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WORKING PAPERS

MILITARY FACTORS IN THE MENA REGION: CHALLENGING TRENDS

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ABSTRACT

Although the Middle East and North Africa (MENA) region has witnessed a long series of conflicts since the end of the Second World War, it is now in the unprecedented situation where nearly all MENA states are involved to a certain extent in ongoing conflict (e.g. in the Iraq–Syria area; Libya; Yemen). MENA states are involved to different degrees in these conflicts, ranging from direct involvement on the ground or in the air, to the arming and training of armed non-state actors. This report assesses the evolution of the armed forces, procurement and the defence industry in the countries of the MENA region, starting with the major regional powers, whose leverage extends across the region. Second, it looks at the middle regional powers, those who have some capacity for power projection but mostly at the sub-regional level. This is followed by analysis of the remaining states, those with little or no capacity for power projection. Finally, the report looks at those states on whose territory war is currently being waged, where governments and non-state actors are vying for control of the national territory. The report ends with a forecast for military development in the region.

OUTLINE AND OVERVIEW

CONFLICTS

Although the Middle East and North Africa (MENA) region has witnessed a long series of conflicts since the end of the Second World War (between and among states, regional conflicts and coup attempts), it is now in the unprecedented situation where nearly all MENA states are involved to a certain extent in ongoing conflict (e.g. in the Iraq–Syria area; Libya; Yemen). Such conflicts are multilayered in nature: some are at local state level; others are regional (e.g. the Iran–Saudi Arabia "Cold War"; the Israeli–Palestinian conflict; trans-border terrorism); others still are global (USA–Russia). MENA states are involved to different degrees in these conflicts, ranging from direct involvement on the ground or in the air, to the arming and training of armed non-state actors.

This report assesses the evolution of the armed forces, procurement and the defence industry in the countries of the MENA region, starting with the major regional powers, whose leverage extends across the region. Second, it looks at the middle regional powers, those who have some capacity for power projection but mostly at the sub-regional level. This is followed by analysis of the remaining states, those with little or no capacity for power projection. Finally, the report looks at those states on whose territory war is currently being waged, where governments and

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non-state actors are vying for control of the national territory. The report ends with a forecast for military development in the region.

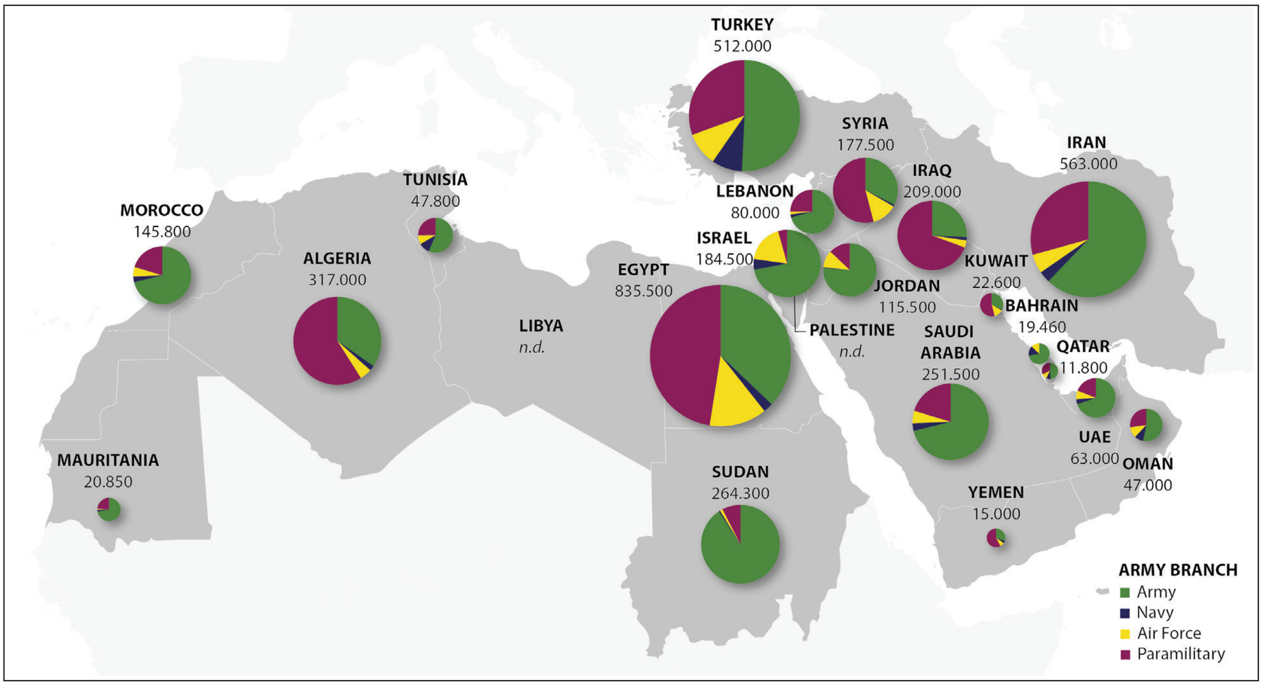
ORGANIZATION OF THE ARMED FORCES

There has been slow progress in the professionalization (i.e. separating the leadership of the armed forces from the government) and "nationalization" (i.e. decreasing the numbers of foreigners and introduction of conscription) of the armed forces in the region. Many MENA states maintain a division between the regular army and separate armed forces which are also charged with protecting the regime. A distinction also persists within the armies between "elite" units and "cannon-fodder" units in terms of equipment, manning and training. MENA states have been affected by cronyism and the inadequate education of officer corps and non-commissioned officers, often leading to poor results in combat situations (from the Arab–Israeli wars to modern-day conflicts).

INDUSTRY AND PROCUREMENT

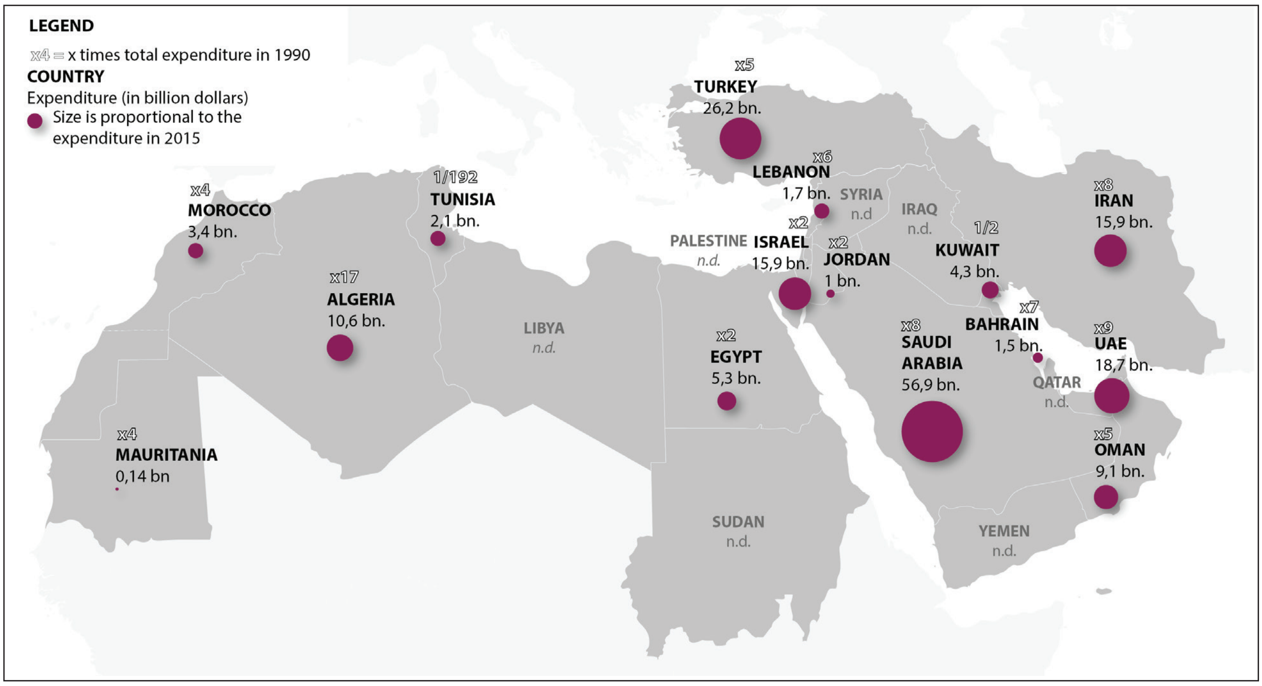
Renewed attempts have been made by MENA states to develop their defence technological and industrial bases (DTIBs) in order to diminish dependence on arms imports and to search for spill-over effects to civilian industry. Offset programmes sometimes have unrealistic ambitions, in terms of both transfer of know-how and development of local industries. Moreover, this has so far produced mixed results in the quantity and the quality of domestically produced arms. In many cases, the development of existing DTIB serves to reinforce the armed forces' grip on the economy. MENA states are among the largest importers of arms in the world and this trend is on the rise: arms imports increased by 130 percent in the Middle East and 9 percent in North Africa during the period 2010–17 (Gaub and Stanley-Lockman 2017: 9). In parallel with this increase, MENA states are seeking to diversify their sources of procurement as emerging actors (e.g. China, India, Indonesia, Pakistan, South Africa, Turkey, Ukraine) are more willing to transfer technology than are traditional suppliers (e.g. the USA, Western Europe and Russia). This phenomenon will remain limited as long as the products are of lower quality than those provided by traditional suppliers. It must also be noted that contracts with traditional suppliers are considered a means to forge political interdependencies between buyers and sellers. This partly explains why some elements of the procurement do not correspond to needs and stated strategy and are more likely to be "white elephants". The different procurement strategies translate into regional power asymmetries between major and minor powers.

Figure 1 | Size of the military by branch



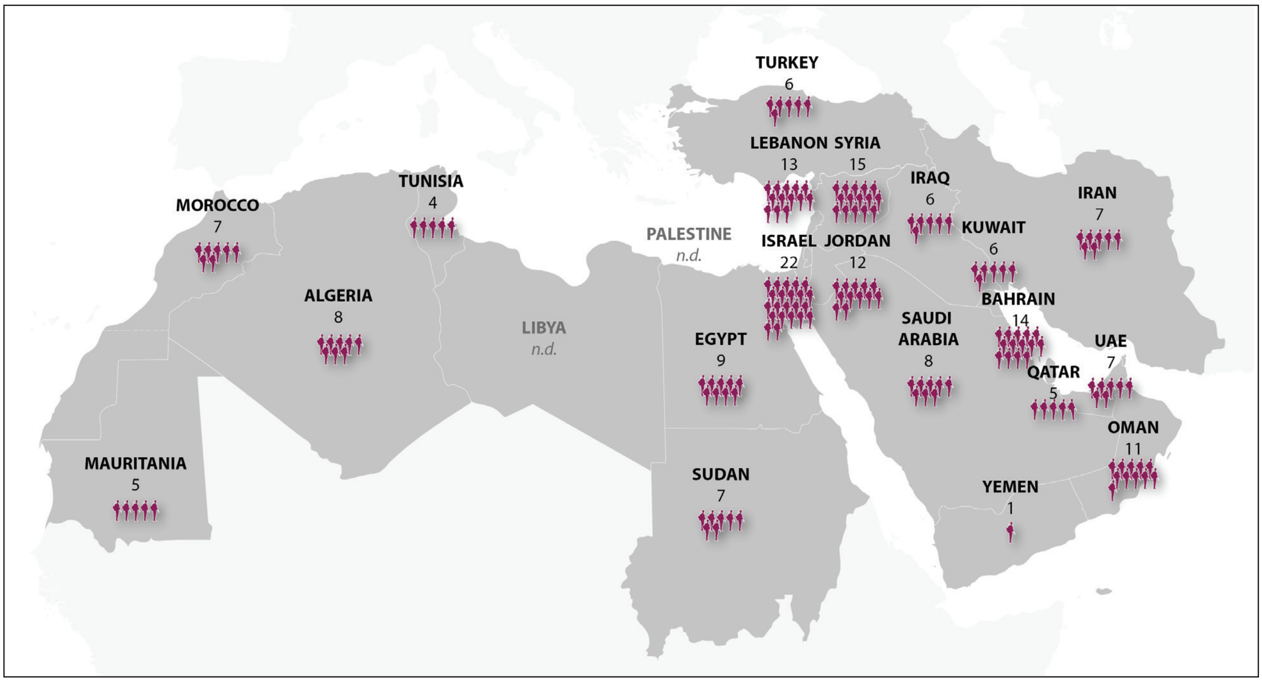
Source: CIDOB elaboration on IISS (2017b) data.
Note: No data available for Libya and Palestine. Size is proportional to the total number of soldiers in armed forces.

Figure 2 | Defence expenditure in the Mediterranean (billion dollars)



Source: CIDOB elaboration on IISS (2017b) data for 2015 and SIPRI (1999) data for 1990.
Note: No data available for Libya and Palestine.

Figure 3 | Militarization in the Mediterranean: soldiers per capita (2015)



Source: CIDOB elaboration on World Bank (2017), IISS (2017b) and UNDESA (2017) data.
Note: No data available for Libya and Palestine. Number of soldiers per one thousand people (rounded).

1. MAJOR REGIONAL POWERS

The first group of states introduced in this report, the major regional players, includes the four nation-states (Egypt, Iran, Israel and Turkey) in the MENA region which, unlike their neighbours, are built on a specific identity or ideology, diverging from the widespread ideologies of Pan-Arabism and Pan-Islamism. In addition, Saudi Arabia is included in this category due to its geography, its resources and the leverage it wields in the region through both soft and hard power. This importance is clearly reflected in international (Organisation of Islamic Cooperation (OIC)) and regional (Gulf Cooperation Council (GCC)) organizations. However, the report will analyse the powers according to the size of their armed forces.

EGYPT

Egypt's armed forces are among the largest in the MENA region. Next to its army, navy and air force, Egypt has an important air defence command and large paramilitary forces (Central Security Forces in the Ministry of Interior, and a National Guard). As a result of its central geographical position in the MENA region and its large population, Egypt continues to be one of the main actors in region, despite its ongoing economic and military decline (Tira 2016: 24).

EVOLUTION OF THE ARMED FORCES

The armed forces have constituted a central element of Egypt's political life since the advent of the Republic in 1952 (Gaub 2014: 23), and they have become an important factor in Egyptian society as well, assuming an increasing role in domestic affairs in recent decades. This is a significant change from the years of unsuccessful wars against Israel and foreign intervention (e.g. in Yemen) (Pollack 2002: 56-57). Since that time, Egyptian rulers have all had military backgrounds, with the exception of President Mohamed Morsi, who has an academic background. Nevertheless, the armed forces as an institution had slowly lost its grip on politics, especially during the administrations of Anwar Sadat and Hosni Mubarak. Since 2011 the armed forces have retaken a prominent role in politics, first by allowing the removal of President Mubarak (although he came from its ranks) and then by ousting President Morsi in 2013. The election of General Abdel Fattah al-Sisi to the presidency allowed the armed forces to present themselves as the protector of the state (Gaub 2014: 23). The actions of the armed forces in both 2011 and 2013 may be interpreted as attempts to maintain the status quo, which was threatened by chaos in 2011 and by President Morsi's policies in 2013 Gaub 2014: 24).

In parallel with this involvement in internal politics, the armed forces are increasingly used in countering terrorism within the country and fighting an insurgency in the Sinai Peninsula. Despite several attempts to professionalize and increase the training of the troops (which has often been considered the armed forces' Achilles' heel) (Pollack 2002: 127-129), the high proportion of conscripts among the rank and file decreases the effectiveness of training and could partly explain the high death toll in the fight in the Sinai (IISS 2017a: 85-86).

With regard to foreign interventions, Egypt has adopted a stated policy to "support national armies", in accordance with which it is now providing Syria's Bashar al-Assad with an unknown number of advisers and some material support (Abdullah 2016). According to the same policy, Cairo is supporting the Libyan National Army faction of General Khalifa Haftar (Kessler 2017). Both moves seem to be tied to Egypt's will to counter whatever movements may be linked to the Egyptian Muslim Brotherhood. Egypt is also part of the Saudi-led coalition in Yemen, although its participation remains limited.

At the same time, Egypt had been the strongest proponent of a Joint Arab Force under the banner of the Arab League in 2015 (Gaub 2016b: 16). However, this initiative has been sidelined by the Saudi initiative for an Islamic Military Alliance.

EVOLUTION OF PROCUREMENT AND DEFENCE INDUSTRY

The armed forces relied for decades on Soviet equipment before turning to Western suppliers (first and foremost the United States) in the wake of the Camp David peace treaty with Israel in 1978. Since then, while not totally abandoning Soviet and Russian designs (Malyasov 2017), the Egyptian military has primarily relied on Western equipment. Cairo is also the beneficiary of substantial Foreign Military Assistance (FMA) from the United States, amounting to 1.3 billion dollars in 2016 (IISS 2017b: 372). Egypt has nevertheless sought to diversify its sources of supply, as relations with the USA became strained after the Obama administration criticized Morsi's ousting. This culminated in a hold on deliveries of AH-64 attack helicopters, F-16 fighters, *Harpoon* ship-to-ship missiles and M1A1 tanks. The hold was lifted in 2016, but in 2017, under President Donald Trump, the USA withheld just under 200 million dollars out of the 1.3 billion dollar military aid package because of concerns over human rights (BBC 2017). In the meantime, Egypt had negotiated several contracts with Russian and European firms for armoured vehicles, ships and fighters (BBC 2017).

The Egyptian DTIB has grown since the birth of the Republic and is among the largest in the MENA region. However, it has failed to develop beyond the lower tiers of technology and is mostly limited to the assembly of kits of foreign origin (Gaub and Stanley-Lockman 2017: 32), while domestic production is of poor quality (Gaub and Stanley-Lockman 2017: 21). The Egyptian DTIB, which is entirely under the control of a conglomerate, the Arab Organization for Industrialization (AOI), seems keen to maintain a low level of ambition while seeking partnerships to ensure technology transfers, notably with China (Bihan 2015: 80). In addition, the factories owned by the Egyptian armed forces are part of a broader economic conglomerate, which makes the armed forces one of the largest economic agents, if not the largest, in the country. It should also be noted that a large proportion of the products manufactured in Egyptian military factories are civilian or dual-use (Gaub and Stanley-Lockman 2017: 21). While this Sunni power enjoys Western backing, the largest Shia country in the region is pursuing a different strategy.

IRAN

Iran's military is characterized by its dual nature: the regular armed forces are tasked to defend the territorial integrity of the country, while what must be considered an ideological army (Anquez 2017: 85), the Islamic Revolutionary Guard Corps (IRGC), is in charge of the defence of the regime within and outside the borders of Iran. Therefore, next to the conventional army, navy and air force, the IRGC has its own ground forces, naval forces and air force (which is in charge of Iran's ballistic missile programme) (IISS 2017b: 376-379). The IRGC also has authority over the *Basij* militia, which in peacetime is a religious police force, but also a source of irregular reserves. The *Basij* numbers remain vague: it officially comprises 11 million members, but is believed to actually have 100,000 members (Anquez 2017: 85). It must also be noted that all armed forces are under the command of the Supreme Guide of the Revolution, Ali Khamenei, who is the Commander in Chief.

EVOLUTION OF THE ARMED FORCES

The Iranian armed forces operate on the assumption that the country's military strength is inferior to that of its regional rivals (Saudi Arabia and Israel) and the United States, and therefore it would be unable to match them in a symmetrical conflict. Iran therefore seeks to deter through a strategy of anti-access/area denial (A2/AD) in the choke point of the Strait of Hormuz and the Persian Gulf, and through its ballistic missile programme. Linked to this, Iran has pursued and maintained relations with proxies such as Hezbollah in Lebanon. In the case of the Houthis in Yemen, Iran's support may be understood to be an opportunistic move aimed at bogging down Saudi Arabia and its allies (Tira 2016: 36). Relations with proxies are cultivated through the external action branch of the IRGC, the Al-Quds Force, led by famed Major-General Qassem Soleimani (Anquez 2017: 87). His presence in conflict areas in Iraq and Syria is a way for Iran to demonstrate its commitment to its regional allies (Sharafedin 2015).

Iran's involvement in regional conflicts is now considerable as it supplies arms, advisers and fighters to Bashar al-Assad in Syria; it supports the Al Abadi government in Iraq while aiding in the development of Shia Popular Mobilisation Unit militias (IISS 2017a: 95); and its support for the Houthis in Yemen has enhanced their ability to inflict casualties on the Saudi-led coalition (Hokayem and Roberts 2017: 163).

EVOLUTION OF PROCUREMENT AND DEFENCE INDUSTRY

Iran spends comparatively less on its military than its regional rivals (Israel, Saudi Arabia and the United Arab Emirates (UAE)). However, the budget increased to 3.85 percent of GDP in 2016, skyrocketing from 2.5 percent in 2015. Part of this increase was to cover undisclosed programmes (Anquez 2017: 85).

The situation of the Iranian DTIB remains difficult to assess: due to the multiple embargoes which have targeted the country since the Islamic Revolution of 1979, it has proved difficult to shift from defence materiel supplied by Western countries (and first and foremost the United States) to that produced by other countries. This leaves the armed forces with few alternatives but the development of a local DTIB. Through retro-engineering and copies, the Iranian DTIB is able to produce new systems and ensure the maintenance, repair and overhaul of existing assets. It must also be noted that Iranian universities provide skilled manpower, including engineers (Anquez 2017: 86). Nonetheless, the quantity of materiel made available by its DTIB does not compensate for the clear technological superiority of the Arab monarchies of the Persian Gulf. With regard to its naval forces, Iranian shipyards are able to produce the torpedo and missile speedboats used by the IRGC (Sheldon-Duplaix 2015: 90-91), and more ambitious programmes to produce submarines and vessels have been initiated (Sheldon-Duplaix 2015: 91-93). Iran has also presented several designs for domestically developed and produced systems, including unmanned aerial systems, aircraft and missiles. It remains difficult to assess the real capacities of such systems, or even to prove their existence, as some presentations have been dismissed by other countries as mere propaganda (Majumdar 2014). However, lower-tier products of the Iranian DTIB are consistent with an A2/AD strategy which could be enacted in the Persian Gulf and the Strait of Hormuz, and the waiving of sanctions thanks to the Joint Comprehensive Plan of Action (JCPOA) on the Iranian nuclear programme will ease access to foreign technology.

ISRAEL

The Israel Defense Forces (IDF) are considered to be the best military forces in the MENA region. They have a qualitative advantage over all other countries while keeping a quantitative edge thanks to compulsory service for both men (thirty-two months) and women (twenty-four months). This leads to a substantial number of reservists which can be quickly mobilized in case of need (Pollack 2002: 114-118). It must also be noted that Israel is the only country in the MENA region to have a nuclear arsenal, increasing its deterrence capability. However, Israel has never acknowledged possessing nuclear weapons, having never tested them.

EVOLUTION OF THE ARMED FORCES

The IDF paradigm has shifted away from a model implying warfare against neighbouring countries, as was the case for all wars from 1948 to 1973, to contrasting asymmetric warfare against non-state actors (Hamas and Hezbollah being the most important) and the threat from Iranian regional policies and the potential military application of its nuclear programme (Tira 2016: 23).

Asymmetric warfare originating in the Gaza Strip, the Sinai Peninsula and southern Lebanon does not constitute a vital threat to the Israeli state. However, military campaigns against such asymmetric threats now constitute the IDF's most frequent operations. The IDF have managed to put a provisional end to those confrontations, leading to ceasefires with belligerents, but there is no long-term peace in sight. In addition, their opponents' development of effective asymmetric tactics and their large arsenals of rocketry (Tira 2016: 24) have led to military and civilian losses beyond what Israeli society considers acceptable (especially during the 2006 campaign against Hezbollah) (Harel and Issacharoff 2008: 241-248).

Nevertheless, the IDF continue to field large numbers of armoured and mechanized units as if to engage in symmetric warfare against their neighbours (Tira 2016: 40). However, this does not impede the development of other capabilities in terms of intelligence, surveillance and reconnaissance (ISR), missile defence, precision weapons and substantial investment in cyber warfare (IISS 2017b: 382).

EVOLUTION OF PROCUREMENT AND DEFENCE INDUSTRY

Israel relies mostly on its own DTIB and solid ties with Western countries for its procurement. While in recent decades most of the aircraft flown by the IDF have been of American design, the country has developed other partnerships, both in the past (mostly involving French designs) (Pollack 2002: 59) and in the present (as it has agreed to buy Italian M-346 trainers) (Ben Zion 2016). Israel has a long-standing partnership with Germany for the production of both submarines and surface vessels (Military Technology 2015: 234).

The domestic DTIB has developed a wide catalogue of assets, ranging from tanks to small arms, which have seen limited export and are mostly designed for the domestic market (IISS 2017b: 383-384). It has also made substantial developments in several niche sectors for export, including cyber defence, missiles, missile defence, ISR and unmanned aerial systems.

This development of the Israeli DTIB was made possible by significant defence expenditure but also by US FMA (amounting to 3.1 billion dollars in 2016) (IISS 2017b: 382). This assistance has been maintained and expanded despite difficult relations between the Obama administration and the Netanyahu cabinet (Ravid 2016). It must also be noted that Israel is the only country beneficiary of US FMA which is exempted from the requirement to spend the assistance on equipment made in the USA (Mehta 2017a). In addition, Israel is able to maintain its technological superiority over other regional actors thanks to the United States' agreement not to export F-35 fighters to other MENA countries (Opall-Rome 2015).

SAUDI ARABIA

Another important regional military power in the MENA region is Saudi Arabia (SA). Next to the conventional triad (i.e. land forces (RSLF), navy (RSN) and air force (RSAF)), Riyadh has created various separate structures (e.g. Air Defence Forces (RSADF), Strategic Missile Forces and National Guard (SANG)). The Saudi armed forces as a whole constitute one of the largest and best equipped forces in the region.

Besides the army, which traditionally is tasked with the territorial defence of the country, the National Guard shares the same core tasks while also being in charge of internal security. Indeed, it is often described as a praetorian guard of the House of Saud and has historically acted as a political counterweight to the regular army units, which are deemed inefficient and unreliable. It retains its own inventory of arms and has recently established an aviation air wing (Judson 2017). In general, the National Guard is better trained and equipped than the regular army and its capabilities go beyond the task of internal security.

The Strategic Missile Forces are based on an unknown number of Chinese designs (DF-3 and DF-21) (IISS 2017b: 365). The current status of the missiles, and what their exact purpose is meant to be, is unknown. There has been speculation about its possible use in the framework of Saudi–Pakistani nuclear agreements. The missiles could also be made immediately available to a domestic nuclear programme, should an Iranian nuclear military programme materialize.

EVOLUTION OF THE ARMED FORCES

Saudi Arabia has traditionally avoided direct confrontation in armed conflicts. Various factors are now pushing SA to assume a more direct role in regional conflicts and develop its capabilities, including the emergence of Iran as a regional competitor, the spread of various forms of Islamism and the United States' perceived disengagement from the region.

SA has therefore taken the lead in several initiatives targeting its designated foes: the creation of an Islamic Military Alliance (aka the Islamic Alliance to Fight Terrorism), which is supposed to be related to the Organisation of Islamic Cooperation (while excluding notable OIC members such as Iran and Algeria). On the other hand, SA is trying to pressurize the GCC members in the strengthening of military ties. So far, the initiative is mostly supported by the UAE and Bahrain while Qatar, Kuwait and Oman have not shown much enthusiasm in the matter.

In the broader context of the "Vision 2030" document, the Saudi armed forces are meant to institute a number of reforms, ranging from defence policy to the development of a national defence industry (IISS 2017b: 363). The different elements of the armed forces are scheduled to further increase their capabilities, in particular in terms of deterrence against Iran. The air force should see its capabilities in transport, air refuelling, ISR and airborne early warning and control (AEW&C) beefed up, as the conflict in Yemen has highlighted several shortfalls in these areas (Hokayem and Roberts 2017: 176-179).

The navy is also set to see a dramatic improvement in the capabilities of its fleet with the procurement of heavier surface ships and strengthened naval aviation. This move is aimed at improving readiness for asymmetric warfare against Iran's Revolutionary Guard Navy in the Persian Gulf and Strait of Hormuz.[2]

The army and the National Guard would also partly turn toward a more expeditionary model, as demonstrated by the procurement of wheeled armoured vehicles. There were also talks to reduce duplication between the RSLF and the SANG and to increase interoperability, but diverging acquisitions and recent developments have demonstrated that there is still a long way to go. For instance, the SANG had to deploy units with French CAESAR wheeled artillery in support of RSLF units involved in Yemen, as the RSLF lacks the appropriate artillery (IISS 2017b: 365).

2 "Saudi Arabia", in *IHS Jane's World Navies*, February 2017, p. 6-10.

It should be noted that the above-mentioned developments represent significant increases in capabilities and will take time to be integrated in the defence framework. Otherwise, they would simply constitute further pieces of advanced hardware without a purpose – a white elephant. It is also important to mention that SA has taken few steps to develop a proper unmanned aerial vehicle (UAV) component.

EVOLUTION OF PROCUREMENT AND DEFENCE INDUSTRY

SA has long-standing procurement relationships with several Western countries and the fourth-largest defence budget in the world. The budget has come under strain, however, due to the fall in oil prices. The country launched its "Vision 2030" plan aimed at reducing the dependence of the Saudi economy on oil revenues. The plan includes a goal to "localize" 50 percent of defence expenditures by 2030. This may be overly ambitious, as it is currently at a level of 2 percent and does not fit with the expected main procurements in the future (Gaub and Stanley-Lockman 2017: 40). In addition, recent developments in the USA and the stated policy of "America First" could further challenge this plan, as American industries might be even less willing to share part of the workload with foreign countries.

However, SA is looking to diversify its suppliers, and it could include procurements which are not state-of-the-art in their respective segments but which could lead to technology transfers (Gaub and Stanley-Lockman 2017: 43). Recent contracts with suppliers such as Pakistan (Al Khalid MBT, JF-17 fighter),[3] Georgia (Didgori APC), Spain (Alakran Mortar Carrier Systems), South Africa (Ingwe ZT3 anti-tank missile), Ukraine (An-178 and An-132 airlifter) and China (CH-4B UAV) could lead to technology transfer and production in SA, with a significant gain in experience for local industries (Gaub and Stanley-Lockman 2017: 40).

TURKEY

As the second-largest armed forces within NATO, the Turkish armed forces (TAF) are able to fight low- to high-intensity conflicts, on the basis of NATO requirements or national policies (IISS 2017b: 166). As a member of NATO, in the past Turkey had to defend its common border with the Soviet Union, and it is now participating in NATO operations in Kosovo and Afghanistan. Turkey maintains difficult relations with Greece (including disputes over airspace and maritime borders) and continues to deploy troops in the northern part of Cyprus (IISS 2017b: 169). However, the TAF have focused operations on countering the Kurdistan Workers' Party (PKK) in south-eastern areas of the country and in neighbouring areas of Syria and Iraq (Tira 2016: 35). This has led to harsh urban warfare and airstrikes within Turkey (IISS 2017a: 145-147). The scope of such operations has been extended by the state of emergency which was decreed in the aftermath of the attempted coup on 15 July 2016 (IISS 2017a: 149). On this matter, it is still difficult to predict the consequences of the removal of large numbers of TAF officers on the effectiveness of the armed forces in ongoing operations within and outside of Turkey (IISS 2017b: 68-69). In the short term, the Turkish gendarmerie, which acted as a paramilitary force, was detached from the armed forces and is likely to evolve into a pure police force (IISS 2017b: 68-69).

3 See "Saudi Arabia", in *IHS Jane's World Armies*, January 2017, p. 9; and "Saudi Arabia", in *IHS Jane's World Air Forces*, 2017, p. 10.

The operation Euphrates Shield was effective in removing opponents (both Islamic State and the Kurdish People's Protection Units (YPG) under the Syrian Democratic Forces umbrella) from border areas and establishing buffer zones that are now a safe haven for the Free Syrian Army. It is unlikely the TAF will enter further into Syria.

Such developments may lead to the TAF shifting from a traditional "cold war" and territorial defence model to a more expeditionary model by acquiring the relevant systems and strategic enablers (Tira 2016: 36).

EVOLUTION OF PROCUREMENT AND DEFENCE INDUSTRY

While Turkey has mostly relied on foreign procurement, often limiting itself to the production of foreign designs under licence (which may or may not include improvements), the country's policy to develop its DTIB has begun to bring results, including a catalogue ranging from small arms to vessels (Military Technology 2015: 180-181). Local industry currently meets 64 percent of procurement requirements, up from 24 percent in 2002 (Bekdil 2017). The stated aim is to attain self-sufficiency by 2023, a symbolic date (the hundredth anniversary of the Turkish Republic) but also a realistic one. This goal is partly motivated by strained relations with traditional partners (Bekdil 2017). Turkey is already exporting its defence industry products to countries in the MENA region, and their use by the TAF in the MENA region could increase their attractiveness as battle-proven equipment. Unlike many other MENA states, Turkey was able to develop its DTIB due to a locally available skilled workforce and the spillover from civilian to military technologies. However, some shortfalls persist in locally available know-how. For instance, Turkey is not yet able to design and produce engines for its future tank, the *Altay* (Bekdil 2017). The five armies discussed above are the military powerhouses of the region. Yet the region is further comprised of middle powers, who can exert substantial military power.

2. MIDDLE REGIONAL POWERS

This category comprises states which are influential at the sub-regional level and have limited abilities to project power in their neighbourhood. However, they are unable to take the initiative in the broader region, unless they are a junior partner in a coalition, as is the case for the UAE in Yemen and Libya.

ALGERIA

The first middle power is Algeria. The Algerian armed forces are nearly equally composed of regular troops (army, navy and air force) and paramilitary (gendarmerie and militias of the Legitimate Defence Groups). The armed forces have slowly lost influence in the political sphere, as their role in the independence movement (emphasized by their name, Armée de Libération Nationale) is no longer considered a justification for their role in contemporary politics (Gaub 2016c: 17). Nevertheless, the civil war in the 1990s pushed the armed forces to the forefront of politics. The creation of militias was essential in the fight against the Armed Islamic Group (Groupe Islamique Armé, GIA), as it re-established the link between the armed forces and the population (Kepel 2001).

EVOLUTION OF THE ARMED FORCES

Although the level of violence has decreased significantly since the civil war, various Islamist groups continue to represent a threat in the south of Algeria, especially since the collapse of Libya and the outbreak of war in Mali (IISS 2017a: 122-123). Those groups, which are the offspring of GIA, maintain independence from or at most loose ties with international groups (Al Qaeda in Islamic Maghreb (AQIM) or Daesh) (Mémier 2017: 14). In addition, Algeria maintains significant forces due to its tense relations with its Moroccan neighbour.

EVOLUTION OF DEFENCE INDUSTRY

Algeria has traditionally relied and still relies on Russia for its procurement and has signed contracts for large amounts of equipment, ranging from armoured vehicles to surface ships (IISS 2017b: 368). The country is, however, trying to diversify its sources as a way of balancing its relations, especially in the Mediterranean basin (Bautzmann 2014: 74-75), as can be seen in the steady development of its navy (Kington 2014) and its air force (Bautzmann 2013: 66-67).

Algeria's DTIB, which had developed in the years following independence, suffered greatly from the civil war, which caused production to stop and impacted the education of workers. It is now mostly able to deliver land vehicles but is looking for synergies with foreign firms, notably in the field of helicopters (Italy) and armoured vehicles (Germany) (Gaub and Stanley-Lockman 2017: 65).

MOROCCO

Next to its army, navy and air force, the Moroccan Royal Armed Forces (RAF) include a gendarmerie and a medical service (IISS 2017b: 394). While Morocco has a minister of defence and a chief of defence (*Inspecteur Général*), it is said that effective control of the RAF is under the direct supervision of King Mohammed VI and his military adviser.

EVOLUTION OF THE ARMED FORCES

Due to its regional rivalry with Algeria and the unresolved issue of the sovereignty of Western Sahara, the RAF maintain a paradigm of territorial defence. Nevertheless, the long-running conflict with the POLISARIO Front (which benefits from Algerian support) in the Western Sahara has led the RAF to acquire expertise in counter-insurgency (COIN) (IISS 2017b: 394), which could be useful in other contexts, especially as the RAF are now progressively shifting to a more expeditionary model and increasing interoperability with their partners (mostly the USA, France and the Gulf monarchies). At the same time, Morocco has entered what looks like an arms race with neighbouring Algeria, which explains the expansion and modernization of its navy (Bautzmann 2014: 88-89) and air force (Bautzmann 2013: 86-87). The latter is participating in the Saudi-led coalition in Yemen (where it has lost an F-16 fighter) (IISS 2017b: 394).

EVOLUTION OF DEFENCE INDUSTRY

Next to the expansion of the navy, thanks to the acquisition of a FREMM frigate (French Anti-Submarine version) and three corvettes (Dutch SIGMA model), the army is modernizing its equipment, most notably its tanks, as M1A1 tanks (originating from Egyptian assembly lines, at M1A1 SA Saudi standards) are replacing older *Patton* designs (M48-M60) (IISS 2017b: 394).

Such deals are meant to help develop regional cooperation in the framework of the DTIB, as Saudi Arabia is expected to invest in Morocco with the aim of developing local industry (IISS 2017b: 394). At the same time, Moroccan authorities are willing to develop local industry through joint ventures with European companies in order to reduce dependency on foreign countries, as Morocco is the thirteenth-largest importer of arms in the world (North Africa Post 2017). This effort is sustained by an increase in defence expenditure, although lack of experience in the defence industry domain may delay attainment of the stated ambitions.

SUDAN

Sudan's armed forces are characterized by the clear dominance of its ground forces (the army numbers 240,000 soldiers, while the navy has 1,300 and the air force 3,000) over the rest of the armed forces. This is due to the fact that Sudanese forces have been mostly involved in internal conflicts, as revolts have broken out in the west of the country while the insurgency in the south led to the independence of South Sudan (IISS 2017b: 538).

EVOLUTION OF ARMED FORCES

Due to its size and its large armed forces, Sudan has for several decades been an important player in the region. After the 1989 coup led by Omar al Bachir and a group of Islamist officers, the country was labelled as a safe haven for terrorists and targeted by US strikes and several sanctions regimes (Kepel 2001). Despite the persistence of the sanctions and an arrest warrant for President Bachir, Sudan has maintained ties with the countries of the MENA region and is actively involved in the conflict in Yemen, providing a large number of ground forces and air assets (Hokayem and Roberts 2017: 171).

EVOLUTION OF DEFENCE INDUSTRY

While Sudan's troops are better equipped and trained than those of sub-Saharan African countries, they fall significantly short of the superior standards of most MENA countries (IISS 2017b: 538). Indeed, most of the equipment, of Soviet-Russian and Chinese origin, is ageing and local industry is limited and only partly able to deliver the needed vehicles, small arms and ammunition (IISS 2017b: 538). Sudan has received support from Iran in previous years, although this relationship may change given their opposition over Yemen. It may be that Sudan will receive help from the Gulf monarchies as a result of its intervention in Yemen.

QATAR

In the past decade, the Qatari armed forces have experienced a boom in numbers and capacities. Having previously played a minor role in the shadow of its much larger neighbour Saudi Arabia, the emirate has emerged as an important regional actor, thanks to an increase in revenue based on gas exports and a proactive foreign policy.

EVOLUTION OF ARMED FORCES

Its armed forces (army, navy and air force) are relatively small (11,800 members) but are scheduled to expand, as recent arms purchases imply at least a multiplication by three of the air force and the navy. This may, however, prove difficult for such a small country (with a population of 2.2 million, of which only 25 percent are nationals) (IISS 2017b: 399).

In parallel with its proactive foreign policy, Qatar has started to engage in military conflicts: it participated in the NATO-led operation in Libya and continues to support a faction in the ongoing Libyan civil war (Toaldo and Fitzgerald 2016). Qatar was also a member of the Saudi-led coalition in Yemen, participating with ground forces,[4] before being expelled as a consequence of the ongoing diplomatic crisis between Qatar and the Saudi–Emirati tandem (Ramy 2017).

EVOLUTION OF DEFENCE INDUSTRY

Due to the expansion of its armed forces, Qatar has signed several contracts with many different suppliers, mostly Western ones but also Turkey, with whom Qatar has established an important partnership (IISS 2017b: 356). The most important increases are observable in the expansion of the fighters fleet, which will grow from twelve *Mirage* 2000s with the addition of twenty-four *Rafales* (IISS 2017b: 416) and a further sale for seventy-two F-15s (Mehta 2017b). It is also developing its projection capacities, doubling its fleet of C17 Strategic Airlifters from four to eight (Mehta 2015). The expansion of Qatar's navy is also noteworthy. Along with the purchase of patrol boats from Turkey (IISS 2017b: 356), the emirate has signed a contract with Italy for the procurement of four corvettes, one Landing Platform Dock (LPD) and two patrol vessels (Defense News 2016). The army is also modernizing its armoured assets, procuring *Leopard* 2A7 tanks and PzH 2000 self-propelled howitzers.[5]

This surge in military contracts does not seem to be linked to any development when it comes to Qatar's DTIB. When awarding contracts, Qatar does not seem to be interested in technology transfer. Besides some interest in dual-use technologies, Qatar has so far preferred to invest in foreign companies in parallel with its investments in civilian companies (Gaub and Stanley-Lockman 2017: 67).

UNITED ARAB EMIRATES

Beside a classical three-way (army, navy, and air force and air defence) subdivision of its armed forces, the UAE Union Defence Forces (UDF) include a Presidential Guard Command (ground forces and a complete special operations command) which is considered an elite force.[6] The UDF have also created a Joint Aviation Command which deploys most of the UAE's military helicopters, as well as light attack and liaison fixed-wing planes (IISS 2017b: 411).

The other peculiarity comes from the political nature of the UAE, which is a federation of seven independent emirates which retain sovereignty over their own forces in peacetime. The bulk of the army troops come from the emirates of Abu Dhabi, Dubai and Ras al-Khaimah,[7] while only Dubai and Abu Dhabi have significant air assets.[8] This has practical implications for procurement and training but also for the financing of the Ministry of Defence. Indeed, the UAE's budget provides the defence budget for the UDF, although this amount is comparatively small compared with the

4 "Qatar Armed Forces", in *IHS Jane's Sentinel Security Assessment. The Gulf States*, April 2017, p. 1.

5 "Qatar – Army", in *IHS Jane's World Armies*, March 2017, p. 7-8.

6 See Global Security website, *UAE Presidential Guard Command*, https://www.globalsecurity.org/military/world/gulf/uae-pg.htm.

7 "United Arab Emirates – Army", in *IHS Jane's World Armies*, January 2017, p. 3.

8 "United Arab Emirates – Air Force", in *IHS Jane's World Air Forces*, 2017, p. 5.

total amount of defence expenditures (fluctuating between 10 and 20 percent). Therefore, most of the UDF's resources come from allocations funded by individual emirates (especially Abu Dhabi).[9]

EVOLUTION OF THE ARMED FORCES

The UAE is currently shifting its defence paradigm from territorial defence and protection of vital interests (i.e. offshore energy infrastructure and freedom of access to the Strait of Hormuz),[10] toward a more proactive stance in the region. Its forces may therefore be able to undertake an expeditionary role. The UAE also seems keener to make use of the whole spectrum of its force catalogue. In recent years the mentality has shifted as both ground and naval forces are now more susceptible to deployment.[11]

The UAE introduced military service in 2015. This move can be interpreted in two ways. On the one hand, it will help reduce reliance on foreigners in the armed forces (estimated at around 30 percent of the total). On the other hand, it can be perceived as a move to instil a greater sense of statehood in young Emiratis.[12]

The Saudi-led operation in Yemen is targeting the alliance between the Houthis and elements loyal to former President Ali Abdullah Saleh. UDF activity is not limited to air operations, but also includes the mobilization of infantry and armoured units (Hokayem and Roberts 2017: 169). The UAE is also participating in the US-led coalition in Syria and Iraq. In Libya, the UAE and Egypt are supporting the armed forces of the faction of General Haftar and his so-called Libyan National Army.

EVOLUTION OF DEFENCE INDUSTRY

The UAE military has traditionally relied on foreign suppliers (especially the USA, UK and France). However, the UAE is moving towards more diversification in supply, especially when it comes to the procurement of assets which are deemed critical and where traditional suppliers seem unwilling or slow to deliver the needed materiel. In this vein, the delays and limits on procuring American UAVs have led the UAE to seek other suppliers who are less reluctant to provide them with armed UAVs. This is the main reason why the UAE has preferred to buy Chinese and Italian UAVs.[13]

The UAE is also looking to increase its allocation to domestic suppliers. The local DTIB has grown in recent decades, offering an increasingly important catalogue of products. With the aim of rationalizing the defence industry, the UAE created the holding of the Emirates Defence Industries Company (EDIC) (Gaub and Stanley-Lockman 2017: 48), with the dual goal of supporting the armed forces and developing local industry (Jovovic et al. 2017: 4). This has enabled them to respect the fixed rule of re-investing 60 percent of the purchase contract amount in the country (Gaub and Stanley-Lockman 2017: 53). However, the EDIC will need to do pursue more research and development (R&D) if it wants to take the next step. Nevertheless, the UAE is now able to

9 "Defence Budget Overview", in *IHS Jane's Sentinel Security Assessment. The Gulf States*, February 2017, p. 1-3.

10 "Security", in *IHS Jane's Sentinel Security Assessment. The Gulf States*, November 2016, p. 2.

11 "Armed Forces", in *IHS Jane's Sentinel Security Assessment. The Gulf States*, November 2016, p. 1.

12 "United Arab Emirates – Army", in *IHS Jane's World Armies*, 2017, p. 6.

13 "United Arab Emirates – Air Force", in *IHS Jane's World Air Forces*, 2017, p. 10-14.

domestically produce assets ranging from small arms to corvettes (Gaub and Stanley-Lockman 2017: 53).[14]

3. SMALL REGIONAL POWERS

The final category of military powers comprises small regional powers. Small powers are unable to go beyond a limited projection of influence in their neighbourhood. Moreover, they are unable to project force unless they join with a major power. Besides their inability to project power, they are limited by the size of their armies or the weakness of their structures.

BAHRAIN

Bahrain has very few but still capable armed forces (IISS 2017b: 370). Yet, even if Bahrain is now participating in the Saudi-led coalition in Yemen, with air and land assets, the country relies on Riyadh for its defence, in the framework of the GCC. Saudi support is essential even in the matter of internal security, as evidenced in its forces' critical role in quelling social unrest and protests in 2011 in Manama (Henderson 2011).

With regard to its equipment and future procurement, it must be noted that most of Bahrain's equipment is ageing compared with other Arab monarchies in the region. The army's armoured component is still relying on M60 tanks, the navy's main vessels are second-hand US ships, and the air force has a squadron flying F-5 fighters (IISS 2017b: 370) (which will be replaced by F-16s, now that the Trump administration has approved the contract which had been postponed by the Obama administration due to human rights concerns) (Lederman and Gambrell 2017). It can be presumed that the ties between Bahrain and the other GCC members may be strengthened in the field of military cooperation, and Manama may seek increasing interoperability with its neighbours.

JORDAN

Compared with its neighbours, Jordan has a small yet very capable army with a rich military tradition, based on the Jordanian monarchy's ties to the Arab revolt during the First World War. Indeed, it is said that the military provides an important bond between the Hashemite dynasty and local tribes, which compose the bulk of the armed forces. Next to its army, navy and air force, Jordan has a large Joint Special Operations Command.

EVOLUTION OF ARMED FORCES

As with many armed forces in the region, Jordan has put a strong emphasis on its air force, which is considered to be among the strongest in the region (Bautzmann 2013: 84-85), even if Jordan's military paradigm has restrained the country from developing capacities for projecting force. At the same time, the development of a large Special Operations Command was somehow related to a decrease in the quality of the regular army units, which by Western standards is deemed insufficient.

14 See also "United Arab Emirates", in *IHS Jane's World Navies*, November 2016, p. 4.

Jordan is using both its special forces and its air force in the Iraq–Syria and Yemen conflicts. In the former, its involvement became the focus of media attention especially after the execution by Daesh of a Jordanian fighter pilot who had to bail out over Daesh-controlled territory (AFP 2017).

EVOLUTION OF DEFENCE INDUSTRY

Jordan's DTIB is centred around the King Abdullah II Design and Development Bureau (KADDB), which provides licensed products (small arms and light weapons), land vehicles and upgrades to existing inventory (Gaub and Stanley-Lockman 2017: 63). Defence expenditure remains low, despite being an important budget item in terms of GDP, and partly depends on US FMA (Gould 2017).

KUWAIT

Kuwait's small armed forces comprise an army, a navy, an air force and a relatively important National Guard. Despite an effort to keep the forces fitted with modern equipment and well trained, their size implies that Kuwait is dependent on GCC and US protection for its defence.

EVOLUTION OF ARMED FORCES

As a small country surrounded by much larger countries (Iran, Iraq and Saudi Arabia), Kuwait has always relied on external intervention to help defend it from aggression (as during the Gulf War) (IISS 2017b: 387). However, in the framework of its membership of the GCC, Kuwait is developing a core of special forces, and the size of its air force will increase in the coming years in terms of both its fighter and transport capacities.

EVOLUTION OF DEFENCE INDUSTRY

Kuwait's DTIB is not particularly developed except in some dual-use technologies, for example in the domain of cyber security and satellite services. The DTIB is not likely to develop in the foreseeable future, but Kuwait could further develop its links with its GCC partners by increasing its imports of regionally produced products (especially from the UAE, with whom Kuwait has signed a contract for the purchase of eight vessels) (Gaub and Stanley-Lockman 2017: 66).

The contract signed with Italy for the procurement of twenty-eight Eurofighter *Typhoons* could enhance cooperation with other countries flying this type of aircraft (Saudi Arabia and Oman), increasing interoperability and facilitating the maintenance, repair and overhaul in the region (Smaldore 2016: 98). Like Qatar, Saudi Arabia and the UAE, Kuwait has decided to diversify its sources of procurement for fighters and will likely replace its current F-18C/D fleet with the latest F-18E/F (DSCA 2016).

LEBANON

Despite its relatively small size and population, Lebanon has quite important armed forces which are complemented by an important gendarmerie force, the Internal Security Force, which is tasked with security and defence.

EVOLUTION OF ARMED FORCES

Lebanon's armed forces are confronted with several challenges, the first being the ongoing war in Syria in which a Lebanese political armed faction, Hezbollah, is involved. In addition, the presence of various Syrian armed groups on the Syrian–Lebanese border has led to confrontations with Lebanese security forces (Abi Ramia 2016, IISS 2017b: 389). In addition, Lebanese authorities still face internal security issues due to the existence of Hezbollah as an independent armed faction, as well as from the Palestinian refugee camps (L'Orient-Le Jour 2017). The Lebanese multi-confessional subdivision has often hampered the action of the armed forces, for example during the civil war (1975–90). Nevertheless, the armed forces are considered the sole symbol of national unity (Corm 2012: 344).

Lebanon also hosts an important contingent of Blue Helmets, members of the United Nations Interim Force in Lebanon (UNIFIL), which has been present in the country since 1978 and was expanded after the 2006 war between Israel and Hezbollah. The current UNIFIL contingent comprises around 10,000 soldiers (IISS 2017b: 391).

With regard to its procurement, the lack of resources makes the Lebanese armed forces dependent on FMA, mostly from Western and Gulf countries (IISS 2017b: 389). This assistance is not unconditional, as the 3 billion dollar contract for French supply, funded by Saudi Arabia, was cancelled due to tensions between Beirut and Riyadh over the former's stance towards Iran (Kechichian 2017). Moreover, Western suppliers have always been reluctant to provide Lebanon with heavy weapons, partly due to Israeli concerns that such arms could be transferred from the armed forces to Hezbollah (Gibbons-Neff 2016).

Hezbollah has grown as a political armed faction in Lebanon since its creation in 1982. While from a political point of view it is the main representative of Lebanese Shiites, from a military perspective it is often considered an Iranian proxy (Roy 2007: 202-203). The military branch has gained conspicuous expertise in guerrilla and asymmetric tactics during years of attrition warfare with the IDF in southern Lebanon. Iranian support has made available weapons which inflicted heavy losses on the IDF during the 2006 war. Besides developing tactics to exploit IDF tanks' weaknesses and using anti-tank missiles, destroying many Israeli *Merkava* tanks, Hezbollah made use of anti-ship missiles to disable a corvette (Makki 2007: 217). In the years since the war, Hezbollah has managed to rebuild its stockpile of weapons and refill its ranks. The organization has around 45,000 members, of which half can be considered as active (Pollak 2016: 4). The reconstitution of its arsenal was mostly achieved through convoys arriving from Syria, which is one reason why Hezbollah is supporting Bashar al-Assad. It is reasonable to assess the size of this arsenal at around 100,000 rockets and missiles of varying range and payload (Pollak 2016: 9), with improved accuracy.

MAURITANIA

The Mauritanian armed forces are limited in size and scope. Ongoing Islamist insurgencies in the Sahel have drawn the country into participating in international efforts in Mali and increasing cooperation with its Western partners (i.e. the USA and France) (IISS 2017b: 393).

Due to its limited defence budget and low level of industrialization, Mauritania does not have a proper DTIB and relies on FMA coming from NATO and the EU for the procurement of larger assets (IISS 2017b: 393).

OMAN

Apart from its classic services (army, navy and air force), Oman has two separate forces, representing the two traditional sources of power in the country: the Royal Household and the Tribal Home Guard (IISS 2017b: 398). Although Oman belongs to the GCC, the country has a tradition of equidistance in the Saudi–Iranian rivalry, preferring to act as mediator. For this reason, Oman is not participating in the Saudi-led coalition in Yemen (IISS 2017b: 398). Muscat maintains important defence agreements with the USA and the UK that guarantee Oman an equipped and well-trained military.

Like the other GCC members, Oman is significantly increasing the capacities of its air force, complementing the latest delivery of F-16s (for a total of twenty-four) with an order for twelve Eurofighters, following the GCC trend of having two different suppliers for fighters (a US design and a European one).

PALESTINE

Governing in parts of the West Bank, according to the Oslo agreements (having been ousted by Hamas from the Gaza Strip), Palestine has many different security services, ranging from civilian police to paramilitary forces, all of which are equipped only with small arms. The total number of these forces is unknown (IISS 2017b: 398). The quality of such forces is difficult to assess as some of them, most notably the Palestinian Civilian Police, are trained by the European Union and other international partners.[15] Some other forces remain exclusively under Palestinian supervision.

The Sunni-Islamist group Hamas has retained control of the Gaza Strip since 2007. Its military branch, the Izz ad-Din al-Qassam Brigades, counts tens of thousands of members and continues to expand (Hecht and Shamir 2016: 130). In recent years, Hamas has learned from and adopted some of the tactics used by Hezbollah in 2006, including employing guerrilla warfare within the Gaza Strip to confront intruding IDF, increasing its rocket and missile capacities, and making use of commando raids within Israel (Hecht and Shamir 2016: 131). Such operations have proved successful, as one-sixth of IDF casualties in the 2014 conflict happened in Israel.

TUNISIA

The Tunisian armed forces include a National Guard in addition to the army, the navy and the air force. The National Guard serves as an internal security provider, acting as a gendarmerie. The army has only a small voluntary core and is mostly composed of conscripts (5,000 volunteers compared with 22,000 conscripts) (IISS 2017b: 408). This high number of conscripts may partly explain the army's support for the revolution in 2011, when it stayed out of Tunisian politics and did not participate in the repression of the uprising (Kirkpatrick 2011). Since then, the armed forces

15 See the EUPOL COPPS website: *Mandate*, http://eupolcopps.eu/en/node/42.

and the whole security apparatus have had to increase their role within society to respond to the emergence of domestic terrorism, which is often used as an excuse to postpone any discussion on security sector reforms (Kherigi 2017: 32). In addition, the civil war in neighbouring Libya continues to threaten conflict in border areas (Kherigi 2017: 34). In the short term, the increasing powers of the security apparatus may threaten the reforms taken after 2011 (Gaub 2016c: 23).

The Tunisian armed forces have long-standing arrangements with Western countries to supply training and equipment, which is deemed qualitatively insufficient to ensure territorial defence (IISS 2017b: 408). For more important assets (especially ships), Tunisia relies on second-hand materiel (IISS 2017b: 409).

4. AREAS OF CONFLICT

The governments of the states in this category have lost control of part of their territory and their main task, if there is any government in power, is therefore to retake control of their country.

IRAQ

The current Iraqi armed forces are very small given Iraq's population. This is due to the collapse of the defence apparatus when Daesh emerged and took over significant areas of Iraq, including some cities, in 2014, as the army lost large numbers of personnel and equipment. Today, while the armed forces are being rebuilt, various militias have emerged under the generic brand of Popular Mobilization Forces (PMF), which the Iraqi central government loosely controls and which are subject to internal and external influences. The entire armed forces are now participating in the fight to retake control of Iraqi areas captured by Daesh (IISS 2017b: 354).

EVOLUTION OF THE ARMED FORCES
Following the US-led invasion of 2003, Iraq started to rebuild its defence force from scratch, as the armed forces as an institution had been totally dismantled by the Coalition Provisional Authority (Bédar 2014: 21). The newly formed armed forces, however, were considered too weak and under-equipped and were infiltrated by political factions (CAPRI 2014b: 86). When Daesh conquered parts of Iraq, the army shrank from 200,000 soldiers (CAPRI 2014: 87) to the current 54,000 (IISS 2017b: 380). It has also had to restock its inventories to compensate for the equipment that was destroyed or lost to Daesh, receiving new equipment under FMA (IISS 2017b: 354). The fight against Daesh has come to involve a wide spectrum of actors including the armed forces, the Kurdish Peshmerga, various PMFs from different sects and political affiliations, and foreign forces (i.e. the US-led coalition and the Iranian-backed militias supported by the IRGC Al-Quds Force) (IISS 2017b: 353, Sharafedin 2015). In addition, the air force has expanded and received new equipment in order to assist in the battle on the ground (IISS 2017b: 414).

Peshmerga from the Kurdish Regional Government (KRG) have also developed as an independent force which is participating in the fight against Daesh while also pursuing a political agenda (as demonstrated by the referendum on independence on 25 September 2017). Iraqi Kurds were supported by the USA for decades as a counterweight to Saddam Hussein's Iraq (Meho and Nehme 2004: 14). The war against Daesh has made available increasing resources from the US-led coalition, as Peshmerga have been considered a reliable actor in comparison with the shattered Iraqi army. Therefore, the KRG is receiving material support (weapons and vehicles) and training from several partners in the US-led coalition (Mehta 2017c, Pugliese 2016).

In Iraq, as in Syria, Daesh is quickly losing ground (IISS 2017a: 92). This could lead to a change of paradigm, with Daesh shifting from a "proto-state" model to that of an insurgency (as it was before 2014), focusing on terrorist attacks instead of warfare (CAPRI 2014a). Indeed, the number of Daesh fighters is shrinking, due partly to casualties and partly to the measures taken by states to prevent departures of foreign fighters to the theatre (IISS 2017a: 92). Nevertheless, Daesh is notable for the way it proved able to develop several services to a level which had never been seen among non-state actors. Findings in Mosul prove that Daesh had set up a form of military industry to produce ammunition, rockets and UAVs (Sallon 2017). Daesh managed to standardize weapons production and, in the field of rocketry, integrate chemicals (CAR 2016: 25). Moreover, Daesh had the opportunity to plunder and stockpile weapons of various origins and calibers from all the belligerents in Syria and Iraq. Again, Daesh performed much better than other non-state actors in developing a logistical chain able to supply ammunitions and arms over long distances (CAR 2014: 6).

LIBYA

In the aftermath of Muammar Gadhafi's fall in 2011, Libya has struggled to unify under a single government. Since 2014, the country had had two rival governments: the Government of National Salvation (GNS), based in Tripoli, supported by the General National Congress (GNC), under the leadership of Khalifa Gwell; and the House of Representatives (HoR), based in Tobruk, in which General Khalifa Haftar wields increasing power.

Following the UN-brokered agreement, those governments were meant to cede power to a new government. However, both governments are still in existence alongside the Presidential Council (PC), led by Fayez al-Sarraj (Toaldo and Fitzgerald 2016).

Each of the three governments is supported by various local militias, which are often acting in support of a government on the basis of strictly local interests. For example, Misrata's militias are supporting the PC while the Petroleum Facilities Guards, a militia present in most oil fields and refineries, has taken an equidistant position (Toaldo and Fitzgerald 2016). Even General Haftar's troops, the so-called Libyan National Army, are made up of local militias and troops loyal to the general.

With regard to external support, the HoR is benefiting from the support of Egypt and the UAE (which are both delivering weapons and providing air support) (Toaldo and Fitzgerald 2016, IISS 2017b: 392), with whom the HoR shares a political agenda of eradicating political Islamism, while the GNS has received support from Qatar and Turkey (Toaldo and Fitzgerald 2016). Western countries (the USA, France, UK and Italy) provide support to the PC while intervening to fight both Daesh and al Qaeda affiliates, often in coordination with local militias, independently from their allegiance to any of the governments (IISS 2017a: 120).

All factions have wide access to arms, both from external supporters and from old local stockpiles. After the 2011 revolution, an enormous quantity of small arms and light weapons (including Man Portable Air Defence Systems (MANPADS) and anti-tank weapons), estimated at 15 million weapons, were spread across the country and the region (Gaub 2016a: 1-2). In terms of heavy weapons, all factions make use of stocks available in the country, though General Haftar is considered to be the only one with a functioning air force (IISS 2017b: 392).

SYRIA

As the civil war has now entered its seventh year, the Syrian armed forces, which used to be among the most important in the region, have suffered enormous losses due to casualties and desertions. Even if most of the general staff remained loyal to President al-Assad (Gaub 2014: 37), it has found it difficult to recruit soldiers outside of its stronghold on the coastline (IISS 2017b: 404). Al-Assad's forces are now heavily supplemented by various militias raised in Syria or brought in from the outside. Hezbollah is assuming an increasingly important role in the conflict, expanding from an advisory role (especially in guerrilla warfare) to a direct combat role (Pollak 2016: 3). Iran's IRGC also maintains a significant presence in Syria, supplying arms and advisers (Sullivan 2014: 13). Both Hezbollah and the IRGC are playing an important role in training and guiding the various Shiite militias from Syria, Iraq, Iran and Afghanistan (ICG 2017). Moreover, Russian support in the form of special forces and air support is critical to cover the ground forces (IISS 2017a: 132).

Rebellion remains divided along geographical and ideological lines: a Free Syrian Army faction has now regrouped in the south of the country. A number of secular and non-jihadist units fall under the Military Operations Centre (MOC), based in nearby Jordan (Oweis 2016: 1). It receives support from Jordan and the USA. Another Free Syrian Army coalition is in the north, where it has had to struggle after the loss of Aleppo and the retreat to the city of Idlib. It has lost ground to the Syrian army and the jihadist groups Jabhat Fateh al-Sham (the former al Qaeda affiliate Al Nusra Front) and Ahrar al-Sham (Oweis and Wimmen 2016: 3). In those areas, Turkmen elements are part of the rebellion and have grouped together on an ethnic basis. In the northern parts of Syria, especially those close to the Turkish border, the Syrian Democratic Forces (SDF) (mostly composed of the Kurdish YPG, considered to be the sister organization of the Turkey-based PKK) (Werz and Hoffman 2014: 6) control the area on the left bank of the Euphrates River. The SDF are receiving substantial support from the US-led coalition and can now be considered its main ground element in the fight against Daesh (IISS 2017b: 406). This support has included military advisers, air support and arms supplies. All factions are benefiting from material support from external actors, besides the plundering of pre-existent Syrian army depots. As relations between the factions are fluid, weapons often do not end up in the hands of the users for which they were intended (Angelovski et al. 2017).

YEMEN

The ongoing civil war in the country has split the armed forces between elements loyal to President Abdrabbuh Mansour Hadi and elements standing with former President Saleh. The latter has negotiated a coalition with the long-standing Houthi insurgency in the northern parts of the country. As an independent faction, the Houthis had already been fighting the Yemen authorities in recent years and had independently confronted Saudi Arabia (Hokayem and Roberts 2017: 161). This new coalition of interest between the Houthis and Saleh is supported by Iran (Hokayem and Roberts 2017: 162), which has become involved in the conflict as a way to divert Saudi resources to Yemen. On the other side, the internationally recognized government of President Hadi receives direct support from the Saudi coalition. However, the tribal context of Yemen makes it difficult to create a cohesive ensemble out of the various militias which are often fighting out of strictly local interests (IISS 2017b: 412). In addition, al Qaeda in the Arabian Peninsula (AQAP) entered the vacuum created by the conflict and took control of parts of the country while their main opponents were being busy fighting each other (Hokayem and Roberts 2017: 163). This has drawn the attention of the United States, which has increased its strikes against AQAP (Mehta and Snow 2017). After more than two years of Saudi-led intervention, the conflict has now reached an impasse as the situation on the ground is not evolving toward a decisive victory by either side (Hokayem and Roberts 2017: 175). On the ground, the alliance between the Houthis and Saleh is still in control of Sana'a and the mountainous north (Baron 2017). President Hadi's authority is limited to the southern provinces and areas in the east (most notably the port of Mukalla) which were retaken from AQAP by the UAE (Baron 2017).

CONCLUSION AND PROSPECTS

Unfortunately for the future stability of the region and the security of its people, recent events demonstrate that the main military trend is the development of more expeditionary forces by nearly all states. From armed forces that were usually geared mostly toward protecting the regime from its own citizens, and perhaps acting as a deterrent against foreign aggression, many states are moving towards armed forces that can intervene abroad. The political will to do so exists, as evidenced by interventions by regional forces in the wars in Iraq, Libya, Syria and Yemen.

Certainly not all of the regional forces are "combat-ready" for expeditionary warfare. The more significant the scale, duration and complexity of an operation, the more every country in the region will have to rely on allies to carry it out. More specifically, they lack the "strategic enablers" to undertake sizeable operations in an advanced fashion. The same can generally be said of European armed forces, by the way. The expeditionary trend is set to increase, however, so the military autonomy and freedom of action of regional actors will grow.

With the exception of Iran, no regional actors have yet developed advanced A2/AD capabilities. Nonetheless, "zero morts", the idea that outside forces can intervene in the region with maximum effect and a minimal risk of casualties, thanks to their technological superiority, is clearly coming to an end. This is especially significant for European forces, as the technological gap between them and regional forces was much smaller than with US forces. Even non-state actors will increasingly have the capacity to inflict serious casualties on any opposing force.

In order to increase their strategic autonomy, most countries of the region have taken steps to develop their defence technological and industrial base, though with limited success so far, apart from Turkey. Foreign suppliers of arms and equipment thus remain crucial. That does give Europe, which is an important source of supply, leverage, though probably only if it coordinates with the USA. This evolving military outlook in the region generates several difficult questions for the EU and its member states.

On the one hand, Europeans especially have always stressed local ownership. Local actors ought to be capable of dealing with their security problems themselves, before they escalate and potentially threaten Europe's vital interests, thus triggering the need for European intervention. Not only is outside intervention costly, but it always carries a political price, as in most cases public opinion and local authorities are understandably reticent to welcome foreign troops on their soil. Arguably, European public opinion has become reticent as well with regard to military action in the complex southern neighbourhood. All of this is in line with the current focus on capacity building in support of security and development (CBSD) in the EU's Common Security and Defence Policy (CSDP), which prioritizes building resilience in its neighbourhood in the EU's Global Strategy.

On the other hand, when local forces intervene, they do not always do so with the same circumspection as European forces strive for. Human security has been incorporated in the doctrine of European forces: one attempts to minimize the cost to the civilian population and to civilian infrastructure when intervening. This is clearly not the case in Yemen, for example, where Saudi Arabia and Iran are fighting a proxy war. Similarly, there have been many worrying reports about war crimes being committed in Syria and Iraq, including by forces that are part of, or supported by, the US-led coalition. (And American and European air forces have of course been criticized for causing civilian casualties.) Yet the alternative, increasing the European (and American) troop numbers and intervening on the ground, is not an acceptable option for EU governments and publics.

The case of Yemen points to a wider issue: not only do regional forces not always use force in a manner that would be acceptable to Europeans, they also act in cases where Europeans would not judge intervention to be necessary at all. On the other hand, the states of the region initially did not intervene to stop the rise of Islamic State, which Europeans felt was of the utmost urgency. In fact, Europe's supposed allies and partners in the region, Turkey and Saudi Arabia, at first supported Islamic State as the most effective fighting force against the Assad regime.

The expeditionary trend might thus relieve the burden on Europe, as the states of the region address the region's security problems themselves. But it might just as likely increase instability in the region if, as a result of their new-found military freedom of action, regional actors continued their current activist strategies. Then the region might see even more armed conflict.

Two factors complicate the issue even further. First, for now the EU and the USA do not seem to be on the same page. Following the nuclear agreement with Iran, Europe is normalizing relations with the country. It is generally accepted in Europe that stability in the Middle East can only be achieved by involving Iran and establishing a constructive dialogue with Saudi Arabia. US President Donald Trump, however, on his first trip to Riyadh, encouraged the Saudis in their geopolitical competition with the Iranians, whom he still seems to consider the enemy despite the nuclear agreement. Coordinating with the USA in order to limit "interventionism" by regional actors is thus not an obvious option.

Second, one must question whether all European governments still consider Turkey a real ally, even though it is a candidate for EU membership and a member of NATO. Turkish military action has targeted forces that were being supported by Europeans and Americans. Objectively, the EU and Turkey have a shared interest in stability in the region, but in reality their strategies to achieve that are diverging.

In sum, the EU and its member states will have to carefully consider their strategy for the Middle East and North Africa. A precise definition of Europe's interests and objectives in the region, and a clear idea of which instruments we are able and willing to use to that end, are a prerequisite before engaging with the complex security situation in our southern neighbourhood.

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