The Changing Military Dynamics of the MENA Region

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The U.S. faces major challenges in its security relations with each state in the Middle East and North Africa as well as from nations outside the MENA region. It still is the dominant outside power in the region, but 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 were limited to low-level clashes between Israel and Palestine. Egypt acted as a stable major regional power. Iraq’s Islamic extremists seemed to be defeated. Iran was a weak military power dependent on low-grade and dated weapons. The other Arab Gulf states appeared to be unified in a Gulf Cooperation Council (GCC). Yemen 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 and outside support 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. Efforts at reforming governance and the economy have fallen far short of the needs of most states. 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 a new struggle with ISIS and two decades in which security assistance meant direct U.S. participation in active combat and combat support of partner forces.

Non-state actors like the Hezbollah, Iraqi Popular Mobilization Forces (PMFs), and Houthis have become significant threats while the U.S. has 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 other important changes in the role of outside powers. European powers remain active in the Mediterranean and 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. Russia has reasserted itself as a major power and competitor with the U.S. and Europe, and it plays a major security role in Libya and Syria as well as a provider of arms. China has emerged as a major global power and potential competitor in the MENA region, and there are reports that it may play a major security role in Iran. Turkey is playing an active military role in Libya, Syria, and Iraq.
All of these changes are still in play, and the Biden administration must now deal with restructuring both security assistance and the entire U.S. force posture in the MENA region at a time when the U.S. has so far failed to find either a broad strategy or an approach to security assistance that offers security and stability in any given area.

At the same time, the military and security forces in every country in the Middle East and North Africa continue to change in size, structure, and force posture. Each MENA country has to create its own approach to creating new systems of command and control, battle management, secure communications, and dependence on space systems. There are advances in military software and uses of artificial intelligence as well as in all the other aspects of what the U.S. has come to call joint/all-domain operations.

So far, most of the more advanced U.S. security partners – Morocco, Tunisia, Egypt, Israel, Jordan, Kuwait, Bahrain, Oman, Qatar, Saudi Arabia, and the UAE – depend on very different degrees of support from the U.S. – and particularly support from the U.S. commands and fleets in the MENA region to support the modernization of their forces for active support in peacetime exercises and operations as well as for advanced operations and interoperability if combat occurs.

Even with U.S. support, the advanced versions of such efforts radically increase the cost and complexity of military and security forces, which involve efforts that most countries are too small or too poor to deploy and afford. There are only three major outside powers – the U.S., Russia, and China – that can provide the full range of capabilities needed to allow interoperable MENA forces to operate at this level.

The end result is that major changes are still taking place in the military and internal security forces of all 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 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 is steadily increasing and will continue to do so indefinitely into the future.

As this analysis explores in detail, these changes impose new demands on U.S. security assistance efforts. Many MENA states have focused on acquiring advanced ballistic and cruise missiles, 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. Gray area operations and hybrid warfare have become added sources of change in the military character of the region, as has the support of rebel and other separatist factions in neighboring states. Many U.S. strategic partners have generally needed added security assistance in restructuring; equipping; intelligence; and operations for their counterterrorism, counterextremism, and counterinsurgency forces.
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The Changing Dynamics of MENA Security by Subregion and Country

There are no clear regional patterns to these changes in MENA country forces, to the role the U.S. plays in security assistance and forging security partnerships, or to the role of other outside powers. Every MENA country is pursuing its own individual course of military and security force developments with a high degree of independence, and they each have different levels of U.S. security assistance that range from limited aid to the deployment of major deterrent and warfighting capabilities. However, the security developments in the MENA region can be broadly divided into three major subregions: North Africa, the Greater Levant, and the Persian/Arab Gulf. They each illustrate the range of different problems and requirements that now drive U.S. security assistance efforts.

At the same time, it should be noted that the civil side of security has become steadily more problematic. If one looks across the region, the shifts in security and political stability since 2011 have led to important shifts in the civil side of security and stability. Algeria, Libya, Tunisia, Egypt, Syria, Lebanon, Iraq, Iran, and Yemen have spent so much on war or building up their military and internal security forces that this 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 also created more repressive regimes and are dominated by their military and security forces.

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 and also where European states play a major role. Morocco has made progress in developing its military security forces and in encouraging political and economic reform as well as internal stability, but it still faces major challenges from poverty and a limited challenge from Polisario rebels in its South. Tunisia seems to have made some progress towards reform, but it remains unstable and could still be the scene of additional civil conflicts.

Algeria has seen major challenges to its ruling military junta, and new uprisings in 2020 have led to some increase in the civil role in government, but the military still remained in power in early 2021. Russia has long been Algeria’s main supplier of arms, although it remains an independent power. In spite of a series of political upheavals, it still remains an army with a country, rather than a country with an army.

Since the fall 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 any coherent role in security assistance since the assassination of the U.S. ambassador and other U.S. officials in 2012. This has helped plunge the country into a state of civil war that began in 2014, and that turned Libya into a divided, violent mess.

Libya is now divided to 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 two major factions: the House of Representatives, government which is based in Eastern Libya and Benghazi, and the Islamist government of the General National Congress (GNC), also called the “National Salvation Government,” which is based in Western Libya and the capital in Tripoli. The Libyan forces in these 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.1

The forces in eastern Libya, are centered around the Libyan National Army, led by General Khalifa Hifter (Haftar), and have been supported by air strikes by 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.

The Islamist government of the GNC in western Libya is led by the Muslim Brotherhood, backed by an Islamist coalition known as “Libya Dawn” and other militias. This faction has received large amounts of aid from Qatar and Turkey as well as some from the Sudan. Tukey 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.

**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 pursues 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 remains a strong, modern military power and economy, and it 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.

Jordan has made some 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.

As for the other states in the greater Levant, Egypt’s popular uprisings in 2011 have failed to bring any lasting new elements of democracy and civil rights. Like Algeria, it remains an army with a country, rather than a country with an army. It has acquired an authoritarian military government, which is now led by Abdel Fattah el-Sisi. Egypt also suffers from serious economic challenges, and it faces security challenges from the fighting in Libya and extremist elements in the Sinai. Egypt remains a major U.S. security 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.

The government and economy of Lebanon have virtually collapsed – leaving 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 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.

Russia intervened in the Syrian civil war in September 2015, and it declared that it would establish a lasting presence in December 2017. Total Russian personnel on the ground, including contractors, likely did not exceed 5,000 and was probably less than 4,000 by 2018 – with about 2,000 composed of mercenaries to fight as a battalion tactical group. 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.

Russia has carried out a number of air strikes in support of the Assad forces, including strikes on civilians and urban areas. It was estimated that during a given period, Russia only maintained 30-50 combat aircraft and 16-40 helicopters. With those limited assets, however, Russian planes and helicopters flew more than 28,000 missions in Syria and attacked approximately 90,000 targets while Russian UAVs have flown over 14,000 sorties.

A Wikipedia article on Russian forces in Syria notes that, 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 these figures 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.

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. Russia now has lasting rights to the use of Hmeimim Airport as well as a Syrian naval base. Russian has made extensive use of those Syrian bases to airlift forces and weapons to Libya.

Russia has 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 massive 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.

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.

So far, the U.S. has not established any clear strategy to dealing with the Hezbollah, Assad in Syria, Russian presence, Iranian influence in the subregion, or Turkey. It has largely ended its support of the Kurdish-Arab forces in Syria that helped the U.S. to defeat the ISIS “caliphate.” There are no clear indicators of what long-term posture Russia will deploy or what Syrian forces it will help to develop if Assad regains full control of Syria. So far, China has no significant military presence in the subregion and has made only limited arms sales.

**The Persian-Arab Gulf Subregion**

In the Persian and Arab Gulf subregion, the U.S. has long established security partnerships with Bahrain, Oman, Qatar, Saudi Arabia, and the UAE, but each state again remains highly independent, pursues its own security interests, and develops its own forces in its own ways. However, the U.S. plays a direct role in aiding these Arab Gulf states in deterrence and defense 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.

This U.S. role – supported by Britain and France – is critical. The Persian and Arab Gulf subregion is the only subregion where the U.S. now faces a major threat of war in addition to the threats posed by extremism, gray area operations, proxy warfare, and low-intensity clashes or combat.

Iran has come steadily closer to a breakout capability to deploy nuclear weapons. It already poses a major missile and hybrid warfare threat to both U.S. interests in the Gulf subregion and to those of its Arab security partners and Israel. 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 now has a steadily growing family of precision-guided ballistic missiles and drones; highly capable irregular naval/air/missile forces in the Gulf region and the Gulf of Oman; as well as strong ties to the Hezbollah in Lebanon, the Assad regime in Syria, and the Houthis in Yemen.

As a result, the Southern Gulf Arab states – Bahrain, Kuwait, Oman, Qatar, the UAE, and Saudi Arabia – along with the U.S. and its security partners like Britain and France must continue to arm and prepare for a major war with Iran. The U.S. must also do so in ways that compensate for the lack of real-world cooperation and interoperability between the Arab Gulf states. They have ended the Saudi-UAE-Bahraini-Egyptian-led boycott of Qatar in early 2021. Nevertheless, their Gulf Cooperation Council (GCC) remains a military fiction with little effective military integration and interoperability. The GCC cannot fight cohesively except under U.S. leadership and by relying on U.S. command and control as well as intelligence, surveillance, and warning capabilities.

U.S. efforts to force Iran to change its behavior – and possibly its regime – by withdrawing from the JCPOA nuclear agreement and imposing “maximum pressure” through sanctions and through the build-up of U.S. and Arab Gulf forces have not succeeded. 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.

As of yet, Russia and China do not play a major military or security assistance role in Iran or other Gulf states, but they do 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.

Russia conducted its first major naval exercise with Iran in February 2021, and one where press reports described the exercises as follows,6

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 Jamamar, patrol ship Mahmudi, support ship Nazeri, supply ship Lavan, corvette Nahdi, and multiple missile boats like Gardouneh, Falaghan, 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.

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 defeat of the ISIS “caliphate” has not prevented ongoing attacks by the remnants of ISIS’s forces, has not united Iraq, or has led to its economic recovery, rather it has led to a major new competition between the U.S. and Iran for military influence in Iraq. So far, the U.S. has not reached any agreement on a post- “caliphate” strategic partnership. Instead, it has cut its military forces to some 2,500 personnel, withdrawn from virtually all of the facilities it shared with Iraqi government forces, and seems to accept the fact that pro-Iranian Popular Mobilization Forces (PMFs) and Iran have gained influence.

The U.S. has repeatedly talked about a lasting strategic partnership with Iraq, but the U.S. has not reacted decisively to attacks from pro-Iranian Popular Mobilization Forces (PMFs). 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 have produced only limited success and have created major problems in support and sustainment. Russia is now Iraq’s major arms supplier in operational terms. Iran may well become the major outside presence in Iraq, although Turkey has a major influence in its North.

Although the Biden administration has made forging a more stable and strategic partnership with Iraq a priority, Iraq’s future status is increasingly uncertain. The U.S. provided critical 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.” The U.S. has not, however, established any clear, lasting security partnerships since it helped defeat the “caliphate” in 2017-2018.

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.

These shifts may well make Yemen the scene of continuing regional power struggles indefinitely into the future – and 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.

As is the case with far too many MENA states, the question is not “how does this war end?” It is rather, “how do you bring lasting security and stability?” Here, the World Banks’ 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.7

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.

Moreover, the end result of Saudi-Iranian competition for Yemen, coupled to the UAE’s ambitions in the Red Sea area and Indian Ocean, 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 – 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 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 Security Assistance

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 none-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 have all 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. 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 U.S. 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 provide battle management and IS&R capabilities that can greatly enhance the recipient’s warfighting as well as its interoperability with U.S., local, and outside forces.

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

It is important to point out that such security assistance now goes beyond military forces and focuses on internal security forces as well – sometimes with negative impacts on civil liberties and effective governance. Most MENA states have a key strategic objective in addition to national
defense and military effectiveness. That objective is internal security and 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 most cases, this clear focus has led to significant increases in internal security spending, the role and sometime size of paramilitary forces, security controls over the regular military, the expansion of the Ministry of Interior’s role, and the changing role of the police and internal security units to have some paramilitary character. It also has led to increases in the internal security role of special forces and other key combat elements in the military that are effectively dedicated to internal security missions.

With some exceptions, 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. It has become a problem in many U.S. and other Western security partnerships with MENA states, and it leads to public opposition, distrust of such relations, or to 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 – and also states whose political systems have partially collapsed – Iraq and Lebanon. Here, the regime’s focus on internal security has led to serious warfighting and long-term humanitarian crises.

This level of repression should not, however, be exaggerated. Most of such repression focuses rather narrowly on the threat from violent extremist movements. 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 these 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.

The cost, size, and character of internal security forces – and their interaction with a given nation’s legal and justice system – receives relatively little detailed study, although the U.S. State Department Country Reports on Human Rights Practices has provided considerable detail on the actual operations of internal forces over the years.8

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

At a very different level, changes in military technology – as well as in the ways that most advanced outside forces are developing – are still 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 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.

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**

Outside powers also increasingly provide security assistance in the form of advanced training aids, readiness indicators, as well as 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 and 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 also become a steadily more important aspect of security assistance for most MENA states. It has become more critical since the 1967 Arab-Israeli conflict, where Israel was able to fly an average of three times as many combat sorties per aircraft overtime. Quick maintenance and rapid capabilities have become more important, as have advanced logistical and supply management systems and equipment.

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

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 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 beginning to lead to major future MENA buys of short, medium, and long-range precision strike systems – including systems designed to attack key land and naval
targets, involving both military and civil facilities. Such buys include ballistic missiles; unmanned aerial vehicles; as well as manportable, light vehicle-borne, and heavy systems.

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

This new ability to use missiles to destroy high-value point targets with precision conventional strikes is turning long-range ballistic missiles, cruise missiles, and drones from 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, are leading MENA countries both to buy more advanced air and missile defense systems and to examine new mixes of missile, air, and counter artillery-rocket defenses.

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

Advances in defense, however, lead to increases in the use of offensive systems, and particularly ones designed to exploit any gaps in layered defenses. Every advance in defense will lead to an interaction against the steadily rising mixes of new unmanned combat aerial vehicles (UCAVs), more accurate rockets, and missiles with precision conventional strike capabilities. They seem likely to lead to major future MENA buys of short, medium, and long-range precision strike systems, including systems designed to attack key land and naval targets and facilities. They too are leading some MENA countries to examine new mixes of missile and air defenses.

**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 to 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 Houthis 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, and it provides 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 or that are not equipped and trained to fight insurgents, extremists, and non-state actors. 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 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” is losing much 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 conventional warfare, the threats of extremism and terrorism has led regional states to make major increases in their capability for counterterrorism and unconventional warfare, and 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.

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 many cases, such developments have had 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.⁹

**New Forms of Paramilitary and Security Forces**

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

These shifts have improved counterextremism and counterterrorism operations, but often at the cost of repression and detentions. These measures sometimes breed more extremists and terrorists, or they radicalize those being detained. Some MENA countries need support from regional and outside powers to develop 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, security assistance can be as important to non-state actors as it is to government forces, and 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 relaying 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. 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.
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.

The 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; 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 MENA region’s military dynamics 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.

**Counterproliferation**

Finally, as has been touched upon earlier, the proliferation of weapons of mass destruction remains an issue and involves security assistance as well. This can take the form of security assistance in arms control, providing defenses, and extending deterrence. It also raises serious questions about 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 Security Assistance**

As has been touched upon earlier, these changes have 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., this 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.\textsuperscript{10}

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.\textsuperscript{11}

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.

One 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 also have become a growing source of outside support. 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. Qatar, Saudi Arabia, and the UAE have all provided funding and support to different rebel factions in Syria.

Another shift, which has been difficult to trace, is the provision 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.
The Civil-Military Challenge

Finally, these military dynamics – coupled with the recent conflicts between MENA states, regional civil wars, and the struggles against extremism – have created new needs for 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 have 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.

These MENA states have faced periods of other political, civil, and economic problems that are described in detail in the UN’s Arab Development Reports, UN humanitarian aid reports, and reporting by the IMF and World Bank. Since 2001, these problems have interacted with the impact of the political upheavals that began with the “Arab Spring.” They also have interacted with the massive population growth and the 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, they send a warning that no currently foreseeable outcome of the fighting – or peace settlement – may be able to bring lasting peace and stability. Such civil problems are reshaping the military dynamics of such states, the ways that wars are fought, and the real-world prospects for 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 governments are to “win” a conflict in grand strategic terms – and if they 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 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.12

Many MENA countries understate their real defense spending in ways that make it is 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 have 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, the competing role of outside powers, and the different character of every regional state now shapes 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 UN’s Arab Development reports, the continuing rise of extremist movements and violent non-state actors, the new pressures created by Covid-19, the rising role of Russia and China, and the growing uncertainties about U.S. “war fatigue” and commitments to the region. At least in the near-term, the practical limits of any effort to use security assistance more effectively will probably consist of the ability to keep things from getting worse, rather than the ability to make them better.

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 real needs for security assistance 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&G 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, Sunnis, 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 also a list of incredibly ambitious goals. The past and current military dynamics in the region make it clear that near-term progress will be extremely difficult for most MENA states, that many challenges will grow, and a number of – if not most – MENA states will become more dependent on U.S. and other outside security assistance.

The most serious security challenge of all may not involve any military aspect of security. It may well be to meet the broader civil challenges posed by the high levels of security spending, the role of the local military in politics, the repressive impact of many internal security efforts, and the inability to either address the causes of extremism and civil conflict or the divisions between regional states.

Even the wealthiest petroleum 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. They face growing demands from their own youth and the rest of their population. They also must deal with religious extremists who seek to return to a past that never really existed with no credible options for developing a given country while also meeting the needs of the present and the future.

National security does remain a vital need, but virtually all of the region’s national military dynamics and internal security efforts 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, such as the ones since 2001, poses a threat to the entire MENA region.
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 in virtually every aspect of such efforts. In practice, security assistance has been transformed into active support of warfighting in much of the region.

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 has 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 goal of outside security “assistance” by states like Russia, Iran, and Turkey also differs from that of the United States 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.

The shifts in the role of outside powers are also 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. It is also questionable as to whether classified estimates are substantially 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 One.\(^\text{13}\)

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 key power blocs had on the military forces in the MENA region and in the individual MENA states where the U.S., major European powers, and Russia have great influence and role. They also show the limited impact China had relative to the other major powers.

The data in Figure One again 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 also 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 One: Value of Arms Transfers to the MENA Region from Major Suppliers in 2012-2017 (In Millions of Current $US)

### North Africa

<table>
<thead>
<tr>
<th>Country</th>
<th>U.S.</th>
<th>Major European</th>
<th>Russia</th>
<th>China</th>
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<tbody>
<tr>
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<td>2012-2014</td>
<td>1,700</td>
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<td></td>
<td>2015-2017</td>
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<tr>
<td></td>
<td>2015-2017</td>
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<td>2012-2014</td>
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<td>100</td>
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<tr>
<td></td>
<td>2015-2017</td>
<td>600</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>Tunisia</td>
<td>2012-2014</td>
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<td></td>
<td>2015-2017</td>
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<td>50</td>
</tr>
<tr>
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<td>2012-2014</td>
<td>4,200</td>
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<td>600</td>
</tr>
<tr>
<td></td>
<td>2015-2017</td>
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<tr>
<td>SUBTOTAL</td>
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</tr>
<tr>
<td></td>
<td>2015-2017</td>
<td>5,900</td>
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### Greater Levant

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<td></td>
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<tr>
<td>SUBTOTAL</td>
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<td>2015-2017</td>
<td>13,000</td>
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<td>3,600</td>
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### Arab-Persian Gulf

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<th>Russia</th>
<th>China</th>
</tr>
</thead>
<tbody>
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<td>700</td>
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<tr>
<td>-------------</td>
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<td>-----------</td>
<td>-----------</td>
<td>-----------</td>
</tr>
<tr>
<td>Iran</td>
<td>0</td>
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<td>Oman</td>
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<td>1,100</td>
<td>2,100</td>
<td>50</td>
</tr>
<tr>
<td>Qatar</td>
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<td>2,400</td>
<td>500</td>
<td>0</td>
</tr>
<tr>
<td>Saudi Arabia</td>
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</tr>
<tr>
<td>UAE</td>
<td>17,300</td>
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<td>1,200</td>
<td>200</td>
</tr>
<tr>
<td>Yemen</td>
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<td>0</td>
<td>50</td>
</tr>
<tr>
<td>SUBTOTAL</td>
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<tr>
<td>TOTAL</td>
<td>82,750</td>
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<tr>
<td>Turkey</td>
<td>13,100</td>
<td>8,500</td>
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</table>

The Changing Role and Impact of the United States

As for the role of the United States, the dominant 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 now focuses on active 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 before the fall of the Shah in 1979 were 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.

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. It 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 developments, however, were ad hoc efforts to deal with developing crises. 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 extremisms 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, 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.”

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 broad strategic rhetoric and intentions do not create any form of strategic reality. A strategy is only meaningful to the point that it is actually defined and implemented in terms of credible plans, 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.

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 dropped 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. This total was reduced to 3,000 by late 2020, and it further dropped to a nominal 2,500 personnel by January 15, 2021.

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 reason to be 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 resulting 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.

As Figure Two shows, the 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.

Moreover, Figure Three 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.
It should also be stressed that as high as such sales figures 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 Two: U.S. Military and Defense Civilian Deployed in the MENA Region: June 31, 2018 versus December 31, 2020

<table>
<thead>
<tr>
<th>Country</th>
<th>Active Military</th>
<th>Reserve Military</th>
<th>Civilians</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>North Africa</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Algeria</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 2018</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>December 2021</td>
<td>14</td>
<td>0</td>
<td>0</td>
<td>14</td>
</tr>
<tr>
<td>Libya</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 2018</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>December 2021</td>
<td>Nd</td>
<td>Nd</td>
<td>Nd</td>
<td>Nd</td>
</tr>
<tr>
<td>Morocco</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 2018</td>
<td>14</td>
<td>0</td>
<td>5</td>
<td>19</td>
</tr>
<tr>
<td>December 2021</td>
<td>27</td>
<td>0</td>
<td>6</td>
<td>33</td>
</tr>
<tr>
<td>Tunisia</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 2018</td>
<td>26</td>
<td>0</td>
<td>0</td>
<td>26</td>
</tr>
<tr>
<td>December 2021</td>
<td>25</td>
<td>0</td>
<td>1</td>
<td>26</td>
</tr>
<tr>
<td>Egypt</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 2018</td>
<td>282</td>
<td>0</td>
<td>16</td>
<td>298</td>
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<tr>
<td>December 2021</td>
<td>251</td>
<td>0</td>
<td>8</td>
<td>259</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 2018</td>
<td>335</td>
<td>0</td>
<td>21</td>
<td>356</td>
</tr>
<tr>
<td>December 2021</td>
<td>317</td>
<td>0</td>
<td>15</td>
<td>332</td>
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</table>

**Greater Levant**

<table>
<thead>
<tr>
<th>Country</th>
<th>Active Military</th>
<th>Reserve Military</th>
<th>Civilians</th>
<th>Total</th>
</tr>
</thead>
<tbody>
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<td></td>
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<td></td>
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<tr>
<td>June 2018</td>
<td>48</td>
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<td>December 2021</td>
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<td>26</td>
<td>127</td>
</tr>
<tr>
<td>Jordan</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 2018</td>
<td>68</td>
<td>16</td>
<td>4</td>
<td>88</td>
</tr>
<tr>
<td>December 2021</td>
<td>206</td>
<td>0</td>
<td>5</td>
<td>211</td>
</tr>
<tr>
<td>Lebanon</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 2018</td>
<td>19</td>
<td>0</td>
<td>0</td>
<td>19</td>
</tr>
<tr>
<td>December 2021</td>
<td>26</td>
<td>0</td>
<td>0</td>
<td>26</td>
</tr>
<tr>
<td>Syria</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 2018</td>
<td>Nd</td>
<td>Nd</td>
<td>Nd</td>
<td>Nd</td>
</tr>
<tr>
<td>December 2021</td>
<td>Nd</td>
<td>Nd</td>
<td>Nd</td>
<td>Nd</td>
</tr>
</tbody>
</table>

**SUBTOTAL**

<p>| June 2018 | 135 | 16 | 23 | 174 |
| December 2021 | 333 | 0  | 31 | 364 |</p>
<table>
<thead>
<tr>
<th>Country</th>
<th>June 2018</th>
<th>December 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Persian/Arab Gulf and Yemen</strong></td>
<td></td>
<td></td>
</tr>
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<td>Bahrain</td>
<td>4,107</td>
<td>4,502</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>500</td>
</tr>
<tr>
<td>Iran</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Iraq</td>
<td>Nd</td>
<td>Nd</td>
</tr>
<tr>
<td></td>
<td>Nd</td>
<td>Nd</td>
</tr>
<tr>
<td>Kuwait</td>
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<td>2,085</td>
</tr>
<tr>
<td></td>
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<tr>
<td>Oman</td>
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<td>40</td>
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<tr>
<td></td>
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<tr>
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<tr>
<td></td>
<td>460</td>
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<td>Saudi Arabia</td>
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<td>0</td>
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<tr>
<td></td>
<td>474</td>
<td>693</td>
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<tr>
<td>UAE</td>
<td>417</td>
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<tr>
<td></td>
<td>11</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>197</td>
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<tr>
<td>Yemen</td>
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<td></td>
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<td>5</td>
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<tr>
<td><strong>SUBTOTAL</strong></td>
<td>7,473</td>
<td>8,497</td>
</tr>
<tr>
<td></td>
<td>447</td>
<td>577</td>
</tr>
<tr>
<td></td>
<td>23</td>
<td>972</td>
</tr>
<tr>
<td><strong>TOTAL MENA</strong></td>
<td>9,564</td>
<td>10,596</td>
</tr>
<tr>
<td></td>
<td>465</td>
<td>658</td>
</tr>
<tr>
<td></td>
<td>26</td>
<td>1,082</td>
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<tr>
<td><strong>Turkey</strong></td>
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<td>1,718</td>
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<td>2</td>
<td>42</td>
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<td></td>
<td>1,684</td>
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</table>

Note: Nd means no data reported.
**Figure Three: U.S. Military Sales to the MENA Region: FY1950-FY2020**

*(in $U.S. Millions)*

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
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<td><strong>NORTH AFRICA</strong></td>
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<td>0</td>
<td>0</td>
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<td>201.3</td>
<td>52.9</td>
<td>11.0</td>
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<td>4,538.6</td>
<td>9,753.9</td>
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<td>Tunisia</td>
<td>1,323.7</td>
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<td>60.3</td>
<td>48.5</td>
<td>67.</td>
<td>58.7</td>
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<tr>
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<td>874.1</td>
<td>307.3</td>
<td>66.2</td>
<td>509.1</td>
<td>783.0</td>
<td>39,864.6</td>
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<td><strong>SUBTOTAL</strong></td>
<td>43,640.3</td>
<td>1,127.6</td>
<td>420.5</td>
<td>125.7</td>
<td>588.7</td>
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<td>51,245.7</td>
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<td><strong>GREATER LEVANT</strong></td>
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</tr>
<tr>
<td>Israel</td>
<td>41,542.5</td>
<td>522.2</td>
<td>2,440.9</td>
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<td>1,489.7</td>
<td>1,058.8</td>
<td>47,653.0</td>
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<td>249.2</td>
<td>280.7</td>
<td>269.6</td>
<td>197.8</td>
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<td>72.3</td>
<td>94.3</td>
<td>157.3</td>
<td>109.4</td>
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<td>Syria</td>
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<td>0</td>
<td>0</td>
<td>1,000</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td>49,093.2</td>
<td>1,194.5</td>
<td>2,762.4</td>
<td>973.8</td>
<td>1,916.6</td>
<td>1,366.1</td>
<td>57,307.0</td>
</tr>
<tr>
<td><strong>PERSIAN ARAB GULF</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Bahrain</td>
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<td>Iraq¹</td>
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<td>Oman</td>
<td>3,318.4</td>
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<td>-178.1</td>
<td>-81.8</td>
<td>11.1</td>
<td>3,175.7</td>
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<td>32,883.3</td>
<td>14,509.3</td>
<td>67.8</td>
<td>661.7</td>
<td>604.4</td>
<td>24,926.1</td>
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<tr>
<td>Saudi Arabia</td>
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<td>3,711.5</td>
<td>2,561.0</td>
<td>14,275.0</td>
<td>14,971.9</td>
<td>1,175.2</td>
<td>172,866.3</td>
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<tr>
<td>UAE</td>
<td>22,133</td>
<td>763.0</td>
<td>759.5</td>
<td>3,217</td>
<td>1,087</td>
<td>3,568</td>
<td>31,528</td>
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<td>Yemen</td>
<td>416.9</td>
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<td>0</td>
<td>-665,244</td>
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<td>0</td>
<td>416.2</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td>217,180.8</td>
<td>5,865,957.07</td>
<td>21,827.1</td>
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<td>20,334.2</td>
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<td>22,974.3</td>
<td>13,493.2</td>
<td>429,412.6</td>
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<td>213.4</td>
<td>37.0</td>
<td>134.8</td>
<td>82.2</td>
<td>20,951.1</td>
</tr>
</tbody>
</table>

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.”

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 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 has 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 is 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 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.

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 Three 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. 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,
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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.

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.” 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.

Moreover, the MENA region remains 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%. 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. 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. 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 Agency notes that:

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.

**The Changing Role and Impact of European States**

Figure One shows 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.
It has sold advanced S-300 air defense systems to Iran and S-400 systems to Turkey, and it is actively marketing advanced weaponry to many other MENA countries. As noted earlier, it also conducted its first major naval exercise with Iran in February 2021.  

Russia has also created 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.

In Syria, Wagner assisted in multiple roles in training Assad’s forces, in reconnaissance, in assisting Russian airstrikes. 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.

Russia deployed Wagner forces to the Sudan when it maintained good relations with the former President Omar al-Bashir. 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. 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 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.

Sources, such as the data in the U.S. State Department’s WMEAT report shown in Figure One and most other databases on weapons transfers like that of the Stockholm International Peace Research Institute (SIPRI), do show that China is still a comparatively small source of MENA arms transfers. It is 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 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 also 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. 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.

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 Lemonier. 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. 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.\textsuperscript{35} 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.\textsuperscript{36}

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 also 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.\textsuperscript{37} 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.”\textsuperscript{38}

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.

Looking at these challenges, it is also 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, but it is in U.S. willingness to keep supporting its strategic partnerships– rather than burden sharing and arms sales.

The second challenge is much broader. Many of the efforts of outside powers to support regional states have helped them deter or limit conflicts and to deal with the threats of extremism and terrorism. They also, however, have played a critical role in bringing instability and civil war to
states like Libya, Syria, Iraq, and Yemen. They have generally either been decoupled from efforts to bring civil development or to address the causes of extremism, 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, it also raises the issue of what 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 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 “Security Assistance”

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 that go far beyond competition with other outside powers. MENA states will make their own choices in response to the quality of U.S. security assistance, but they will also pursue their individual strategic priorities. Even in the case of the Arab Gulf states, they will do so with far less unity than is the case with NATO.

Given the full range of differences between the MENA states and outside powers, the end result is almost certain to be the equivalent of a game of three dimensional chess with no fixed rules, no limit to the number of players, and no limit to the number of boards at play. The problem also 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 U.S. and other outside security assistance will not 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 become 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.


5 These quotes and the following comments on Russia come from “Russian military intervention in the Syrian civil war,” Wikipedia. https://en.wikipedia.org/wiki/Russian_military_intervention_in_the_Syrian_civil_war, accessed February 28, 2021; reporting by the Institute for the Study of War (ISW); and discussions with U.S. experts. Sources differ in detail.


17 The U.S. database on military personal and defense civilians deployed overseas is highly complex and often involves unexplained shifts over short-term periods. These comments are based on a full country-by-country examination of the MENA data in the Defense Manpower Data Center (DMDC) database on the 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_and_background_discussion_with_defense_officials.

18 This history is extremely complex, but individual major sales requests are listed by month in the Major Arms Sales database that the Defense Security Cooperation Agency provides at https://www.dsca.mil/press-media/major-arms-sales.


20 IISS. Military Balance, 2021. Taken from country sections, and pp. 23 and 519-520.


24 U.S. Energy Information Administration (EIA), The Strait of Hormuz is the world’s most important oil transit chokepoint, June 20, 2019, https://www.eia.gov/todayinenergy/detail.php?id=39932.


