUK each maintained Asayish forces. The KDP and PUK also maintained separate intelligence services, nominally under the KRG Ministry of Interior.

Civilian authorities did not maintain effective control over some elements of the security forces, particularly certain Iran-aligned PMF units. Poorly defined administrative boundaries and disputed territories between the Iraqi Kurdistan Region (IKR) led to confusion over the jurisdiction of security forces and the courts.

The country experienced large-scale protests in Baghdad and several Shia-majority governorates beginning in early October. Demonstrators gathered in the streets to reinforce their demands for an end to corruption and a restructuring of the government. Civilian authorities quickly lost control of the situation. Security and armed groups, including PMF forces, responded with live ammunition, tear gas canisters shot as projectiles, and concussion grenades, in an attempt to suppress the demonstrations. By official accounts, as of December 17, more than 479 civilians were killed and at least 20,000 were injured. While one general and several officers were under investigation, efforts to achieve accountability were limited.

Significant human rights issues included: reports of unlawful or arbitrary killings, including extrajudicial killings; forced disappearances; torture; arbitrary detention; harsh and life-threatening prison and detention center conditions; arbitrary or unlawful interference with privacy; the worst forms of restrictions on free expression, the press, and the internet, including violence against journalists, censorship, site blocking, and criminal libel; significant interference with the rights of peaceful assembly; legal restrictions on freedom of movement of women; threats of violence against internally displaced persons (IDPs) and returnee populations perceived to have been affiliated with the Islamic State of Iraq and Syria (ISIS); widespread official corruption; unlawful recruitment or use of child soldiers by elements of the Kurdistan Workers' Party (PKK), Shingal Protection Units (YBS), and the Iran-aligned PMF that operate outside government control; trafficking in persons; criminalization of lesbian, gay, bisexual, transgender, and intersex (LGBTI) status or conduct; violence targeting LGBTI persons; and restrictions on worker rights, including restrictions on formation of independent unions, discrimination in employment of migrants, women, those with disabilities, and child labor.

The government, including the Office of the Prime Minister, investigated allegations of abuses and atrocities perpetrated by the ISF, including a ministerial investigation of the October protests, but the government rarely punished those responsible for perpetrating or authorizing human rights abuses. Impunity effectively existed for government officials and security force personnel, including the ISF, Federal Police, PMF, and certain units of KRG Asayish internal security services.

Despite a reduction in numbers, ISIS continued to commit serious abuses and atrocities, including killings through suicide bombings and improvised explosive devices (IEDs). The government had ongoing investigations and was prosecuting allegations of ISIS abuses and atrocities and, in some instances, publicly noted the conviction of suspected ISIS members under the 2005 counterterrorism law.

The Southern Arab Gulf States: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE

The Southern Gulf Arab states – Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE – along with the U.S. and its security partners like Britain and France continue to arm and prepare for a major war with Iran. They are making major individual efforts to defend and deter. The military expenditure data in **Figure Five** and the arms transfer data in **Figures Eight** and **Figure Ten** show the massive scale of their collective spending efforts and the fact that such funding consumes enough of their GDP to be a serious burden on their citizens and civil development.

The Gulf Cooperation Council: Facade or Farce?

They Arab Gulf states do, however, face major challenges and the divisions between them are a self-inflicted wound as well as stem from the different sets of internal security threats in each state. They theoretically have been bound together in a Gulf Cooperation Council (GCC) since May 1981 that has included Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE. This alliance was formed in reaction to the collapse of Iraq's initial gains in invading Iran, but remained more hollow than real.

The totals for the GCC forces in **Figure Five** and its comparisons with Iran are, however, more mythical than real. In practice, each state largely pursued its own force developments with little regard to interoperability and overall mission capability and force development needs. The GCC acquired an impressive headquarters building, but two key states – Saudi Arabia and Oman – could never reconcile their differing approaches to forming a real military alliance, and the other states pursued their individual interests and goals as well. As a result, the GCC remained a military fiction with limited effectiveness, military integration, and interoperability.

The U.S. did provide power projection, training, and support that allowed most GCC countries to cooperate in the liberation of Kuwait in 1990-1991, but most of the advancements made vanished over time, and efforts to create integrated air defense remained somewhat cosmetic. Similarly, in 2014, when Saudi Arabia and the UAE backed the Hadi government against a Houthi government, effectively invading Yemen, Oman and Kuwait stood aside – and largely too did the other GCC states.

This lack of serious progress became even more clear in on June 5, 2017, when Saudi Arabia, the UAE, Bahrain, and Egypt severed diplomatic relations with Qatar. They banned Qatar-registered planes and ships from utilizing their airspace and sea routes, and Saudi Arabia blocked Qatar's only land crossing. The other Arab Gulf states sought the support of Jordan, and then effectively bought the Maldives, Mauritania, Djibouti, Comoros, and Tobruk government in Libya.

Kuwait and Qatar stood aside and maintained relations with Qatar, while Turkey used the boycott to expand its influence in Qatar and the Gulf.

Qatar quickly found that it could not afford to stand alone under these conditions, and the result was something of farcical "Game of Princes" where Qatar responded by reestablishing full relations with Iran on August 24, 2017. This farce finally came to an end on January 4, 2021 after U.S. and Kuwaiti mediation efforts. An Arab summit the next day established a basis for ending the crisis, but it did nothing to move towards a more real military alliance.

These failures have made the Arab Gulf states far more dependent on outside aid in dealing with threats like Iran than their level of military spending and the totals for the entire GCC that **Figure Four** indicates. As the country-by country force data in **Figure Four** help illustrate, the sharp disparities in their national force structures and their lack of real-world joint warfare capabilities mean that the U.S. and European allies like Britain and France must help the Arab Gulf states to compensate for their lack of real-world cooperation and interoperability if any serious conflict occurs.

The Impact of Military Geography

It is important to understand that the geography of the Gulf has a major impact on the capabilities of the Arab Gulf states. From a military viewpoint, it is far larger in terms of air and missile power, sea power, and land force maneuver than many realize. It has a total surface area of 97,000 square miles (251,000 square kilometers) and is 60 nautical miles (NM) (970KM) from the Strait of Hormuz to Kuwait. The northern side is largely near mountains – which allow Iran to shelter some air operations from land/sea-based sensors, and it has many small bays or coves where small ships can disperse. It has an average depth of only 160 feet (50 meters) and a maximum depth of 360 feet (110 meters) with natural restrictions on shipping routes and a rough or “noisy” bottom that makes it easy to deploy and conceal smart mines.

Iran, Iraq, and Saudi Arabia are the only countries with real strategic depth, and their key petroleum export facilities are easily targetable in or near the Gulf. Oman’s position on the Indian Ocean does give it some distance from the other smaller Gulf states, but its enclave on the coast of the Strait of Hormuz makes its relations with Iran highly sensitive. Kuwait is relatively isolated from the other smaller Gulf states, and is more exposed to Iran and any Iranian ability to cross Iraq.

All the Gulf states are sensitive to the security of critical infrastructure and military facilities on or near their coasts –including key power and desalination plants. All are dependent on maritime traffic and petroleum exports through the Gulf, but Iran, Bahrain, the UAE, and Qatar have no real options. Qatar is dependent on good relations with Iran in peacefully sharing the giant offshore gas field that separates the two countries while the UAE splits between a Hawkish Abu Dhabi and a Dubai that is critically dependent on trade with Iran.

Divided Forces Are A Self-Inflicted Wound

The four smaller GCC states – Bahrain, Kuwait, Oman, Qatar – do have some effective combat units, although they are too small to have balanced and effective independent national force structures, to be able to operate against a serious threat without massive outside support, and often suffer from critical diseconomies of scale.

Unit quality and effectiveness vary sharply by force element. Joint warfare capabilities and interoperability with neighboring powers are limited, and many combat units are dependent on support by their home base and cannot easily redeploy or maneuver in combat without extensive reorganization or outside support. Missile and drone defense capabilities are being improved, but they remain divided and weak. IS&R and battle management capabilities are equally limited and many units would be dependent on U.S. or other outside support to play an effective role in combat, and particularly in a joint all-domain environment or in complex hybrid warfare.

Key force elements also rely heavily on outside and national contractors and local base facilities for even limited sustainability and repair of combat damage. Key national command and control,

other C4I, and other IS&R capabilities are lacking or grossly inadequate. As a result, the smaller states in the GCC cannot fight cohesively except under U.S. or other outside leadership and must rely on U.S. command and control as well as intelligence, surveillance, and warning capabilities. Virtually all of the systems needed for advanced and effective joint all-domain warfare and for advances like layered air/missile defense are now lacking.

Saudi Arabia

Saudi Arabia is the driving force behind any Southern Arab Gulf effort to defend against Iran. It has the geographic reach to unite the Arab Gulf states (if they choose to become a more effective alliance), the strategic depth, and the ports and petroleum export facilities on its Red Sea Coast as well as in the Gulf.

It has the largest military forces of any Southern Arab Gulf state. These forces are exceptionally modern and well-funded. In fact, they are some of the most expensive military and security forces in the world. The IISS estimates that it ranked ninth in total global spending in 2020, well over twice as much as Iran and Israel.

Saudi Arabia ranked fifth in terms of military spending as a percent of GDP although this was far less than some other MENA states. The IISS estimates that Oman ranks first at 12%, Lebanon spent 10.5%, and Kuwait spent 7.1% – as much as Saudi Arabia. This spending was 2.7% of total global spending compared to 6.2% of all other MENA countries combined.⁵⁴

The Kingdom continued to steadily modernize its forces in recent years. As **Figure Six** and **Figure Eight** show – it has made massive recent arms buys – largely from the United States and Europe. An analysis by the Congressional Research Service shows that Congress was notified that Saudi Arabia requested a total of \$141.7 billion worth of arms sales from the U.S. during the period from January 2009 to August 2019.⁵⁵

Saudi Arabia has made initial efforts to modernize its training and sustainability as well as to develop some elements of capability for joint all-domain warfare – especially for air strike and air combat missions – although they are a work in progress. It has some highly effective land, air, and internal security units, and it has gained expensive experience in combat in Yemen.

There are some highly effective units, but the orders of battle of each service and force element have mixed quality, and creating more consistent force quality between units, more ability to project power and carry out long-range movements and maneuvers, and better joint and all-domain warfare capabilities have high priority.

Saudi forces are also divided into too many different force elements – some of which seem to have originally been separated to ensure that no given force element could present a threat to the regime. Most forces have limited joint warfare capabilities as well as only moderate national command and control, C4, and IS&R capabilities for joint warfare. Some land – as well as air and naval – warfare capabilities – would seem to have limited capability to maneuver or to project power away from their peacetime bases.

The Army needs more elements trained for hybrid warfare and counterinsurgency and less dependence on the military cities that are its main bases. If the Saudi Air Force is to maintain its current lead over Iran, it will need to further modernize its F-15s and other combat aircraft or

acquire a 5th generation fighter like the F-35 as well as develop its joint all-domain warfare capabilities.

Saudi air defense forces need to be modernized to create an effective layered missile and UAV/drone defense capability, and UAVs with precision-guided conventional warheads. Saudi Arabia also needs to replace its current aging Chinese surface-to-air missile systems with precision guided, conventionally armed weapons. The Saudi Navy badly needs to fully execute its modernization plan, focus more on key mission areas like dealing with Iranian hybrid and mine warfare capabilities, and set higher readiness standards – particularly for the Red Sea fleet.

As the same time, Saudi Arabia needs to be careful to ensure that it does not overspend on military forces and limit its civil development and stability. **Figure Six** and **Figure Seven** show that Saudi Arabia does still need improvements in governance and in fighting corruption, and it needs to be more careful about making well-planned and slower arms buys and in the total cost of its security forces.

Saudi Arabia also needs to reevaluate its ambitious effort to spend 50% of its defense outlays locally as part of its ambitious *Vision 2030* civil-military development plan and to spend money on trying to create major new state-owned Saudi Arabian Military Industries to oversee local defense production. Even Saudi oil wealth is limited, and it is now engaged in an extremely costly – and sometime grandiose – civil development plan that has to provide large numbers of real and productive jobs for its young men and women.

Improvements to the National Guard and the Ministry of Interior security forces have made real progress. Saudi Arabia has developed far more effective internal security forces since 2001, and it has largely driven elements of Al Qaeda in the Arabian Peninsula out of the country. It does, however, still use excessive and repressive methods, and it discriminates against its Shi'ite minority.⁵⁶ The U.S. State Department *Country Report on Human Rights* notes that,⁵⁷

...Significant human rights issues included: unlawful killings; executions for nonviolent offenses; forced disappearances; torture of prisoners and detainees by government agents; arbitrary arrest and detention; political prisoners; arbitrary interference with privacy; criminalization of libel, censorship, and site blocking; restrictions on freedoms of peaceful assembly, association, and movement; severe restrictions of religious freedom; citizens' lack of ability and legal means to choose their government through free and fair elections; trafficking in persons; violence and official discrimination against women, although new women's rights initiatives were implemented; criminalization of consensual same-sex sexual activity; and prohibition of trade unions.

In several cases the government did not punish officials accused of committing human rights abuses, contributing to an environment of impunity. Following the high-profile October 2018 killing of journalist Jamal Khashoggi in Turkey, a court sentenced five officials to death and three officials to prison on December 23. The court ruled that guilt could not be established in the case of three other defendants.

... On December 23, a court sentenced 11 government agents accused of killing journalist Jamal Khashoggi at the Saudi Arabian consulate in Istanbul, Turkey, in October 2018. The court did not publicly name the defendants but sentenced five to death; three to prison sentences ranging from seven to 10 years; and ruled that guilt could not be established in the case of three others—including the former deputy director of the General Intelligence Presidency. The defendants, prosecutors, and victim's family can appeal the verdicts. No additional individuals were believed to be under continuing investigation. In an op-ed column published on the day of the verdicts, UN special rapporteur Agnes Callamard stated the trial was "grossly inadequate" and did not meet "even minimum international standards." A government official stated in a press conference following the announcement of the verdicts that investigators did not indict former royal court official Saud al-Qahtani due to "insufficient evidence." Human rights groups asserted the lack of significant prison

sentences for the most senior officials suspected of involvement in the killing was indicative of a climate of impunity for human rights violations in the country. Authorities allowed some diplomatic observers to attend trial hearings during the year.

Under the country's interpretation and practice of sharia (Islamic law), capital punishment may be imposed for a range of nonviolent offenses, including apostasy, sorcery, and adultery, although in practice death sentences for such offenses were rare and usually reduced on appeal. The government, however, frequently implemented capital punishment for nonviolent drug trafficking offenses. As of November 11, the country carried out 177 executions, 77 of which were for drug-related offenses. According to Amnesty International, this was the highest number of executions in a single year since 1995, when authorities carried out 192 executions.

...In 2015 Saudi officials announced the formation of a coalition to counter the 2014 attempted overthrow of the Yemeni government by militias of the Ansar Allah movement (also known colloquially as "Houthis") and forces loyal to former Yemeni president Ali Abdullah Saleh. Membership in the coalition included the United Arab Emirates, Bahrain, Egypt, Jordan, Kuwait, Morocco, Somalia, Sudan, and Senegal. The Saudi-led coalition continued conducting air and ground operations in Yemen, actions initiated in 2015.

Killings: The United Nations, NGOs, media, and humanitarian and other international organizations reported what they characterized as disproportionate use of force by all parties to the conflict in Yemen, including the Saudi-led coalition, Houthi rebels, and other combatants. According to the Office of the UN High Commissioner for Human Rights (OHCHR), from March 2015 to June 2019 there were at least 18,922 civilian casualties, with 7,292 killed and 11,630 injured in the conflict, with a 12 percent increase in the civilian death toll from June 2018 to June 2019. Since the conflict began, more than 7,500 children had been killed or injured. UNICEF reported that since December 2018, an average of eight children per day were killed due to war-related violence. The UN Group of Eminent International and Regional Experts on Yemen assessed the actual death toll was likely higher than these estimates, in view of restrictions on UN researchers' access.

Saudi-led coalition airstrikes reportedly resulted in civilian casualties and damage to infrastructure on multiple occasions. In March a Saudi airstrike hit close to a hospital 60 miles northwest of Saada. The NGO Save the Children, which supported the hospital, reported that eight persons were killed, including five children, and several were unaccounted for following the strike.

The International Committee of the Red Cross reported that on September 1 an airstrike hit a building serving as a Houthi detention facility in Dhamar. The Red Cross estimated more than 100 prisoners were killed in the attack and that another 40 were wounded. The Saudi-led coalition acknowledged it struck the facility as part of an operation against arms depots in the area, noting that the Houthis had not declared it on the no-strike list.

The government established the JIAT in 2016 to identify lessons and corrective actions and to implement national accountability mechanisms, as appropriate. The Riyadh-based group consisted of military and civilian members from coalition member states who investigated allegations of civilian casualties as well as claims by international organizations that humanitarian aid convoys and infrastructure were targeted by the coalition. The JIAT announced the results of numerous investigations during the year, largely absolving the coalition of responsibility in civilian deaths in the incidents reviewed. The Saudi government did not prosecute any cases based on JIAT findings. The OHCHR and others asserted the JIAT's investigations did not provide sufficient transparency on the targeting process for strikes. HRW stated the JIAT's public conclusions raised serious questions regarding the ways in which the JIAT conducted investigations and applied international humanitarian law.

Other Conflict-related Abuse: Yemen's Houthi militants conducted missile, rocket, drone, and artillery attacks into Saudi Arabia, including launching more than 110,000 projectiles into Saudi territory since the beginning of the conflict in 2015. In 2018-2019 authorities reported some of these projectiles had damaged airports, schools, homes, hospitals, mosques, and critical energy infrastructure. In May a drone attack claimed by the Houthis damaged the country's East-West oil pipeline, the country's main cross-country oil link. In August Houthi militants attacked with armed drones the Shaybah oil facility in the Eastern Province. In September state-owned Saudi Aramco oil processing facilities in Abqaiq and Khurais were attacked by

drones and missiles, damaging and temporarily taking offline half of the country's oil production capacity. Houthi militants in Yemen claimed responsibility, but the government concluded that Iran was responsible for the attacks. There were no reports of deaths or injuries from the attack.

Because of security concerns, authorities restricted categories of imports allowed to arrive at Yemeni ports. In order to facilitate commercial cargo flows into Yemeni Red Sea Ports, coalition officers carried out an inspection and approval regime coordinated with the United Nations via the United Nations Verification and Inspection Mechanism for Yemen and the Defense Ministry-hosted Evacuation and Humanitarian Operations Committee. During some periods the committee barred fuel and some categories of materials, including those provided by humanitarian relief agencies, from entering the key Houthi-held Yemeni port of Hudaydah. Commercial imports into Yemen during the year remained well below pre-2015 figures. Sana'a International Airport remained closed throughout the year to commercial traffic.

As is the case with the UAE, Saudi Arabia takes strong measures against Islamist groups, including elements that do not clearly have ties to violent extremism. It conducts extensive surveillance of its Shi'ite minority elements, and it sometimes takes harsh measures in dealing with both Shi'ites and moderate political activists.

When it comes to relations with outside powers, Saudi Arabia has strong ties to the United States, and **Figure Nine** showed that a significant cadre of U.S. military personnel were deployed in 2020. Media reports have since indicated that Saudi Arabia has granted the U.S. new, although limited, basing facilities. The U.S. has also worked closely with Saudi Arabia to improve its battle management, C4, and IS&R capabilities.

The UAE

The UAE has some of the most advanced weapons and military systems of any state in the Gulf and MENA region, particularly for its Air Force. It is buying the F-35 stealth fighter from the U.S. as well as the THAAD missile defenses. It has relatively high readiness and training standards at the combat unit level and sets higher standards than most MENA forces. It is actively pursuing advanced battle management, C4, and IS&R capabilities.

It also, however, is over-equipped for a force its size and its limited personnel. Its power projection capability to sustain or operate outside its own territory and bases is limited to moderate by the limited size of its Army and Navy, and it is highly dependent on foreign personnel and contract support in some areas of operations, maintenance, and sustainability.

Like Saudi Arabia, the UAE is also a nation that needs to rush its acquisition of a layered land-based air/missile defense system and an effective joint all-domain training and battle management capabilities tailored to its needs.

As the force data in **Figure Five** shows, the UAE is to some extent an advanced air force with an army and a navy – rather than a fully balanced force structure. The UAE did successfully project land force in Yemen by sea, and this imbalance is to some extent dictated by its small size and limited population. The UAE could, however, be far more effective as a critical high quality element of an effective Gulf Arab alliance – a limitation that applies to all Gulf Arab forces.

Unlike most of its neighbors other than Qatar, UAE can probably afford this force quality, although its costs continue to rise. The data, however, are unclear. It does not seem to publicly report its real military and internal security expenditures, which seem quite high. **Figure Eight** and **Figure Ten** show that it is making massive arms buys from the United States and some from Europe. The UAE is also seeking to develop more advanced military industries and service capabilities.

Figure Nine shows that it has a significant U.S. train and assist presence, and it is capable of support U.S. power projection forces. It also has a small French base, and it is exploring arms buys from China and Russia.

Its revenues are sufficiently high, however, so that it does not seem to face a major strain on its development, its civil governments, and the civil aspect of its stability and security as a result. Its level of government and freedom from corruption is high for a MENA state. It has not, however, been free from economic challenges – which have varied by Emirate – or the impact of Covid-19. The World Bank reported in October 2020 that,⁵⁸

The UAE's economy will contract in 2020 due to the disrupted engines of growth from COVID-19 pandemic containment efforts, OPEC+ oil production cuts, lower oil prices, reduced global oil demand, and disruption in global supply chains. The government continues to provide mitigation support in response to the pandemic as businesses strive to recover, worsening the consolidated fiscal deficit. The medium-term non-hydrocarbon outlook remains uncertain and hinges on a rebound in tourism and trade following a global recovery.

The UAE's non-hydrocarbon (non-HC) economy was already weakening prior to the pandemic as it faced persistently weak business sentiment and a prolonged real estate downturn. Overall GDP contracted by 0.3% in Q1-2020, with non-HC GDP contracting by 1.9% y/y. The purchasing managers' index (PMI) had slipped to 49.1 in February (below 50 indicates negative growth) for the first time since the crisis in 2009. On the other hand, HC GDP increased by 3.3% as OPEC+ cuts ended.

In the wake of COVID-19, authorities aggressively implemented a containment strategy with strict lockdowns, postponed major events such as World Expo2020, imposed social distancing, and large-scale testing.

Growth in 2020 is projected to contract by 6.3% due to the fallout from COVID-19 and lower oil production following the revitalization of the OPEC+ agreement. Over the medium-term, and dependent on the speed of global recovery, [growth in the UAE is expected to reach to 2.5% by 2022; supported by the government's mitigation and recovery plans, higher oil prices and production capacity, improved business sentiment and a boost from Dubai Expo2021](#). The UAE-Israel normalization deal could expand opportunities as it also involves trade/technology cooperation. Modest inflation will return as growth rebounds.

The UAE's internal security operations are generally effective, but they are authoritarian in character and can be repressive. The U.S. State Department *Country Report on Human Rights* notes that,⁵⁹

The United Arab Emirates (UAE) is a federation of seven semiautonomous emirates with a resident population of approximately 9.4 million, of whom an estimated 11 percent are citizens. The rulers of the seven emirates constitute the Federal Supreme Council, the country's highest legislative and executive body. The council selects a president and a vice president from its membership, and the president appoints the prime minister and cabinet. Sheikh Khalifa bin Zayed Al Nahyan, ruler of Abu Dhabi emirate, is president, although Crown Prince Mohammed bin Zayed Al Nahyan of Abu Dhabi exercises most executive authority. The emirates are under patriarchal rule with political allegiance defined by loyalty to tribal leaders, leaders of the individual emirates, and leaders of the federation. A limited, appointed electorate participates in periodic elections for the partially elected Federal National Council (FNC), a consultative body that examines, reviews, and recommends changes to legislation and may discuss topics for legislation. The last election was in October, when appointed voters elected 20 FNC members. Citizens may express their concerns directly to their leaders through traditional consultative mechanisms such as the open majlis (forum).

Civilian authorities maintained effective control over the security forces. Each emirate maintained a local police force called a general directorate, which was officially a branch of the federal Ministry of Interior. All emirate-level general directorates of police enforced their respective emirate's laws autonomously. They also enforced federal laws within their emirate in coordination with each other under the federal ministry. The federal government maintained federal armed forces under the Ministry of Defense for external security.

Significant human rights issues included allegations of torture in detention; arbitrary arrest and detention, including incommunicado detention, by government agents; political prisoners; government interference with privacy rights; undue restrictions on free expression and the press, including criminalization of libel, censorship, and internet site blocking; substantial interference with the rights of peaceful assembly and freedom of association; the inability of citizens to choose their government in free and fair elections; and criminalization of same sex sexual activity, although no cases were publicly reported during the year. The government did not permit workers to join independent unions and did not effectively prevent physical and sexual abuse of foreign domestic servants and other migrant workers.

The government investigated, prosecuted, and punished officials who committed abuses. There were no public reports of impunity involving officials, but there was also no publicly available information on whether authorities investigated complaints of police abuses, including prison conditions and mistreatment.

The United Nations, human rights groups, and others alleged UAE military operations as part of the Saudi-led Coalition in Yemen killed civilians, damaged civilian infrastructure, and obstructed delivery of humanitarian aid. Human rights groups alleged UAE-backed security forces in Yemen committed torture, sexual assault, and mistreatment against detainees. The government rejected allegations that members of its security forces serving in Yemen had committed human rights abuses, and there was no publicly available information on whether the government carried out any investigations into these reported incidents.

As is the case with Saudi Arabia, the UAE takes strong measures against Islamist groups, including groups like the Muslim Brotherhood that do not have clear ties to extremism. Control over foreign labor remains tight.

Kuwait

All of the other Southern Arab Gulf states are relatively small states that cannot develop major military forces or are located on the Gulf and have highly vulnerable trade routes, offshore facilities, and critical infrastructure – including electric power, desalination facilities, and drinking water. They can generally handle internal security and maintain the independence in any feud with a fellow Arab neighbor, but they need outside support in any serious conflict involving a power like Iran.

Each is currently dependent in its own way on U.S. military support or power projection capability. Each state has also developed its military forces with only limited regard to interoperability and standardization, sharply limiting the ability to integrate various national forces into an effective alliance.

Figure Five shows these limitations in terms of each smaller Arab Gulf nation's force size, and they become far more clear from reviewing the numbers of the different types of weapons by service shown in the IISS *Military Balance* and commercial reporting by IHS Jane's. Kuwait is of particular interest because of its vulnerable geographic position and proximity to Iran and Iraq.

Kuwait has, however, come a long way since it faced an Iraqi invasion in 1990. It now has an effective and modern air force, and one that is moderately large for a country its size. It has modern armor and artillery as well as land-based air defenses. Kuwait also, however, has an army with only 11,500 personnel – well under the size of the combat forces in one U.S. Army division. Its Navy only has some 2,000 personnel and limited numbers of patrol ships – even if its Coast Guard is counted – and its land-based air defenses consist largely of one surface-to-air missile brigade with 40 MIM-104 Patriot launchers – effective systems although they are not designed to meet all of Iran's current missile and UAV threats.

Kuwait also has U.S. military personnel to provide train and assist support, is reported to have some U.S. prepositioning, and relies on U.S. air and naval forces that can deploy quickly to provide aid in an emergency. U.S. advisors indicate that training and readiness are moderately effective. **Figure Eight** and **Figure Ten** show that Kuwait has made major arms buys from the U.S. in recent years and only limited buys from Europe and Russia. It has more combat aircraft on order. And continues to upgrade its armor while it may buy more advanced missile-equipped patrol boats.

Figure Six and **Figure Seven** show that governance standards are relatively high by MENA standards, corruption is relatively low, and the quality of governance is good. Kuwait is, however, politically divided and the IISS reports that Kuwait is now spending over 7% of its GDP on security forces. This is a relatively high amount for a country so reliant on petroleum exports as its main source of income and that is facing the current Covid-19 crisis. The World Bank noted in October 2020 that,⁶⁰

While performance in 2020 will suffer from the twin shocks of COVID-19 and the oil price slump, growth in Kuwait has been tapering since 2014. The inevitable fiscal deficit increase from declining oil revenue and crisis mitigation spending, and funding needs for the Future Generations Fund are exacerbating pressure on fiscal buffers, in the absence of a debt law. While less exposed to internationally hard-hit sectors than its GCC neighbors, long-standing rigidities will impede adjustment to the protracted COVID-19 shock.

Real GDP posted a modest decline of 1.1% in Q1-2020; non-oil growth contracted by 3.5% while real oil GDP increased by 1.2% with the OPEC+ deal lapse. Broad-based measures to stem the pandemic included suspending flights, closing schools/ universities, banning public gatherings, suspending nonessential work, and imposing 24-hour curfew. Kuwait's persistence with variants of these measures is one of the longest continuous stretches in the world. These measures have significantly impacted private spending, investment activity and overall GDP starting Q2-2020.

The protracted nature of the pandemic and slow government response has led to a downgrade in forecasts. Real GDP is now expected to contract by 7.9% of GDP in 2020 (compared to -5.4% forecasted in June 2020) as non-oil GDP growth is subdued by protracted public health measures and the constrained fiscal mitigation measures, while oil GDP contracts in compliance with the OPEC+ agreement. Over the medium-term growth in Kuwait will recover with continued recurrent public spending and credit growth, reaching to 2.9% by 2022.

Kuwait's internal security structure is less repressive than that of many MENA states, and it has been effective – although Kuwait faces intelligence challenges from Iran as well as from internal tensions. The U.S. State Department describes Kuwait's internal security structure as follows:⁶¹

Kuwait is a constitutional, hereditary emirate ruled by the Al-Sabah family. While there is also a democratically elected parliament, the amir holds ultimate authority over most government decisions. The last parliamentary general election was held in 2016 and was generally free and fair with members of the opposition winning seats. By-elections were held in March for two seats vacated by opposition members of parliament who had left the country after being sentenced to prison.

Police have sole responsibility for the enforcement of laws not related to national security, and the Kuwait State Security (KSS) oversees national security matters; both report to the Ministry of Interior, as does the Kuwait Coast Guard. The armed forces are responsible for external security and report to the Ministry of Defense. The Kuwait National Guard is a separate entity responsible for critical infrastructure protection, support for the Ministries of Interior and Defense, and the maintenance of national readiness. Civilian authorities maintained effective control over the security forces.

Significant human rights issues included: reports of torture; arbitrary detention; political prisoners; arbitrary or unlawful interference with privacy; restrictions on free expression, the press, and the internet, including criminalization of libel, censorship, and internet site blocking; interference with the rights of peaceful assembly and freedom of association; restrictions on freedom of movement; trafficking in persons;

criminalization of consensual adult male same-sex sexual conduct; and reports of forced labor, principally among foreign workers.

The government took steps in some cases to prosecute and punish officials who committed abuses, whether in the security services or elsewhere in the government. Impunity was a problem in corruption cases.

Bahrain

Bahrain is a small island that occupies an exposed position relative to Iran and has been subject to past claims that it is Iranian territory. It also is ruled by a Sunni elite that has sometimes exploited its Shi'ite minority, and this has led to the creations of Shi'ite opposition groups – some of which have used limited amounts of force with support from Iran. It has, however, had strong support from Saudi Arabia and the UAE in dealing with such challenges.

Figure Five shows that its forces are relatively small, and they only total some 8,200 personnel with an Army of only 6,000 personnel, roughly the equivalent of one U.S. Army brigade. It does, however, have a moderately capable small Navy and an Air Force with two squadrons of F16s as well as I-Hawk surface-to-air missiles.

In practice, Bahrain relies heavily on Saudi and U.S. support in any serious conflict with Iran, and it can count on such support from both countries. Saudi Arabia has close links to Bahrain, and the U.S. has over 4,000 military personnel deployed as well as air and naval facilities in Bahrain, which is the located at the headquarters of the U.S. 5th Fleet. This headquarter not only assists Bahrain in deterring and defending against Iraq, but it is the major facility that conducts joint exercises for all the Southern Arab Gulf air and naval forces in defending Gulf waters against any threat from gray area to serious levels of conflict.

Figure Eight and **Figure Ten** show, however, that Bahrain only spends moderate amounts of money on arms imports, most from the U.S. It still makes a serious effort to fund effective forces, and it spends roughly twice the 2% of GDP that is a largely unmet goal for NATO countries. This is a major effort for a country that no longer has the capacity to make major petroleum exports, needs outside help in supporting its other industries, and badly needs to create as many real jobs as possible for its own growing population.

The World Bank reports that,⁶²

Bahrain's economy is expected to contract in 2020 due to lower international oil prices and the spread of COVID-19. Fiscal and external deficits are expected to rise sharply in 2020, reversing the narrowing path observed in 2019. The overall budget deficit is projected to only gradually narrow over 2021-22 given lower oil revenues, and the large off-budget spending. Downside risks arise from duration and depth of the twin crises of continued weakness in oil prices and COVID-19.

[Hit by the sharp drop in oil prices and unfavorable global and domestic conditions including disruptions from COVID-19, preliminary official data indicate that Bahrain posted a 1.1% \(y/y\) contraction in its real GDP in Q1/2020.](#) The decline was caused by disruptions in the non-oil economy which contracted by 1.7% (y/y), weighed down by the lockdown measures and travel restrictions, especially for services and tourism sectors where Bahrain has heavily invested. Weak consumer demand driven by social distancing and rising uncertainties due to the pandemic led to 2% (y/y) deflation in the first 7 months of 2020; rising prices expected in the next two quarters could off-set that on annual basis.

Faced with further pandemic disruptions coupled with only modest recovery in oil prices over the remainder of the year, real GDP is expected to contract by 5% at end-2020. Over 2021-22, growth could bounce back to an average of 2%, supported by infrastructure projects and the pick-up in non-oil activity. Lower oil prices and large off budgetary spending, along with constrained oil production capacity are projected to widen the

overall fiscal deficit to over 13% of GDP in 2020. Persistent large fiscal deficits will lead to a rapid rise in public debt estimated to reach 130% of GDP in 2020.

As for internal security, **Figure Six** and **Figure Seven** show that Bahrain has relatively effective overall governance and freedom from corruption, but that Bahrain faces serious problems with Iranian support of some Shi'ite elements, and its main problems comes from the oppression of legitimate native Shi'ite protests by its Sunni ruling elite. The U.S. State Department *Country Report on Human Rights* notes that,⁶³

Bahrain is a constitutional, hereditary monarchy. King Hamad Bin Isa al-Khalifa, the head of state, appoints the cabinet, consisting of 24 ministers; 12 of the ministers were members of the al-Khalifa ruling family. The king, who holds ultimate authority over most government decisions, also appoints the prime minister—the head of government—who does not have to be a member of parliament. Parliament consists of an appointed upper house, the Shura (Consultative) Council, and the elected Council of Representatives, each with 40 seats. The country holds parliamentary elections every four years, and according to the government, 67 percent of eligible voters participated in the most recent elections, held in November 2018. Two formerly prominent opposition political societies, al-Wifaq and Wa'ad, did not participate in the elections due to their dissolution by the courts in 2016 and 2017, respectively. The government did not permit international election monitors. Domestic monitors generally concluded authorities administered the elections without significant procedural irregularities.

The Ministry of Interior is responsible for internal security and controls the public security force and specialized security units responsible for maintaining internal order. The Coast Guard is also under its jurisdiction. The Bahrain Defense Force is primarily responsible for defending against external threats, while the Bahrain National Guard is responsible for both external and internal threats. Civilian authorities maintained effective control over the security forces.

Significant human rights issues included: allegations of torture; arbitrary detention; political prisoners; arbitrary or unlawful interference with privacy; restrictions on freedom of expression, the press, and the internet, including censorship, site blocking, and criminal libel; substantial interference with the rights of peaceful assembly and freedom of association, including restrictions on independent nongovernmental organizations (NGOs) keeping them from freely operating in the country; restrictions on freedom of movement, including revocation of citizenship; and restrictions on political participation, including banning former members of al-Wifaq and Wa'ad from running as candidates in elections.

The government prosecuted low-level security force members accused of human rights abuses, following investigations by government or quasi-governmental institutions. Human rights organizations claimed investigations were slow and lacked transparency.

Qatar

Qatar has steadily built up its military forces since the First Gulf War, and has given the U.S. major basing facilities for air operation at Al Udeid in its southern border area. The deployment data in **Figure Nine** only show personnel assigned to permanent activities, and the real level of U.S. activity was far higher during the campaign to destroy the ISIS “caliphate,” and it still seems much higher than these figures show.

The fact that the U.S. occupied this base did much to undermine that potential threat from Saudi Arabia and the UAE during the boycott they led on Qatar and does much to deter any Iranian pressure – although Qatar has been careful to be much less confrontational in dealing with Iran than Saudi Arabia and the UAE; has been equally careful to maintain good relations with Kuwait, Oman, and increasingly Turkey; and has bought arms from Europe including British supported Eurofighters and Italian-built ships for the Omani Navy that will have Italian naval support.

It is improving its battle management, C4, IS&R support, and long-range radars. It also is examining options for creating layered land-based air/UAV/ ballistic missile defenses – including improved Patriots, the U.S. THAAD, and possibly Russian S-400s.

Figure Eight and **Figure Ten** show that Qatar spends massive amounts of money on arms imports. It has faced some financial pressure from the Covid-19 crisis, but it is perhaps that last major petroleum exporter wealthy enough to ride out almost any financial crisis and to buy its way out of trouble without affecting its long-term development and civil welfare and stability. It also has limited its role in other MENA states to limited funding of various opposition and information warfare efforts, and it has not shown of some more grandiose ambitions exhibited by some figures in the UAE.

Its forces are now lightly to moderately well-equipped but are small. Its 12,000 man land forces (Army plus Emiri Guard) seems too small to operate and sustain serious land combat, particularly at any maneuver distance from their main peacetime bases. Some of its land force combat elements do seem effective, but they seem to be lightly armed with major weapons compared to other Gulf forces.

Its naval forces have only 2,500 personnel – including its coast guard and coastal defense forces. They too are only lightly armed and seem to have little capability for joint or all-domain warfare. Its Air Force has only 2,000 military personnel. It is expanding, but it now operates and sustains only 33 aging fixed wing combat aircraft and 24 AH-64E attack helicopters.

It will be interesting to see how much Qatar actually does to expand its military forces and make them effective now that the boycott is lifted, particularly given its ability to depend on U.S. support and the value the U.S. gains for the use of the base at Al Udeid, which is critical as an air operations center for regional air operations and coordinating coalition operations with its other Arab and European allies.

Qatar does an effective job of supporting its longer term economic development and passing on significant amounts of its wealth to its citizens as well as some benefits to foreign workers. The World Bank reports that,⁶⁴

COVID-19 and the sharp fall in hydrocarbon revenues will lead to a contraction of real GDP growth of 2% in 2020. The decline has been mitigated by infrastructure related spending ahead of the FIFA World Cup in 2022, continued expansion of LNG capacity, and fiscal and monetary response. Steps taken to improve the business environment, as well as the final push ahead of the World Cup are expected to underpin growth in the medium-term.

Qatar has been struck very hard by COVID-19 both through global demand and price channels as well as through the domestic health impact (more than 120,000 cases reported by September 9, 2020), the second highest exposure in the GCC. Yet stringent containment measures, aggressive testing and trace policies, as well as the effectiveness of the Qatari health care system, have resulted in the second lowest death rate amongst this group of countries (73 deaths per one million population). Nearly 240,000 tests per million have been conducted in Qatar and there are no visible signs of a second wave.

The annual growth rate for 2020 is expected to be -2%, driven by a curtailed hydrocarbon sector and deteriorating non-energy market sentiment. Real GDP growth in Qatar will turn positive again in 2021 as energy prices stabilize at around US\$42bbl, global LNG demand picks up, and non-energy economic sentiment improves once the pandemic is controlled. Over the medium-term, growth will reach around 3% by 2022 from delivery and legacy investments for the FIFA World Cup.

The fiscal deficit is expected to be -3.6% on account of substantial drops in fiscal receipts of hydrocarbon exports, and a fiscal stimulus to mitigate COVID-19. As the pandemic is controlled, global demand picks up,

and energy prices normalize, the fiscal deficit is expected to regain balance and turn into surplus by 2022. Public sector balances will also be supported by the eventual introduction of a VAT.

As for internal stability and security, **Figure Six** and **Figure Seven** show that Qatar has effective overall governance and relatively high levels of freedom from corruption. Qatar is more discrete in its internal security operations than most MENA states, and it is more tolerant of moderate opposition as long as it is not directly attacking the regime. Somewhat ironically, the Saudi-UAE led boycott also seems to have made the regime significantly more popular and supportive of its ruler. It does, however, have many elements of the same repressive focus as other MENA countries. The U.S. State Department *Country Report on Human Rights* notes that,⁶⁵

Qatar is a constitutional monarchy in which Amir Sheikh Tamim bin Hamad Al Thani exercises full executive power. The constitution provides for hereditary rule by men in the amir's branch of the Al Thani family. The most recent elections were in 2019 for the Central Municipal Council, an advisory and consultative body. Observers considered these elections free and fair. All cabinet members are appointed by the amir, including the prime minister.

The national police and ministry of interior forces maintain internal security that addresses, among other matters, terrorism, cyberattacks, and espionage. The national police oversee general law enforcement. The army is responsible for external security. Civilian authorities maintained effective control over security forces.

Significant human rights issues included: criminalization of libel; restrictions on peaceful assembly and freedom of association, including prohibitions on political parties and labor unions; restrictions on the freedom of movement for migrant workers' travel abroad; refusal to grant asylum despite risk of arrest and torture; limits on the ability of citizens to choose their government in free and fair elections; criminalization of consensual same-sex sexual activity; and reports of forced labor.

The government took limited steps to prosecute those suspected of committing human rights abuses. The government took steps to address forced labor.

Oman

Oman has close ties to the British military, and it has a good reputation for military effectiveness that dates back to the Dhofar Rebellion. It signed a new security agreement with Britain in February 2019 and has a joint training facility. The IISS reports that it is developing the port at Dqum to be a major logistics facility for British and other operations. The U.S. has several contingency facilities in Oman.

Figure Five also shows that it has some 42,000 military personnel, including some 25,000-31,000 land forces depending on whether the Royal Household Forces are included. It does, however, have a very diverse mix of land combat equipment – some aging significantly.

Oman's 4,200 personnel Navy seems better equipped, more ready, and better suited to the kind of maritime threats it faces than many other Arab Gulf navies, but it would almost certainly need British and U.S. support to engage Iran at the Strait of Hormuz and to deal with its submarine threat in the Gulf of Oman. It has no real capability to deal with Iran's submarines or smart mine threats.

The burden that Oman's military spending puts on its civil sector seems high. As is clear from virtually all of the data on MENA defense spending shown in this study, the real level of Omani national security spending is uncertain. **Figure Five** does show, however, that the IISS reports that Oman may be spending extraordinary amounts of money on its military forces.

Figure Eight and **Figure Ten** show the same may be true of its arms imports – although it is sometimes hard to track where its reported levels of European and U.S. arms imports are being allocated to given parts of its force structure. If these spending figures are even approximately correct, they are far too high for a country with Oman's moderate export income to sustain and to meet its needs for civil development and large numbers of job for its youth.

Oman also faces major new challenges because of the COVID-19 crisis. The World Bank reports that,⁶⁶

The economy is expected to contract very sharply in 2020 amid the weakness of oil prices and the disruptions from COVID-19. Fiscal and external deficits will remain under immense strain due to prolonged low oil and gas prices, elevating public and external debt. Key risks to the outlook are prolonged low oil prices, which will induce high external borrowing needs, and lack of impetus for private sector job creation that does not depend on government spending.

The drop in oil prices and COVID-19 are placing unprecedented strain on Oman's economy. While no official data are available yet on the economy in 2020, preliminary data issued by the authorities indicate that Oman's nominal GDP has contracted by 3.9% in Q1/2020 (y/y); non-oil activities contracted by over 6%. Inflation has reached negative territory with -0.4% (y/y) in Q2/2020 reflecting weak domestic demand. The sharp drop in oil prices in 2020 will take a heavy toll on public finances. Latest data reveals that total revenues declined by 22% in Q2/2020 (y/y), of which 20% comes from a decline in oil receipts.

The economy is projected to sharply contract by over 9% in 2020, owing to depressed global demand for oil and the pandemic hit to the non-oil sector. The new OPEC+ oil cut agreement is putting significant pressure on the hydrocarbon sector, which is expected to contract by over 12% this year. The non-oil economy also faces significant pressure amid ongoing restrictions, with tourism and hotel sectors are among the hardest hit. If conditions ease, growth in Oman is projected to gradually pick up to an average of 4% in 2021-22, but very backloaded to 2022, partly due to a spike from the second phase of the Khazzan field. Gas field development has been critical to meet growing domestic and global demand, but it is not on a scale that is transformative in its own right. Inflation will likely pick up to around 3% in 2021, reflecting the recovery of domestic demand and the introduction of VAT.

As for internal security, **Figure Six** and **Figure Seven** show that Oman has relatively effective overall governance and freedom from corruption. Oman does a much better job of concealing its internal security problems and operations than most MENA states, but it seems to be quietly and ruthlessly effective. The U.S. State Department *Country Report on Human Rights* notes that,⁶⁷

The sultan has sole authority to enact laws through royal decree, although ministries and the bicameral Majlis Oman (parliament) can draft laws on nonsecurity-related matters, and citizens may provide input through their elected representatives. The Majlis Oman is composed of the Majlis al-Dawla (upper house or State Council), whose 85 members are appointed by the sultan, and the elected 86-member Majlis al-Shura (lower house or Consultative Assembly). In October nearly 350,000 citizens participated in the Majlis al-Shura elections for the Consultative Assembly; there were no notable claims of improper government interference.

The Royal Office controls internal and external security and coordinates all intelligence and security policies. Under the Royal Office, the Internal Security Service investigates all matters related to domestic security. The Royal Oman Police (ROP), including the ROP Coast Guard, is also subordinate to the Royal Office and performs regular police duties. The Royal Office and Royal Diwan—the sultan's personal offices—maintained effective control over the security forces.

Significant human rights issues included: allegations of torture of prisoners and detainees in government custody; restrictions on free expression, the press, and the internet, including censorship, site blocking, and criminal libel; substantial interference with the rights of peaceful assembly and freedom of association; required exit permits for foreign workers; restrictions on political participation; and criminalization of lesbian, gay, bisexual, transgender, and intersex (LGBTI) conduct.

Authorities generally held security personnel and other government officials accountable for their actions. The government acted against corruption during the year, with cases proceeding through the court system.

The Changing Role of Russia and China

As is discussed in more depth later in this study, Russia and China do not yet play a major military or security assistance role in Iran or other Gulf states. **Figure Eight** shows that they do, however, export arms – and their security relations may be changing. Iran has recently procured Russian aid in modernizing its land-based surface-to air missiles forces and air defenses systems, and UN sanctions against conventional arms transfers to Iran expired in late 2020.

As is discussed later, Russia has already sold Iran relatively advanced S-300 air defense missiles. Russia conducted its first major naval exercise with Iran in February 2021, and one where press reports described the exercises as follows,⁶⁸

The joint naval exercise covered 17,000 square kilometers and included numerous tactical exercises such as some target practice and rescue operations. It also included surface-to-surface and surface-to-sea missiles and joint naval drills intending to advance anti-piracy operations. The joint naval exercise featured corvette Stoyky and tanker Kola from the Russian navy's Baltic Fleet and frigate URO Jamaran, patrol ship Mahmudi, support ship Nazeri, supply ship Lavan, corvette Nahdi, and multiple missile boats like Gardouneh, Falakhan, and Tondar from the Iranian side.

China can now export far more advanced weapons and military systems, and both China and North Korea seem to have been important sources of Iran's family of missiles and drones. Iran is also reported to have at least discussed a major strategic partnership with China to trade Iranian petroleum exports for Chinese arms transfers and military support.

Figure Four: The Total Gulf Military Balance - I

Category	Iraq	Iran	GCC	Yemen**
Actual Military Expenditures (\$US billions)				
IISS	-	20.0+?	108.49	
SIPRI	7.5	12.6	77.7	nk
Iran Primer		18.4		
As % of GDP				
IISS	10.3?	14.1?	40.31	
SIPRI	3.5	2.3	26.1	nk
Iran Primer		4.0		
Active Military Personnel	193,000	610,000	374,800	
Reserve Military Personnel	-	350,000	23,700	
Islamic Revolutionary Guards Corps (IRGC)	-	190,000	0	
Land Forces				
Active Personnel	180,000	350,000	173,500	
IRGC/National Guard Forces	0	150,000	112,000	
Armor				
Main Battle Tanks	391+	1,513+	1,999	
Other Armored Fighting Vehicles (AFVs)	1,153	725	4,237	
Armored Personnel Carriers	1,592+	640+		
Artillery ***	1,601	6,798+	4,759+	
Towed	60+	2,030+	529	
Self-Propelled	48+	292	777	
MRLs	3+	1,476+	206+	
Naval Forces				
Active Personnel	3,000	18,000	24,900	
IRGC/National/Coast Guard Forces	0	15,000+	1,500?	
Tactical Conventional Submarines	0	3	0	
Submersibles	0	15	0	
Principal Surface Combatants				
Missile	0	6	22	
Other	0	0	0	
Patrol and Coastal Combatants				
Missile	0	70+	69	
Other	6	59	88	
Coastal/Small	26	57	221	
Mine Warfare	0	0?	5	
Amphibious Ships	0	12	2	
Landing Craft	-	11	52	
Maritime Patrol/ASW Aircraft	0	3	12	
ASW Helicopters	-	10	15?	
MCM Helicopters	-	13	0	
Marine Active Personnel	3,600	5,000	3,000	

Figure Four: The Total Gulf Military Balance - II

Category	Iraq	Iran	GCC	Yemen**
Air Force/Air Defense Forces				
Active Personnel	10,000	18,000	51,500	
IRGC/ Guard Forces	-	15,000	0	
Combat Capable Aircraft	80	333	799	
Fighter Ground Attack (FGA)	34	39	473	
Fighter	-	183+	93	
Attack	30	39	89	
Combat capable trainers	24	15	148	
EW, IS&R, ELINT	10	6+	30	
AE&W	0	0	11	
Tanker	0	0	16	
Transport/Airlift	43	116	123	
Combat/Attack helicopters*	35	50	143	
Other helicopters*	117	220+	526+	
Surface-to-Air Missile Launch Units				
Major	0	?	276	
Short Range	24	?	235	
Surface-to-Surface Missiles				
MRBM	0	50?	10+?	
SRBM	0	100?	18?	
GLCM CSIR	?	129	6?	
GLCM ISR	?	130	?	
Paramilitary Personnel	148,000		53,760?	
Basij Resistance Mobilization Force	0	600,000	0	
Al Quds Force Active	0	5,000?	0	
Law Enforcement Active	-	50,000?	9,000	
Law Enforcement Reserve	-	450,000	-	
Militias	100,000+	-	-	
Federal Police	36,000	-	-	
Territorial Interdiction Force	12,000	-	-	

*Includes holdings of both land and air forces.

** Only rough estimates of personnel and equipment types for each major side are available, with no meaningful estimates of equipment numbers.

*** Total usually includes highly uncertain number of mortars

Note: These totals only include the data provided. Nk represents omitted data.

Source: Adapted from Relevant country sections of the IISS, *Military Balance*, 2021; SIPRI, *SIPRI Military Expenditure Database*, 2019; and Henry Rome, "Iran's Defense Spending," *Iran Primer*, The United States Institute of Peace, June 17, 2020, <https://iranprimer.usip.org/blog/2020/jun/17/iran%E2%80%99s-defense-spending..>

Figure Five: The Arab Gulf State Military Balance - I

Category	Bahrain	Kuwait	Oman	Qatar	Saudi Arabia	UAE
Actual Military Expenditures (\$US billions)	-	-	-	-	-	-
IISS	1.41	7.8	7.48	23.5	48.5	19.8
SIPRI	1.40	7.71	6.73	-	61.86	-
As % of GDP						
IISS	4.06	7.14	12.01	4.37	5.60	7.13
SIPRI	3.70	5.60	8.80	-	8.00	0.00
Active Military Personnel	8,200	17,500	42,600	16,500	227,000	63,000
Reserve Military Personnel	0	23,700	0	0	0	0
Islamic Revolutionary Guards Corps (IRGC)	0	0	0	0	0	0
Land Forces						
Active Personnel	6,000	11,500	25,000	12,000	75,000	44,000
National/Presidential Guard Forces	0	0	0	0	100,000	12,000
Armor						
Main Battle Tanks	180	293	117	96	960	353
Other Armored Fighting Vehicles (AFVs)	89	537	258	144	2,365	844
Armored Personnel Carriers	303+	260	262	160	2,118	1,656
Total Artillery (Including mortars)	175	211	245	89+	1,197+	613+
Towed	36	0	108	12	280	93
Self-Propelled	82	106	24	24	360	181
MRLs	13	27	0	8+	70	88+
Naval Forces				***	***	***
Active Personnel	700	1,500	4,200	2,500.	13,500	2,500
IRGC/Border/Guard Forces	0	0	0	0	1,500?	?
Tactical Conventional Submarines	0	0	0	0	0	0
Submersibles	0	0	0	0	0	0
Principal Surface Combatants						
Missile	0	0	5	0	10	7
Other	0	0	0	0	0	0
Patrol and Coastal Combatants						
Missile	0	28	1	7	9	24
Other	7	10	4	7	45	15
Coastal/Small	4	0	3	9	94	111
Mine Warfare	0	0	0	0	3	2
Amphibious Ships	0	0	1	0	0	1
Landing Craft	9	8	5	0	13	17
Maritime Patrol/ASW Aircraft	0	0	4	0	*****	8
ASW Helicopters	0	0	0	8?	0	7
MCM Helicopters	0	0	0	0	0	0
Marine Active Personnel	0	0	0	0	3,000	0

Figure Five: The Arab Gulf State Military Balance - II

Category	Bahrain	Kuwait	Oman	Qatar	Saudi Arabia	UAE
Air Force/Air Defense Forces						
Active Personnel	1,500	2,500	5,000	2,000	36,000	4,500+
IRGC/ Guard Forces	0	0	0	0	0	0
Combat Capable Aircraft	38	66	63	33	443	156
Fighter Ground Attack (FGA)	20	39	35	27	215	137
Fighter	12	0	0	0	81	0
Attack	0	0	0	0	66	23
Combat capable trainers	6	27	28	6	69	12
EW, IS&R, ELINT, SIGINT	0	0	0	0	16	14
AE&W	0	0	0	0	7	4
Tanker	0	0	0	0	13	3
Transport/Airlift	12	5	12	18	39	37
Combat/Attack helicopters*	28	16	0	24	47	28
Other helicopters*	29	13	41+	39	260+	144+
Surface-to-Air Missile Launch Units *****						
Major	0	40	0	PAC-3	236?	IHawk/PAC3
Short Range	0	12	0	0	181?	42?
Surface-to-Surface Missile Launch units						
MRBM/IRBM	0	0	0	0	10+?	0
SRBM	0	0	0	0	12?	6
GLCM CSIR	0	0	0	6	?	?
GLCM ISR	0	0	0	0	?	?
Paramilitary Personnel	11,260	8,600	4,400	5,000?	24,500	?
Law Enforcement Active	9,000	-	-	-	-	-
National Guard/Tribal Guard	2,000	6,600	4,000	0	****	-
Coast Guard	260	500	400	0	0	0
Royal/Emiri Guard	0	1,500	6,400	0	?	-
Internal Security	?	?	?	5,000	500	?
Border Guard	?	?	?	?	15,000	?
Facilities Security	?	?	?	?	9,000+	?

*Includes holdings of both land and air forces.

** Only rough estimates of personnel and equipment types for each major side are available, with no meaningful estimates of equipment numbers.

***Includes Coast Guard, Border Guard, Saudi Critical Infrastructure and UAE Coastal Protection Agency (CISPA) naval forces.

****Saudi National Guard is included in Land force Totals

***** E-3A can perform maritime patrol role.

***** Two THADD missile defense batteries on order.

Note: These totals only include the data provided.

Source: Adapted from Relevant country sections of the IISS, *Military Balance*, 2021; and SIPRI, *SIPRI Military Expenditure Database*, 2019.

An Emerging Red Sea Subregion?

The civil war in Yemen has produced a major impact on the security of Saudi Arabia, on Iranian influence in the MENA region, on the military development of the UAE, and on the strategic position of Oman. It also, however, has a major impact on Yemen's prospects for emerging as a unified and developing state and on the extent to which the Red Sea is becoming a new subregion of the MENA area.

In the case of a desperately poor Yemen, the fall of its former "president" or dictator, Ali Abdullah Saleh, has led to a series of power struggles that have divided the country into warring factions which are now dominated by the Houthis, a Shi'ite tribal faction – backed by Iran – whose main opponent is rival Yemeni government led by Saleh's former "vice-president" Abdrabbuh Mansur Hadi. A number of other factions – including Al Qaeda in the Arabian Peninsula and a complex mix of other tribal and extremist factions – are fighting in the less populated eastern regions of the country along with factions that call for an independent South Yemen.

Outside regional powers have played a major role in the fighting and have dominated the actual fighting in support of the Hadi faction with only limited success. So far, Saudi Arabia and the UAE have supported the Hadi faction – with U.S. support in the forms of arms transfers, intelligence and targeting support, and airborne refueling. These efforts have largely failed. The UAE and Saudi Arabia have not cooperated effectively, and the UAE has largely abandoned its role in the war. The U.S. also ceased to provide targeting and refueling support as well as arms transfers to Saudi Arabia in February 2021 because of excessive Saudi air strikes on civilians and the Saudi role in creating a rising major humanitarian crisis.

In contrast, Iran has successfully backed the Houthis, who now dominate Yemen's heavily populated Northwest, which threatens the remaining area that the Hadi forces control. The Houthis have outfought the Saudis in the Saudi-Yemeni border area, and Iran has helped to create a new threat of Houthi operated precision-guided missiles and drones. In the process, this expansion of Iranian influence has given Iran a growing role in the Red Sea/Bab-el-Mandeb area.

The Houthis have not only shown the ability to operate precision-guided missiles and drones, but to fight well at the local level and counter Saudi air and land capabilities in the Saudi-Yemeni border area. There is little doubt that they would have decisively defeated the Hadi government forces if it had not been for past Saudi-UAE-U.S. support.

These shifts may well make Yemen the scene of continuing regional power struggles indefinitely into the future – and make any real peace settlement impossible. As is the case with Libya, Lebanon, Syria, Iraq, and other MENA crisis states, any apparent peace may simply be a prelude to further power struggles. More than that, however, no one has yet advanced any proposals that would lead to the development and unity of a post-civil war Yemen that would end its violent internal divisions; create a stable political structure; give it acceptable levels of governance; deal with its population pressures; and offer its people economic development, jobs, and living standards.

Once again, the civil dimension of security is at least as important as the military one. As is the case with far too many MENA states -- especially Libya, Lebanon, Syria, and Iraq -- the question is not "how does this war end?" It is rather, "how do you bring lasting security and stability?" Here, the World Bank's summary assessment is a critical warning of the fact that successful

security assistance in fighting a given war or set of extremists may be little more than a pyrrhic victory, and that any apparent peace settlement may not bring effective or honest governance, stable and equitable civil development, or lasting peace and stability:⁶⁹

Yemen has been embroiled in conflict since early 2015. The poorest country in the Middle East and North Africa (MENA) before the conflict escalated, now, according to the UN, it is suffering the worst humanitarian crisis in the world. Fighting has devastated the economy, destroyed critical infrastructure, and led to food insecurity verging on famine. In 2020, the UN estimated 24.3 million people—80% of the population—were “at risk” of hunger and disease, of whom roughly 14.4 million were in acute need of assistance.

Socio-economic conditions deteriorated further in 2020, affected by low global oil prices, the economic fallout of the COVID-19 crisis, and weak public infrastructure, as well as extreme climate events and natural disasters. Distortions created by the fragmentation of institutional capacity in the Central Bank of Yemen and other government agencies, and by diverging policy decisions taken by parties to the conflict, have further compounded the crisis. Conflict has interrupted services and caused acute shortages of basic inputs, including fuel, with anecdotal evidence suggesting the economy is likely to contract from a low base in the first half of 2020. The oil sector (the only large export earner) has been hit hard by low global oil prices, and non-oil activity has suffered from the slowdown in COVID-19-related trade and from exceptionally heavy rainfalls, which caused intense flooding, damage to infrastructure, and human casualties.

An estimated 20.5 million people are without safe water and sanitation, and 19.9 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 has exacerbated the humanitarian crisis. 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 on the political and security situation. Most recently, the compounded threats of continued conflict, the spread of COVID-19, extensive flooding, and locusts have pushed the country close to catastrophe. The unaffordability of food is a threat to household welfare, as global food price increases and the depreciation of the Yemeni rial interact with COVID-19-related restrictions by food exporters. The impact desert locusts have had on crops has increased Yemen’s import dependence.

This is especially true in states like Yemen where the internal security situation is dictated by the civil war between unstable factions with no history of successful civil governance or mutual political compromise and accommodation. The State Department *Country Report on Human Rights* issued in 2020 summarizes the situation in Yemen as follows:⁷⁰

... In 2014 Houthi forces aligned with forces loyal to former president Ali Abdullah Saleh occupied the capital, Sana’a, igniting a civil conflict between Houthi forces and the Republic of Yemen Government (ROYG) that continued through the year... The primary state security and intelligence-gathering entities, the Political Security Organization (PSO) and the National Security Bureau (NSB), came under Houthi control in 2014, although their structure and operations appeared to remain the same. The ROYG staffed the PSO and the NSB in areas under its control. By law the PSO and the NSB report first to the interior minister and then to the president; coordination efforts between the PSO and the NSB were unclear.

The Criminal Investigation Division reports to the Ministry of Interior and conducts most criminal investigations and arrests. The paramilitary Special Security Forces was under the authority of the interior minister, as was the counterterrorism unit. The Ministry of Defense supervised units to quell domestic unrest and to participate in internal armed conflicts. Civilian authorities did not maintain effective control over security forces. Houthis controlled most of the national security apparatus in sections of the north and some former state institutions. Competing tribal, party, and sectarian influences further reduced ROYG authority, exhibited in August when United Arab Emirates (UAE)-funded Security Belt Forces (SBF), many of which

aligned with the secessionist Southern Transitional Council (STC), took over Aden and several other southern territories.

In 2014 the Houthi uprising compelled the ROYG to sign a UN-brokered peace deal calling for a “unity government.” The ROYG resigned after Houthi forces, allied with former president Ali Abdullah Saleh’s General People’s Congress (GPC) party, seized the presidential palace in 2015. Houthi forces then dissolved parliament, replacing it with the Supreme Revolutionary Committee. Hadi escaped house arrest and fled to Aden, where he declared all actions taken by Houthi forces in Sana’a unconstitutional, reaffirmed his position as president, pledged to uphold the principles of the 2014 National Dialogue Conference, and called on the international community to protect the country’s political process.

After Houthi forces launched an offensive in southern Yemen and entered Aden in 2015, Hadi fled to Saudi Arabia, and Saudi Arabia formed a military coalition, Operation “Decisive Storm,” on behalf of the ROYG. Peace talks in Kuwait in 2016 between the Houthis and ROYG ended inconclusively. In 2017 Houthi forces killed Saleh after he publicly split from the Houthis and welcomed cooperation with the coalition. In December 2018 direct talks between the ROYG and Houthis under UN supervision in Sweden led to agreements on a ceasefire in and around the city and port of Hudaydah, as well as on prisoner exchanges and addressing the humanitarian situation in Taiz. These agreements were not effectively implemented; hostilities—including Houthi drone strikes and coalition airstrikes—continued throughout the year.

Significant human rights issues included: unlawful or arbitrary killings, including political assassinations; forced disappearances; torture; arbitrary arrest and detention; harsh and life-threatening prison conditions; political prisoners; arbitrary infringements on privacy rights; criminalization of libel, censorship, and site blocking; substantial interference with freedom of assembly and association; the inability of citizens to choose their government through free and fair elections; pervasive corruption; recruitment and use of child soldiers; pervasive abuse of migrants; and criminalization of consensual same sex sexual conduct between adults.

Impunity for security officials remained a problem, in part because the government exercised limited authority and in part due to the lack of effective mechanisms to investigate and prosecute abuse and corruption. The ROYG took steps to investigate, prosecute, and punish officials who committed human rights abuses, but had limited capacity due to the ongoing civil war. Houthi control over government institutions in the north severely reduced the ROYG’s capacity to conduct investigations.

Nonstate actors, including the Houthis, tribal militias, militant secessionist elements, al-Qa’ida in the Arabian Peninsula (AQAP), and a local branch of ISIS committed significant abuses with impunity. Saudi-led coalition airstrikes resulted in civilian casualties and damage to infrastructure.

One key issue that is often lost in discussing progress and reform in cases like Yemen (and Libya, Syria, and Iraq) is that any peace settlement is as often a prelude to new power struggles or fighting as it is to any serious form of peace. There are good reasons why most revolutions fail or mutate beyond recognition, and the same is true of all too many exercises in conflict resolution. It is far easier to advocate democracy, the rule of law, human rights, and political accommodation than it is to make them work, and this is especially true when leaders have no practical experience in government while technocrats have no real practical experience.

These problems are reinforced in far too many cases by the fact that outside powers lose interest once the fighting or immediate crisis appears to be over, and they do not attempt to ensure that aid is spent effectively and with proper conditionality. Far too often, they do not seek to impose or support solutions that realistically reflect the cultural norms of the country involved, and/or treat the population as if it would united behind functional common goals rather than reflect its actual sectarian, ethnic, tribal, and regional divisions.

More broadly, the end result of the Saudi-Iranian competition for Yemen, coupled to the UAE’s ambitions in the Red Sea area and Indian Ocean, the Chinese creation of a base and port in Djibouti,

Russian interests in a base in the Sudan, and civil fighting and lack of stability in most African Red Sea states does seem to be making the Red Sea a new subregion in the MENA military balance. Given the instability of the African Red Sea states, China's acquisition of a new port and naval base in Djibouti as well as Russia's deployment of paramilitary forces in the Sudan – alongside its agreement with the Sudanese government to build a naval base there in February 2021 – all make the Red Sea a possible emerging major, new area for U.S. security assistance. This, however, remains unclear, and the U.S. has not yet announced any major plans to deal with such threats.

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

These political-military changes are only part of the radical shifts taking place in the nature of MENA force development and outside security assistance efforts. Major changes are also taking place in the role of other outside powers. Shifts in their role in deterrence, warfighting, and counterextremism are reshaping the ways in which MENA states need to develop their military and internal security forces as well as in the ways that the U.S. and other outside states provide military and security support for each MENA state.

New Forms of Military Dynamics

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 warfighting 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.

These military dynamics have all changed significantly since the first Gulf War in 1991. So has the role of outside forces in deploying forces in the region, providing power projection, and providing security assistance. Outside support has gone far beyond arms transfers, limited security financing, training and education, and the peacetime support of conventional forces. The role of security assistance has steadily broadened, 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.

These changes in military dynamics include conducting multi-domain warfare; using advanced battle management, targeting, and damaging assessment systems as well as 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. They also involve a new focus on internal security, counterinsurgency, and the role of proxy forces and non-state actors.

The United States – supported by several European states – has changed its role in supporting MENA country forces to help them reshape their military and internal security forces, deploy outside combat forces, and develop new power projection capabilities. So too, in different ways, have Russia and Turkey.

The fall of the Shah in 1979, the Iran-Iraq War in 1980-1988, and the First Gulf war in 1991, triggered a process where U.S. support of its MENA security partners has increasingly included providing 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. This process has also included a wide range of expanded arrangements with MENA countries to provide

contingency capabilities for power projection, such as providing major basing facilities, prepositioning equipment, providing reserves of interoperable munitions and support facilities, providing strategic lift facilities, and providing direct host country support as well as funding of outside combat forces.

U.S., European, and increasingly Russian security assistance and military support now include 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, as well as train and assist units that operate in forward areas during actual combat. Outside states like the U.S. and Russia provide combat air and missile support from bases in other countries.

At the same time, the U.S. has changed its approach to combat support. It has shown since 2011 that a major military power like the United States can compensate in part for the hollow character of a given MENA country’s efforts to create effective military alliances, interoperability, and joint warfare capability.

The U.S. can do so by providing battle management and IS&R capabilities that the partner forces lack and that can greatly enhance the recipient’s warfighting as well as its interoperability with U.S., local, and outside forces. The U.S. has also increasingly substituted air and missile strikes for the deployment of land combat forces as well train and assist cadres of Special Forces, new Security Assistance Brigades, and other elite units that are embedded with a host country’s forward combat units.

The Dominant Regional National Strategic Objective Is Often Regime Survival and Internal Security, Not National Defense and Military Effectiveness

It is important to point out that the region’s security dynamics military forces have a key strategic objective the sometimes overrides its focus on national defense, military effectiveness, and national security. That objective is preserving the existing regime. This focus on regime survival affects the size, nature, armament, technological base, and funding of each country’s internal security dynamics, rather than the dynamics of its actual military forces.

In many cases, this 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, the previous country-by-country analysis has shown that MENA states have tended to increase the repressive character of such forces, often in ways that further limit any form of dissent – even if it is peaceful or focused on the rule of law, freedom of expression, and human rights. This repression has become a problem for U.S. and other Western security partnerships in dealing with MENA states, and it leads to public opposition in the U.S. and Europe, a distrust of such relations, and legal restrictions on arms transfers and other forms of direct cooperation.

The worst cases are the MENA states that are now engaged in some form of deeply divisive civil war – Libya, Syria, and Yemen. Here, the regime’s focus on internal security has led to serious warfighting and long-term humanitarian crises. There also have been problems in states whose political systems have partially collapsed – notably Egypt, Iraq and Lebanon.

This level of repression should not, however, be exaggerated. Much of such repression focuses rather narrowly on the threat from violent extremist movements or direct challenges to the regime. It often has little practical impact on most citizens, although it also suppresses any open political challenges that could lead to public demonstrations and calls for changes in the character of the regime that could lead to a peaceful change rather than civil violence.

Moreover, many of the details of the changes in national internal security efforts and dynamics are unclear. Much of the unclassified reporting on MENA internal security forces and activities is highly uncertain. Some exaggerate the threat while other reporting tends 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 vary sharply by country. This is why this study relies heavily on the human rights reporting of the U.S. State Department, although many individual NGO reports seem reliable.

These issues need far more study within the national security studies community and a new focus on the cost, size, and character of internal security forces – and on their interaction with a given nation’s legal and justice systems. The details of such efforts – and their effectiveness – receive comparatively little detailed study, although the U.S. State Department *Country Reports on Human Rights Practices* has provided some detail on the actual operations of individual MENA country’s internal forces over the years.⁷¹

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

At a different level, changes in military technology – as well as in the ways that most advanced outside forces are developing – are forcing all MENA military forces to focus on new aspects of force development and to shift their priorities, insecurities, spending, and arms transfers. Many MENA military forces 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.

Some of the planners involved have come to see that such changes can be as – or even more – important than acquiring more – or the most advanced – major combat platform, and many of which are becoming increasingly more vulnerable unless a nation has advanced joint warfare and battle management capabilities.

As noted earlier, several MENA states – most notably the UAE – 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 and can improve a given MENA nation’s ability to conduct more effective joint warfare.

Lifecycle, Sustainment, and Combat Intensity

MENA countries are also increasingly realizing that sustainment, deployability, and repair capabilities can be as important as force numbers. Progress remains somewhat slow and differs from country-to-country, but outside powers increasingly provide security assistance in these areas in the form of advanced training aids, readiness indicators, as well as more advanced 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.

The U.S., major European powers, and Russia use military advisors – contractors or the equivalent of contractors – to support weapons and the full range of military technology and systems over their entire life cycle as well as during intense combat, which has become a critical part of security assistance. This reflects the fact that modern weapons need to be procured, upgraded, and supported on a far more intensive and expensive life cycle basis.

The cost of such support and modifications over the life of a weapon – while rarely reported – can now exceed the original procurement cost of the system. The ongoing modification and improvement of weapons – sometimes called “multistage improvement programs” – has become more of 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.

As a result, receiving outside contractor and active military support for actual combat operations has become a steadily more important aspect of security assistance for most MENA states. It has been a slow learning process. For example, during the 1967 Arab-Israeli conflict, where Israel was able to fly an average of three times as many combat sorties per aircraft as its Arab opponents over time. 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

The Iranian and Houthi use of precision-guided weapons against industrial targets in Saudi Arabia as well as the increasing use of precision-guided anti-armor weapons and drones in a number of other MENA conflicts have shown that another major change is taking place in MENA forces and their need for security assistance.

Precision-guided and “smart” missiles along with UCAVs can increasingly inflict serious strategic damage to armor, ships, aircrafts, key military facilities, and civil/economic 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 leading to more MENA buys of short, medium, and long-range precision strike systems – including systems designed to attack key land and naval targets, involving both military and civil facilities. Future buys are likely to include ballistic missiles and unmanned aerial vehicles, as well as manportable, light vehicle-borne, and heavy systems.

These developments have already led some arms transfers and forms of outside military support to take on new forms. North Korea and possibly China have provided significant technology

transfers 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, and it has used its missiles and drones to directly attack Saudi oil facilities.

The growing 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 previous systems, which once could only do random damage to area targets, to upgraded 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.

The Iranian and Houthi attacks on Saudi civil targets and key petroleum facilities have shown that even a force with a very limited technology base can use such systems effectively. The same is true of the Hezbollah use of anti-ship missiles against an Israeli combat ship or the growing use of drones in Libya, Iraq, and Syria. At the same time, the impact of such longer-range systems would also be radically changed if Iran – or any Arab state – acquired nuclear weapons, advanced biological weapons, or fourth-generation chemical weapons.

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

These advances in ballistic and cruise missiles, coupled with the proliferation of shorter-range rockets and artillery weapons, have also led MENA countries to buy more advanced air and missile defense systems as well as sensors and battle management systems in order to examine new mixes of layered 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.

Advances in defense, however, are likely to lead to increases in the numbers of ballistic missile, UAV/drone systems, and other long-range strike capabilities or use of offensive systems to exploit any gaps in layered defenses or supplement existing air strike capabilities.

Every advance in air and missile defense will lead to steadily improving mixes of new unmanned combat aerial vehicles (UCAVs), more accurate rockets, and missiles with precision conventional strike capabilities. While the availability of such systems is still limited, the pressures involved to make 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 – seem likely to make such systems increasingly available over time.

Proliferating Other “Smart” Weapons

Other “smart” weapons are coming to supplement or replace 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.” These systems are also increasingly being used to arm drones and unmanned air, land, and naval platforms – creating a steadily increasing risk to major weapons platforms and enhancing the abilities to arm non-state actors, light forces, and extremist/terrorists more effectively and at a lower cost.

The U.S. Marine Corps shift from main battle tanks to light armored vehicles with much longer-range anti-armor systems, the arming of Iranian forces with more effective anti-ship missiles and smart mines, and the steadily increasing use of relatively low-cost drones are only a few examples of such changes.

Privileged Access to Advanced Weapons and Military Technology

The U.S. and its MENA, European, and Asian strategic partners have benefited from privileged access to advanced weapons and military technology. This includes access to 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.

So far, this privileged access to U.S. weapons and military technology has given U.S. strategic partners a major advantage, but there is no guarantee that U.S. security assistance efforts will continue or that U.S. strategic partners can count on such advantages in the future. Russia and China can also sell or provide advanced weapons, and nations like Iran or non-state actors like the Hezbollah and Houthi have shown that they can acquire and successfully operate them.

Much will depend on Russian and Chinese willingness to provide such weapons and technology in the future, but it does provide them with a relatively low-cost way to exploit countervailing powers and to carry out "spoiler" operations where the objective is to increase the threat and the cost to the U.S. and its partners rather than to "win" tactical or strategic victories.

The Declining Need for Conventional Major Weapons and Warfighting

The other side of these military dynamics is that they cumulatively reduce the value of conventional armies, navies, and air forces that cannot operate without advanced targeting and IS&R capabilities and that lack long-range strike capabilities and/or that are not equipped and trained to fight insurgents, extremists, and non-state actors as well as the conventional wars of the past. As Saudi Arabia and the UAE learned in Yemen, fighting threats like the Houthis is very different from land-air war with Saddam's conventional military forces.

The same is true of other forces that focus on conventional warfare and ignore hybrid or irregular warfare. For example, the Arab Gulf navies have mixed capabilities 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. 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," and focus on having the most advanced and expensive major weapons platforms, is losing some of its shine.

Counterterrorism and Counterextremism

As has been touched upon earlier, the regional focus on internal security has made counterterrorism and counterextremist operations 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 11, 2001 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 missile warfare, the threats of extremism and terrorism have also led regional states to make major increases in their capability for counterterrorism and unconventional warfare, and in doing so, also forced them to seek changes in security assistance in order to help them radically improve the capability and strength of their paramilitary and internal security forces.

This is forcing some hard trade-offs on MENA powers. MENA countries have needed 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 most cases, such developments have received little public reporting – as have their costs and the level of outside security assistance. In some cases, human rights reporting, commercial reports on national police forces, and official government reports – like the annual U.S. State Department report on terrorism – provide more data than most unclassified reporting on military forces.⁷²

New Forms of Paramilitary and Security Forces

Some 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 operations, but often at the cost of repression and detentions. These measures sometimes breed more extremists and terrorists, or they radicalize those being detained.

Other MENA countries need support from regional and outside powers to develop paramilitary and security forces that are more effective, less repressive, and more able to win support while imposing fewer direct and indirect burdens on investment and economic development.

In some cases, the proliferation of such security forces also has two other impacts. First, it sets clear limits on the call for political reform. Second, it directly and indirectly increases the level of corruption by creating ways to bypass an already weak rule of law and structure of governance.

The military already plays too large of a role in many civil economies – Algeria, Egypt, Iran, Iraq, and Syria are examples – and corruption is far too common throughout the region. Internal security forces and paramilitary police often largely bypass the rule of law and can be bribed for civil business purposes when the situation does not threaten a rise in extremism or opposition.

At the same time, countries like Lebanon, Libya, and Iraq have experienced significant local or national shifts in ethnic, sectarian, and tribal separation as a result of the lack of effective security. In some cases, particularly Iraq and Syria, most of some minorities have been forced to leave the country – the equivalent of ethnic cleansing.

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

As noted earlier, a variety of new forms of non-state actors are appearing in the MENA region. Russia has deployed state-controlled mercenaries, specifically the Wagner PMC to Libya and Syria. Iran has deployed “volunteers” that include both non-Iranian mercenaries and Iranian

elements to Syria. Syria and Iran work alongside and arm the Lebanese Hezbollah. Iran arms the Houthis in Yemen and supports Popular Mobilization 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 to conduct operations that can achieve tactical and strategic benefits with limited risk. This can include the support of non-state actors – including terrorists and extremist groups – 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 operations, 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.

Cyber, Internal Security, and Information Operations and Warfare

Most MENA states are now creating at least some capability to wage Cyber, Internal Security, and Information Operations and Warfare. Depending on the country, they may rely heavily on outside support – often relying on commercial vendors and contractors that come from a wide variety of different countries. Some countries like Israel and Iran have developed relatively advanced domestic capabilities for cyber and information operations – often with links to intelligence. Most have bought at least some support from other sources – not always knowing the level of control or influence from outside governments. Internal security efforts and public information campaigns both develop in technical sophistication and sensor coverage. Reporting on the level of such activity, however, remains limited.

Population Warfare

The nature of war and violence in the MENA region also continues to change in ways that have a major human impact. It is scarcely true that the “best defense is a civilian human shield defense,” hiding in in populated areas or cities, or acting critical civilian facilities to intimate an opponent or regime. It is, however, often an effective defense and a good way to support offensive operations and execute extremist attacks.

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 civilians and was even fought, to some extent, along sectarian lines.

It was not until the 2003 invasion of Iraq and the creation of a war between the U.S. forces and the new Iraqi 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 the crippling damage inflicted on the Iraqi economy – problems repeated in the war against ISIS with even more serious urban warfare and cumulative

economic impact on development. It was also the resulting divisions between Iraqi Shi'ites and Sunnis, other religious groups, and ethnic groups like Arabs and Kurds that began the process of major internal conflicts along sectarian and ethnic lines.

As has been described earlier, population warfare in the Syrian civil war has created even more civilian casualties, refugees, and internally displaced persons (IDPs). It has led to the systematic use of air and helicopter strikes on civilian populations and targets, the use of poison gas, a long series of brutal urban battles against Syrian rebels, and the deliberate creation of new groups of refugees and displaced persons. 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 it has been limited. Yemen, however, has become an even worse case of conflicts along internal fault lines than Syria and Iraq. The Yemeni civil war has created a situation in which Saudi and Emirati bombing, land forces fighting on the ground, and the proliferation of fighting between the Houthis and other tribal factions have further crippled one of the poorest countries in the world.

None of these wars can be said to reflect some consistent set of regional patterns, 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 that is on a clear path towards stability. There is still a possibility of other civil wars – fought to the extremes. The impact of a full-scale war with Iran is all too real, and the growing numbers of precision-guided ballistic missiles and UCAVs create a new risk of major attacks on critical civilian infrastructure, ranging from major petroleum facilities to war supplies like desalination plants.

These population dynamics go well beyond the impact on military forces, and they present a clear and unpredictable risk. They are driven by the major sources of internal economic and social tensions in each state; by their different sectarian, ethnic, tribal, and ideological differences; and by the different ways in which leaders and elites cling to power. All can drive internal conflicts and wars between states to extremes, even without the impact of ambitions and competitions between outside powers. All present new and very different challenges in shaping security assistance that go far beyond aid in normal warfighting and internal security.

Human Shields, Air Power, and Precision Strike

At the same time, the military dynamics of the MENA region's air and missile strike systems as well as the ability to conduct warfare in populated and built up areas are increasingly affected by the fact that extremist and terrorist factions – and a wide range of rebel groups – can 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 that the U.S. is steadily cutting back on its ground presence, train and assist

efforts, as well as forward-deployed IS&R assets is also reducing U.S. capability to target – a capability that no MENA state or outside state now possesses.

So far, there is a tendency inside the U.S. and in many European powers to deny the reality of this dilemma and the fact that population warfare means having to target opponents that use civilian as defensive weapons. Libya, Syria, Iraq, and Yemen, however, have all shown that it has become a key military dynamic in the MENA region.

At a very different level, there is an increasing volume of transfers of provisions of manportable or light precision guided anti-armored, drone mounted, anti-ship, and anti-air systems – as well bomb making materials, related triggering systems, and easy to operate short-range surveillance systems – to non-state actors and terrorist/extremist groups. Such transfers can also become much more effective if the operating system is simplified and the system is made more rugged, easier to transfer, and easier to conceal and smuggle. It is unclear what efforts to provide such systems are underway.

Counterproliferation

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 the 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. 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 produced a major impact on Iran's efforts – countries like Pakistan are producing weapons at rates that could allow them to start selling such weapons. Egypt and a number of Arab Gulf countries are procuring nuclear reactors or have shown an interest in nuclear power plants that make little sense when used as cost-effective sources of power, and instead, 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.

New Forms of Outside Military Support

All of these changes have also led to new forms of dependence on outside countries that vary sharply by each MENA state, by military service or internal security element, and by the police and internal security elements which often have paramilitary capabilities.

In the case of Libya, Syria, Iraq, and Yemen; they have led to extensive outside support from the U.S., several European powers, and Russia in actual warfighting. This outside support ranges from direct combat support and technical support of given factions in combat to complex mixes of support in training, operating, and maintaining military and internal security systems.

In the case of the U.S., its role has changed in Iraq and Syria from a massive U.S. use of both land forces and airpower in Afghanistan and Iraq from 2003-2011 to the creation of new intelligence, targeting, and air precision strike systems that allowed U.S. airpower to be far more effective in strikes on key extremist cadres and non-state threats in both urban and rural environment by relying on the build-up of partner government land forces with forward support from limited numbers of forward deployed advisors, elite troops, and special forces.

In the case of Iraq, for example, the direct military cost of the first round of war dropped from a peak of \$140 billion a year in FY2008 to \$42 billion a year in FY2012. The cost of the second round of fighting never exceeded \$12 billion from FY2012 to FY2020 even during the peak campaign against ISIS.⁷³

U.S. casualties in the first round of fighting in Operation Iraqi Freedom and Operation New Dawn were 3,564 killed in action and 32,292 wounded in action, from March 19, 2003-December 31, 2010 in Iraq, the Gulf, and the Red Sea. They dropped to only 103 killed in action and 237 wounded in action in the fighting against ISIS in Operation Inherent Resolve between January 1, 2010 and February 22, 2021.⁷⁴

This has led to the creation of intelligence and targeting methods as well as new approaches to advisory activity like the Security Assistance Force Brigades (SFABs). However, these U.S. security assistance efforts have been steadily cutback since 2018. They have not been sustained in ways that created effective and independent Iraqi land and air forces, and they have not been applied in other MENA states.

Another key shift in such U.S. train and assist efforts has been the provision of U.S. foreign and native contractor forces that have provided major train and assist support to Iraqi forces in roles that used to be performed by U.S. military personnel. In recent years, these contractors – which are not normally reported in U.S. official data on the size of U.S. personnel in Iraq – have outnumbered the size of military personnel.

In contrast, Russia has deployed a mix of active air forces, combat forces, land-based air defense units, and small elements of land combat forces tailored to support pro-Assad military operations in Libya and Syria, resuming a role in supporting outside forces that it had largely given up after the collapse of the FSU in 1991. These security assistance forces include specialized elements supporting MENA air forces in counterextremist operations as well as civil and military elements tailored to aid MENA paramilitary operations. Some aspects of these Russian train and assist efforts have appeared in Libya, but largely as mercenaries, although Russia has provided large numbers of arms transfers by air to both Syria and Libya.

Other MENA states have become a growing source of outside support to the level of conflict in MENA states. The Iranian Al Quds Force is a key example of a dedicated train and assist force with elements active in Lebanon, Syria, Iraq, and Yemen. However, nations like Egypt, Saudi Arabia, and the UAE also provide or hire such support as well, and the UAE has provided major airborne arms transfers to Libya. Meanwhile, Qatar, Saudi Arabia, and the UAE have all provided funding and support to different rebel factions in Syria.

The Civil-Military Challenge

Finally, all of these military dynamics – coupled with the recent conflicts between MENA states, regional civil wars, and the struggles against extremism – have created new needs for an integrated approach to civil-military aid; recovery and reconstruction efforts; and responses to the problems of civilian casualties, collateral damage, refugees, and internally displaced persons.

The recent levels of violence and civil war in a number of MENA states had a critical impact on the levels of political unity, social development, governance and economic development in Libya, Tunisia, Lebanon, Syria, Iraq, Iran, and Yemen. These problems have been further compounded by the Covid-19 crisis, and the intensity of such problems is further driven by a number of other factors.

MENA states have long faced political, civil, and economic problems that put a major strain on their resources and often lead to massive popular protests, and the rise of extremism as well as terrorist attacks. These problems (and their probable consequences) have been described in detail in the UN's Arab Development Reports, UN humanitarian aid reports, and reporting by the IMF and World Bank. The excerpts from World Bank reporting cited in the earlier country-by-country portions of this analysis are only brief and partial summaries of problems that have now grown for decades.

Since 2001, these problems have interacted with the impact of the political upheavals that began with the "Arab Spring." They also have interacted with massive population growth and a resulting "youth bulge" that has created an employment crisis. In most cases, corruption, the self-seeking actions of political leaders, and factional divisions and discrimination have pushed such countries even further towards the status of failed states.

In at least the cases of Libya, Lebanon, Syria, Iraq, and Yemen, civil conflicts send a warning that no currently foreseeable outcome of the fighting – or peace settlement – may be able to bring lasting peace and stability. The military dynamics of such states and the ways that wars are being fought, are steadily reducing the real-world prospects for lasting conflict termination efforts and postwar development. They also increasingly requiring major outside economic aid and loans, massive humanitarian aid, and major national reform efforts if the governments concerned are to bring a lasting end to conflicts and to sustain internal peace and stability.

So far, however, nation-building exercises like the U.S. effort in Iraq have resulted in very limited success. More broadly, civil, humanitarian, and economic aid have sometimes bought time or ameliorated suffering at least in the short-term, but it failed to address the major causes of instability and internal conflict. Virtually every conflict state has seen its civil divisions as well as governance and economic problems grow in spite of such civil forms of security assistance.

Increased military and internal security spending have also created growing civil problems for the MENA states that are not at war or that have not suffered from serious civil conflicts. Most MENA

states steadily increased their military and internal security spending in constant dollars to deal with such security and stability problems long before the Covid-19 crisis. Even the wealthy Gulf states spent higher percentages of their GDP on military and security forces than they could really afford even before Covid-19.

Some MENA states did reduce their military and internal security spending after 2017, but most such reductions have not been large enough to offset the negative economic impact of lower petroleum export revenues and the Covid-19 crisis. The latest World Bank and IMF reports on the economies of most MENA states make it all too clear that they still spend more on defense and security than they really can afford if they are to meet the needs of their rising populations, economic development, and the creation of a new civil structure after civil war or combat.

Today, a lack of public debate, corruption, and weak governance further compound the negative impact of these civil-military dynamics. The scale of these governance problems in given MENA states are well-described in the reporting by the World Bank and Transparency International, and which are described in wide-range of media reporting on the failures in peace negotiations and aid.⁷⁵

Many MENA countries understate their real defense spending in ways that make it impossible to estimate the real burden imposed by excessive security spending, but it is clear that military-dominated states like Algeria and Egypt face such burdens; that Iran's security spending aids in crippling its civil economy; and that many wealthy Arab oil states – Iraq, Saudi Arabia, Oman, and the UAE – may be spending enough to limit their social development.

Here, it is critical to note that there are two sides to these problems. There have also been consistent failures in all forms of aid and the civil side of security assistance. Optimism, good intentions, ceasefires, and peace negotiations are not solutions to creating lasting security and stability. So far, most MENA humanitarian aid, economic aid, and peace-making efforts have so far had only limited short-term impacts, and they have been manipulated by state and non-state actors to serve their political and military goals. They have been poorly managed by the leaders of the MENA states involved, have been managed in ways designed to support the ruling elites rather than their peoples, and have been heavily affected by outside influence and corruption.

Key Challenges to MENA States

This complex mix of changes in national military dynamics, in the competing role of outside powers, and in the different character of every regional state now shape the military and security assistance efforts throughout the MENA region. The region 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 UNDP'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, as well as 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.

If one focuses on the security efforts of individual MENA states, the MENA region has become a fragmented mess with active wars in Libya, Syria, and Yemen; ongoing clashes between Israel and the Hezbollah; and significant fighting in Somalia. Meanwhile, Algeria, Tunisia, Egypt, Syria, Lebanon, Iraq, and Sudan all remain unstable, have uncertain security structures, and rely on inconsistent outside security assistance.

What is clear is that the key challenges affecting individual regional states, and their needs for new security dynamics, 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 the 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. And by clearly tying joint security planning to an assessment of both civil and military priorities and needs.
- Following up on the end of the Saudi-UAE boycott of Qatar and on other divisions within the Arab Gulf or GCC states, and then creating an effective approach to regional security cooperation between the Arab Gulf states – including Iraq.
- Finding some way to make some form of the JCPOA effective, to limit the Iranian nuclear weapons program, and to 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 negotiations on some broader and more stable security agreement.
- Finding ways to stabilize the nuclear forces of Israel and the chemical weapons capabilities of Egypt, Israel, Syria, and Iran; and preventing any other new state from acquiring nuclear weapons and deploying or using chemical and biological weapons.
- Finding national and local approaches to limit the growing threat from precision-guided conventional missiles and unmanned aerial vehicles, and also creating effective missile and layered air defenses.
- Creating defenses and deterrents to protect shipping thereby 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 maximizing the export income from arms sales and the “glitter factor” in receiving such transfers.
- Providing cost-effective security assistance to help MENA security partners develop joint and interoperable multi-domain warfare capabilities by using advanced battle management, targeting, and damaging assessment systems as well as IS&R systems. Finding ways to integrate national forces to take advantage of the kind of advanced capabilities available to states like the United States, Russia, and China.

- Addressing the causes of extremism and terrorism as well as making increases in MENA state capability for counterterrorism and unconventional warfare. Seeking 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, Sunni, Kurds, and minorities in order to put the country on a path to stable development.
- Developing a viable approach to ending the Yemeni Civil War and to reconstruct a post-war country.
- 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 as well as 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 of challenges to create, but it is also a list of incredibly ambitious goals. The past and current military dynamics in the region make it clear that serious near-term progress in meeting them will be difficult for most MENA states, that many challenges will grow, and that a number of – if not most – MENA states will become more dependent on U.S. and other outside security assistance to help deal with them.

The most serious security challenge many states face will not involve any military aspect of security. It will be to meet the broader civil challenges posed by the high levels of security spending, to establish the right role for their military in politics, to reduce the repressive impact of excessive internal security efforts, and to address the causes of extremism and civil conflict or the divisions between regional states.

Furthermore, some MENA states have such limited capability for governance and are sufficiently corrupt so that their military development poses additional issues in terms of waste, theft, and sheer incompetence. **Figure Six** provides a broad comparison of the quality of each state's governance based on World Bank estimates that highlights such states, and **Figure Seven** provides a comparative picture of their level of corruption – and corruption is a problem that regional public opinion polls often rank near to the top of popular perceptions of a given country's problems.

The history of military development and internal security efforts in the region makes it all too clear that no attempt to assess them that ignores these civil problems can have more than marginal value in establishing the best approach to achieving overall security and stability. History also makes it clear that the type of regime – military, monarchy, titular democracy, or divided into civil factions

and conflict – is far less important both in military terms and in creating stability than the actual behavior of a given government and the division within a given state.

Military regimes are often some of the most corrupt and self-seeking both in MENA and the world. Monarchies benefit their ruling elites at the expense of the people – including religious and ethnic minorities. As for unnecessary repression, as distinguished from more effective internal security operation, far too many MENA countries have a dismal record.

Even the wealthiest petroleum exporting states still face major problems in civil development, in coping with the impact of massive population increases, and in dealing with reform and social change. Virtually all MENA states 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 while also meeting the needs of the present and the future.

Meeting the new national security addressed early does remain a vital priority, but meeting the region's national military dynamics and internal security efforts can come at a critical cost to the kind of civil development that each country needs. At the same time, the evolution of regional military forces can lead to further wars, civil conflicts, and extremism that create even more civil casualties, refugees, and collateral damage. The prospect of another decade of security efforts, like the ones in the decades since 2001, poses a threat to the entire MENA region.

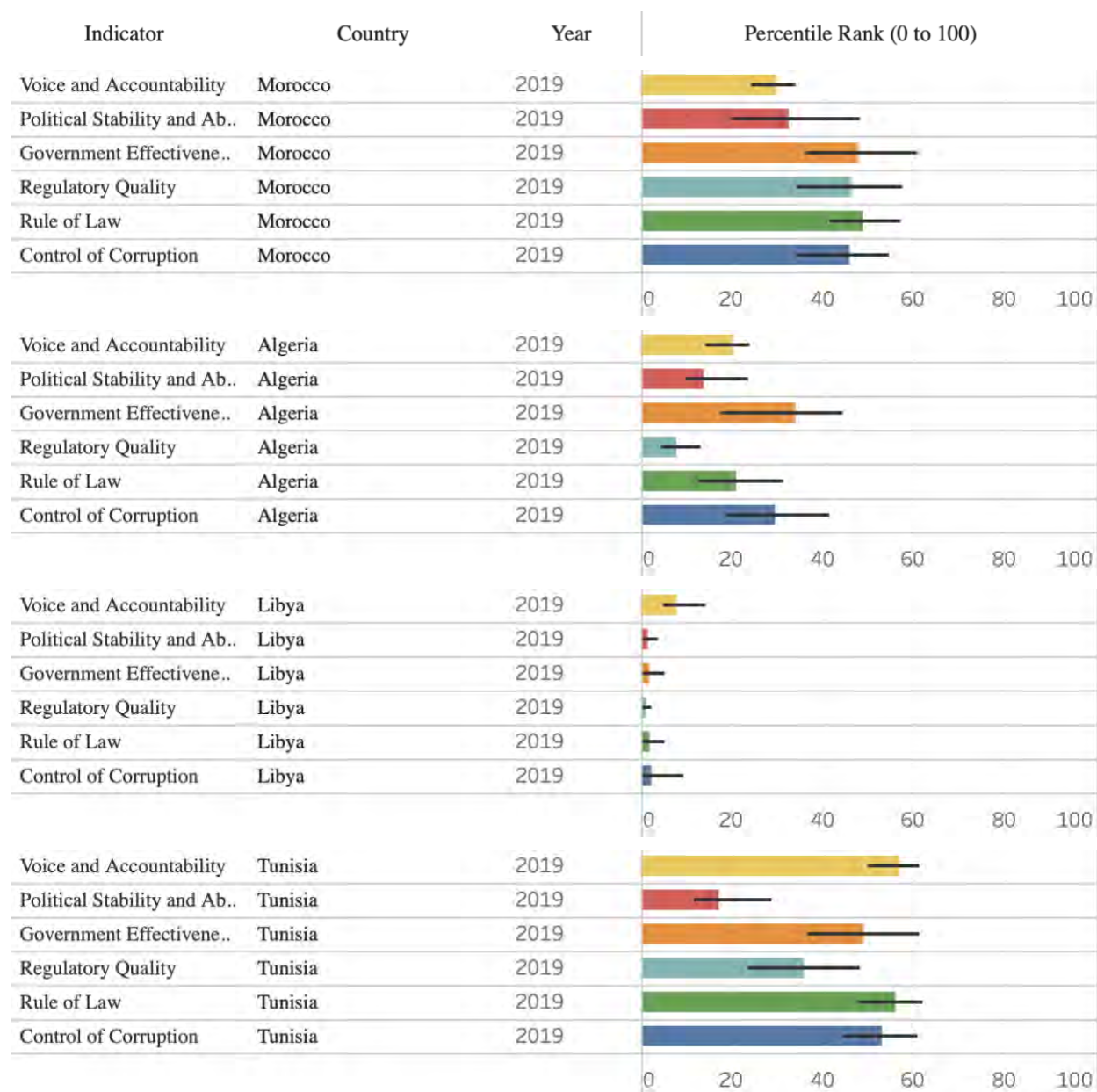
Figure Six: World Bank MENA Governance Ratings: 2019 - I**North Africa**

Figure Six: World Bank MENA Governance Ratings: 2019 - II

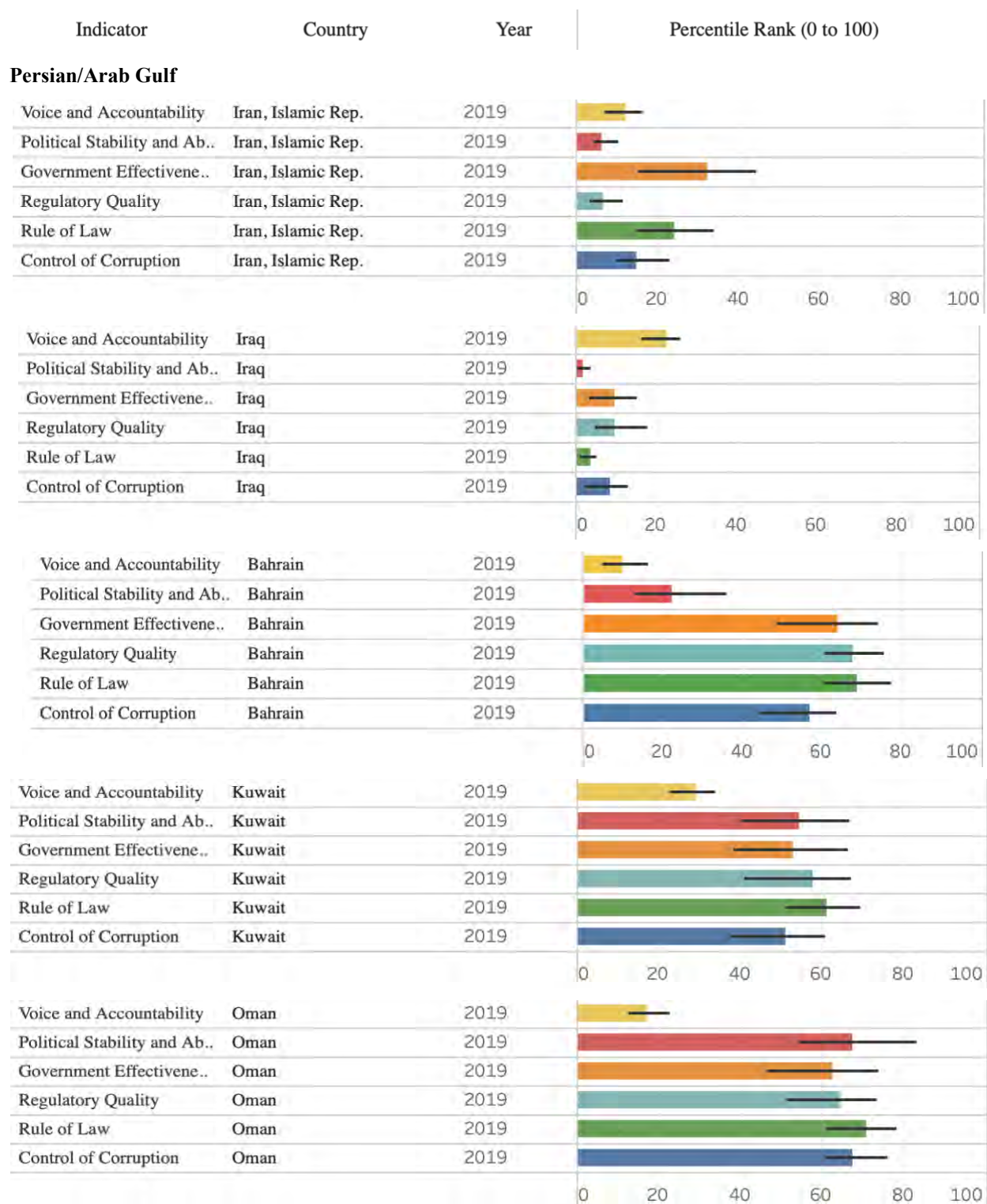
Figure Six: World Bank MENA Governance Ratings: 2019 - III

Figure Six: World Bank MENA Governance Ratings: 2019 - IV

Source: World Bank, "Interactive Data Indicators," *Worldwide Governance Indicators*, <https://info.worldbank.org/governance/wgi/Home/Reports>. For definitions and methodology see <https://info.worldbank.org/governance/wgi/Home/Documents>.

Figure Seven: Transparency International 2020 MENA Corruption Ratings

Ranking	2020 Global Ranking (Ranking Relative to most Corrupt out of 180 Countries)	2020 Comparative Score (Highest is Best = 100)
North Africa		
Morocco	94	40
<i>Algeria</i>	76	36
<i>Libya</i>	7	17
Tunisia	111	44
Greater Levant		
<i>Egypt</i>	63	33
Israel	145	60
Jordan	120	49
<i>Lebanon</i>	31	25
<i>Syria</i>	2	14
Persian/Arab Gulf		
<i>Iran</i>	31	25
<i>Iraq</i>	20	21
Bahrain	102	42
Kuwait	102	42
Oman	131	54
Qatar	150	63
Saudi Arabia	128	53
UAE	159	71
<i>Yemen</i>	4	15
Turkey	94	40

Note: Bold highlighting means corrupt to the point of being dangerously dysfunctional in author's judgment.

Source: Transparency International, Corruptions Perception Index, 2020,
<https://www.transparency.org/en/countries/afghanistan?redirected=1>.

Changes in the Role of Outside Powers

Changes in the role of the United States, its European allies, Russia, China, and other outside powers also affect the military dynamics and the role of security assistance in the MENA region – and major shifts are taking place that affect virtually every aspect of the region’s security dynamics.

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. Cooperation between outside and regional powers seemed to be defeating violent extremist and terrorist movements, and the role of other major powers was limited.

Russia had only a token military presence and arms sales to a comparatively limited number of countries. China had no bases or meaningful military presence, and its role as an arms seller had diminished since the Iran-Iraq War from 1980-1988. Its emerging status as a major global military power had not emerged as a factor that could reshape security assistance in the region.

Today, outside states like Russia, Turkey, and the neighboring MENA states like Iran increasingly intervene and support given states, non-state actors, rebel factions, and opposing sides in civil wars. Russia has an active military presence in Syria and has again become a major arms seller. China remains a comparatively limited source for arms transfers and still has no major military presence, but it is clearly emerging as a major global challenger to the United States – and may well come to play a much larger role in arms transfers and power projection in the region.

The real-world goals of outside “security” assistance” by states like Russia, Iran, and Turkey can differ from that of the United States and its European allies in that such states can exploit “spoiler roles” and compete for political and strategic influence at the cost of supporting regional conflicts and civil wars, rather than promoting efforts to deter, bring lasting security or stability, or make a country’s military forces more effective. It is enough to defeat, weaken, or exploit an existing regime; to gain influence or power; and/or to displace or weaken the influence of other outside powers.

These shifts in the role of outside powers are hard to quantify. The previous analysis has highlighted the countries where Russia and European powers now play a significant role in given countries and their total volume of arms sales. However, there are no reliable databases that provide reliable comparative data or that trace the size of the efforts that given outside powers play in deploying military advisors, contractors, mercenaries, “volunteers,” and military forces in the region to aid given states and non-state actors.

Open source estimates of the military personnel numbers; the cost of arms transfers; and the numbers of new weapons systems, contractors, mercenaries, and “volunteers” that Russia, any given European powers, or China deploys often rely heavily of sources and methods that are little more than guesswork. Estimates of the cost and or value of outside country military aid and arms transfers are equally uncertain and lacking in comparability. And, it is questionable as to whether classified estimates are all that more accurate.

There is, however, one set of U.S. official indicators that at least provide some degree of directly comparable official data on MENA arms transfers. Most of the country-by-country patterns in these data also track loosely with the patterns in the very different estimates on the value of major

weapons transfers in the database developed by SIPRI and with the shifts in weapons holdings reported in the annual editions of the IISS *Military Balance*. These data are provided in the declassified estimates in a U.S. State Department report on *World Military Expenditures and Arms Transfers*, and where the data for the MENA region is shown in **Figure Eight**.⁷⁶

Unlike estimates from, commercial sources and NGOs, these data are based upon official U.S. estimates of the actual value of *delivered* transfers, rather than on potential arms sales, on efforts to create standardized and directly comparable estimates of the value of weapons like the SIPRI estimates, or on totals for potential arms sales like most commercial databases.

They do have many of the same uncertainties as other databases, but they at least provide a rough indication of U.S. official estimates on the impact that arms transfers from key powers have had on the military forces in the MENA region. They highlight the individual MENA states where arms transfer from the U.S., major European powers, and Russia have played a major role.

The data in **Figure Eight** make it clear that the U.S. and major European powers, such as Britain, France, Germany, and Italy, dominate arms sales and security assistance to the region. They do, however, warn that most MENA countries will still buy from outside powers if they offer lower prices and/or more value – or the U.S. attempts to pressure strategic partners by cutting arms transfers and security assistance. They show that Russia has already been a key exporter to Algeria, Egypt, Syria, Iran, and Iraq. As for China, they show how limited its direct impact has been on regional military forces, but it is important to stress that China is still in the process of becoming fully competitive in military technology and arms quality.

Figure Eight: Value of Arms Transfers to the MENA Region from Major Suppliers in 2012-2017 - I

(In Millions of Current \$US)

North Africa

Country	U.S.	Major European	Russia	China
Algeria				
2012-2014	1,700	0	3,700	200
2015-2017	1,500	3,500	4,500	500
Libya				
2012-2014	100	0	50	0
2015-2017	100	0	0	0
Morocco				
2012-2014	1,000	1,200	100	0
2015-2017	600	50	50	100
Tunisia				
2012-2014	300	50	0	0
2015-2017	500	50	0	50
SUBTOTAL				
2012-2014	3,100	1,250	3,850	200
2015-2017	2,700	3,600	4,550	650

Greater Levant

Country	U.S.	Major European	Russia	China
Israel				
2012-2014	14,200	800	0	0
2015-2017	11,300	1,600	0	0
Egypt				
2012-2014	4,200	50	600	400
2015-2017	3,200	5,900	4,500	200
Jordan				
2012-2014	1,700	50	50	50
2015-2017	1,400	150	0	200
Lebanon				
2012-2014	200	0	0	50
2015-2017	300	100	0	50
Syria				
2012-2014	50	0	1,300	50
2015-2017	0	0	3,600	0
SUBTOTAL				
2012-2014	20,350	900	1,950	550
2015-2017	16,200	7,750	8,100	450

Figure Eight: Value of Arms Transfers to the MENA Region from Major Suppliers in 2012-2017 - II

(In Millions of Current \$US)

Arab-Persian Gulf

Country	U.S.	Major European	Russia	China
Bahrain				
2012-2014	700	0	50	0
2015-2017	500	50	50	50
Iran				
2012-2014	0	0	50	0
2015-2017	0	0	1,000	0
Iraq				
2012-2014	6,200	400	2,000	100
2015-2017	8,600	350	3,200	700
Kuwait				
2012-2014	2,900	100	300	50
2015-2017	2,400	100	300	50
Oman				
2012-2014	1,300	2,100	50	0
2015-2017	1,100	2,600	0	0
Qatar				
2012-2014	3,100	500	0	0
2015-2017	2,400	2,000	0	50
Saudi Arabia				
2012-2014	14,600	4,400	0	0
2015-2017	27,300	7,700	0	3,600
UAE				
2012-2014	17,300	1,200	200	0
2015-2017	1,600	700	100	200
Yemen				
2012-2014	100	0	50	50
2015-2017	50	0	50	50
SUBTOTAL				
2012-2014	46,200	8,700	2,700	200
2015-2017	43,950	13,500	4,700	4,700
TOTAL				
2012-2014	82,750	12,200	8,500	950
2015-2017	71,350	25,250	17,350	5800
Turkey				
2012-2014	13,100	1,350	0	0
2015-2017	8,500	400	0	0

Source: U.S. Department of State, "World Military Expenditures and Arms Transfers 2019," *Bureau of Arms Control, Verification and Compliance*, WMEAT 2019 Tables II IV Arms Transfer Deliveries, 2019, <https://www.state.gov/world-military-expenditures-and-arms-transfers-2019/>.

The Changing Role and Impact of the United States

As for the United States, the key U.S. strategic objectives in the MENA region have not changed as a result of the shifts in the region's political-military dynamics. They remain creating and strengthening strategic partnerships to meet U.S. national security needs, bringing added stability and development to the countries involved and the region, providing forward bases and contingency facilities for U.S. power projection, and encouraging a shift towards added civil rights and more representative governments.

In broad terms, however, U.S. security assistance does now focus on security partnerships that extend far beyond the U.S. aid programs reported in the State Department and the Department of Defense (DoD) budgets. U.S. security assistance has changed from limited aid in areas like military education as well as limited transfers of weapons and military equipment to far larger efforts at strengthening local military and internal security forces, supporting larger commercial arms transfers, sending the forward deployment of U.S. forces, and providing direct U.S. support in actual warfighting.

The relatively low levels of security aid the State Department and the Department of Defense provided to the MENA region before the fall of the Shah in 1979 have been replaced in most Arab Gulf countries by mixes of U.S. forces, advisors, and arms transfers that made U.S. strategic partnerships in the Gulf the de facto equivalent of active alliances.

Changes in the Mix of U.S. Efforts

This mix of U.S. forward deployments, arms sales and aid, as well as power projection capabilities has evolved in ways that are intended to create a mix of U.S. and partner deterrent and defense forces that can respond to the threats posed by extremist movements and by states like Iran. After the beginning of the Iran-Iraq War in 1990 – and certainly after the massive build-up of U.S. forces to liberate Kuwait in the First Gulf War from 1990-1991 – the U.S. built-up a major set of U.S. deployments and contingency bases in the Gulf region.

The United States focused on building up its Gulf Arab strategic partners through massive arms sales, training, and joint exercises. It created major naval battle-management and command centers for the 5th Fleet in Bahrain, and it advanced air warfare command centers in Saudi Arabia and then at Al Udeid in Qatar.

The U.S. further expanded these contingency bases and facilities after the Al Qaeda attacks on the Pentagon and World Trade Center in 2001 to help support the war in Afghanistan, and it simultaneously expanded its security assistance to cover a wide range of new counterterrorism and counterextremism activities throughout the region. The U.S. expanded its presence, contingency agreements, arms sales, and advisory roles once again from 2003 onwards as a result of the U.S.-led invasion of Iraq. This invasion led the U.S. into two major cycles of war in Iraq as an attempt to create effective Iraqi national forces and to expand country-by-country efforts to deal with the consequences of the political uprisings in the region that began in 2011.

Most of these U.S. actions, however, were ad hoc efforts to deal with developing crises rather than part of any clear or consistent strategy. Over a period of nearly three decades, the U.S. largely reacted to outside events. It did not develop cohesive structures or strategies for most such efforts. Many of the individual U.S. security assistance efforts in the MENA region after 2011 were divided and constantly changing, although progress still took place. The U.S. won its battles

against extremists in Iraq, but it did not create any lasting political stability. It has won victories that still leave it facing threats from extremism while it has concluded it must give other threats and challenges a higher priority.

The U.S. never developed clear strategies to deal with the civil wars in Libya, Syria, Iraq, and Yemen. It pursued efforts to support political reform and human rights that led to troubled or uncertain relations with strategic partners like Egypt and the Arab Gulf states. It could not respond effectively as Russia intervened in the Syrian Civil War in 2015 and when Turkey intervened in 2016. It since has been forced to deal with growing Russian, Turkish, and Chinese influence and competition in the MENA region.

The level of U.S. commitment and security assistance also became significantly more uncertain during the Trump administration. The Trump administration never fully defined how the new National Security Strategy it announced in 2017, or the National Defense Strategy it announced in 2018, should be implemented in the MENA region or in any other part of the world in terms of practical force plans, programs, and budgets.

The U.S. did seem to finally emerge from its two major conflicts against Al Qaeda and ISIS extremists in Iraq towards the end of the Trump administration – conflicts which had become the equivalent of a “long war” that lasted from the U.S. invasion in 2003 to the break-up of the ISIS “caliphate” in 2016-2018. However, as has been noted earlier, the U.S. defeat of the “caliphate” did not create a stable Iraq or do anything to unify Syria. Many ISIS fighters and extremist survived the fall of the “caliphate,” and the U.S. never created clear or stable force posture and modernization plans for Iraq and its other MENA security partners or created integrated military and civil plans for security.”⁷⁷

The Road to Hell in Strategy is Paved With...

More broadly the Trump administration followed in the footsteps of the Obama administration in failing to define clear strategies for dealing with any of the other major crises in the region. It had no clear posture for dealing with Libya, Egypt, Lebanon, Yemen or in regional development and security. It issued reassuring generalizations about regional strategy as part of its new National Security Strategy and National Defense Strategy as well as in the statements that followed. However, the administration took a largely transactional approach to security assistance, threatened to cut its forces if its partners did not do more, and failed to demonstrate any clear level of ability to cope with the steady deterioration of regional stability described earlier.

Here, it is important to point out that issuing strategic rhetoric, and “good intentions,” do not create any form of strategic reality. A strategy is only meaningful to the point that it is defined in terms of credible plans, and actually implemented through programs budgets, actions, and successes.

The Trump administration left office without having created such plans for the MENA region or plans for dealing with crisis states like Syria, Iraq and Yemen. The Trump administration also focused heavily on asking its partners to make major increases in their military efforts and arms purchases by “burden sharing” – sometimes threatening to cut U.S. forces – but never setting clear goals for partner force developments and capabilities or for a future U.S. presence.

The U.S. did, however, begin to shift away from a de facto national strategy that had focused on extremism and terrorism centered in the MENA region. After announcing the new National Defense Strategy in 2018, the United States increasingly focused on the global threats posed by

China and Russia. The U.S. made major efforts to end the U.S. military presence in Afghanistan – which directly affected its posture on the Persian/Arab Gulf and Indian Ocean. It neither effectively resisted the growing role of Russia, Iran, and Turkey in Syria, nor did it play a strong military role in Libya.

Shifts in U.S. Presence

From 2019 onwards, the administration also sought to minimize the U.S. military presence and security assistance efforts in Syria and Iraq. These policies led to major cuts in the U.S. military presence in Syria and Iraq. The number of U.S. troops in Iraq had peaked at 170,300 in 2007, and it drooped to 47,305 in 2011. It dropped to a low of around 1,000 in 2014; and it rose back to some 3,500 by December 2015; then to 5,000 forces by April 2015.

In December 2019 – at the point when the ISIS “caliphate” had been defeated – it was well over 6,000 in Iraq and Syria. This number did not include the large numbers of civilians and contractors, some Special Forces and other combat personnel, and civilian intelligence officers.⁷⁸ This total was reduced to 3,000 by late 2020; and it further dropped to a nominal 2,500 personnel by January 15, 2021.⁷⁹

The Trump administration also talked about reducing the U.S. presence in the rest of the MENA region as if its wealthier strategic partners did not pay more to subsidize U.S. forces and power projection capabilities or did not buy more arms as part of their “burden sharing.” The administration also shifted its stance on the Israeli-Palestinian problem from a focus on a two-state solution to far stronger support of Israel, shifting its embassy to Jerusalem and pushing its Arab partners to formally recognize Israel in return for an uncertain suspension of Israeli annexation activity on the West Bank.

Accordingly, America’s strategic partners in the MENA region had good reason to become more uncertain about the continuing level of U.S. commitment to strategic partnerships in the region and to push back when U.S. pressure affected their military and political priorities. Moreover, if the U.S. often had valid reasons to question individual MENA military and internal security priorities, MENA states also had good reasons to question U.S. capabilities based on recent U.S. actions in Libya, Syria, Iraq, and Yemen.

However, the actual reductions in the U.S. role in the Middle East need to be kept in careful perspective. The Trump administration only made limited cuts (and sometimes made increases) in the U.S. troop presence in the rest of the countries in the MENA region. It also made major improvements in most U.S. power projection capabilities and in the quality of Israeli and Arab Gulf partner forces through advanced arms transfers. Relations with strategic partners at the military-to-military remained good, and often offset the tensions at higher political levels.⁸⁰

As **Figure Nine** shows, the permanently assigned U.S. military and defense civilian presence in most MENA countries other than Iraq and Syria did not decline between 2018 and 2020, and the net U.S. presence actually increased in some MENA countries. It is also important to point out that these figures only cover personnel assigned on a lasting basis and not personnel onboard ships, the large volumes of commercial contractors, the personnel deployed for military exercises, the civilian intelligence personnel, and the Special Forces or other military personnel deployed for special missions. As a result, military-to-military relations between the U.S. and MENA partner

forces generally remained good, and the impact of the negative rhetoric emerging from the White House was limited.

Figure Nine: U.S. Military and Defense Civilian Deployed in the MENA Region: June 31, 2018 versus December 31, 2020 - I

Country	Active Military	Reserve Military	Civilians	Total
<i>North Africa</i>				
Algeria				
June 2018	6	0	0	6
December 2020	14	0	0	14
Libya				
June 2018	7	0	0	7
December 2020	Nd	Nd	Nd	Nd
Morocco				
June 2018	14	0	5	19
December 2020	27	0	6	33
Tunisia				
June 2018	26	0	0	26
December 2020	25	0	1	26
SUBTOTAL				
June 2018	335	0	21	356
December 2020	317	0	15	332
<i>Greater Levant</i>				
Israel				
June 2018	48	0	19	67
December 2020	101	0	26	127
Egypt				
June 2018	282	0	16	298
December 2020	251	0	8	259
Jordan				
June 2018	68	16	4	88
December 2020	206	0	5	211
Lebanon				
June 2018	19	0	0	19
December 2020	26	0	0	26
Syria				
June 2018	Nd	Nd	Nd	Nd
December 2020	Nd	Nd	Nd	Nd
SUBTOTAL				
June 2018	417	16	39	472
December 2020	584	0	39	623

Country	Active Military	Reserve Military	Civilians	Total
<i>Persian/Arab Gulf and Yemen</i>				
Bahrain				
June 2018	4,107	0	74	4,502
December 2020	4,081	0	500	4,603
Iran				
June 2018	0	0	0	0
December 2020	0	0	0	0
Iraq				
June 2018	Nd	Nd	Nd	Nd
December 2020	Nd	Nd	Nd	2,500*
Kuwait				
June 2018	1,816	67	202	2,085
December 2020	1,862	1	191	2,054
Oman				
June 2018	14	2	24	40
December 2020	22	0	3	25
Qatar				
June 2018	791	46	51	888
December 2020	460	0	41	501
Saudi Arabia				
June 2018	321	0	205	526
December 2020	474	0	219	693
UAE				
June 2018	417	11	21	449
December 2020	197	0	18	215
Yemen				
June 2018	7	0	0	7
December 2020	5	0	0	5
SUBTOTAL				
June 2018	7,473	447	577	8,497
December 2020	7,101	23	972	10,596
TOTAL MENA				
June 2018	9,564	465	658	10,687
December 2020	9,369	26	1,082	12,977
Turkey				
June 2018	1,674	2	42	1,718
December 2020	1,684	3	71	1,758

Note: Nd means no data reported.

Source: Number of Military and DoD Appropriated Fund (APF) Civilian Personnel Permanently Assigned, By Duty Location and Service/Component; DMDC, <https://dwp.dmdc.osd.mil/dwp/app/dod-data-reports/workforce-reports>.

Trends in the Volume of U.S. Arms Sales

Moreover, **Figure Ten** shows that America's wealthier MENA Arab Gulf security partners continued to make massive buys of arms, military technology, and contract services from the United States. Moreover, if one looks at the history of most actual U.S. foreign military sales – rather than arms sales requests or various media and media estimates – it is clear that most arms buys were far smaller than the Trump administration claimed, and they were driven far more by tensions with Iran as well as by the differences between Qatar and Saudi Arabia/the UAE than by U.S. burden sharing efforts.⁸¹

At the same time, it should be stressed that as high as the arms sales numbers in **Figure Ten** are, they only reflect part of the volume of U.S. sales since they exclude sales that were not part of the FMS program, the high volume of defense related sales and services that did not require Congressional notification or reporting as arms sales, and the sales to the many services that were intended to create local military industries in order to maintain and sustain military and security operations.

Figure Ten: U.S. Military Sales to the MENA Region: FY1950-FY2020
(in \$U.S. Millions)

Country	FY1950- FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY1950- FY2020
NORTH AFRICA							
Algeria	14.0	0	0	0	0	2.60	16.6
Libya	39.9	0	0	0	0	0	39.9
Morocco	4,937.7	201.3	52.9	11.0	12.4	4,538.6	9,753.9
Tunisia	1,323.7	52.2	60.3	48.5	67.1	58.7	1,610.5
SUBTOTAL	6,315.3	253.5	113.2	59.5	79.5	4,599.9	11,420.9
GREATER LEVANT							
Israel	41,542.5	522.2	2,440.9	598.8	1,489.7	1,058.8	47,653.0
Egypt	37,325.0	874.1	307.3	66.2	509.1	783.0	39,864.6
Jordan	6,017.0	425.7	249.2	280.7	269.6	197.8	7,440.0
Lebanon	1,533.7	247.0	72.3	94.4	157.3	109.4	2,214.1
Syria	1,000	0	0	0	0	0	1,000
SUBTOTAL	87,418.2	2069	3,069.7	1,040.1	2,425.7	2149	98,171.7
PERSIAN ARAB GULF							
Bahrain	2,939.6	185.4	62.5	2,425.5	1,946.2	67.0	7,626.2
Iran	10,715.4	0	0	0	0	0	10,715.4
Iraq ¹	15,990.2	1,202.0	3,139.2	735.9	1,362.3	367.8	22,797.4
Kuwait	16,445.3	75.6	585.2	7,456.1	386.2	908.5	25,856.9
Oman	3,318.4	-104.3	210.5	-178.1	-81.8	11.1	3,175.8
Qatar	9,050.0	32.9	14,509.3	67.8	661.7	604.4	24,926.1
Saudi Arabia	136,171.8	3,711.5	2,561.0	14,275.0	14,971.8	1,175.2	172,866.3
UAE ¹	22,133.2	763.0	759.5	3,217.0	1,087.9	3,568.0	31,528.6
Yemen ¹	416.9	0	0	-7	0	0	416.2
SUBTOTAL	217,180.8	5,866.1	21,827.2	27,998.5	20,334.3	6,702.0	299,908.9
TOTAL	330,169.2	8,417.4	25,223.4	29,135.1	22,974.3	13,493.2	429,412.6
Turkey	20,254.8	228.9	213.4	37.0	134.8	82.2	20,951.1

Notes:

1. These Countries/Programs have multiple Country and/or Program Codes directly associated with them. For the complete list see Appendix.

Data Source for Sales figures for FY1950 through 2014: DSCA 1200 System

Data Source for Sales figures for FY2015 – Present: Defense Security Assistance Management System (DSAMS)

“Sales numbers include not only new sales implemented in a given fiscal year, but also any adjustments (increases or decreases) to existing programs via Amendments or Modifications that were also implemented that fiscal year. Negative sales numbers for a country in a fiscal year, is an indication that the amount of program decreases (via Amendments and Modifications) were more than the combined new sales and positive adjustments.”

Source: Department of Defense, “Historical Sales Book: Fiscal Years 1950 - 2020,” *Defense Security Cooperation Agency*, 2020.

Shaping the Future

As for the future, it is too early to tell how the Biden administration and the U.S. Congress will now react to these issues. Some of the first reactions of the Biden administration in February 2021 were ambiguous. President Biden ended security assistance to Saudi Arabia that supported Saudi military intervention in Yemen and released an intelligence report directly implicating Crown Prince Mohammed Bin Salman in the killing of Jamal Khashoggi, but he promised that the U.S. would support Saudi Arabia in dealing with the threat from Iran at a time when the U.S. was also providing a presence to additional Saudi bases.

This raises questions about the emphasis that the Biden Administration – and the U.S. Congress – will give to human rights, democracy, and civil reform relative to security partners and security assistance that only time can determine. Past experience has shown that the U.S. responses may be of pragmatic compromise, particularly given the failure to force reform on other states, but the answer does remain unclear in a region where authoritarianism and civil violence have made far more gains since 2011 than good governance and reform.

More broadly, the Biden administration must now rebuild many aspects of U.S. strategic relations with its MENA security partners, develop more coherent strategies and plans for regional security, and restructure many other aspects of its security assistance efforts. It has set the goal of renegotiating the JCPOA nuclear agreement with Iran, but faces serious challenges in Iraq and the Gulf from Iran, ISIS, and other extremist fighters.

The administration has also come to office at a time when it must deal with the lack of any broader U.S. strategy for dealing with the ongoing wars and crises in the MENA region, which also means that it must reevaluate the U.S. military presence and power projection role in the region and rebuild strategic partnerships in Iraq and the Persian/Arab Gulf.

The administration also faces potential challenges in funding U.S. military and security assistance activities in the MENA region because of the costs from a new force posture designed to meet the direct challenge from both China and Russia, the costs of civil aid to meet the Covid-19 crisis, the political “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.

The nuclear agreement with Iran is another key issue. Under the Trump administration, the U.S. attempted to use economic sanctions to put “maximum pressure” on Iran. 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 or the future creation of any new U.S. form of “extended deterrence” – is uncertain.

The dilemmas the U.S. faces in seeking to negotiate with Iran while facing ongoing low-level attacks have been reflected in the airstrikes President Biden ordered on February 25, 2020 against Iran-backed militias in Syria after they struck at U.S. targets in Iraq. At the same time, so has the challenge posed by Iran’s steadily improving capability to use conventionally armed, precision-guided missiles and drones to hit critical military, petroleum, and infrastructure targets like desalination and electric power plants throughout the Gulf region. A nuclear agreement that only delays production of weapons grade uranium while allowing Iran to both improve alternative strategic strike capabilities and steadily refine many aspects of its nuclear warhead designs has progressively less value over time.

Other uncertainties have arisen because the President Biden made it clear that he would restore the U.S. emphasis on human rights and political reform that the Trump administration had downplayed. This is fine in theory, and it perhaps can be put into practice if the U.S. accepts the limits to what it can actually accomplish and also that the U.S. cannot impose its own values and standards.

Successful U.S. strategic partnerships with MENA states mean that the U.S. must deal with each partner on the basis of its own priorities, national political structure, and approach to security – which often has an authoritarian character. This means the U.S. will to adapt its efforts in dealing with a given country to suit the wishes of its ruling elite and the character of its political system and internal security system – often authoritarian and repressive.

The U.S. can urge countries to make reforms, be more liberal and less repressive, and focus on popular needs and freedoms, but it can scarcely compel them. It must adapt to their priorities in reshaping and equipping their security forces, accept the fact they often have different approaches to human rights and the rule of law, focus on the areas where U.S. influence can have a positive effect, and make many compromises in the process.

That said, U.S. security efforts do give it considerable political and strategic leverage. The U.S. continues to deploy the largest outside military presence in the MENA region, dominates global power projection capabilities, and plays a critical role in supporting the forces of its strategic partners and to serve as their largest source of arms transfers. However, U.S. military efforts and arms transfers now focus on U.S. opposition to Iran and support of the southern Arab Gulf states in building up their forces to counter Iran.

Burden Sharing as the Enemy of Security and Stability

As for burden sharing, this is far less of a real issue, and one where both the Obama and Trump administrations badly underestimated the level of military expenditures that most MENA security partners were making as well as the volume of arms sales. While unclassified reporting often badly underestimates the level of MENA efforts, U.S. experts would almost all agree that MENA partners were spending at least twice the two percent of GDP that the U.S. was asking from its NATO partners, and some were close to 8% to 10%

The arms sales totals in **Figure Ten** are high enough by any standard, and the major Arab Gulf states have steadily increased their contributions to the cost of U.S. forward basing and facilities. Regional states can also scarcely be blamed for the massive U.S. expenditures of a minimum \$780 billion on fighting in Iraq and Syria. Fighting that was driven almost solely by the forces triggered by the U.S. invasion in 2003 – an invasion that that most Arab Gulf states quietly opposed.⁸²

Moreover, even before President Biden announced a major shift towards rebuilding real strategic partnership and mutual trust shortly after taking office, a number of senior military officers, defense experts, and political voices from both political parties had challenged President Trump's emphasis on burden sharing over effective alliances, his calls for rapid overseas force reductions, and his emphasis on the National Strategies advanced in 2017 and 2018 that placed a focus on direct higher levels of combat with China and Russia.

The figures on relative military spending are clear. If one considers the primary threat that Arab Gulf strategic partners face, the latest unclassified DIA estimate of Iranian military spending is \$27.3 billion in 2018 and \$20.9 billion in 2019.

To put this estimate of Iranian spending in a burdensharing perspective, the IISS estimates that a single strategic partner like Saudi Arabia spent over \$61.9 billion in current dollars in 2018, \$50.9 billion in 2019, and \$48.5 billion in 2020 – a year that faced the impact of the Covid-19 crisis on its economy combined with low petroleum export revenues. As for other Gulf partners, the IISS estimates that Bahrain spent \$528 million in 2020, Kuwait spent \$7.76 billion, Oman spent \$7.48 billion, Qatar spend \$23.5 billion, and the UAE spent \$72.8 billion. This is a total of \$160.6 billion for the Arab Gulf states in the GCC – or some 7.7 times the DIA estimate for Iran for 2019. And, Iraq spent another \$10.3 billion.⁸³

If one considers military spending as a percent of GDP and a burden on the economy, the IISS estimates that 11 of the top 15 defense budgets in the world in 2020 were MENA states. They included Saudi Arabia (7.1%), Algeria (6.7%), Iraq (5.8%), the UAE (5.6%), Morocco (5.3%), Israel (5.2%), Jordan (4.9%), and Qatar (4.4%). Bahrain spent 4.06%, and Oman spent 12.01%. The standard the U.S. has set for NATO – where all of the states involved are now considered to be developed states – is only 2% of GDP

Some of these Arab states have high incomes from oil exports, but even most of the Arab Gulf exporting states are countries where their growing population means that their “oil wealth” is steadily more limited in per capita terms, that they face additional pressure from reduced petroleum revenues due to Covid-19 and other causes, and that they need money for economic reform. If the U.S. wants stability in the MENA region and to reduce the causes of extremism, its focus should be on both effective deterrence, defense, *and development* – not on increasing the total volume of security spending or U.S. profits from arms sales.

Secretary 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.”⁸⁴ President Biden's campaign raised similar points in his initial address on the U.S. need to revitalize its alliances and strategic partnership shortly after his inauguration.⁸⁵

The MENA Region Remains a Vital Strategic Interest

The MENA region does remain a vital U.S. strategic interest. Some in the U.S. argue that the U.S. has increased domestic energy production thereby limiting its strategic interest in the MENA region, which sharply cuts the strategic importance of the MENA region and the Persian/Arab Gulf in particular.

The problem with such argument is that they ignore the critical importance of a stable flow of Gulf petroleum and LNG to the global economy and the fact that U.S. imports of manufactured goods now make up a much larger percentage of U.S. trade and the GDP than petroleum imports from the Gulf once did.

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%.⁸⁶ The percentages of high 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.

U.S. strategic planning must also consider the broader strategic impact of Gulf petroleum exports on U.S. competition with an energy import-dependent China and on the interaction between Russia's petro-economy and its security relations with Gulf states like Saudi Arabia.

The U.S. Energy Information Administration (EIA) estimates that flow of petroleum out of the Strait of Hormuz provides roughly 20% of the world's total petroleum liquids consumption and dominates the supply of China and Asia.⁸⁷ Chinese and Asian demand as well as strategic dependence are also likely to grow in the near and mid-term future. Although such estimates are now uncertain – given the impact of Covid-19 and shifts to alternative energy supplies – the EIA's current *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 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.⁸⁸ The U.S. GNP already is far more dependent on trade with Asian states and is dependent on the steady flow of Asian exports and imports than it has ever been on direct petroleum imports. The flow of Gulf oil directly out of the Gulf is also as important to the Chinese economy as is its flow through the Strait of Malacca.

The U.S. Energy Information Administration notes that:⁸⁹

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.

Shifting the U.S. Focus to Real Security Partnerships and an Equal Focus on the Civil Aspects of Security

It is striking that one of the two most serious problems affecting outside powers like the U.S. and European states is not in dealing with regional failures and challenges or with possible Russian and Chinese strategic ambitions. It is rather U.S. willingness to keep supporting its strategic partnerships in the MENA region – and to do so in ways that stress real partnership and not than burden sharing and arms sales.

The second problem is broader. Many U.S. efforts to support regional states have helped them deter or limit conflicts and to deal with the threats of extremism and terrorism. Others, however, have played a critical role in bringing instability and civil war to states like Libya, Syria, Iraq, and Yemen. U.S. civil efforts have been particularly weak. They have been decoupled from efforts to bring civil development or to address the causes of extremism, and 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 to provide better military and internal security. This problem has been made 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, the U.S. needs to be more careful in addressing the issue of how the growing global competition between the U.S. with 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.

The Changing Role and Impact of European States

Figure Eight has shown that Europe remains a key source of arms transfers to the MENA countries. European states also provide advisors to many other MENA states as well as support in operating and sustaining the arms they sell and in dealing with internal security and the extremist threat.

Britain and France are still committed to roles in the Persian/Arab Gulf. France has contingency facilities in the UAE, and the United Kingdom still plays a major security assistance role in Oman. France also still plays a key role in Lebanon and the Levant. Britain, France, Italy, and Turkey all play an important military role in the Mediterranean. Smaller European powers have also played a significant role in U.S. led coalitions, and European states also remain a major source of regional arms transfers.

At the same time, most European powers have steadily cut their levels of security assistance and power projection forces, and they cannot project significant actual warfighting capabilities without U.S. support in battle management, intelligence, surveillance, space, and other multi-domain warfare capabilities. They can sell effective arms and technology or deploy effective small elements of combat forces, but they often do not insist that buyers also buy the capability to actually operate their weapons effectively in order to properly support them in the field – conditions buyers must meet to participate in the U.S. Foreign Military Sales (FMS) program.

Turkey, in contrast, has steadily increased its efforts in dealing with Syria and Iraq, its ties to Qatar, and its role in supporting Islamist movements. So too, in a totally different way, 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.

Much of the future role of Europe in security assistance in the MENA region will depend on how convincingly the U.S. becomes in restoring confidence in its willingness to work with its European partner in the entire MENA region and especially in its Gulf power projection capabilities to aid its strategic partners and to provide them with effective security assistance. It is possible, however, that either NATO or the European Community can develop broader European security assistance and power projection capabilities. This seems to be a case where rhetoric again is far easier than reality, but the possibility at least exists.

The Changing Role of Russia

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.

In contrast, Russia has reemerged as a major source of security assistance and arms transfers in a number of countries. Russia has again become a key source of regional arms transfers to countries like Algeria, Libya, Egypt, Syria, and Iraq. Russia has 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 has also played a growing role in the civil war in Libya. It has deployed its Wagner private military company (PMC) – a supposedly commercial force of mercenaries created and controlled by the Russian government – in supporting the pro-Hifter forces in Libya. It has airlifted well over 150 major arms shipments to Libya, and it has started to deploy MiG-29 and Su-24 fighters in a direct combat support role in 2020.

Russia 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. As noted earlier, it also conducted its first major naval exercise with Iran in February 2021.⁹⁰ Israeli reports also indicate

that Russia signed a new intelligence agreement with Iran during a visit by Iran's Foreign Minister Muhammad Javad Zarif to Moscow to meet Russia's Foreign Minister Sergey Lavrov in January 2021.

The full nature of the agreement is unclear but seems to have focused on information security and aid in counterintelligence in dealing with Israeli and U.S. capabilities in these areas. This illustrates Russia's (and China's) capability to gain influence and play a spoiler role in the region by transferring selective areas of intelligence, joint all-domain technology, and weapons technology that counter key U.S. and partner capabilities selectively, all with low cost and visibility – a new form of “countervailing power.”⁹¹

Russia has created other new tools it can use to reduce the visibility of its role in the region. Russia has set up a private military company (PMC) Wagner in both Libya and Syria to serve as a covert force to claim plausible deniability. In Libya, Russia has used Wagner since 2015 to train and equip Hifter forces. As of 2020, there are estimates between 800-1,200 Wagner personnel in Libya that are supporting in direct combat with capabilities including anti-tank guided missile units and precision-guided artillery and rocket systems.⁹²

In Syria, Russian forces and Wagner mercenaries have assisted in multiple roles in training Assad's forces, in reconnaissance, in assisting Russian airstrikes.⁹³ Although Russia supports its PMCs with IS&R, cruise missiles, combat aircraft, and drones in Syria, it's unclear how Wagner forces would perform if engaged in a full conflict with the U.S., as exemplified by the heavy losses that Wagner forces suffered against the U.S. in the Battle of Khasham in February 2018.⁹⁴

Russia also deployed Wagner forces to the Sudan when it maintained good relations with the former President Omar al-Bashir.⁹⁵ However, following the 2019 revolution in Sudan and the departure of a majority of Wagner forces, Moscow partnered a deal with the new Sudanese government in November 2020 to establish a naval base at Port Sudan.⁹⁶ The base will allow Russia to maintain a naval logistics center, 300 people, and four naval ships which can include nuclear-powered vessels. This deal is contracted to last for the next 25 years, and it will give Russia a placeholder for power projection from Sudan.

These shifts mean that the U.S. must now tailor its security assistance efforts to compete in a region where 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; and in efforts to expand its ties to the Arab Gulf states. So far, however, the U.S. has not 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 Changing Role of China

China is clearly emerging as a global superpower, and U.S. and Chinese military competition has intensified on a global basis. China's leader Xi Jinping has made it clear that he sees a world in which, “the East is rising and the West is declining,” and he sees the U.S. as at least as much of a threat as a competitor. At a party conference in February he is reported to have said that, “The United States is the biggest threat to our country's development and security.” He has called upon Chinese officials “to grasp clearly the grand trend that the East is rising while the West is

declining,” while other Chinese officials have pursued the line that, “There is a vivid contrast between the order of China and the chaos of the West.”⁹⁷

Sources, such as the data in the U.S. State Department’s *WMEAT* report shown in **Figure Eight**, and in other databases on weapons transfers like that of the Stockholm International Peace Research Institute (SIPRI), show that China is still a comparatively small source of MENA arms transfers. It is also clear from a wide range of media and unclassified analyses that China still has no bases or significant major military presence in MENA states.

However, China is making major increases in the size and capability of its naval, air, and missile forces. It is now manufacturing and deploying far more advanced weapons, and it may well become a much larger exporter of arms and related services, such as advisory support, to the MENA region. 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 both may increasingly compete for its support – particularly if the U.S. security role in the Gulf continues to diminish and remain uncertain.

China has steadily expanded its economic presence in Gulf countries, especially to 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.

In particular, China had deep economic investment in Libya before 2011 and the fall of Gaddafi. Libya was exporting 3% of China’s oil imports, which accounted for 10% of Libya’s crude exports. China had also invested in 50 infrastructure projects in Libya through the Belt and Road Initiative.⁹⁸ Although China has tried to remain uninvolved in the Libyan Civil War, it is preparing to cooperate with the GNA and use Libya as a major source of oil in the future.

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 key ports and transit routes in Pakistan, East Africa, and Central Asia. It is also expanding its naval presence in the Indian Ocean and near the Horn of Africa and the Gulf.

There are good reasons why Chinese strategy increasingly focuses on the MENA region, and the Gulf in particular, as indicated by the critical sources of energy imports. The revised 2020 estimates of the U.S. Energy Information Administration and other recent energy projections do show a 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 may help to explain why China is already expanding its power projection capabilities in the western parts of the Indian Ocean and the Red Sea. China also now has port development and transit route deals with Pakistan as well as 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 like Sri Lanka, and it has deployed anti-piracy forces near Somalia.

The base in Djibouti, which opened in 2017, is only 7 miles away from the U.S. base, Camp Lemonnier. The small size of the country accounts for the close proximity, but tensions have already increased between the U.S. and China following the U.S. Department of Defense report that China was harassing its aircraft by pointing lasers from the Chinese base at U.S. pilots.⁹⁹ China’s base

can house 10,000 personnel, but China has stated that it will not deploy more than 2,000 officers and soldiers there at a time.¹⁰⁰ China also has plans to increase its power projection, and it recently finished renovations in late 2019 to install a pier, which can accommodate China's new aircraft carriers, assault carriers, other large warships, and nuclear-powered attack submarines.¹⁰¹

At the same time, China's present capabilities should not be exaggerated. China is just beginning to expand its ability to project serious military power into the Indian Ocean and the MENA region, and its role in providing strategic assistance to the MENA military is only in the initial stages – but it is emerging as a major global power. It is developing far more effective naval and air forces as well as new weapons and others military systems it can transfer and export. It is now free of the UN arms embargo on sales to Iran, and – as noted earlier – it may be negotiating a major long-term strategic agreement with Iran.

China may have far more dramatic plans for the future. There have been several media reports that China is seeking a 25-year strategic partnership with Iran – involving some \$400 billion in investment and trade.¹⁰² While there is no official confirmation of such Chinese plans, Iran's foreign minister, Mohammad Javad Zarif, did announce in September 2020, that some form of partnership had been proposed by China's leader, Xi Jinping, during his visit to Iran in June 2016, and had later been 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.”¹⁰³

If China did become a strategic partner of Iran, this would give it a radically different role in the Gulf, although China has so far been careful not to provoke a strong reaction from the U.S. and the Arab Gulf by taking high profile or hardline positions in the region. Moreover, China could have a major impact simply by increasing its trade in advanced arms and military technology with states like Syria and Iran. While North Korea is sometimes 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.

Both China and Russia are 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 strongly opposed past U.S. efforts to extend the broad UN embargo on arms exports to Iran – and the end of UN sanctions on most arms exports to Iran in 2020 means that China and Russia could start exporting many forces or advanced weapons and military technology. The split between the U.S. and European states over the JCPOA has helped to make this possible. 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 that the JCPOA imposes on Iran.

It is also possible that China and Russia could find some way to cooperate in dealing with Iran. They do not need to dominate Iran, or share any ideological values with Iran's theocracy to undercut the U.S. position in the region, either by supporting Iran, Syria, and useful non-state actors or by pushing the Arab states to expand their ties in to China and Russia to limit Chinese and Russian support of Iran. So far, China has taken the official position that it has “no plans for military alliance” to confront the U.S. but the Russian MoD has been more positive, and Chinese

military cooperation with Russia in military exercises and taking joint security positions in Asia has steadily expanded in recent years.¹⁰⁴

The Changing Role of Turkey

Much depends on Turkey's politics. If the Erdogan regime stays in power, Turkey will continue to try to expand its regional influence in the Mediterranean, Lebanon, Syria, Iraq, and in Gulf states like Qatar and Oman. It will seek to block any ties between its own Kurdish population and the Kurds in Syria and Iraq. It will openly and covertly transfer arms, sometimes to support factions in given MENA countries or to aid some Islamist causes and non-state actors seen as extremist by a number of Arab Gulf states. Much will depend on the outcome of the Syrian Civil War and the Turkish enclave in Northern Syria – as well as the role Turkey plays in dealing with the Iraqi Kurds.

The Uncertain Future of MENA Military Dynamics

Much will depend on how convincingly the U.S. can restore confidence on its willingness to aid its strategic partners and provide them with effective security assistance. At the same time, there will be serious limits to what the U.S. can accomplish, and limits that go far beyond security its strategic interests and its competition with other outside powers.

MENA states will make their own choices in response U.S. security policy, but they will also pursue their individual strategic priorities. And, even in the case of the Arab Gulf states, they will do so with far less unity than is the case with NATO countries. Many states are actively involved in civil wars, and others are deeply divided on a tribal, sectarian, and/or ethnic basis. In most cases, it is unclear that even if some form of peace can be negotiated it will be stable or bring lasting security.

Most states face major demographic and economic challenges. Many have governments that are corrupt and govern poorly, and have met the threats posed by extremism and internal tensions with excessive use of force and authoritarian action. Many countries no spend more on their military and internal security forces than they can really afford, and failed to properly plan and execute their military development. The growing competition for influence by outside states is making thing worse, as do the deep tensions and arms race between Iran and its Arab neighbors.

Given the range of problems within the MENA states, the tensions between the MENA states, and the competing roles of outside powers, MENA military dynamics may well become the equivalent of a game of three dimensional chess that is played with no fixed rules, no limit to the number of players, and no limit to the number of boards at play. The problem will not be a lack of strategy *per se*. It will rather be that there will be so many conflicting or parallel strategies – some within the same country – and the region-wide “game” will be too broad and complex for any credible group of such strategies to become highly effective.

At the same time, this does not mean that future U.S. and other outside security assistance efforts effort cannot improve the military capability of MENA forces or that the U.S. cannot work with its MENA and European strategic partners to create better strategic goals, plans, and programs. The fact that most MENA nations make the preservation of its regime their primary objective will remain 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, which is an effort where smaller MENA countries cannot build large enough national forces on their own in any case.

It should be stressed that such goals can be a valid set of strategic objectives even if they come 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 like the U.S., offering basing facilities, and building up intelligence and counterterrorism links may be more critical in ensuring outside support than increasing the effectiveness of national military forces.

Security assistance will also have to cope with other problems in national decision-making, and some MENA states still make the prestige and status they gain from buying advanced weapons systems a strategic objective 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.

Focusing on a few key areas of effectiveness like layered, missile/air defense, interoperability; having the ability to support and arm outside forces like the power projection forces of the U.S.; and creating effective links for joint/all-domain warfare can offer the most cost-effective and politically viable approach to national defense if it can generate more outside aid and power projection support. The same is true of playing off the U.S. against Europe, Russia, or China and may offer more advantages in a given case.

Still, at least three MENA states are failed states that are so divided by civil war or internal divisions 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 some stable form of *national* unity and stability. This is especially important in the case of Syria. Even though it seems likely that the Assad faction will win, a victory based on ruthless suppression of more than half the population is scarcely likely to put Syria on the road to future development. 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.

No one has shown how a peace agreement in Yemen can produce an effective, function government, stability, or development. Iraq may also be becoming a fourth “failed” 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 as well as an unstable set of ties to the U.S. It is unclear if it can unite its governance and security structures, create the economy it needs, or decide on some future force posture.

And, Lebanon may already have become a fifth case. Its national military forces steadily improved in terms of border defense and low-level combat capability. However, these efforts are offset by divided, corrupt, and incompetent governance. In the last two years, its politics have been so divided that they have brought the country to a state of near chaos, and its economy is in collapse. The Lebanese civil war may have ended, but it 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 distinguished 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 keep giving the build-up of their military postures an exceptionally high priority – each giving security forces so high of a priority that their cost and impact on the government and the economy pose a threat to the civil side of national development. Enhancing regime security and giving military forces a high priority can hurt just as much as it can assist security.

Algeria’s only real threat is internal stability, and its emphasis on military forces is far more a product of its political history than of any need for the current size and cost of its 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, and Egypt is not prepared for major power

projection as far as the Gulf. 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 in spite of the end of the boycott of Qatar. They have made limited progress in collective security, but they still have serious and divisive national rivalries, pursue isolated and nationalist strategies and force development efforts, and overspend on limited showpiece aspects of their force posture.

All of the Southern Arab Gulf states do have some effective combat elements. The UAE has successfully absorbed advanced air combat systems, and it 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 previous 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 end result can be to make their forces far more costly and less effective over time. 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 preparing for 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.

As for Iran – the *bête noire* of U.S. security policy in the MENA region – 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, have 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.

And, for all its advances in missiles and hybrid warfare capabilities, Iran remains a weak military power in many ways, and its military forces are still heavily dependent on obsolescent and combat worn weapons and equipment. It has achieved major successes in building up its national military to deter any outside attack and putting pressure on its Arab neighbors by expanding its ties to Iraq, Syria, the Hezbollah in Lebanon, and the Houthis in Yemen. It does, however, face critical economic challenges and badly needs a source of advanced arms and outside support.

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