

Key issues - Country files - Balance of forces - Summaries

STRATEGIC ATLAS

OF THE MEDITERRANEAN AND THE MIDDLE EAST

2022 EDITION



FMES
Fondation Méditerranéenne
d'Études Stratégiques

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»» Summary

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»» The FMES Institute

The FMES institute is a think-tank based in Toulon on the shores of the Mediterranean, its region of expertise. It was born out of an awareness more than thirty years ago at the end of the Cold War, of the strategic nature of the Mediterranean Rim and the Middle-East , two regions that merge int one, and of the need to strengthen our common understanding of the issues and challenges of security and defence in this region, an understanding that is essential for the regional governments, for France and for the European Union.

The FMES Institute carries out missions of general interest of education and information through a combination of research and study of strategic thinking, through the analysis of geopolitical issues and through a range of training opportunities on geostrategic issues, provided by the Mediterranean Sessions of Strategic Studies (SMHES).

In recent years, it has broadened its field of competence to include international maritime issues and the development of the defence economy in the Provence-Alpes-Côte d'Azur region, for which it is a resource center.

It is a partner of the Institut des hautes études de défense nationale (IHEDN), the universities of Toulon, Nice Côte-d'Azur and Aix-Marseille, the Institut d'études politiques d'Aix-en-Provence and the Euro-Mediterranean network Euromesco.



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PREFACE

The Mediterranean Rim and the Middle East have become a distillation of our fragmented world. It happens in the middle of a moment of historic change: the loss of the economic, political, cultural and moral ascendancy of the West marks the end of a centuries long trend that had been reinforced by the industrial revolution of the 19th century, accelerated after the Second World War and reached a kind of apotheosis at the end of the Cold War just 30 years ago.

This move away from the western model has favoured the emergence of alternative models and powers, in first place that of China, which has exploited the crisis arising from the Covid pandemic to shift up a gear and consolidate its leadership by exploiting the disarray of the Americans and the Europeans. But other models are reappearing too, models that draw their support from historical and cultural references that we had forgotten, as with Russia, Iran, Turkey and the Islamic world. The invasion of Ukraine by Russia, unthinkable a decade ago, illustrates this drastic change. This war will have indeed impacts on the Middle East & North Africa region; it is too early to assess them today, but we will integrate these impacts in our next edition.

We are therefore present at a fragmentation of the world: breakup of mental depictions, of societal and political models, of interests, of alliances and of the rules of international cooperation. It echoes the fragmentation at the heart of societies, in particular those that are open and subject to the growing financial, economic, computing and human changes that are destabilising the fragile constructs of the nation-states in which the democracies were established, reinforcing their vulnerability when confronted with autocracies motivated by a strong sense of revenge.

This fragmentation can seem incongruous when the world is shrinking with regards to its populations and the growing means of communication and interaction between them. Humanity is confronted with global challenges that transcend borders and urgently require more cooperation: global warming, biodiversity, pandemics, energy, overpopulation, finance, trade, criminality, terrorism – the list goes on.

And yet these two phenomena do not stand in opposition, rather they reinforce each other generating a complex environment where confrontation and cooperation cohabit in shifting and often unexpected ways, with neither apparent design nor global coordination. If the general issues are known and widely shared, they have become part of a game of local interests which states are less and less hesitant to use confrontation to defend, and if necessary, armed confrontation. Kantian universalism and pacifism no longer count in this world that is at once interwoven and fragmented.

The region of the Mediterranean Rim and the Middle East has been doubly affected by this reconfiguration on account of its geographical position. It is at the crossroads of models of civilisation – Russian, Turkish, Iranian, Islamic – which are becoming more independent, and it is at the tectonic plate boundaries of the geopolitical tensions setting the two competitors of the 21st century against each other: the United States and China. This region is therefore a sort of concentrate of the new world that is being created in front of our own eyes.

The divergence from the European model is becoming more visible every day. The 1990s appeared to mark the coming together of the region's

states and their gradual but ineluctable move towards liberal democracy and the market economy. Economic development was supposed to move them towards modernity, secularism, and democracy, allowing an unhindered entry to the western family which was to be achieved through joining the European Union in a process that was at the time perceived as being a rapid one, at least for Turkey, the Balkans and Morocco. All the agreements signed during that decade – from the EU's Euro-Mediterranean Partnership (The Barcelona Process), the OSCE Mediterranean Partners, the NATO Mediterranean Dialogue partnership forum, through to the Israeli-Palestinian Oslo Accords – seemed to augur well for an almost automatic pacification of the region as it progressively became part of a sort of European melting-pot.

The fact is that nothing of the kind happened. The north-south division deepened. The western model became the object of resentment and disdain amongst the peoples of the south who believed that their lives had not improved enough, that the societies of the north were neither enviable nor admirable and that the rules and values of the international system were nothing other than a cover up designed to maintain an indefensible domination. Western interventions at the start of this century in Afghanistan, Iraq and Libya that were both violent and unsuccessful, followed by a disengagement that was perceived as a sign of disinterest, the activism of Russian and Chinese rivals, the perception of a window of opportunity for regional powers, but also the rise of an anti-western Islamism and the doubts engaging the societies of the north, were all catalysts of this rejection.

Today the Mediterranean Rim and the Middle East are criss-crossed by many tensions, as detailed in this Atlas.

Firstly, there are tensions at the heart of the societies of the south, where frustration at disappointed hopes for improved living standards and societal progress has given rise to a muted anger which manifests itself in the social movements that appear here and there in the region. Then there are the tensions felt towards Europe, linked to a growing resentment felt amongst weakened governments and to an increasing lack of mutual understanding along both shores of the Mediterranean, borne of their cultural and intellectual separation. There are tensions between the countries of the southern Mediterranean themselves, unable to create a cooperative partnership such as the European Union. Even around the Persian Gulf where the manna of hydrocarbons has allowed a form of societal peace, the frustration generated by political and social systems log-jammed by contesting value systems is patent. Faced with these mounting tensions the area's leaders can be tempted to keep such pressures in check by hardening their stance internally while channelling popular anger against an outside target through military adventures.

The other factor affecting regional tension is linked to the competition being played out between the great powers on the gaming table that this vast region represents. Competition between the United States and Russia first of all, since the latter has taken advantage of the space offered to it by the US's minimal engagement to regain its place in this corridor that provides access to the warm seas. Vladimir Putin these days has the necessary resources for his politics of influence and destabilisation vis-à-vis the west: control of the Black Sea thanks to the Crimea, guaranteed access to the Turkish Straits thanks to his partnership with Recep Tayyip Erdogan, permanent troop deployments thanks to the logistics bases of Tartous and Port Sudan. Russia cannot be ignored in Syria and the Eastern Mediterranean, it has influence in Libya and the Sahel, and is ever more present in the Red Sea. Then there is competition between Washington and Beijing, which is being played out on a more global scale. China's priority is to guarantee its access to hydrocarbons through long term economic partnerships with the Gulf states. It also wants to preserve its Silk Road shipping routes to Europe. For its part, the United States, itself independent in energy requirements, wants to be able to threaten China's access to these very resources in order have geopolitical leverage over its Asian competitor. The US's influence in the region is first of all military, aiming for regional stability and above all to apply pressure to Chinese interference. The area of friction and tension between the two rival powers is therefore concentrated around the Arabian Peninsula.

Powers of a lesser magnitude have also profited from the strategic upheaval to release themselves and try to strengthen their regional posture, at the risk of engendering new frictions. Such is the case with Turkey that is surfing on a wave of anti-westernism, Islamism and neo-Ottoman nationalism to develop its political, military, cultural and economic influence, particularly in the Eastern Mediterranean, Libya, in the Maghreb and in the Balkans. It is the same again with Iran which hopes to regain a dominant position in the Gulf and is seeking to secure its access to Mediterranean thanks to Shiite militias in Iraq, Syria, and Lebanon. The same applies to Washington's traditional allies who have freed themselves up to develop independent strategies. And so, with a certain amount of success, Egypt and the United Arab Emirates have moved closer to the Russians in Libya, to the Greeks and the Israelis in the Eastern Mediterranean, and economically to the Chinese. We are observing, with a return swing of the pendulum as it were, a form of middle-easternisation of the Mediterranean Rim's geopolitics.

The main character missing from this grand game of geopolitics remains the European Union, despite French attempts to broker a common position. A disinterest regarding a south that is perceived as being a generally insoluble problem, a denial of the reality of a return to balance of power politics, a feeling of guilt towards former European colonies, and the narcissistic self-centeredness that characterises our era - all of these prevent Europe from articulating a coherent strategy to tackle these reconfigurations that will for good or evil determine the future of our countries.

This is why the FMES Institute has developed the Strategic Atlas of the Mediterranean and the Middle East. With this Atlas it aims to provide the largest number of people possible, in particular those who are not experts, with the keys to an understanding of this region in turmoil that remains so important, along with the essential data and strategic perspectives to enhance this understanding. The Atlas details not only the geopolitical postures and strategic objectives of the actors in the area, but also their military capabilities, for armed might is back again and its uninhibited use is one of the tools that those in power no longer hesitate to wield.

The fault lines are changing, interests are becoming more complex, cooperation and confrontation are intertwined, state violence is back. France, Europe, but also all the countries of this region that is under so much tension, must show clarity of thought, imagination, and courage to develop strategies that will preserve both the general interest and the national interests and security of the Mediterranean and the Middle East. This new and innovative atlas aims to take part in this collective process. Published in January 2022, at no cost in order to reach as wide a public as possible, the aim is for it to be updated every two years. Its conception in the form of a 'toolbox' will in any case ensure its longevity. We hope you take great pleasure in reading it.

Admiral (Ret) Pascal Ausseur, Director General of the FMES Institute

INTRODUCTION

This Atlas, which has no other equivalent in the world, aims to enlighten the reader in a clear and comprehensive manner on the principal strategic issues in the Mediterranean Rim and the Middle East, issues that constitute the area of expertise of the Mediterranean Foundation of Strategic Studies (Fondation méditerranéenne d'études stratégiques - FMES). The region covered runs from Morocco to Iran and includes the north and south shores of the Mediterranean, the Levant, the Arabian Peninsula, and the Persian Gulf.

This tool, conceived to allow the general public to get to grips with complex problems, is just as much aimed at journalists, academics, researchers, industrialists and politicians, as well as military professionals, experts in defence and strategic studies; indeed, to all those who are interested in geopolitics and international relations. Every reader will find useful and comprehensive information for their work or research. The Atlas – which is free, so that it can be available to as many as possible – is intended to become the Foundation's biannual work of reference. It is our hope that you will circulate it as widely as possible.

This first edition summarizes the state of strategic thinking on our chosen region at the beginning of January 2022. It will be updated every two years. The many events that will occur in that period may cause some to fear that the Atlas will quickly become out of date. It seems to us that this will not be the case, because it has been designed to remain relevant for as long as possible by giving a major emphasis to states' geopolitical postures and their strategic objectives, elements that are by definition very stable. In the same way, the unavoidable time lag in the development of military equipment, the magnitude of the financial commitments necessary for the acquisition of the best performing weapons systems, and the time required for training and operational deployment will to some degree smooth out annual variations. The armed forces of 2024 ought therefore not to be radically different from those of today.

»» Concept and methodology

Since the aim of this Atlas is to be of the greatest use to the greatest number of people, it is divided into three large sections each offering a specific perspective, but at the same time complementary to the two others.

The first part examines the principal strategic issues from three distinct points of view based on a funnel logic. First, it presents the region of the Mediterranean Rim and the Middle East as a crossroads of world rivalries, emphasising the importance of sea lanes of communication, along with the grand strategic designs of the United States and China and their application in this region. It then focuses on the security challenges that affect the region whether these are to do with conflicts and trouble spots linked with the flow of migrants, with terrorism and trafficking in all its forms, with water stress and food insecurity, or even ballistic missiles and nuclear weapons proliferation. A spotlight will be put on the tensions in the Eastern Mediterranean and the Persian Gulf, since both areas are linked today. Finally, it analyses the structure of the political reconfigurations in the Mediterranean and the Middle East that highlight the movement of the tectonic movements that characterize the region today. Each individual theme, summarised on one page, is illustrated by an original map.

The second part represents the heart of the Atlas: it contains the 'country files' of the states of the Mediterranean Rim and the Middle East, to which have been added the country files of the five permanent members of the United Nations Security Council (the United States, China, Russia, France and the United Kingdom), all of which are very active in this vast region. With regard to the northern shores of the Mediterranean Rim, and for reasons of space, only those states that are active in the area have been selected; even though it is a member of '5 + 5 Dialogue', Portugal is not represented because it is not on the shores of the Mediterranean and remains essentially focussed on the Atlantic. Conversely, Mauritania does figure because it is impacted by the conflict in the Western Sahara and its strategy affects those of Morocco and Algeria. Similarly, those Balkan states that face onto the Adriatic Sea, as with those surrounding the Black Sea, do not feature in this first edition; they may be represented in a later edition to reflect the impacts of the war in Ukraine on the Mediterranean and on the Middle East.

We have chosen to present the countries of the Mediterranean by geographical proximity, starting with Morocco, then moving along the coast of North Africa and the Levant, before returning along the northern shores of the Mediterranean towards Gibraltar. The countries of the Middle East are then presented one after another, starting with Jordan and following the route a ship would follow on exiting the Suez Canal and then sailing around the Arabian Peninsula to reach Iran and the Persian Gulf.

Each country file is illustrated by an original map, designed to illustrate and complement the file clearly and completely. Each file also contains a certain number of headings: The Overview summarises the key data (political, demographic, macro-economic, defence) which give an initial insight into the size, institutions and resources of the country; Geopolitical posture allows an insight into a country's posture and influence; the Strategic objectives heading describes its level of ambition and aims at better understanding what its leaders are really looking to achieve. Thereafter several headings describe the country's armed forces, summarising the important things to consider: Capabilities assesses five key areas (motivation, combat effectiveness, resilience, equipment, doctrine and planning) on a five-point scale, complemented on the map by four fundamental capabilities (non-attributable actions, long range strikes, force projection and access denial) also assessed on a five-point scale. In this connection, the combat effectiveness, which represents the synthesis of the other key areas also depends on the ability to plan operations that is incorporated in the 'Doctrine and planning' item, even if it is not expressly mentioned. This initial approach allows for a qualitative comparison of the armed forces of the concerned countries. Others illustrate in a simple and concise manner the strengths and vulnerabilities of each army, the size of its ground units capable of maneuvering, the main equipment already in service, and that which is awaiting delivery, or the purchase of which is currently under negotiation.

The original aspect of this Atlas consists in highlighting three key elements that are rarely to be found in this kind of work: 1) An account of the 'invisible assets', covering everything that is not obviously apparent but which nevertheless plays a crucial role in the country's strategy (strategic intelligence gathering assets, satellites, cyber-warfare, jamming and electronic warfare, submarine operations, undercover operations, stealth strikes or those where no responsibility is claimed) ; 2) The quality of the most important equipment on a five-point scale, setting out the weapons systems likely to have a key influence on the outcome of any conflict, such as cruise missiles, armed UAVs, anti-ship missiles and torpedoes, long-range anti-aircraft missiles and the most up to date equipment of the combatants, capable of projection deep into enemy territory (the most effective portable anti-tank and anti-aircraft missiles) ; the aim is not to detail the exact number of delivery systems an army has, but the best weapon systems that a possible enemy might be confronted with; 3) The effectiveness of an army, again on a five-point scale, analysing as objectively and completely as possible the material and human aspects. Of course, these qualitative assessments may appear subjective, and the FMES Institute does not claim that they are scientifically exact; they provide an illustrative value that represents the synthesis of very many assessments available on open-source references, themselves cross-referenced with information gathered in the preparation of this Atlas and the experience of our network of experts on the region.

The Atlas only considers arms that have a genuine operational value; the numerous items of military hardware that are decommissioned, obsolete, in storage, or whose maintenance in operational readiness appears very doubtful, are not included unless they are very recent, in which case specific mention is made of their limited availability. In other words, the aim of the Atlas is not to count unusable weapon systems stored in depots, but those that a state could quickly mobilise in the event of a serious crisis or conflict.

Each country file ends with a brief synopsis that summarises in a few lines the main geopolitical, strategical, or military points to remember. The reader can extract from these files what is of the greatest interest to him/her, without having to undertake a thorough reading of the complete file.

The third part of the Atlas summarises the principal information for each country in the form of easily readable graphs and tables that are designed to make the key points stand out. This section highlights the balance of powers between the various actors in the Middle East and North Africa area (MENA). These depictions of the balance of power, supplemented by assessments that compare the strengths and weaknesses of each state in the region allow the reader to detect with a quick look just who has the advantage in a particular field, or of course in a particular operational theatre. This third section finishes with a series of scenarios that explore possible armed confrontations between several of the states in the region. These scenarios that involve a qualitative, and therefore subjective, appreciation also constitute one of the plus-values of this work since they encourage the reader to reflect upon strategic forecasting.

» Sources

The particularity of this Atlas lies not in repeating in full all the information available in open-source resources; on the contrary it lies in the analysis and cross-referencing of information, and where necessary the assessing of that information using the experience of FMES' experts.

For the armed forces one of the most useful sources remains the 2021 edition of *Military Balance* by the International Institute for Strategic Studies (IISS) in London; but compared to the original that compiles all the arms reckoned to be operational in a systematic and sometimes dry manner, without taking into account their age, their effectiveness or their operational readiness, FMES' Strategic Atlas only considers those arms that have a real operational value. For naval forces, two tools remain essential: the latest edition of *Flottes de combat [Combat Fleets of the World]* by Stéphane Gallois and Alexandre Sheldon-Duplaix, published by éditions Ouest-France, and *World Naval Review 2021* supervised by Conrad Waters and printed by Seaforth Publishing (United Kingdom). When it came to air power, the 'Air' section of Jane's (www.janes.com) proved invaluable.

For arms transfers and acquisition, four sources proved particularly useful: the annual reports of the Stockholm International Peace Research Institute (*SIPRI Yearbook 2021*); the *GRIP Compendium 2021* from the Groupe de recherche et d'information sur la paix et la sécurité de Bruxelles (*Peace and Security Research and Information Group*); the 2020 report from the Washington Center for International Policy co-directed by William Hartling and Jessica Draper (*The Mideast Arms Bazaar: Top Arms Suppliers to the Middle East and North Africa 2015-2019*), as with the latest 2020 report from the Congressional Research Service of the United States (*Arms Sales in the Middle East: Trends and Analytical Perspectives for US Policy*); recent articles from the principal press agencies, along with those from specialised internet sites (*Jane's, Defence News, Zone militaire Opex 360*) allowed us to keep our information up to date as of December 2021.

For more general information on countries other than from on-line encyclopaedias, several sources were very useful: *the CIA World Factbook 2021*, *the RAMSES 2021* by the French Institute of International Relations (l'Institut français des relations internationales - IFRI), *the Atlas géopolitique mondial 2022* by Rocher publications, all completed by statistics from the World Bank and the UN.

Beyond published and open-source resources, the Atlas calls on the very long professional experience that the FMES experts have of the Mediterranean Rim and the Middle East. Forty years of operating in the countries that make up the zone and of interacting with experts from those countries allow for the creation of valuable networks, while also creating templates that allow the geopolitical reconfigurations and the development of the region's armed forces to be interpreted. The Atlas is therefore built upon many unpublished sources, whether they be based on experience, interviews, consultations, or discussions with a large number of regional experts, many of whom work on the ground in the heart of the countries we are studying. This work is therefore not just the fruit of a huge amount of research and summarising work as much as it is the result of the slow maturation of professional lives devoted to defence matters, and in particular in this region.

»» **Wargames & Serious Games workshops that complement the Atlas**

The scenarios of armed conflict presented at the end of the Atlas – all of them plausible – each represent a game changer for the region, especially if several of them were to occur simultaneously or in quick succession. These scenarios are just hypothetical ones because history, like geopolitics, is not deterministic. To measure the potential outcomes there are empirical tools such as wargames that allow one to explore possible scenarios previously considered highly improbable. The immense advantage of such wargames is that they allow every strategy, even the most audacious ones, to be tested with no risk to human life. These inventive instruments stimulate participants' intellectual agility, forcing them to take decisions and to think like their potential adversaries. For such activities linked to the Middle East, FMES uses the wargame *FITNA – Global War in the Middle East* (NUTS Publishing: <https://www.nutspublishing.com/eshop/fitna-en>) which allows the most varied permutations of conflict in the region to be explored.

Without going as far as dealing with armed confrontation, there are serious games that allow participants to enter the heads of regional or global actors, such as those described in this Atlas, and explore the geopolitical and strategic rivalries of the Middle East and its Mediterranean extension.

To explore this field of the possible, FMES has set up free monthly workshops devoted to contemporary wargames and serious games (<https://fmes-france.org/reflexion/wargames-et-seriousgames>) that offer participants the original experience of getting “into the other's head” and understand his real objectives as opposed to those received objectives that tie in with a politically correct world view.

This is also the ambition of the Strategic Atlas of the Mediterranean, that we hope you will enjoy reading.

Dr Pierre Razoux, Academic director of the FMES Institute

»» The Key Issues

1

THE MEDITERRANEAN RIM AND THE MIDDLE EAST – A CROSSROADS OF GLOBAL RIVALRIES



The Mediterranean Rim and the Middle East – a Crossroads of Global Rivalries at the centre of world shipping routes

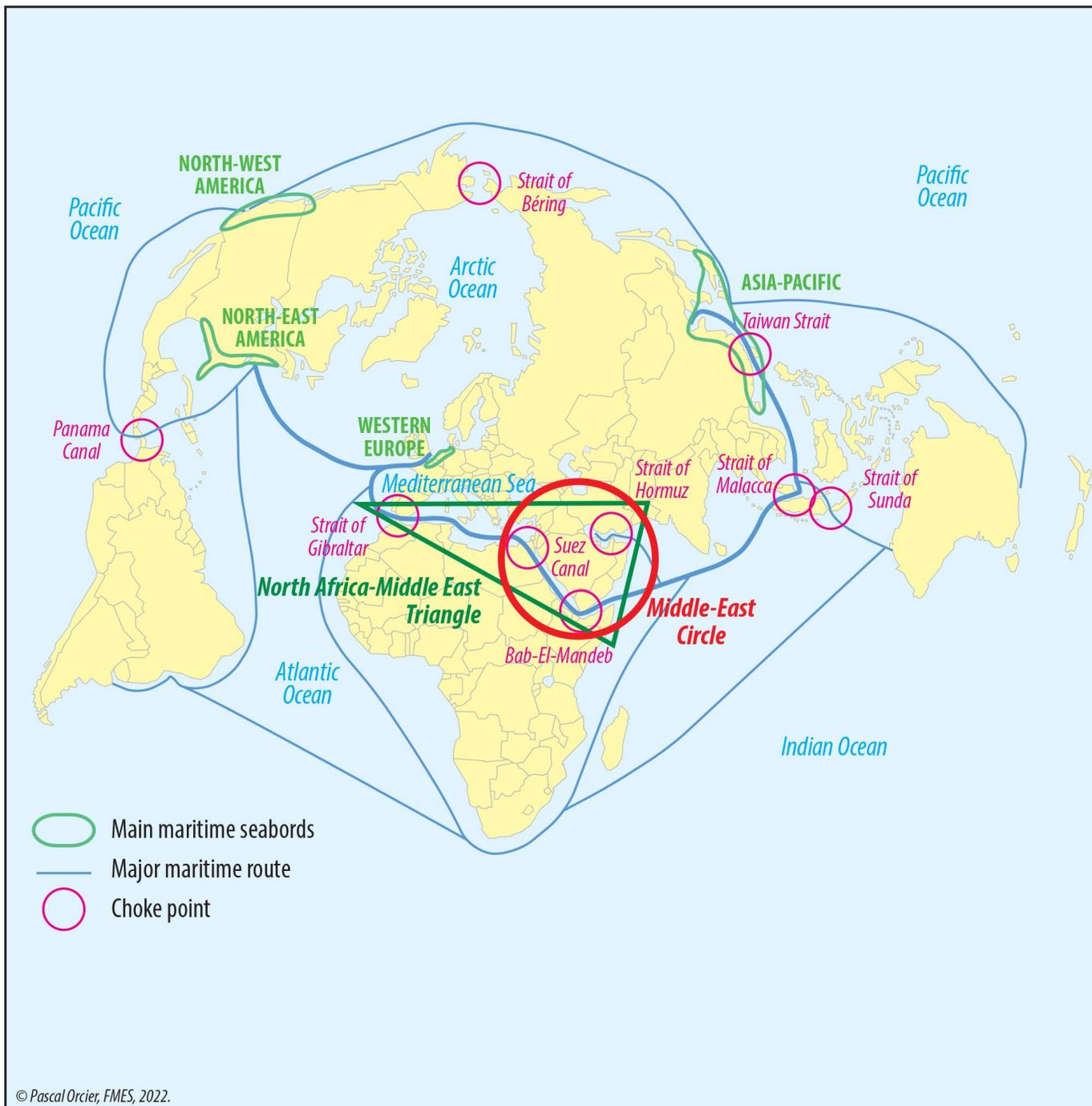
Globalisation is first and foremost an affair of shipping; 90% of the world's trade, almost 12 billion tonnes, is carried by sea. Maritime transport is essential to our globalised world.

Between them the shipping routes link four great seaward facing areas that are the gateways to the world economy's important areas. The first seaward facing area is Asia, the world's workshop (with 9 of the world's top 10 ports, of which 7 are in China), the second is in Europe (the Northern Range Ports that stretch from Le Havre to Hamburg), and the two others are in the United States (one in the north-east of the Gulf of Mexico and the other being the Pacific Coast).

There is a fifth strategic zone: this consists of the Persian Gulf, the main energy resource zone of this globalised economy; 40% of the world's oil exports are produced there, 80% of which heads in the direction of Asia to supply the world's workshop.

The maritime routes linking these five strategic regions are constricted at the unavoidable pinch points of straits and canals. The Mediterranean Rim and the Middle East are home to four of these: the Strait of Hormuz, through which are shipped more than 30% of the world's hydrocarbons and 23% of its liquefied gas; the Bab el-Mandeb Strait and the Suez Canal, through which 9% of the world's trade sails. This traffic is essential for Europe's provision in energy and its trade with Asia; after leaving the Suez Canal it passes through the Straits of Gibraltar to reach the North Sea ports. This passage through the Mediterranean corridor could be replaced by the bypass around Africa via the Cape of Good Hope. This route, which is already used by the very large ships linking Brazil and West African producers to Asia, extends the journey by 6,500 km (4,000 miles), i.e. another 7 to 10 days at sea. A blockage of the Red Sea would therefore be surmountable for those countries with access to the Atlantic, and most European countries that are connected to the Northern Range Ports. However, it would be very destabilising for the countries of the Eastern Mediterranean, especially Egypt, for Russia (one third of its traffic) and for the Levant.

The «Middle East ring», which contains the Straits of Hormuz and Bab el-Mandeb and the Suez Canal, is both a vital source of energy for China and Europe and an essential transit zone for the economies of the Eastern Mediterranean countries and Russia. It is also a particularly vulnerable area in terms of shipping routes. These contradictions place it at the epicentre of the strategic issues related to maritime traffic. Only the Straits of Malacca, which are close to its limits, and Taiwan (because of issues surrounding control of the China Sea) represent equivalent risks, given their sensitivity for China.



»» The importance of submarine cables

Submarine cables represent the physical element of cyberspace. More than 95% of Internet traffic is carried by fibre optic lines laid on the ocean floor, which most often follow shipping routes. Economic development, international financial flows (estimated in 2015 at \$10 trillion of daily transactions), military action and the daily lives of people all around the world depend on the proper functioning of these facilities.

Espionage (of the type revealed by the Snowden affair in 2013) or cable breakages (several have been observed, accidental or not, as for example in Algeria in 2015 and in Egypt in 2017) are the two main threats to this absolutely crucial technology. If specialised trawlers or submarines exist, the simplest operation consists of intervening at the cables' landing points. The Mediterranean Rim and Middle East region, because of its compact nature and the number of choke points it has, multiplies opportunities to access the cables from land. The Straits of Hormuz, Bab el Mandeb and Gibraltar, as well as the Suez Canal, are therefore the best locations where these threats can be posed. The United States, China, Russia, Great Britain, and France (which controls the digital hub of Marseilles, the largest in the Mediterranean) are able, either through their bases or through military cooperation, unobtrusively to access these cables. The Bab el-Mandeb Strait represents today one of the most sensitive points of the network for the Mediterranean-Red Sea-Indian Ocean, as do the Straits of Malacca for South-East Asia.

It should be noted that the continental powers (Russia, China et Iran) can also exchange information between each other directly, using terrestrial cabling which does not have the same technical constraints as submarine cabling and is not subject to the same threats.



»» America's grand strategy

Spurred on by China's stated ambition to become the world's leading power, the United States is reacting and reorganizing its position on a global scale. It is aware that it has real assets to maintain its leadership in the foreseeable future: economic growth, a young and dynamic population, sufficient energy and strategic resources, the industrial base, technological superiority, the ability to attract scientific elites, a quasi-insular geographical location, and numerous and experienced armed forces superior to those of its declared rivals.

However, the United States is aware of its vulnerabilities: first, internally, through the increasing fragmentation and division of its society; second, externally, through the scattering of its forces in the many theatres of operation in which it has been engaged since the Cold War, through liberal idealism or neo-conservative ideology, taking advantage of its position as the only superpower. American elites are also aware of the deterioration of the United States' moral and operational prestige, a consequence of the crudeness, incoherence and failure of its foreign policy over the past two decades. This is particularly the case in the Middle East, where America is now perceived as unreliable and as a disruptive and fickle element, knowingly or unknowingly threatening the autocratic regimes in place, and no longer as an actor capable of stabilizing the region.

Since Barack Obama, the United States has been re-evaluating its grand strategy, which is now focused on the Indo-Pacific zone, in order to counter Chinese competition more effectively. For the US it is a question of redefining the line of defence of their crucial interests, allowing them to defend their most important allies (Europe, Japan, India, the Arabian Peninsula) located in the contested part of Rimland (Spykman, Kissinger, Brzezinski), in the face of the aggressive speeches and thinly veiled threats of China and Russia, the continental powers of the Heartland dear to Mackinder. This new line of defence protects the main maritime axes that guarantee American strategic superiority but implies a withdrawal from areas where the United States has been engaged for several decades (e.g., the northern part of the Middle East, Pakistan, etc.), leaving the question of Taiwan unresolved. Perhaps American strategists are hoping to trip up the Chinese and Russians by tempting them with supposedly easy gains in this buffer zone that they are relinquishing to them? Meanwhile, they are buying up technological nuggets all over the place in order to maintain their lead in this crucial area.

In all this geopolitical updating, the AUKUS pact (with Australia and the United Kingdom) and the QUAD (with India, Japan and Australia) are helping the Pentagon to contain China's drive, while NATO's role is to fix and contain Russia in the West, giving the United States the necessary time to counter Chinese expansion in the INDOPACOM zone. There is no doubt that Washington will nurture its highly valued alliance with the Anglo-Saxon democracies, the Five Eyes (United States, United Kingdom, Canada, Australia, New Zealand), which it considers as its vital core, that no other actor can hope to be part of.

The Mediterranean Rim and the southern part of the Middle East are now no more than a transit corridor that allows for the rapid redeployment of American forces to the Indian Ocean, as well as giving the US the necessary ability to seal off China's hydrocarbon reservoir. Prudently, the United States has proceeded with modernising its military bases in the region to cope with a rapid redeployment there if need be.



»» China's grand strategy

The strength of China and its leaders is that they have a long-term strategy for the next thirty years, made possible by the stability of the regime and its institutions, a natural form of strategic patience and prudence, but above all by the impression of durability of the power in place, which no longer has any open electoral deadlines on the horizon. In 2019, Chinese President Xi Jing-Ping clearly stated his strategic objective: China must be the world's leading power again by 2049, when the 100th anniversary of the Communist People's Republic is commemorated.

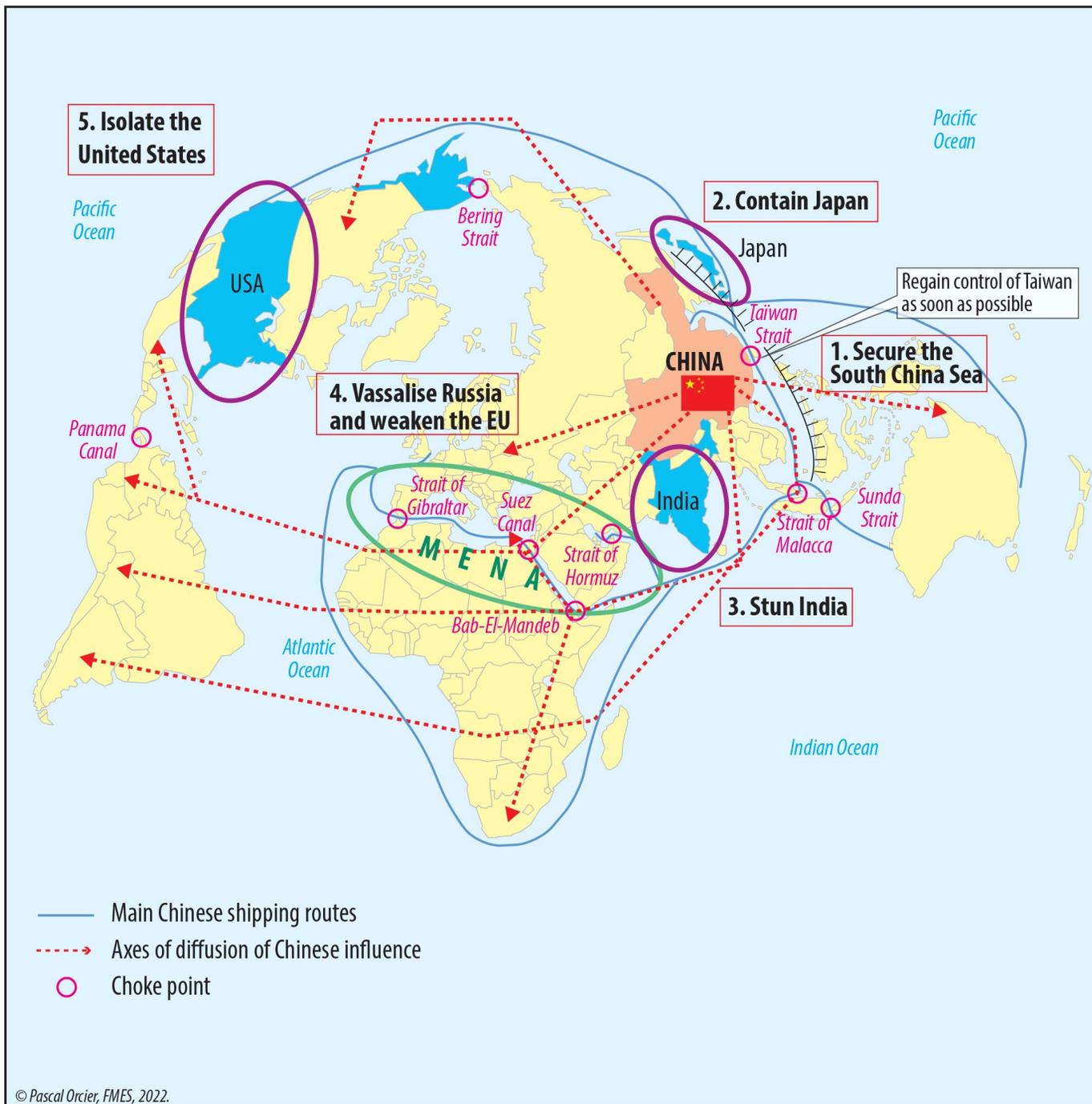
To achieve this, China's leaders know that they must first meet the basic aspirations of the 1.4 billion people who make China the most populous country on the planet: food, shelter and employment for everyone, and a standard of living sufficient to consume in a liveable environment that is not too polluted. For China has become over the decades the world's factory, even if this role is gradually slipping away. These same leaders also know that their country is ageing and that it is torn by separatist forces as well as by the desire of its rich megacities to gain autonomy; they are therefore banking on a strong single party, that provides the means for social mobility but also the coercive tools to preserve national cohesion. This is why the issue of Taiwan remains probably the most crucial for the Chinese leaders who will not tolerate the island declaring its independence. If they are convinced that they cannot preserve the current status quo, they are likely to seize the first opportunity to take control of Taiwan directly or indirectly which would give them guaranteed access to the Pacific.

On the geopolitical level, China's grand strategy aims to keep its rivals at bay and isolate them, while securing its energy supplies, both raw materials and strategic resources. It seems to be broken down into five consecutive stages as depicted on the attached map. China's leaders are playing Go and placing their pawns on the global board with a long-term logic, while trying not to alarm their opponents. Seen in this light, their concept of new land and sea Silk Roads serves both to penetrate the markets of Central Asia, the Middle East, Africa and Eastern Europe, while gradually stifling regional rival India.

The Middle East and the Mediterranean Basin represent an energy reservoir for China that supplies half of its oil consumption, and a strategic crossroads that allows it to pursue its economic and political expansion towards Europe, Africa and Latin America. To secure its hydrocarbon supplies, China will undoubtedly have to become more involved in the Middle East.

On the military front, beyond the spectacular growth of its air and naval forces, China faces a dilemma. It is seeking at all costs to avoid a major confrontation with the United States, India and Russia, all three of which have nuclear weapons, but also to avoid a war with Japan (a historical adversary) from which it is not sure it would emerge victorious. But in order to increase its capability and credibility, and to give its armed forces combat experience, it knows that it will probably have to accept limited confrontations. These could occur in Taiwan, of course, as well as in Southeast Asia, the China Sea and the Indian Ocean.

In the meantime, China has entered the battle, integrating the threat of military force into a global approach that covers the informational, cultural, economic, financial, political, legal, normative, ecological, biological and cyber domains. Above all it seeks to catch up with its technological backwardness with the hope of overtaking the United States in this field. The conquest of space represents an ideal field for this, mixing prestige and scientific progress.



»» A Game of Chess in the Middle East

If the Chinese play Go and the Americans play Poker as part of their global grand strategy, the Iranians, Arabs, Israelis and Russians are playing chess in the Middle East.

Since 1979 and the Islamic revolution that disrupted the balance of the Cold War, the Iranians have been playing a chess tournament against the Arabs (Iraqis, then Saudis), the Americans, the Russians and more recently against the Israelis. A tournament, because we have been watching several games: the first (the Iran-Iraq war of 1980-1988) ended in a stalemate, i.e. a situation where the black Iranian king wearing his ebony turban could not move without putting himself in check; the second (1989-2004), during the mandates of Presidents Rafsanjani and then Khatami, was won by the Iranians, who took advantage of a decade of calm to restore their regional influence, to the detriment of the white Saudi player; the third (2005-2013), characterized by the outrageous provocations and blunders of Iranian President Ahmadinejad, ended in a draw against a succession of aging Saudi monarchs and the Americans, bogged down in Iraq. Taking advantage of the relative inaction of their traditional opponents, the Iranians pushed their advantage towards the Levant on the left side of the chessboard. They have in fact penetrated Israel's sphere of interest by placing their Hezbollah knight in a threatening position (during the 2006 Lebanon War), and thereby going head-to-head with Israel.

The last game, still ongoing, began in 2013 with the election of President Rohani. After an opening game that ended to the Iranians' advantage, materialised in the nuclear agreement of 2015, the Saudis, the Israelis, and their Emirati allies reacted with counterattacks in the centre of the chessboard. IS' lightning breakthrough disrupted the game by suddenly occupying the left wing of the chessboard and threatening the squares of Baghdad, Damascus and even Beirut, provoking the return of the Russian player who had left the game a quarter of a century earlier during the collapse of the Soviet Union. The Iranians counter-attacked by mobilizing their Hezbollah (Lebanese) and Hashd al-Shaabi (Iraqi) knights, protected by their castles (ballistic arsenal), then by advancing their Yemeni Houthi pawn to G1 on their opponent's base line, turning the latter into a queen who threatened to checkmate the young and turbulent Saudi crown prince. Since then, the Saudis have transferred most of their pieces to this corner of the chessboard (Yemen) to avoid an immediate defeat, leaving the field open to the Iranians, the Israelis and the Russians who are now moving their own pieces in Iraq, Syria and Lebanon for an endgame that promises to be hotly contested, under the watchful eyes of the Turkish player who is also getting ready to move his own pieces.

Iran, having neutralized Saudi Arabia on the regional chessboard, now faces two Grandmasters: Israel and Russia.

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SECURITY CHALLENGES IN THE MEDITERRANEAN RIM AND THE MIDDLE EAST

»» Conflict and crisis areas

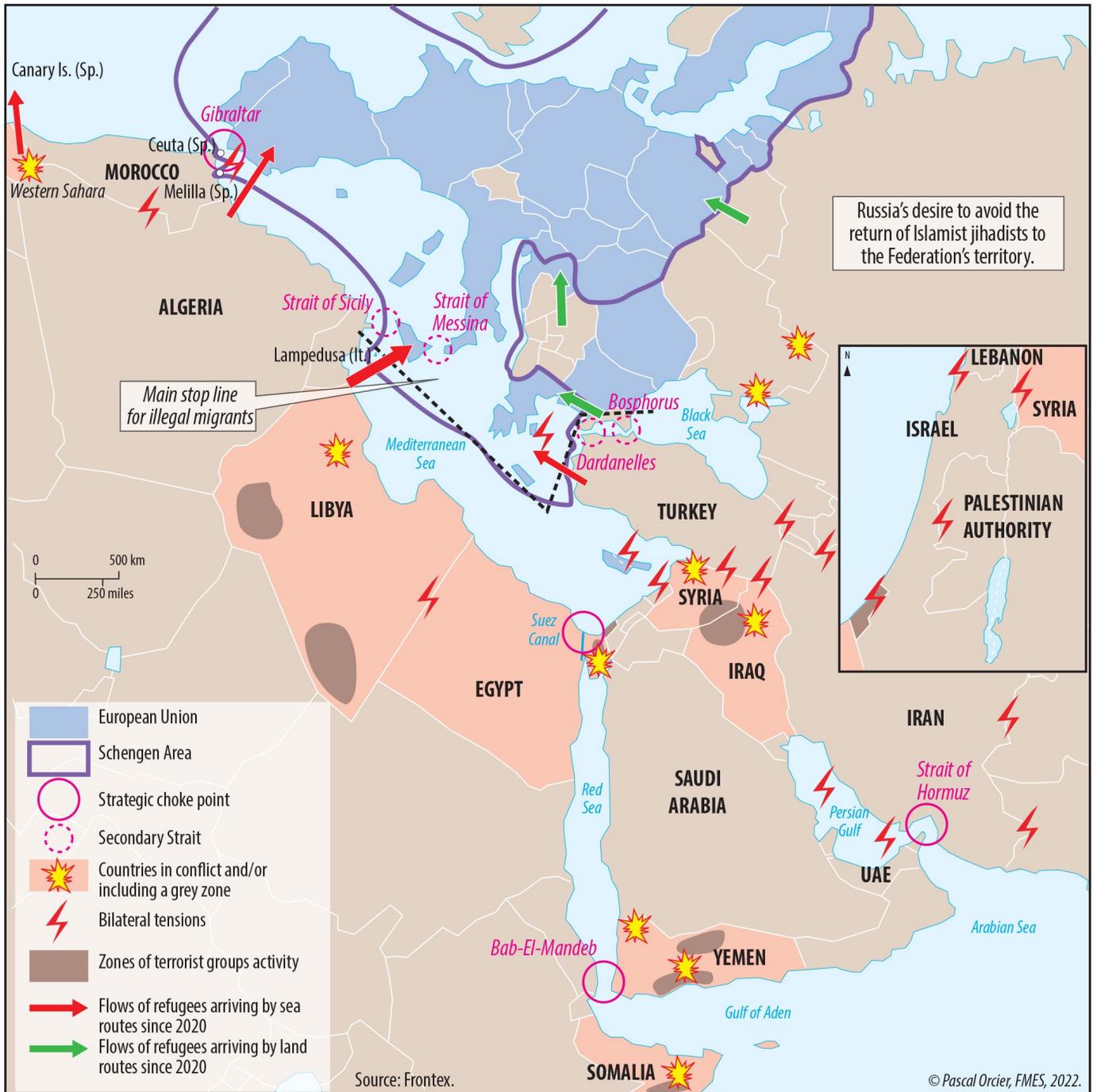
As we enter 2022, several conflicts of varying intensity continue to affect the stability of the Mediterranean Rim and the Middle East. The civil wars raging in Yemen, Syria and Libya remain the most important conflicts, especially since they are internationalized by the presence of foreign military contingents. The conflict in Yemen, which today seems the most intractable, is itself impacted by the conflict and tensions in Somalia. In Syria, each of the belligerents seems to have an interest in the status quo, even though the regime of Bashar al-Assad seems to have won overall. In Libya, the factions involved also seem to have an interest in maintaining the status quo as long as they can guarantee the functioning of the oil industry.

Three lower-intensity conflicts, however, are helping to destabilize this vast region. In North Africa, the Western Sahara conflict between Morocco and the Polisario Front is fuelling tensions between Morocco, Algeria, and Mauritania. In the Levant, the ongoing guerrilla warfare in the Sinai Peninsula remains a factor of local destabilization, even though it has led to increased security cooperation between Egypt and Israel. The latent civil war that continues to tear Iraq apart, two decades after the fall of Saddam Hussein, is continuing to exacerbate regional instability. If the central state were to collapse again, Iraq could once again become a battleground between regional actors seeking to strengthen their influence and diminish that of their adversaries, whether Iran, Saudi Arabia and its allies, IS, the Kurds or Turkey.

Many regional tensions remain without for the time being escalating into open conflict. In North Africa, the long-standing rivalry between Algeria and Morocco has seen an increase in intensity, raising the possibility of border clashes. The Canary Islands and the Spanish enclaves of Ceuta and Melilla are fuelling friction between Spain and Morocco, while Gibraltar remains a subject of tension between Spain and the United Kingdom. Further east, tensions remain between Egypt and Libya over the security of their common border, raising the threat of Egyptian and Emirati military intervention.

In the Levant, the Israeli-Palestinian conflict, the collapse of the Lebanese state, the latent confrontation between Israel and Iran, as well as the regular clashes between Israel, Hezbollah and Syria could at any moment degenerate into a large-scale armed confrontation, especially in the context of an Iran reaching the nuclear threshold. Turkey continues its anti-Kurdish operations in Iraq and Syria and remains hostile to Greece and Cyprus, but also to the European Union, whether in the Balkans, the eastern Mediterranean, Libya, or the South Caucasus. Its complex relations with Russia sometimes degenerate into military skirmishes.

Finally, in the Persian Gulf, geopolitical, ideological and religious rivalries keep tensions alive between Iran on the one hand, and Saudi Arabia, the United Arab Emirates and Bahrain on the other, against a backdrop of dynastic quarrels between these three monarchies and the Emirate of Qatar. These may ease with the combined positive effect of an agreement on the Iranian nuclear issue and greater Chinese involvement in the region.



»» Food insecurity and water stress

The notion of food security, which includes access to fresh water, has established itself as a vital issue for the populations of the Mediterranean Rim and the Middle East over the decades. These populations are however impacted differently by population growth and global warming. The European countries bordering the Mediterranean do not have the problem of food insecurity, even if water stress is increasingly prevalent, except in France, which remains relatively unaffected for the moment.

Iran and the monarchies of the Arabian Peninsula are facing a major water stress problem, but do not have any particular food difficulties; Iran thanks to its highly developed agriculture, the Gulf monarchies because of the small size of their population. Only Saudi Arabia and Jordan are highly impacted because their population and their capitals are located in the heart of the desert, far from underground aquifers and seawater desalination plants.

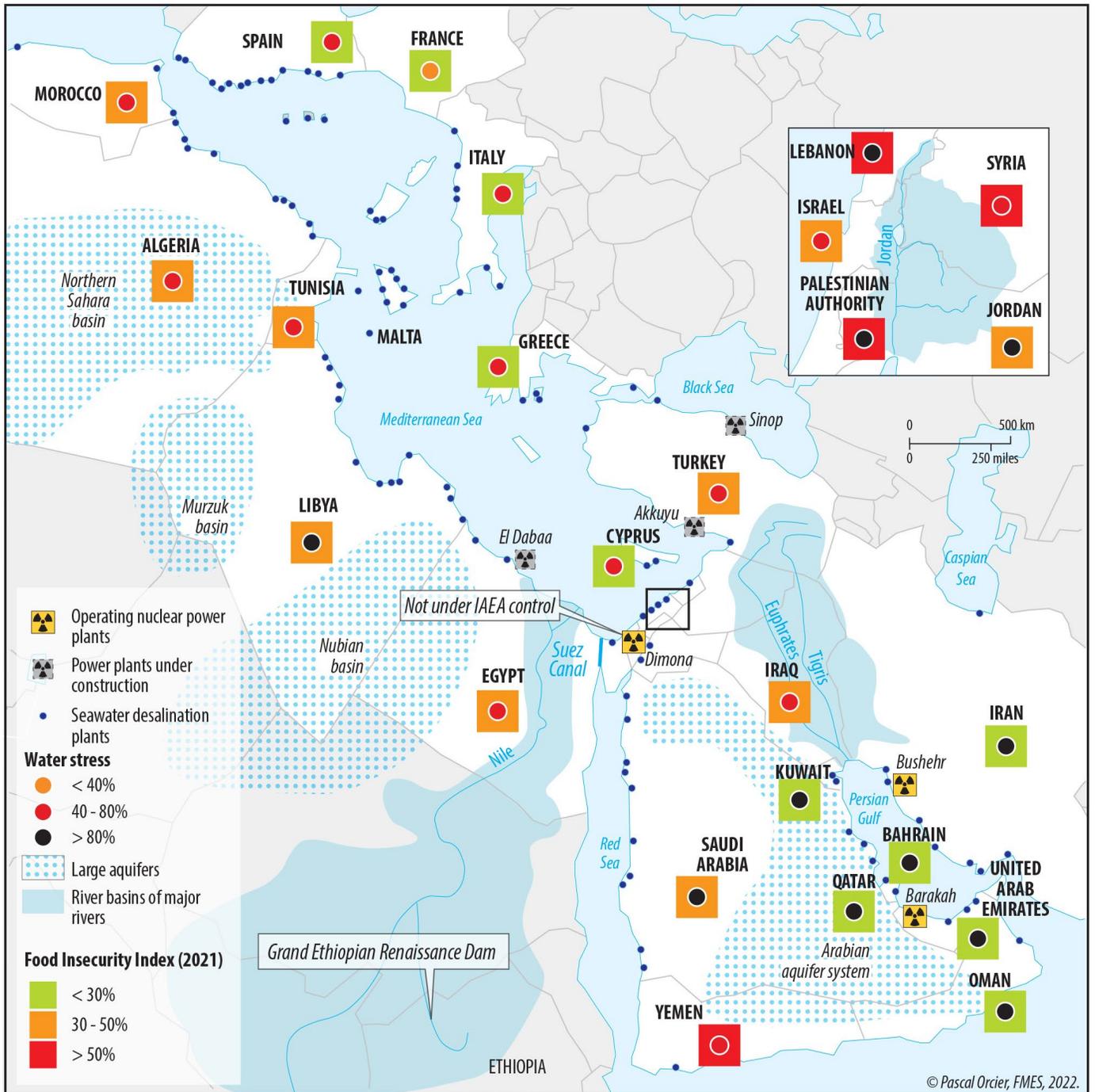
The countries of North Africa and the Levant, on the other hand, are experiencing an alarming situation of food insecurity, increased by impacts of the war in Ukraine, even though water stress affects them less than the countries of the Middle East. Several countries that are well placed geographically should fare better but are handicapped by their uncontrolled demographic growth (Egypt, Yemen), by agricultural overexploitation (Turkey, Israel) or by the negligence of their governments and the wastefulness of their population (Algeria, Palestinian Authority, Lebanon, Iraq).

While food insecurity remains under control for the time being thanks to donations and the action of international actors such as the FAO and the World Food Programme, water stress has led to very strong tensions between certain states in the region: Turkey-Iraq for the Tigris, Turkey-Syria for the Euphrates, Israel-Palestinian Authority for the Jordan, Egypt-Sudan-Ethiopia for the Nile; some have contributed in the past to the outbreak of armed conflicts: Israel-Syria-Jordan for the control of the sources of the Jordan river, Iraq-Iran for the control of the Chat el-Arab. The construction of major dams, notably in Turkey, Syria, and Ethiopia (Renaissance Dam) have since increased tensions.

To cope with water stress, the states that can do so are pumping into the vast aquifers and building seawater desalination plants. But these costly plants require very large amounts of electrical energy supplied for the moment by conventional thermal power plants, a process that emits large quantities of greenhouse gases, which only accelerates global warming in the region. This is why the states that have the means (Iran, United Arab Emirates, Turkey, Egypt) are now focusing on civil nuclear programmes designed to eventually supply their seawater desalination plants; others are aiming to do the same (Algeria, Jordan, Saudi Arabia, Qatar, Kuwait). This multiplication of civilian nuclear programmes, however, increases the risk of military nuclear proliferation in the region.

Food insecurity: this index, created in 2021 by The Economist, assesses access to food by combining 58 indicators measuring food availability, quality, affordability, resilience, and ability to store food in good conditions.

Water stress: this index created in 2019 by the World Resources Institute combines 13 indicators measuring water-related risks; two-thirds measure the quantity available in relation to the population while the last third assesses water quality



»» Tensions in the Eastern Mediterranean

The Eastern Mediterranean is the focus of many tensions:

First, tensions between the United States and Russia. American forces still have a significant presence in Italy, Greece, and Turkey, within the framework of NATO and ballistic missile defence, even if the VIth Fleet is only a shadow of its former self. The United States has nonetheless modernised and strengthened its bases to be able to come back quickly and strongly if needed. Russia has a presence that can't be ignored in the Black Sea since the annexation of Crimea (2014) and now has a permanent presence in the Eastern Mediterranean since its intervention in Syria (2015); it has a solid base in Tartous, which nevertheless requires regular logistical supplies (the famous Tartous Express) subject to the law regulations of the Turkish straits (Montreux convention, 1936).

Secondly, regional tensions are deteriorating. Between Israel and Iran, through Iran's regional armed wing the Lebanese Hezbollah, tensions erupt in the form of regular skirmishes, including at sea. Between Turkey and Greece, its historical rival, in the context of a policy of claiming Greek and Cypriot maritime and air space. The self-proclaimed Turkish Republic of Northern Cyprus, which could be annexed in a matter of hours, remains a trump card for President Erdogan, as would a blockade of the Cypriot Republic which would force the European Union to react or have its credibility seriously undermined.

Finally, these tensions are part of a game of economic, cultural, and political rivalries. Thus, the exploitation of the wealth of undersea gas resources pits Turkey, associated with the Libyan government, against the East Mediterranean Gas Forum (EMGF) which includes Egypt, Israel, Jordan, Greece, Cyprus, Palestine, Italy, and France. The competition for regional leadership in the Muslim world pits Turkey, backed by Qatar and the Muslim Brotherhood networks, against Egypt, supported by the United Arab Emirates and Saudi Arabia, which relies on Salafist ideology. These two regional heavyweights are trying to attract external powers to their camp: the United States, Russia, China, and the European Union, of which France seems to be the most active member in this highly important strategic area. The United States, for its part, obsessed with containing Russia and China, could sacrifice European migration and anti-terrorism policies in order not to alienate these two coveted actors.

»» Tensions in the Persian Gulf

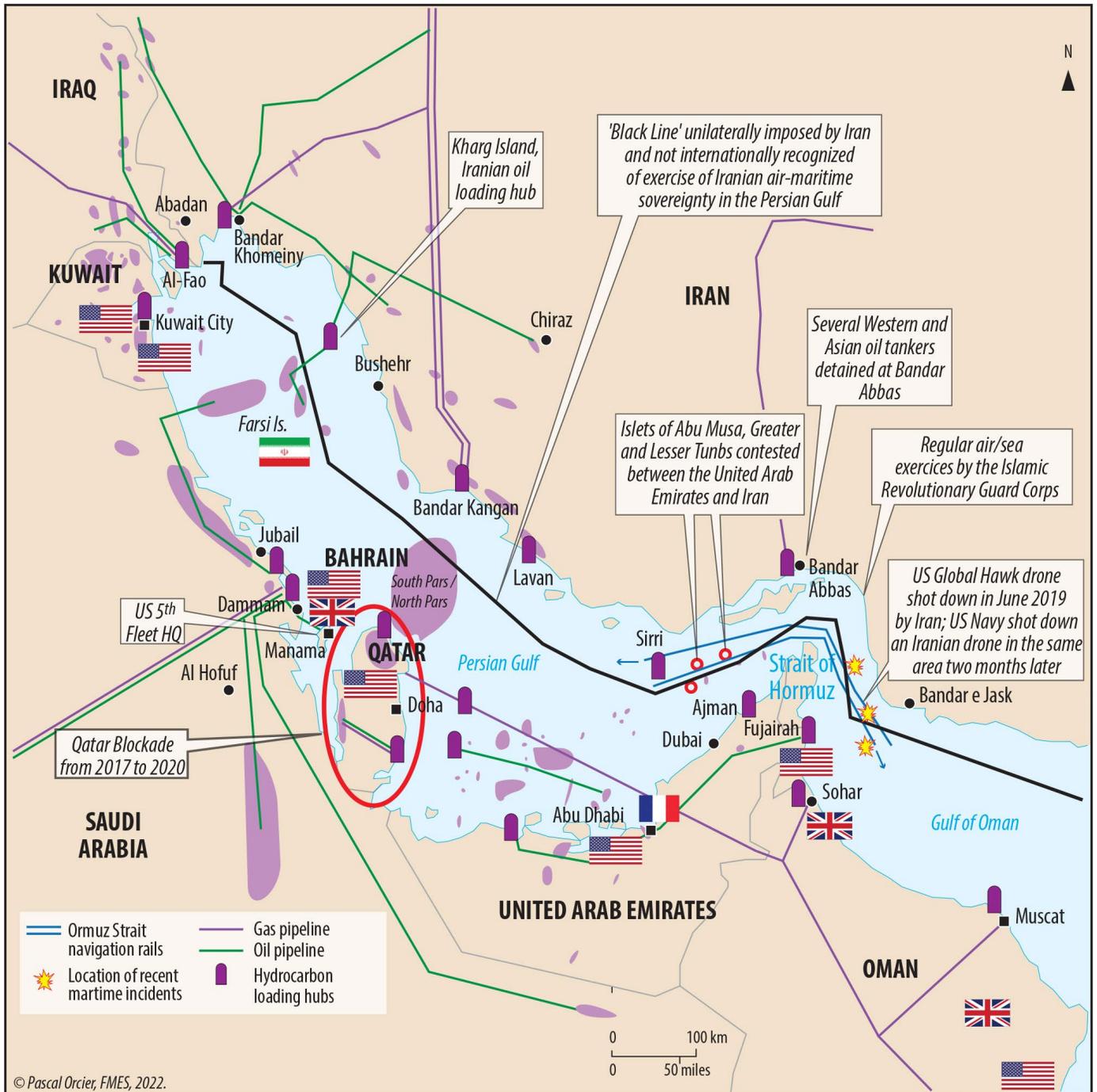
Since the Iranian Islamic revolution of 1979, the Iran-Iraq War (1980-1988) and the First Gulf War (1991), the Persian Gulf has continued to act as a focus for the tensions of the Middle East. After a decade of détente allowing the economic development of its southern shore and the reconstruction of its northern shore, the situation became tense again with the arrival in power of George W Bush in 2001, his combative speech on the «Axis of Evil», his invasion of Iraq in 2003, followed by the arrival in power in Tehran of the populist Mahmoud Ahmadinejad (2005), who was determined to accelerate Iran's nuclear programme.

Along the southern shores of the Gulf the monarchies of the Arabian Peninsula are being indulged by the United States to prevent them from collapsing after the wave of Arab revolutions in 2011 that rocked Bahrain and the Sultanate of Oman. From 2005 to 2015, and despite the aggressive rhetoric of both sides, Americans and Iranians avoided any overly aggressive provocation. If the election of Hassan Rohani in Tehran and the conclusion of the nuclear agreement (JCPOA, 14 July 2015) eased relations between the West and Iran, they had the opposite effect of straining them between Iran and the three monarchies of the Arabian Peninsula (Saudi Arabia, Bahrain, and the United Arab Emirates), which now felt marginalized and threatened by the Islamic Republic's regional ambitions. The period 2015-2020 became one of great danger, especially when U.S. President Donald Trump denounced the JCPOA in 2017 and gave the Gulf monarchies a blank check to exert «maximum pressure» against Iran with the help of Israel. These three monarchies took advantage of this to set up a blockade of Qatar and settle some old scores with Doha, which had taken advantage of the Arab Spring to become the beacon and banker of political Islam. Oman and Kuwait, very attached to their neutrality, refused to go down this road. In the meantime, Iraq, devastated by twenty years of war, tried painfully to rebuild itself and become a functioning state again.

In 2019, clashes increased in the area (see map), especially around the Strait of Hormuz, to demonstrate the ability of both the Iranians and the Americans to blockade it in case of armed confrontation. The strikes against the Saudi oil infrastructure, which did not provoke any American military reaction, constituted an electroshock for Riyadh and Abu Dhabi and encouraged the UAE to conclude the Abraham Accords with Israel, and to look more towards China.

With Joe Biden's arrival in 2021 and his stated desire to renegotiate with Iran, to focus on Qatar and to snub Saudi Arabia and the UAE, tensions seem to have subsided, especially since China has made it known to its Iranian, Saudi and Emirati partners that it will not hesitate to take severe economic reprisals if any ill-considered actions lead to the blocking of the Strait of Hormuz, which is vital for its energy supply. The clashes between Iran, Israel, Saudi Arabia and the UAE have therefore moved out to sea, to the Gulf of Oman, the Red Sea and the eastern Mediterranean.

Now, at the beginning of 2022, the prospect of failed negotiations on the Iranian nuclear issue and the nervousness of the Israeli government, seem as if they might together resurrect hypothetical military options to prevent Iran from crossing the nuclear threshold. The Persian Gulf could then once again become a battleground, including a scenario involving Chinese naval forces, encouraging all those who can to pull out of the Strait of Hormuz and find alternative routes to export their oil to the Indian Ocean. This is the chance for the Sultanate of Oman, which is banking more than ever on its strategic and relatively protected position at the entrance to the Persian Gulf to establish itself as the region's new and indispensable hub.



»» **Ballistic proliferation and missile defence (BMD)**

The problem of ballistic missiles in the Mediterranean is primarily driven by the threat of Russian intercontinental nuclear missiles. While the trajectories of missiles destined for American territory are mostly in the north, integrated warning, detection and interception systems to strike the missiles while still climbing (the easiest technically) can benefit from the capabilities offered by sensors and anti-missile launchers on the southern flank, as close as possible to Russian territory. The BMD systems pre-positioned in Romania, Turkey and Israel, and the AEGIS frigates based in Spain and deployable in the Black Sea, perform this function while also protecting US troops in Europe along with NATO allies from Russian medium-range missile strikes.

Iran's development of a medium-range ballistic missile capability has increased the importance of these systems in protecting forces deployed at the many US bases in the region, as well as Israel and America's other allies. Numerous assets have been deployed in the Persian Gulf for this purpose, both land-based and ship-based. Interconnected with previous systems, they also serve to reinforce the overall BMD network.

The general rise in tensions and the perception of a lesser US involvement (the lack of a US response to the 2019 Iranian-attributed drone attacks in Saudi Arabia sent shockwaves through the region) could encourage regional proliferation. Riyadh, traumatised by the 1987-88 'War of the Cities' between Iraq and Iran, has had Chinese ballistic missiles since 1989 (currently DF21s), and the United Arab Emirates, Turkey, Egypt and Algeria could be next. For their part, alternative medium-range anti-ballistic missile systems (S300, S400, THAAD, Iron Dome) are deployed by several countries in the region (Algeria, Israel, Syria, Iran; Qatar and the UAE for the American THAAD).

This escalation, combined with the development of hypervelocity missiles by the major powers and the proliferation of cruise missiles in the region - two categories of missiles that are undetectable by BMD systems - is not a stabilising factor because of the sense of invulnerability it provides to a potential aggressor.



GEOPOLITICAL RECONFIGURATIONS IN THE MEDITERRANEAN RIM AND THE MIDDLE EAST

»» Plate tectonics in the Middle East

Seen from above, the Middle East is divided into two geopolitical plates that are in friction along a tectonic fault line zigzagging from Cyprus to the Strait of Hormuz via the Levant and the Persian Gulf.

The northern plate is controlled by both Iran and Russia, each claiming zonal leadership. It includes Iran, Iraq, Syria, Lebanon and Turkey, which joined as part of the Astana process. The US is still tolerated in Iraq, but it is unlikely to be able to hold on much longer.

The southern plate is dominated by the United States, which relies on Israel, Egypt (the Suez Canal's hub) and the monarchies of the Arabian Peninsula. American leadership, without being openly questioned, has been weakened. Russia's involvement has increased with the growing antagonism between Tehran and Washington and the American setbacks in Iraq and Syria. It should be noted that regional tensions are of interest to the Americans and Russians as a justification of their presence and role as sponsors, arms suppliers and providers of support in the UN Security Council. However, both powers know that tensions must not escalate to the point where they risk causing a conflagration that would be very damaging both to themselves and their regional influence.

China remains lying in wait for the time being, investing massively wherever it seems possible. It knows that its investments will be unevenly productive, but it is patient and knows that time is probably on its side. Its interest lies in stabilising the region to maximise the return on its investments and pursuing its grand global strategy of economic-political domination towards the west.

Iran, Saudi Arabia, Turkey and Israel have emerged as the four most influential regional players, each representing a different people and culture (Persian, Arab, Turkish and Jewish), although Islam remains a strong link in terms of representation. These four states oscillate between extreme rivalry and demonstrations of alliance in order to favour their immediate interests. Their leaders know that they are vulnerable domestically and could be tempted to escalate tensions to create a diversion and thus try to save their regime. This is probably the greatest danger in the region. In this game of influence, Turkey seems divided between strengthening its ties with Qatar and reconciling with the United Arab Emirates. In an economic context that has been severely damaged by the health crisis that will bring many airlines down, will Turkish Airlines ally itself with Qatar Airways or Emirates, all three major levers of influence for these ambitious states? Such a rapprochement would shed light on the future of regional recompositions.

In the long term, China's interest is probably to bend the fault line southwards to include the United Arab Emirates and Oman, in order to fully control the Strait of Hormuz and secure the exit from the Persian Gulf for its own benefit. This would mean becoming more involved in the region, strengthening its ties with Russia and Iran to establish a condominium on the northern plate, and having the levers to push the US back.

Europe remains the great absentee in this Great Middle East Game, even if France, the United Kingdom and Italy are individually active. The European Union's dilemma is simple: either it aligns itself with one of the two major protagonists at the risk of being dragged into tensions that go beyond it, or it tries to articulate an autonomous policy in line with its interests by using its small but decisive weight to overcome the antagonisms it will generate. The second option is more difficult, more ambitious, but the only one to avoid its erasure. The Middle East could well reveal the destiny of Europe and France.



»» North Africa divided into north-south bands of influence

While everything should be encouraging the North African states to cooperate closely with each other (economic development, environmental issues, security threats, terrorism, the flow of illegal migrants, the fight against trafficking of all kinds), these five states have closed their common borders (except for Algeria and Tunisia) and remain obsessed with the North-South relationship. The coastal motorway linking the Suez Canal to the Strait of Gibraltar, which could be a link between them, has turned into an obstacle course.

In the west, Morocco looks almost exclusively towards the south and West Africa, presented as the «new frontier» of the Kingdom of Morocco, as well as towards the north and Europe (mainly Spain, France and Belgium) perceived as an Eldorado and an essential economic partner. Morocco also looks to the open sea, with the United States, Canada and Brazil being its three main clients, as Moroccan phosphates feed their intensive agriculture.

Algeria, on the other hand, is struggling to break out of its ambivalent relationship with France (to the north) while being increasingly active in the south towards the Sahel and the Gulf of Guinea states. Further north, Algeria still looks towards China, Russia and now Germany.

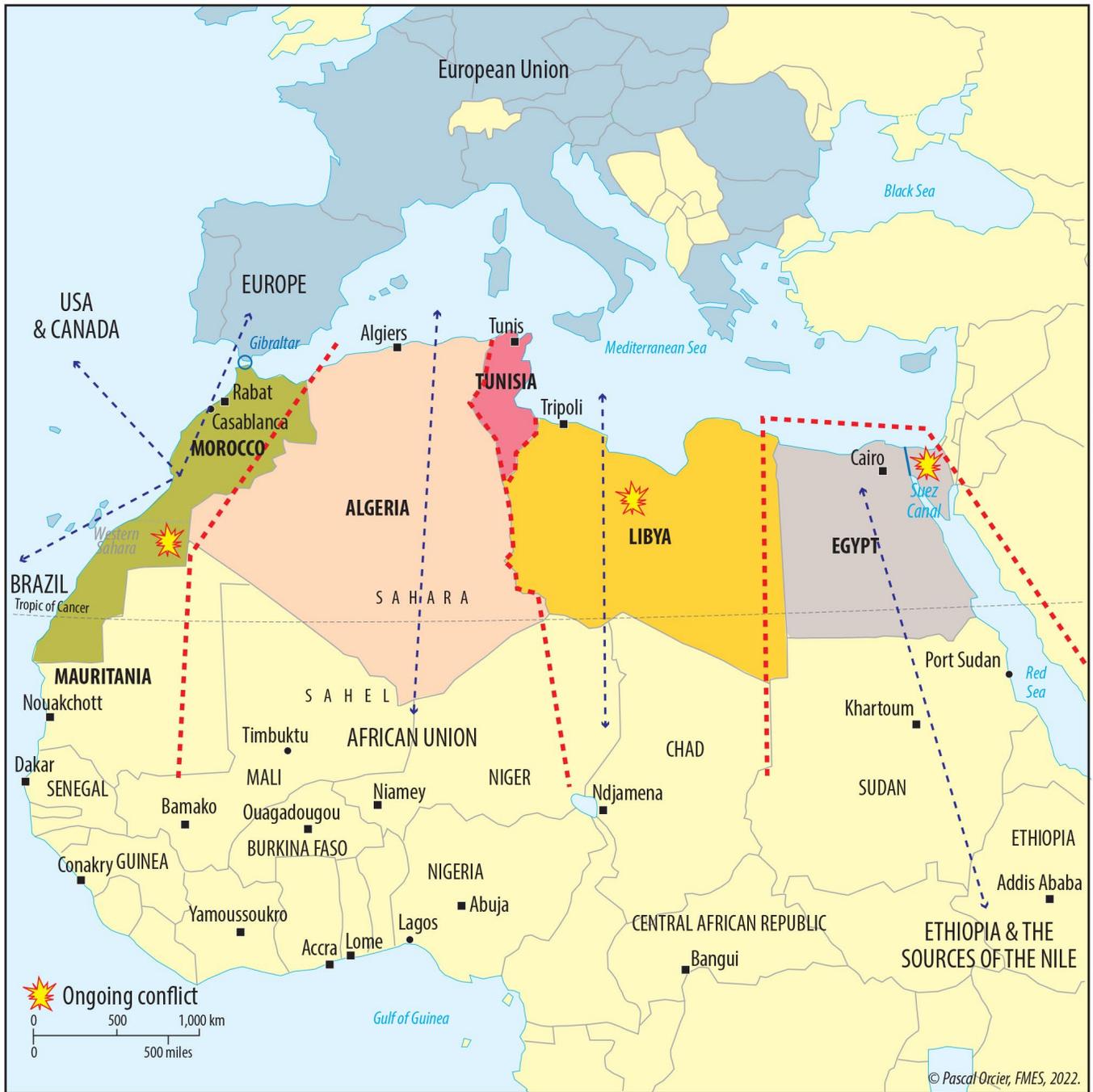
Tunisia, squeezed in the south by Algeria and Libya, has no other hope than to turn to Malta and southern Europe to its north, favouring its two historical patrons: France and Italy; it does, however, count on the United States to guarantee its security as a last resort.

Libya, painfully emerging from a black hole created by ten years of civil war, remains closely linked to Italy and Turkey in the north, and is regaining its historical interest in Chad and Niger to the south.

Egypt, with a population larger than that of all the other North African countries combined, aims to become once again the beacon of the Arab world. Its priorities are nonetheless conditioned by North-South interests: management of the Nile, protection of the Red Sea and the Suez Canal, and the defence of offshore gas fields in the eastern Mediterranean.

Not only do the five North African states not cooperate with each other, but their southern borders, which should be tightly controlled to contain armed jihadist groups and curb trafficking of all kinds, are porous, which is to the great benefit of mafia and criminal groups. These five states, all of which face real risks of internal destabilisation, have locked down their coastal capitals to protect the powers that be, abandoning their great south which is a vast sea of sand. The money generated by the trafficking that abounds there helps to feed armed groups and thus to destabilise the region a little more.

Finally, the power rivalries between global and Middle Eastern actors - now all present in the Mediterranean Rim - only serve to increase the fragmentation of North Africa and the hardening of its leaders' attitudes.



»» The Mediterranean Rim, a new area of global and regional power rivalry

The Mediterranean Rim is no longer a *mare nostrum*. The United States, the guardian power of the last 70 years, is reorienting itself towards Asia, leaving a geopolitical void that is being filled to a rhythm dictated by the awareness and appetites of the new players. Thus, the VIth Fleet, which served to illustrate the American presence, is now only a shadow of its former self, even if maritime and air support bases remain, such as Rota, Moron, Naples, Aviano, Souda, Incirlik or Izmir. The United States is also maintaining its cooperation with its allies on the southern shore, notably Morocco, Tunisia and Egypt. This arrangement would allow for a rapid increase in power if necessary. It is therefore more the political display of a lesser American interest in the region that gives Washington's competitors in this area room for manoeuvre.

The first of these is of course Russia, which is now present in Tartous and Khmeimim in Syria, permanently deploys submarines, aircraft and frigates in the eastern Mediterranean and displays its ability to deny access. This local leadership has allowed it to be the arbiter of peace in Syria, to be present in Libya with Wagner Group mercenaries and to strengthen its links with Turkey, Algeria and Egypt. China is developing a low-profile policy of commercial infiltration in this region, especially in port infrastructures. Piraeus, which came under its control in 2016, is its main European home port.

Beyond these three global players, other regional powers are involved in the regional balance of power. The first of these is undoubtedly Turkey, a revanchist and revisionist power that uses the American disengagement, European weakness, and the dynamics within Islam and neo-Ottoman nationalism to develop its political, military, cultural and economic influence. Very active in the Eastern Mediterranean as it seeks to strengthen its influence in Cyprus and to recover the maximum of gas deposits in the sea, it has been heavily involved in the Syrian and Libyan conflicts; it activates the Muslim Brotherhood networks in the region, with Qatar's support, to influence the powers that be.

In reaction to Turkey's attempt at regional leadership, Egypt and the United Arab Emirates have moved closer to the Russians in Libya, and the Greeks and Israelis in the Eastern Mediterranean, with some success. For its part, Iran is seeking to secure its access to the Mediterranean through the Shiite militias in Iraq, Syria and Lebanon. We are thus witnessing a form of Middle Easternisation of the Mediterranean. All the rivalries of the Middle East are now to be found in the Mediterranean Rim.

Only the European Union, although the main provider of development aid to the southern shore, seems to be absent from this power game. The European countries are acting in an uncoordinated manner, in search of short-term economic gains without a shared strategy despite the French attempt through Med7, which brings together the seven Mediterranean countries that are members of the European Union: France, Italy, Spain, Portugal, Greece, Cyprus and Malta.

This multiplication of actors in strong geopolitical competition is not conducive either to long-term stabilisation or to European interests. Europe is gradually losing its foothold in this region, which is nevertheless of strategic importance for its future.



»» A cacophony of partnerships

The organisation of partnerships in the Mediterranean Rim and the Middle East has followed the evolution of political and cultural representations.

After the Second World War, the time was ripe for the formation of large communities of states, able to weigh in on the geopolitical Great Game of the Cold War: NATO (created in 1949) federated the Western bloc around the United States to counter the USSR, and then the Warsaw Pact (1955). The Arab League (1945) wanted to unite the «Arab nation» into an anti-colonial, anti-European and anti-Israel entity (1948). Europe, finally, progressively structured itself as an autonomous entity through the Western Union (1948), the Western European Union (1954), the European Economic Community (1957), and finally the European Union (1993). The Gulf Cooperation Council (1981) was created to strengthen the monarchies of the Arabian Peninsula in the face of the Iranian revolution and Baathist Iraq. The Arab Maghreb Union (1989) is the last initiative of this type, attempting to align the interests of the Maghreb states faced with the inefficiency of the Arab League. The energy of these two regional organisations is concentrated on their internal structures, and interactivity between the two is very insubstantial. Today they are inoperative.

The end of the Cold War ushered in a unipolar world and a convergence of countries towards a single Western model, driven by the economic partnership that aimed to integrate the southern shore into the European Union. Security issues were then confined to the fight against crime and, after 2001, to the fight against terrorism. Western organisations then multiplied cooperation initiatives, very much oriented towards economic aid and governance: the 5+5 Dialogue (1990) of the Western Mediterranean countries and its defence component, NATO's Mediterranean Dialogue (1994), complemented by the Istanbul Cooperation Initiative (2004), the EU's Euro-Mediterranean Partnership (1995), extended by the Union for the Mediterranean (2008). Despite a strong financial involvement (almost 6 billion dollars in 2019 of European development aid), these North-South efforts at cooperation have failed due to regional tensions (the Israeli-Palestinian conflict and wars in Iraq, Syria, Libya, and Yemen) and the difficulties North African and Middle Eastern countries have in accepting a multilateral (and no longer bilateral) mode of cooperation and in adapting to European governance standards and the American anti-terrorist obsession. The progressive disaffection with the Western model would exacerbate these trends from the mid-2000s onwards.

Since the 2010s and the failure of the Arab revolutions, along with the loss of Western prestige, the perception of American disengagement (despite the establishment of a NATO mission in Iraq in 2018), the demand for alternative models (e.g., Chinese, Russian, neo-Ottoman, Islamic) and the rise in tensions have reduced the appeal of these cooperative formats and favoured the emergence of ad hoc formats bringing together countries with interests that now and again converge. The Astana format (2017) has thus enabled Russia, Turkey and Iran to formalise their cooperation in the Syrian civil war, similar to the specific coalition set up by the United States in the Iraqi-Syrian theatre. The Abraham Accords are a framework of specific agreements between Arab countries and Israel that have relaunched a concrete inter-state partnership (including the economy, technology, and security) that had until now been limited to Egypt and Jordan. The Shanghai Cooperation Organisation allows Iran, which joined in 2021, to limit the effects of American sanctions. It is therefore the era of less ambitious, ad-hoc and pragmatic cooperation, which preserves the sovereignty of states and rationalises their reciprocal investments. Since 2020, the health crises linked to Covid-19 have accelerated the decoupling of Western countries from the countries of North Africa and the Middle East, which are increasingly turning in on themselves.



»» Country files
and their military forces

2

THE STATES OF NORTH AFRICA AND THE MEDITERRANEAN RIM

The Mediterranean Rim is structured by the clear separation between its north and south shores. Even if the coasts are geographically similar, the countries belonging to the European Union live in a world that is fundamentally different from their neighbours in terms of economy, development, education, demography, political regime or society, with a few nuances with regard to Turkey, Israel, Lebanon and Tunisia.

This north-south divide, which begins at the Dardanelles Straits and has been growing for the past 30 years, is reinforced by the interface role that the countries of the southern shore have with their southern neighbours, who are further away from Europe and are often in an even more precarious situation, particularly in Sahelian Africa. Finally, the rise of Islam in these countries contributes to the intellectual distance in terms of symbolic and religious representations compared to European populations that are in the process of atheisation.

Although the analysis of the countries in this area in terms of their belonging to the Eastern, Central and Western Mediterranean regions retains a certain relevance, the trend towards homogenisation of the southern shore under the effect of globalisation, Islamisation and the growing influence of the Middle East on the whole Mediterranean is progressively erasing this classification which has now become artificial.

The tensions inherent in this polarisation are reinforced by the inability of the countries on the southern shore to generate a sphere of cooperation between them in the image of the European Union. On the contrary, neighbourly relations are most often non-existent and sometimes even conflictual. All the countries on the southern shore have difficult relations with their coastal neighbours, with the sole exception of Tunisia.

It is therefore not surprising that geopolitical tensions are highest in the countries of the southern shore. The protection of the regimes in situ in the face of the risk of destabilisation, the diverting of discontent towards external scapegoats, the channelling of frustrations by embracing nationalism, all of these favour the hardening of governments' attitudes and their military postures. The growth of the region's defence budgets and the large orders for first-line weapons systems are illustrations of this.

Today, the southern shore is notable for two countries that have just emerged from civil war (Libya and Syria) and three countries that are offensive in their geopolitical posture: Algeria vis-à-vis Morocco, Israel vis-à-vis Iran and the pro-Iranian militias in Lebanon and Syria, and Turkey vis-à-vis Greece and Cyprus. On the northern shore, concerns are limited to Islamic terrorism, migration and gas resources, with the exception of Greece and Cyprus both of which are more directly confronted with Turkish expansionism. This discrepancy in perceptions and positions can lead to misunderstandings and conflicts.



»» Overview

Political system: **constitutional Monarchy** (King Mohammed VI)

Population: 36 million inhabitants / 6th in the MENA region

Median age: 29 years old (length of compulsory military service: 12 months)

GDP: \$120 billion / 11th in the MENA region

Principal sources of wealth: phosphate, services

GDP/inhabitant: \$3,000 / 16th in the MENA region

Defence spending: \$5.5 billion (5% of GDP) / 11th in the MENA region

Total strength of armed forces: 211,000 / 6th in the MENA region

Breakdown of armed forces: Ground (185,000), Air (15,000), Navy (11,000)

Total strength of internal security forces: 100,000 (which 33,000 from the Gendarmerie)

»» Geopolitical posture

Relevant international/regional security organisations: Abraham Agreement (USA, Israel, UAE, Bahrain), 5+5 Defence

Special relationships: USA, France, Israel (in progress)

States in which the Moroccan armed forces have bases: None

States in which the Moroccan armed forces are deployed: **Central African Republic** (mission ONU), **Democratic Republic of Congo** (UN mission), Yemen (until 2018)

States with which Morocco is experiencing high levels of political tension: Algeria, Spain, Germany

No permanent foreign military presence on the territory.

Armed forces characteristics and capabilities

Motivation ★★★★★☆

Equipment ★★★★★☆

Resilience ★★★★★☆

Combat effectiveness ★★★★★☆

Doctrine/Planning ★★★★★☆

»» Strategic objectives

- Guarantee the durability of the monarchy (the king remains the Commander of the Faithful) in a structurally fragile domestic context, while securing the Western Sahara (in the face of the Polisario Front) and integrating the Berber minority to the maximum possible.
- Contain Algeria by securing the border, adopting a dissuasive posture, preventing it from accessing the Atlantic Ocean (via the Western Sahara) and being very active in regional international forums (African Union, Arab League).
- Maintain a special link with the United States, France and Canada, while managing the normalisation of relations with Israel.
- Manage complex relations with Spain (Ceuta, Melilla, Canary Islands and Perejil Island).
- Be able to project into West Africa (Morocco's 'new frontier') if necessary.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Regional surveillance capabilities.

Real capacity, even if limited in volume, for deep strikes and force projection (5 battalions = 3,000 men).

Multi-mission UAVs.

Hardy and motivated fighters with operational experience acquired against the Polisario Front and in UN missions.

Borders (mountains and desert) easy to defend.

VULNERABILITIES

Aging 2nd and 3rd line equipment (awaiting replacement for Air Force and Navy).

No real inter-service coordination.

Scattering of armed forces to hold the whole territory, especially in Western Sahara.

Logistical deficiencies amplified by the lengthening of supply lines.

Very insufficient anti-aircraft defence.

'INVISIBLE' ASSETS

Long range surveillance and strategic intelligence gathering:

- **2 reconnaissance satellites:** Mohammed VI-A (2017), Mohammed VI-B (2018, metric resolution)
- 6 MALE UAVs (3 Wing Loong, 3 Heron)
- 4 Gulfstream G-500 early-warning aircraft
- 2 Falcon 20 electromagnetic listening aircraft
- Several infiltration units in hostile territory (desert, mountain)

Potentially non-attributable actions:

- UAV strike capability (13 armed UAVs delivered progressively between 2021 and 2023 + Harop suicide drones delivered by Israel)
- Clandestine operations capability: about 1,000 Special Forces commandos

'VISIBLE' ASSETS

Ground forces:

- **7 brigades** [2 armoured, 1 of which is equipped with Russian weapons identical to the Algerian army, 3 mechanised and 2 airborne]
- **9 infantry regiments**
- 70 independent battalions
- **650 main battle tanks:** 220 M-1A1 Abrams & 50 T-90 ★★☆☆☆ (1st line), 340 M-60 Patton & 40 T-72B (2nd line)
- 1,850 other armoured fighting vehicles (VAB, AMX-10RC, AMX-10P, Ratel, M-113, M-577, AML-90, Kuerassier)

Portable surface-to-air missiles:

Igla-S ★★☆☆☆

Anti-tank missiles: Milan, TOW II ★★☆☆☆

Artillery: 460 guns and howitzers, mainly M-109 (155mm) and M-110 (203mm), and multiple rocket launchers

Air assets:

- **73 combat aircraft:** 23 F-16C/D ★★☆☆☆ (2nd line), 25 Mirage F-1 modernisés, 25 F-E
- 19 Gazelle attack helicopters
- 32 UAVs

Naval assets:

- **2 frigates** (1 FREMM ★★☆☆☆, 1 SIGMA)
- 5 corvettes (2 Floréal, 2 SIGMA, 1 Descubierta)
- 4 missile boats (Lazaga)
- 2 King Air maritime patrol aircraft

Anti-ship missiles:

Exocet MM-40 Block-3 ★★☆☆☆

Long range strike capability: (+ 125 mi)

- 23 F-16C/D strike aircraft ★★★★★
- 2 KC-130 air-to-air refuelling aircraft
- 1 EC-130 electronic warfare aircraft
- 13 TB2 Bayraktar armed MALE UAVs
- Harop suicide drones

Force projection:

- 13 C-130J transport aircraft
- 3 CH-47 heavy lift helicopters
- 24 Puma utility helicopters
- 2 airborne units
- 4 aeromobile commando units
- 3 amphibious assault ships (LSM)
- 3 marine infantry units

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-missile systems: None

Anti-aircraft systems: FD-2000B (Chinese, not yet delivered) ★★★★★

Interceptors: F-16 armed with Air-Air missiles AIM-9X & AMRAAM ★★★★★

Principal deliveries expected of military equipment



· 25 chasseurs F-16V (not yet delivered) ★★★★★



· 36 AH-64 Apache attack helicopter (not yet delivered) ★★★★★



· Patriot PAC-2/3 anti-aircraft systems (delivery under negotiation) ★★★★★



· VL MICA anti-aircraft systems (not yet delivered) ★★★★★



· 36 CAESAR guns (not yet delivered)



· armed MALE UAVs + Cyber and electronic warfare means (delivery under negotiation)

»» Briefing note

Morocco is looking more towards the open sea (the United States, Canada and Brazil, its three main clients), towards West Africa (its «new frontier») and towards Europe, than towards North Africa, the Sahel and the Mediterranean, which remain concerns for it. Its armed forces are therefore structured accordingly to dissuade Algeria from intervening on its territory, to act on the Polisario Front's rear and to exert pressure, if necessary, on the neighbouring Spanish possessions (Ceuta, Melilla, the Canary Islands, the Perejil islet). They are mainly trained for territorial defence and counter-offensive. Once the expected armaments are delivered, the Moroccan armed forces will have increased naval and air capabilities, especially in terms of deep strikes, force projection and denial of access.

»» Overview

Political system: **Islamic Republic** (President Mohamed Ould El-Ghazaouani)

Population: 4.5 million inhabitants / 15th in the MENA region

Median age: 6 years old (length of compulsory military service: 24 months)

GDP: \$8 billion / 20th in the MENA region

Principal sources of wealth: Minerals (iron, copper, gold) and fisheries

GDP/inhabitant: \$1,750/ 18th in the MENA region

Defence spending: \$200 million (2.5% of GDP) / 20th in the MENA region

Total strength of armed forces: 16,000 / 19th in the MENA region

Breakdown of armed forces: Ground (15,000), Air (300), Navy (700)

Total strength of internal security forces: 5,000

»» Geopolitical posture

Relevant international/regional security organisations: G5 Sahel, 5+5 Defence

Special relationships: France, USA

States in which the Mauritanian armed forces have bases: None

States in which the Mauritanian armed forces are deployed: 460 troops in the Central African Republic (CAR), Mali and Somalia (UN mandated missions).

States with which Mauritania is experiencing high levels of political tension: None

No permanent foreign military presence on the territory.

Armed forces characteristics and capabilities

Motivation ★★☆☆☆

Equipment ★☆☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★☆☆☆☆



»» Strategic objectives

- Ensure territorial integrity in the face of foreign Jihadi groups based in Mali, Algeria, and the Sahel-Saharan strip.
- Deter the Polisario Front from acting in Mauritania.
- Maintain good relations with Morocco and Algeria without falling under their influence.
- Strengthen strategic cooperation with all states that can provide free (or very low cost) equipment to the Mauritanian armed forces.
- Promote the G5 Sahel and the Arab Maghreb Union.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Expertise in desert combat.
Strong experience in counter-guerrilla and anti-Jihadist warfare.
Hardiness and resilience of fighters.
No political obligation to protect the population.

VULNERABILITIES

Minimal and obsolete weaponry.
No air and naval capabilities.
No denial of access capability at all.

'INVISIBLE' ASSETS

- Infiltration capacity in desert areas

'VISIBLE' ASSETS

Ground forces:

- 28 autonomous battalions (equivalent to 7 brigades)
- 35 T-54/T-55 main battle tanks ★☆☆☆☆ (3rd line)

Air assets:

- 2 Cessna-208 armed anti-guerrilla trainers

- 85 other armoured fighting vehicles (AML-90, Saladin, Cobra, Bastion, Panhard M3)

- Many pickups

Portable surface-to-air missiles:

SA-7 & SA-9 ★☆☆☆☆

Anti-tank missiles: Milan ★★★☆☆

Artillery: 50 guns, howitzers & multiple rocket launchers, mainly D-30 & D-74 (122mm)

Long range strike capability: (+ 125 mi)

- No ability

- Some surveillance UAVs delivered by Israel

Naval assets:

- 15 light patrol boats

Force projection:

- No ability

No expected delivery of military equipment.

» Briefing note

Mauritania seeks to live in harmony with its neighbours.

Its under-equipped armed forces (with the exception of anti-tank missiles) are incapable of any offensive action, but they are well trained for the defence of an essentially desert territory. They are similar to the forces of the Sahelian countries and have mastered the techniques of combating the Polisario Front guerrillas and the armed Jihadi groups that constitute the main threat to the country.

»» Overview

Political system: presidential regime (President Abdelmadjid Tebboune)

Population: 45 million inhabitants / 4th in the MENA region

Median age: 29 years old (length of compulsory military service: 12 months)

GDP: \$148 billion / 9th in the MENA region

Principal sources of wealth: Oil and natural gas

GDP/inhabitant: \$3,300 / 14th in the MENA region

Defence spending: \$9.7 billion (6.5% of GDP: 1st state budget) / 7th in the MENA region

Total strength of armed forces: 370,000 / 4th in the MENA region

Breakdown of armed forces: Ground (130,000), Air Defence (15,000), Air (14,000), Navy (6,000),

Common services (15,000), Gendarmerie (180,000)

Total strength of internal security forces: 90,000

»» Geopolitical posture

Relevant international/regional security organisations: 5+5 Defence

Special relationships: Russia, China, Germany

States in which the Algerian armed forces have bases: None

States in which the Algerian armed forces are deployed: 2 Algerian military observers at MONUSCO (Democratic Republic of Congo). No operations outside the borders, but operational cooperation with Tunisia, Niger and Mali.

States with which Algeria is experiencing high levels of political tension: Morocco, Israel, France

Permanent foreign military presence on Algerian territory: Russian structural cooperation related to arms contracts.

Armed forces characteristics and capabilities

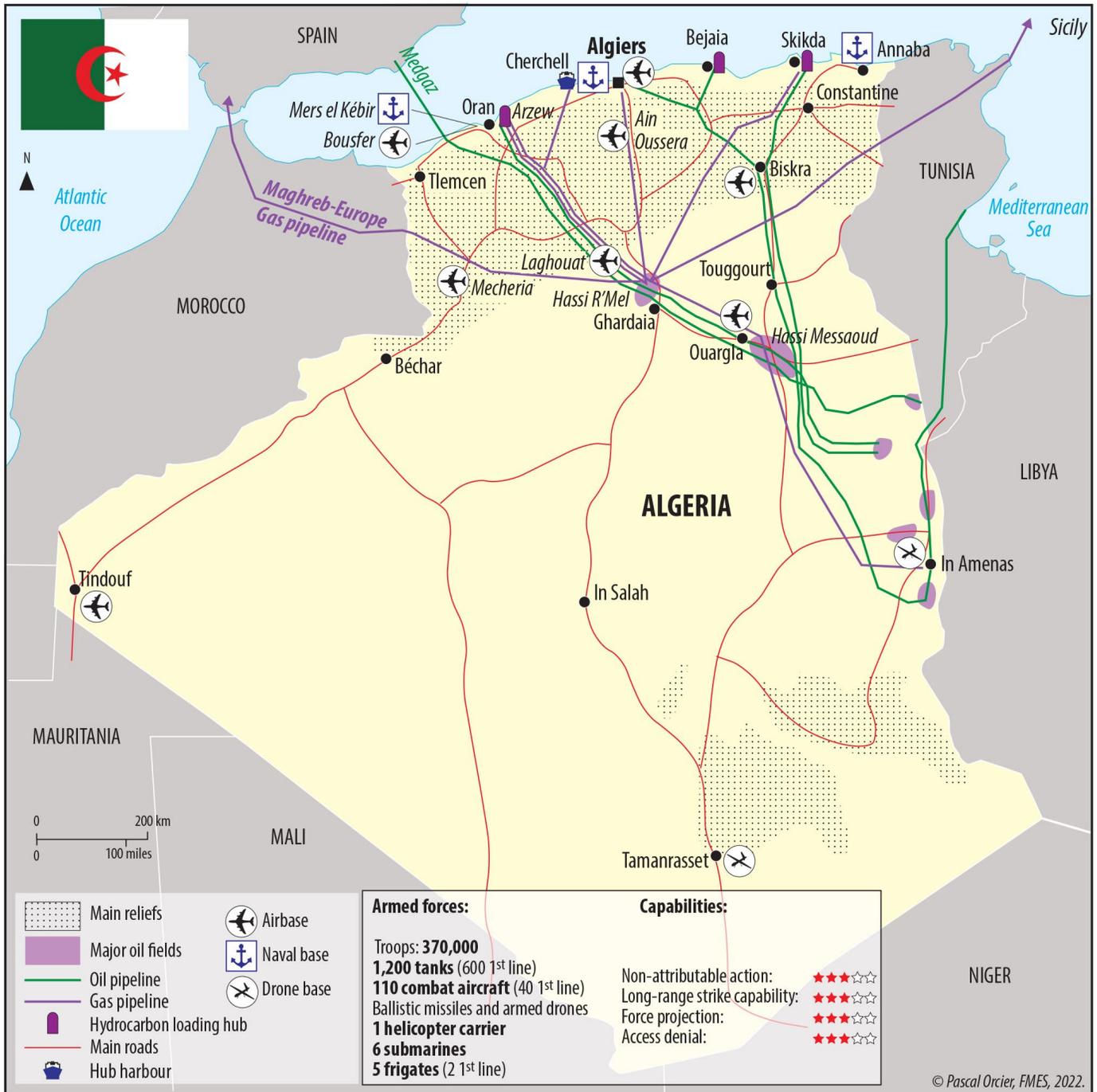
Motivation ★★☆☆☆

Equipment ★★★★★

Resilience ★★★★★

Combat effectiveness ★★★★★

Doctrine/Planning ★★☆☆☆



»» Strategic objectives

- Guarantee the independence and integrity of the country (Kabylia) by all means necessary, through ensuring the loyalty of the army and fighting against the armed Jihadi groups that threatened the country during the years 1990-2000. The army, a major player in the survival of the regime (FLN), instrumentalises tensions with Morocco, France and Israel.
- Establish itself as the natural leader of the Maghreb against Morocco; to provide ideological and material support to the Polisario Front to put pressure on Rabat and eventually find an outlet to the Atlantic Ocean.
- Project its influence in the direction of the Sahel while controlling the desert part of the territory to prevent it from being destabilised by armed Jihadi groups and the irredentism of the cross-border populations (Azawad) which would threaten the country's oil and gas sites (95% of its foreign currency resources).
- Strengthen energy and arms cooperation with Russia and China without falling under their influence.
- Maintain strong links with Tunisia and important links with Spain and Italy (its two main European clients in terms of hydrocarbons) but also with Germany with which it shares growing interests (economic and military).

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Numerous and highly effective weapons.

Significant deep strike capability (ballistic missiles, cruise missiles, 4th generation fighters, armed UAVs) and force projection capability (equivalent of 6 regiments).

Significant denial of access capability.

Growing capabilities in the field of Invisible assets (surveillance, intelligence, non-attributable actions, special forces, underwater threat).

VULNERABILITIES

Low motivation of many conscripts.

Operational experience limited to counter-insurgency.

Large and mainly desert territory difficult to control.

Rigid Soviet-inspired doctrine.

Generational gap between middle-ranking officers and the very old upper hierarchy.

Dependence on supplier countries.

Weak cyber capabilities.

'INVISIBLE' ASSETS

Long range surveillance and strategic intelligence gathering:

- **3 reconnaissance satellites:** Alsat-2A (2010), Alstat-1B et Alstat-2B (2016, resolution of 2.5m)
- MALE UAVs (from China): CH-3, CH-4, Yabhon United-30, Wing Loong II
- 4 MiG-25RB reconnaissance aircraft
- 3 Gulfstream G-550 electromagnetic listening aircraft
- Infiltration units in hostile territory
- Strategic planning and forecasting Department (attached to the Chief of the Defence Staff)
- Large (but very inward-looking) intelligence services

Potentially non-attributable actions:

- UAV strike capability (CH-4)
- Submarine strike capability: **6 submarines** (2 Kilo 877 and 4 Kilo 636 upgraded ★★☆☆☆)
- Underwater mines: MDM-1 & 2
- Combat swimmer sabotage capability
- Clandestine operations capability: 4 special forces regiments (104^e et 116^e RMO, RASM & 772^e RFCA)

'VISIBLE' ASSETS

Ground forces:

- **5 divisions** (2 armoured, 2 mechanised, 1 airmobile)
- **8 independent brigades** (2 armoured, 4 mechanised, 2 infantry) and 5 airborne regiments
- **1,200 main battle tanks:** 600 T-90S ★★☆☆☆ (1st line), 600 main battle tanks T-62/T-72 (2nd line)
- 2,000 other armoured fighting vehicles (BRDM-2, BMP-2, Fuchs, Fahd, BTR-60, BTR-80)

Air assets:

- **110 combat aircraft:** 40 Su-30MK of 1st line ★★☆☆☆
30 MiG-29S, 10 MiG-25PDS, 30 Su-24M
- 45 attack helicopters (Mi-24, Mi-28)
- Seeker II & Yabhon Flash-20 armed UAVs

Naval assets:

- **1 helicopter carrier** (LHD, with 6 helicopters on board)
- **5 frigates** (including 2 MEKO 200 ★★☆☆☆)

(Ground forces)

Portable surface-to-air missiles:

SA-9 ★★☆☆☆

Anti-tank missiles: Kornet-E ★★★★★☆

Artillery: 620 guns, howitzers and multiple rocket launchers (Smerch, TOS-1, 2S1, 2S3, PLZ-45, D-30, D-74, M-30, M-46, BM-14, BM-21, BM-24)

Long range strike capability: (+ 125 mi)

- 12 Iskander ballistic missiles (range of 300 km)
- 40 Su-30MK fighter bombers
- 5 Il-78 Midas air-to-air refuelling aircraft
- 3 Su-24 Fencer E electronic warfare aircraft
- CH-4 armed MALE UAVs

Sea-launched cruise missiles:

SSN-30 Klub-S Kalibr (range of 280 km) ★★★★★☆

(Naval assets)

· 3 Koni corvettes ★★☆☆☆

· 16 missile boats

Anti-ship missiles: RBS-15 ★★★★★☆

Torpedoes: Type 53-65 & MU-90 ★★★★★☆

Force projection:

- 11 Il-76 strategic transport aircraft
- 14 C-130H transport aircraft
- 14 Mi-26 heavy lift helicopters
- 4 airborne units
- 1 commando unit
- 4 amphibious assault ships (1 LHD & 3 LSM)
- 1 marine infantry unit

ANTI-ACCESS/AREA DENIAL (A2/AD)

Coastal defence: Missiles SSC-3 Styx ★★☆☆☆

Anti-aircraft systems: FD-2000B (From China, not yet delivered) ★★☆☆☆

GPS jamming capability

Interceptors: MiG-25PDS & MiG-29S armed with air-to-air missiles AA-10, AA-11 & AA-12 ★★★★★☆

Principal deliveries expected of military equipment



· 15 Su-30MK fighters ★★★★★☆ and 45 MiG-29 fighters ★★☆☆☆ (Currently being delivered)



· Several dozen multi-mission UAVs (Currently being delivered)

»» Briefing note

The People's National Army (ANP) remains the best equipped in North Africa. Politicized at the top and poorly motivated at the bottom, it remains first and foremost the life insurance, or even the embodiment, of a regime that has run out of steam. Although its offensive capacities are real, it remains structured for defence and follows a rigid tactical doctrine based on the old Soviet model. There is no doubt that the army would be efficient in the defence of Algerian territory if it were attacked, even if today it remains focused on counter-insurgency and the hunt for armed Jihadi groups.

In order to provide a diversion from a deteriorating internal situation and to justify its disproportionate military expenditure, since independence the Algerian regime has not hesitated to use tensions with Morocco, Israel, and France on a different level. Given the major importance of its diaspora, it could have a very strong capacity to influence France, which exercises a very strong attraction for the Algerian population. If the regime were to collapse, the risk would be:

- 1) to see the ANP take over the country as it did in 1992 by finding a compromise with the Islamist movement (the most likely scenario);
- 2) to see the army launch a military adventure against the Moroccan «hereditary enemy» to distract from internal difficulties;
- 3) to see the ANP disintegrate to the benefit of autonomous armed groups and breakaway military units that are likely to make use its arsenal of ultramodern weapons, destabilising the western Mediterranean and the Maghreb region.

»» Overview

Political system: **de facto presidential regime** (President Kaïs Saïed)

Population: 11.8 million inhabitants / 10th in the MENA region

Median age: 33 years old (length of compulsory military service: 12 months)

GDP: \$39 billion / 16th in the MENA region

Principal sources of wealth: phosphate, services, agriculture

GDP/inhabitant: \$3,300 / 15th in the MENA region

Defence spending: \$1.1 billion (2.8 % of GDP) / 19th in the MENA region

Total strength of armed forces: **35,500** / 16th in the MENA region

Breakdown of armed forces: Ground (27,000), Air (4,000), Navy (4,500)

Total strength of internal security forces: 28,000 (National Guard)

»» Geopolitical posture

Relevant international/regional security organisations: status of major US ally, 5+5 Defence

Special relationships: USA, France, Italy, Germany, Algeria

States in which the Tunisian armed forces have bases: None

States in which the Tunisian armed forces are deployed: **Mali, Central African Republic, Democratic Republic of Congo, South Sudan** (UN missions with 330 Tunisian troops)

States with which Tunisia is experiencing high levels of political tension: Israel

Foreign military presence in the country:

USA: deployment of a security support team. Participation in securing the Libyan border and occasional deployments of American MALE drones to the Bizerte air base.

Algeria: exchange of intelligence, in particular along the border and on the mountain ranges to the west of Kasserine.



Armed forces characteristics and capabilities

Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★★☆☆☆

»» Strategic objectives

- Guarantee Tunisia's security and sovereignty within a complicated domestic context and in a very unstable regional environment; manage (or prevent) the return of the many Tunisian jihadists.
- Maintain excellent relations with the European Union (particularly France and Italy) and the United States, which are seen as the ultimate guarantors of Tunisian security, particularly in the face of the possible presence of armed jihadist groups.
- Maintain good relations with both Algeria and Morocco.
- Observe a cautious attitude with President Erdogan's Turkey - especially on the Libyan border - that sees itself as the heir of the Ottoman empire that colonised Tunisia for three centuries.
- Promote the Palestinian cause considered as sacred by the Tunisian population and reject any normalisation with Israel; for the record, Tunisia hosted the PLO leadership on its territory from 1982 to 1994 (many Palestinian leaders have dual nationality).

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

A core of highly motivated regular personnel.

Excellent knowledge of the terrain, very useful in the fight against armed jihadist groups.

Strong American support, especially in terms of training (US AFRICOM).

Excellent image among the population.

VULNERABILITIES

Largely obsolete weaponry.

Lack of national strategy, doctrine and inter-service structures; rigid command structures at strategic and operational levels.

Very limited operational experience (fighting in Ben Gardane in 2016).

Ongoing progress in surveillance and intelligence (acquisition of drones).

Very low denial capability, especially in the anti-aircraft domain
= Inability to effectively protect the population in case of hostile strikes.

'INVISIBLE' ASSETS

Capacity for surveillance and discreet intervention

- Desert infiltration unit
- Special Forces Group (SFG)

'VISIBLE' ASSETS

Ground forces:

- **5 brigades** (3 mechanized, 2 adapted to the desert environment)
- 2 independent regiments (1 armoured, 1 commando)
- **80 M-60 main battle tanks** ★★☆☆☆ (3rd line)
- 150 other armoured fighting vehicles (AML-90, SK-105 Kuerassier, Saladin, M-113, Fiat 6614, Yalcin, Kirpi)

Portable surface-to-air missiles:

RBS-70 ★★☆☆☆

Anti-tank missiles:

Milan, TOW II ★★☆☆☆

Artillery:

60 guns and howitzers: M-101 (105 mm) & M-198 (155mm)

Long range strike capability: (+ 125 mi)

- no ability

Air assets:

- **5 F-5E combat aircraft** (3rd line) ★☆☆☆☆
- 14 OH-58 Kiowa attack helicopters

Naval assets:

- 3 Combattante II missile boats
- 4 offshore patrol boats
- 13 maritime patrol boats

Anti-ship missiles:

Exocet MM-40 Block-1 ★★☆☆☆

Force projection:

- 10 C-130 transport aircraft
- 8 UH-60 maneuvering helicopters
- 1 commando unit
- Special Forces Group (SFG)

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-aircraft systems: M-48 Chaparral ★☆☆☆☆

Interceptors: F-5E armed with air-to-air missiles AIM-9P Sidewinder ★☆☆☆☆

»» Principal deliveries expected of military equipment



· 18 fighters F-18C/D Hornet ex-Kuwaitis (delivery under negotiation)



· 2 training and support aircraft L-39NG (delivery under negotiation)



· 8 tactical observation UAVs Raven (not yet delivered)



· 3 ANKA-S UAVs (Currently being delivered)



· Altay main battle tanks and multiple rocket launchers TGR-300 Kasirga (not yet delivered)

»» Briefing note

Tunisia seeks to maintain good relations with all its neighbours as well as with the Arab world (a legacy of Bourguiba that the current president seems to want to continue), but above all with the United States perceived as its ultimate guarantee of security. Before taking an interest in regional geopolitics, Tunisia seeks first and foremost to guarantee its internal security threatened by militias and armed jihadist groups operating near its southern borders. One of these concerns consists in keeping Turkey at a distance, accused of interfering in domestic politics, while negotiating a good price with it for the modernisation of part of its armed forces (drones, armoured vehicles and artillery). Legitimist and loyal, the Tunisian armed forces remain discreet and do not interfere in political life. They are exclusively focused on territorial defence and participate in peacekeeping operations. Their main challenge is to modernise with a very limited equipment budget.

»» Overview

Political system: Civil War between:

- the UN-backed government of national unity (GNU) in Tripoli
- the Libyan national army (LNA) supported by the parliament in Tobruk

Population: 6.5 million inhabitants / 14th in the MENA region

Median age: 26 years old (military service: volunteering)

GDP: \$40 billion / 15th in the MENA region

Principal sources of wealth: Oil and natural gas

GDP/inhabitant: \$6,000 / 11th in the MENA region

Defence spending: \$2 billion (5% of GDP) / 15th in the MENA region

Total strength of armed forces: 60,000 / 13th in the MENA region

Breakdown of armed forces: Ground (58,000), Air (1,000), Navy (1,000)

Total strength of internal security forces: Militias attached to the main cities

»» Geopolitical posture

Relevant international/regional security organisations: 5+5 Defence

Special relationships:

- GNU : Turkey, Qatar, Italy, United Kingdom
- LNA : Russia, Egypt, United Arab Emirates, Jordan, Syria

Each side is strengthening its positions despite a ceasefire agreement signed on October 23, 2020.



Embargo on arms deliveries to Libya monitored by the European Union's «Irin» maritime mission.

Armed forces characteristics and capabilities

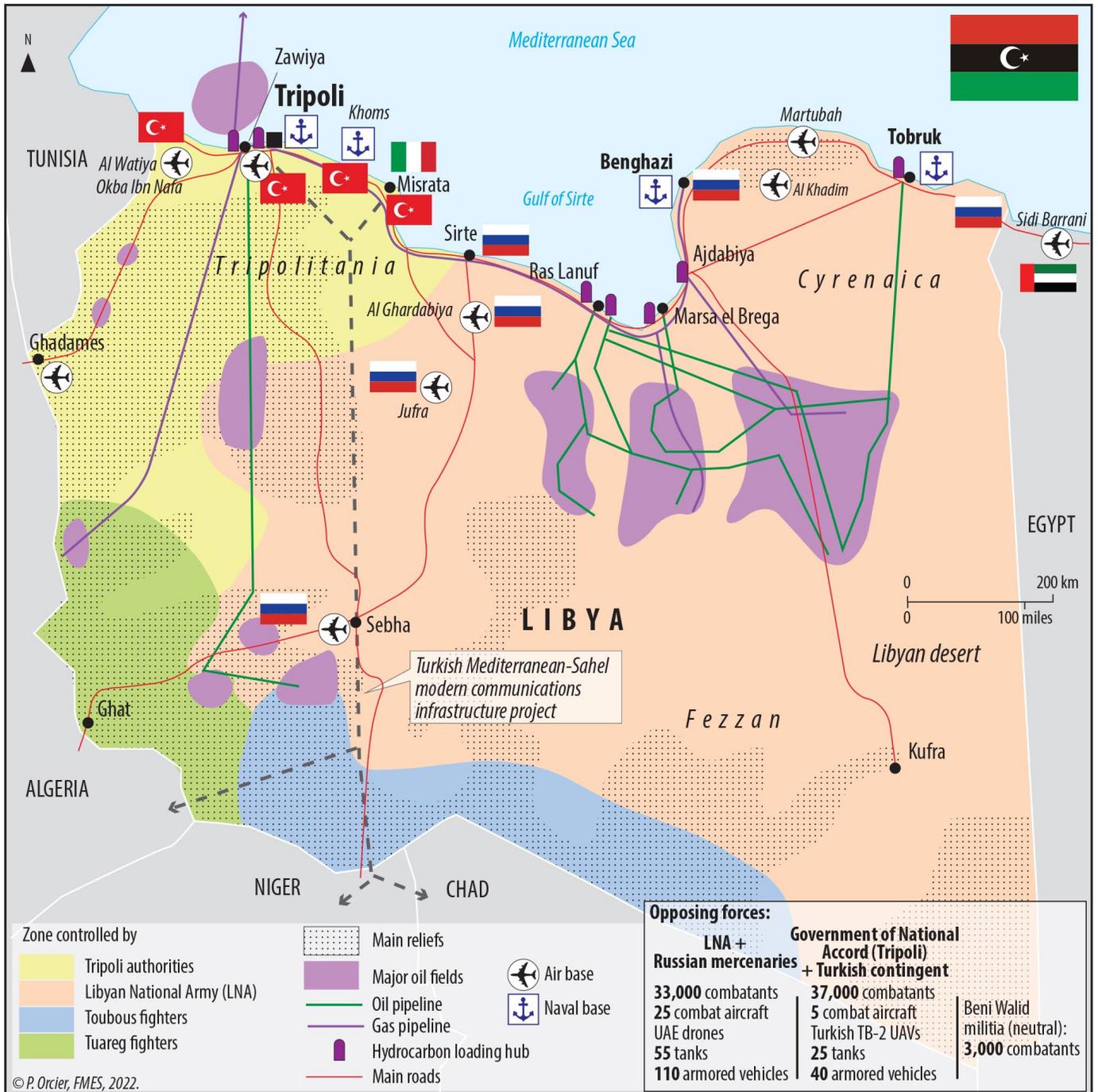
Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★☆☆☆☆

Doctrine/Planning ★☆☆☆☆



»» Strategic objectives

- End the civil war by agreeing on a political outcome, finding a way to distribute resources and holding presidential and legislative elections.
- Secure energy infrastructures to ensure their proper functioning.
- Ensure the neutrality of the United States and the European Union, while maintaining channels of communication with all actors involved on the ground.
- Disarm the militias and avoid the intervention of additional foreign military contingents.
- Negotiate the eventual withdrawal of foreign quotas.

»» Foreign military presence in the country:

Invited by the GNU:



Turkey: Contingent of about 1,000 military + 6,000 pro-Turkish Syrian mercenaries exfiltrated from the Syrian front using artillery, UAVs, intelligence, anti-aircraft, and anti-tank systems.
No F-16 fighter deployed in Libya, probably because of American and Russian pressure.



Italy: Military advisors + a field hospital and its security detachment (400 soldiers).

Invited by the LNA:



Russia: Presence of Russian military advisors and special forces.



Wagner Group (Russia): Contingent of 1,000 mercenaries with 10 MiG-29 and 4 Su-24 based in Jufra, Al Ghardabiya and Al Khadim + about 2,000 Syrian mercenaries.



United Arab Emirates: Occasional presence of UAE military advisors and special forces to operate UAVs, UH-60 Black Hawk helicopters and SA-22 Pantsir surface-to-air missile systems; occasional strikes by UAE Mirage 2000-9 based at Sidi Barani in Egypt. Presence of several thousand Sudanese, Nigerian and Chadian mercenaries.

Likely to intervene very quickly:



Egypt: Egypt deploys the 21st Armored Division, the 33rd Mechanized Division and two parachute and commando brigades to the Libyan border to intervene, if necessary.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Foreign support.

Excellent knowledge of the ground and the local actors.

Involvement with the civilian population.

GOVERNMENT OF NATIONAL UNITY (GNU)

Ground forces (3rd line) :

• **5 joint brigades** (5,000 fighters)

• **A dozen city militias** (20,000 fighters)

25 main battle tanks T-55, T-72 & M-60 ★★☆☆☆

40 other armored fighting vehicles (ACV, Kirpi, Vuran)

300 pickups with twin or quad of 23mm guns

Portable surface-to-air missiles:

Strela-2 ★★☆☆☆

Anti-tank missiles:

AT-14, Karaok ★★★☆☆

VULNERABILITIES

Insufficient and aging heavy weaponry (except for UAVs and missiles).

Low motivation of fighters on both sides; loyalty of militias very uncertain.

No coordination between the main combatant units. Uncertain logistics due to the international embargo and the respective agendas of the «sponsor» states.

Air support very insufficient and naval support almost non-existent.

LIBYAN NATIONAL ARMY (LNA)

Ground forces (3rd line) :

• **10 joint brigades** (25,000 fighters)

• **5 city militias** (10,000 fighters)

55 main battle tanks T-55 & T-72 ★★☆☆☆

110 other armored fighting vehicles (BTR-60, BMP-2, Puma, Terrier)

100 pickups with twin or quad of 23mm guns

Portable surface-to-air missiles:

Igla-S ★★★☆☆

Anti-tank missiles:

Avelin, Kornet-E ★★★★★

GOVERNMENT OF NATIONAL UNITY (GNU)

Artillery:

20 guns, howitzers and rocket launchers (2S1, Palmaria, Firtina, D-30, M-46, BM-21)

Air assets (3rd line):

- 5 combat aircraft (L-39 & SF-260)
- 2 CH-47 transport helicopters
- Bayraktar TB-2 armed UAVs

Naval assets (3rd line):

- 1 landing ship (LST)
- 20 light patrol boats

Submarine mines:

MDM-1 & 2

Anti-Access/Area Denial (A2/AD):

- Coastal defence: SSN-2C Styx ★☆☆☆☆
- Anti-aircraft systems: S-200, MIM-23B Hawk ★★☆☆☆

LIBYAN NATIONAL ARMY (LNA)

Artillery:

2 SCUD ballistic missile launchers + 40 guns, howitzers and rocket launchers (2S1, 2S3, D-30, M-46, BM-21)

Air assets (3rd line):

- 25 combat aircraft
(including 14 from Wagner group): 10 MiG-29 ★★☆☆☆
4 Su-24, 3 MiG-23, 2 MiG-21, 2 Mirage F-1, 4 SF-260
- 2 Mi-35 attack helicopters
- UAE armed UAVs

Naval assets (3rd line):

- 1 Al Hani corvette (Koni) held in Malta
- 1 Combattante II missile boat
- 12 light patrol boats

Anti-ship missiles:

Otomat Mk2 ★★☆☆☆

Submarine mines:

MDM-1 & 2

Anti-Access/Area Denial (A2/AD):

- Coastal defence: SSN-2C Styx ★☆☆☆☆
- Anti-aircraft systems: S-200, MIM-23B Hawk ★★☆☆☆
- Interceptors: MiG-29 ★★☆☆☆

»» Briefing note

The fighting of 2020 has led to a status quo that suits the regional and global actors involved in Libya well; neither side (UNG & NLA) can prevail or threaten its neighbours, which can only favour a negotiated political outcome that would allow each of the protagonists to preserve its interests, especially Turkey, which considers Tripolitania as a bridgehead to the Maghreb and the Sahel. Given the lack of means, of efficient arms (especially in the air), but above all of their mediocre command and coordination structures, neither of the two camps can hope for a major breakthrough without the support of foreigners (Turkey for the GNU; Russia, the UAE and Egypt for the ANL). On the other hand, each side remains sufficiently powerful to control its own territory and prevent any incursion of armed jihadist groups into Tripolitania and Cyrenaica. Only the south of the country (Fezzan) remains a lawless area dominated by Tubu and Tuareg tribes.

»» Overview

Political system: **military presidential regime** (President Abdel Fattah al-Sissi)

Population: 103 million inhabitants / 1st in the MENA region (140 million in 2050)

Median age: 24 years old (length of compulsory military service: 12 to 36 months)

GDP: \$330 billion / 2nd largest African economy / 6th in the MENA region

Principal sources of wealth: Diaspora, Tourism, Hydrocarbons, Suez Canal, textile

GDP/inhabitant: \$2,900 / 17th in the MENA region

Defence spending: \$4 billions (1.3% of GDP) + \$1.3 billion of American aid / 12th in the MENA region

Total strength of armed forces: **438,000** / 2nd in the MENA region

Breakdown of armed forces: Ground (310,000), Air Defence (80,000), Air (30,000), Navy (18,000) + 400,000 poorly trained reservists

Total strength of internal security forces: 390,000

»» Geopolitical posture

Relevant international/regional security organisations: None, but major US ally status

Special relationships: USA, France, Russia, United Arab Emirates, Saudi Arabia, China, Greece

States in which the Egyptian armed forces have bases: None

States in which the Egyptian armed forces are deployed: **Yemen** (6 F-16 fighters and frigates based in Saudi Arabia from time to time); 2,400 troops engaged in UN missions in **Sudan, South Sudan, Mali, Western Sahara and Central African Republic.**

States with which Egypt is experiencing high levels of political tension: Ethiopia, Turkey, Qatar, Libya



Armed forces characteristics and capabilities

Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★☆☆☆☆

»» Strategic objectives

- Ensure regime survival and domestic stability in the face of uncontrollable population growth and the socio-economic challenges this presents.
- Challenge the political Islam of the Muslim Brotherhood by keeping the Turkish rival and its Qatari ally at bay, with the support of the United Arab Emirates, especially in Libya.
- Re-establish itself as a regional power and the leader of the Arab world, without antagonising Saudi Arabia, which remains an essential diplomatic and financial supporter of the Egyptian regime.
- Dissuade Ethiopia, by moving closer to Sudan in particular, to limit the effects of the large Ethiopian dam on the flow of the Nile, vital for Egypt, by showing if necessary that the Egyptian air force can strike as far south as Ethiopia.
- Maintain a balance in its international relations: managing the complex relationship with the United States, which fluctuates according to the administrations in place in Washington, while maintaining excellent relations with France, Russia and China, which nevertheless have divergent interests.
- Cooperate with Israel to eradicate the insurgency in the Sinai Peninsula and manage the Palestinian issue in a way that benefits both Egyptian and Israeli interests.

» Foreign military presence in the country:

Invited by the ruling government:



United Arab Emirates: 300 military personnel, 12 combat aircraft (Mirage 2000-9 / F-16 Block-60) + Wing Loong I/II MALE UAVs at Sidi Barrani air base.



USA: 275 military personnel at the Naval Medical Research Unit (NAMRU-3), the largest U.S. biological laboratory abroad.

Mandated by the United Nations:



Multinational Force & Observers (MFO) in Sinai: 1,120 military observers from 12 countries; main contingents: USA (455), Colombia (275) and Fiji (170)

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

- High quality intelligence and strategic analysis capabilities.
- Flexibility and pragmatism of the Ministry of Defence at the highest level, in unison with the President; real capacity for military intervention in case of necessity.
- Very good integration of the armed forces in society, including in the economic field, which is partially controlled by the military.
- Resilience of the military structure used to shortages, management of imponderables and operational failures.
- New equipment in the air force and navy and high motivation of the personnel serving them.

VULNERABILITIES

- Large army equipped with aging weapons that are highly dependent on American supplies.
- Outdated and compartmentalised Soviet-inspired doctrine; lack of inter-service cooperation.
- Operational experience limited to air strikes, maintenance of order and counterinsurgency; insufficient training and very rigid command structure that does not encourage initiative.
- Remoteness from sites to be protected (offshore gas fields, Suez Canal, Nile Valley, nuclear power plant under construction, Libyan and Israeli borders); inability to hold the immense desert territory.
- No in-flight refuelling capacity, making it essential to possess cruise missiles for a long-range strike capability.

'INVISIBLE' ASSETS

Long range surveillance and strategic intelligence gathering:

- **2 satellites:** 1 TIBA-1 for communications (2019), 1 Egyptsat-A of reconnaissance (2019, metric resolution)
- Wing Loong I MALE UAVs
- 6 E2-C Hawkeye early-warning aircraft
- 2 EC-130 electromagnetic listening planes
- Undercover and counter-terrorism units
- Strategic planning and forecasting (attached to military intelligence)

Potentially non-attributable actions:

- Offensive cyber-warfare capability
- Wing Loong UAV strike capability
- Submarine strike capability: **4 Type-209/1400 submarines** ★★☆☆☆
- Combat swimmer sabotage capability
- Clandestine operations capability: 5 special forces regiments

'VISIBLE' ASSETS

Ground forces:

- **13 divisions** (8 mechanized, 4 armored, 1 infantry)
- **14 independent brigades** (4 armored, 4 mechanized, 2 infantry, 1 paratrooper, 2 airmobile, 1 Republican Guard)
- **2,200 main battle tanks:** 1 100 M-1A1 Abrams ★★★★★☆ (1st line) 1 100 M-60A1/A3
- 4,600 other armoured fighting vehicles (M-113, BMP-1, BRDM-2, BTR-60, Fahd, Walid)

Portable surface-to-air missiles:

Stinger, Igla-S ★★★★★☆

Anti-tank missiles:

Milan, TOW-2 ★★★★★☆

Artillery:

1,000 guns, howitzers and multiple rocket launchers, mainly M-46 (130mm), M-109 (155mm) and M-270 MLRS (227mm)

Long range strike capability: (+ 125 mi)

- 24 Rafale fighters ★★★★★☆
- Wing Loong MALE UAVs
- 10 SS-1C Scud-B ballistic missiles (range of 300 km)

Cruise missiles:

Scalp EG (range of 400 km) ★★★★★☆

Air assets:

- **250 combat aircraft:** 24 Rafale ★★★★★☆ and 12 Su-35 (1st line) 158 F-16C/D, 16 Mirage 2000, 40 MiG-29 (2nd line)
- 80 attack helicopters: 40 AH-64D Apache, 30 Ka-52, 10 Mi-24
- Wing Loong armed UAVs

Naval assets:

- **2 Mistral class helicopter carriers** (waiting for KA-52K attack helicopters)
- **9 frigates:** 3 FREMM ★★★★★☆ (1st line) 4 de classe Perry (2nd line), 2 de classe Knox (3rd line)
- 6 corvettes (2 Gowind, 2 Type-53HE, 2 Descubierta)
- 12 missile boats
- 10 Super Seasprite anti-submarine warfare helicopters

Anti-ship missiles: MM-40 Block3 ★★★★★☆

Torpedoes: SeaHake DM2A4 ★★★★★☆

Force projection:

- 2 Il-76 strategic transport aircraft
- 24 C-130 transport aircraft
- 1 airborne brigade
- 18 CH-47 heavy lift helicopters
- 2 airmobile brigades
- 2 Mistral helicopter carriers + 2 amphibious assault ships (LSM) intended to serve as militarized ferries
- 2 divisions (21st armored, 33rd mechanized) deployed at the Libyan border, ready to enter into Libya, if necessary.

ANTI-ACCESS/AREA DENIAL (A2/AD)

Coastal defence: Otomat Mk2 missiles (range of 150 km) ★★★★★

Anti-aircraft systems: S-300, Buk-M2E & upgraded Hawk ★★★★★

Interceptors: Rafale armed with air-to-air missiles MICA ★★★★★

»» Principal deliveries expected of military equipment



· 30 Rafale fighters (not yet delivered)



· 24 attack helicopters of AH-64E Apache (currently being delivered)



· 6 corvettes (4 Meko  and 2 Gowind  currently under construction)



· 500 T-90s main battle tanks ★★★★★ (delivery under negotiation)



· 12 Su-35 fighters ★★★★★ (Currently being delivered)



· Wing Loong II MALE UAVs (delivery under negotiation)

»» Briefing note

Egypt, as the custodian of the Suez Canal, has a duty to protect the canal and to maintain good relations with the main global players in order to prevent any foreign military intervention and to find allies to prevent the military regime from becoming isolated in the UN Security Council.

The Egyptian armed forces remain primarily focused on fighting armed groups in Sinai, or anywhere they might enter from Libya and the Sahel. The emergence of more distant threats (Turkey, Libya and Ethiopia) is forcing the military's leaders rapidly to modernise the navy and part of the air force, and to reinforce the special forces to the detriment of the rest of the army and the anti-aircraft defences, both of which are excess remnants of Soviet influence. These arms are becoming the poor relatives of the Egyptian armed forces and are in charge of absorbing the very large number of conscripts. A cultural revolution seems necessary if the armed forces are to be digitised and their interaction processes modernised. In terms of defence, one of the dilemmas of the Supreme Council of the Armed Forces (SCAF), which is where the heart of power lies, consists in matching the need for standardisation of equipment (aircraft, tanks and ships) while guaranteeing multiple sources of supply so as not to depend on a single supplier state.

»» Overview

Political system: **Parliamentary democracy**

Population: 9 million inhabitants / 12th in the MENA region

Median age: 31 years old (length of compulsory military service: 30 months for men, 2 years for women)

GDP: \$395 billion / 5th in the MENA region

Principal sources of wealth: High Tech, industries, agriculture

GDP/inhabitant: 43 000 \$ / 4^e rang des pays ANMO

Defence spending: \$17 billion (4.3% of GDP) + \$4 billion of American aid / 2nd in the MENA region

Total strength of armed forces: 180,000 (active) / 8th in the MENA region + 450,000 trained reservists = 630,000

Breakdown of armed forces: Ground (135,000 + 385,000), Air & Space (35,000 + 55,000), Navy (10,000 + 10,000)

Total strength of internal security forces: 35,000 + 70,000 volunteers

»» Geopolitical posture

Relevant international/regional security organisations: The USA is a strategic ally of Israel; Peace treaties with Egypt and Jordan; Abraham Agreements with the United Arab Emirates, Bahrain and Morocco.

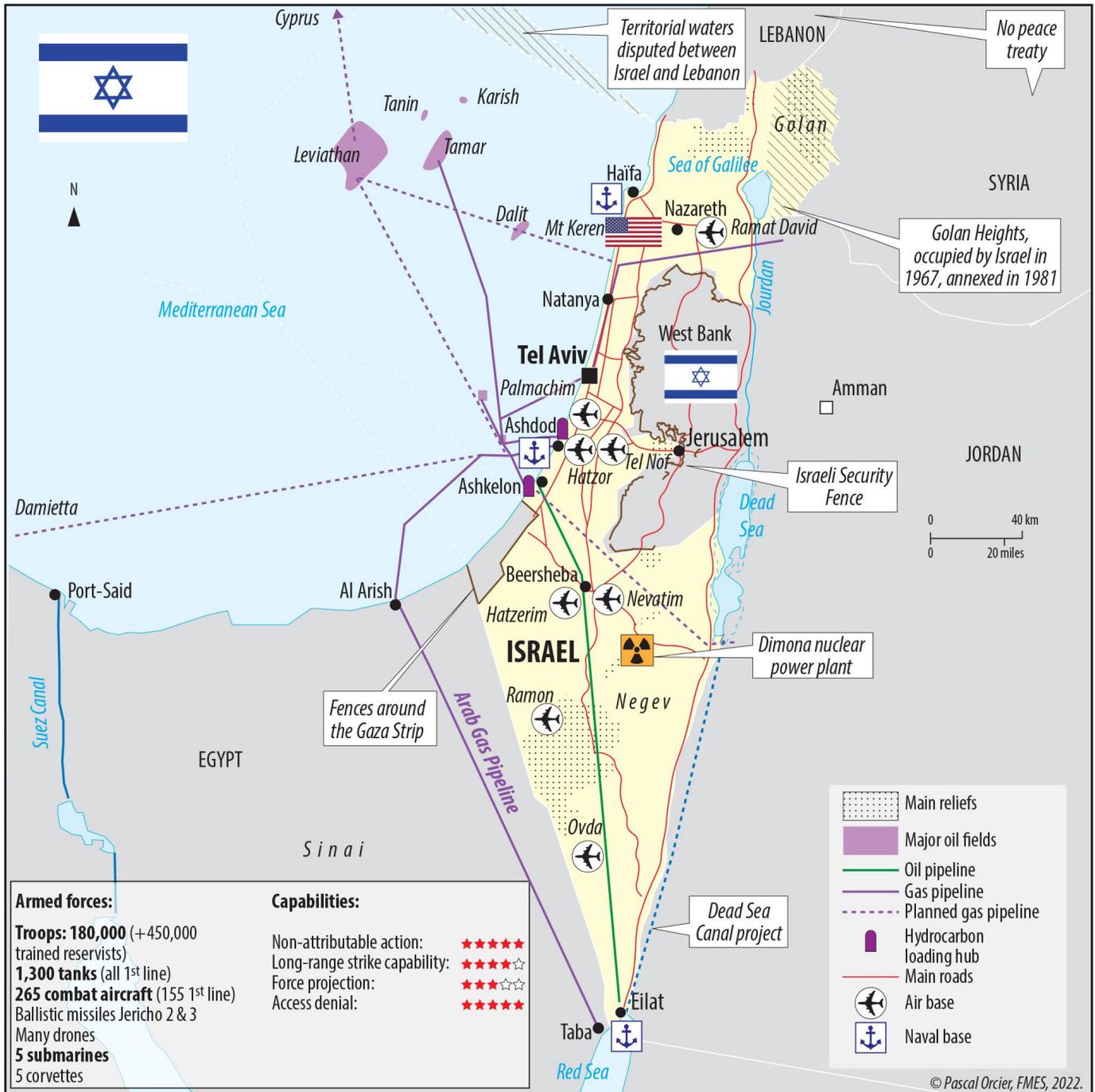
Special relationships: USA, Germany, Italy, Greece, India, France, Singapore, Azerbaijan

States in which the Israeli armed forces have bases: None officially but there are allegations of facilities or presence of wiretapping stations in Azerbaijan, Greece, United Arab Emirates and Eritrea.

States in which the Israeli armed forces are deployed: Lebanon and Syria (frequent raids and overflights by Israeli aircraft).

Israel occupies militarily a part of the territories under the control of the Palestinian Authority (areas B & C).

States with which Israel is experiencing high levels of political tension: Iran, Lebanon, Syria, Algeria, Tunisia, Turkey (depending on the period and concerning the Palestinian file only).



Armed forces characteristics and capabilities

Motivation ★★★★★☆

Equipment ★★★★★★

Resilience ★★★★★☆

Combat effectiveness ★★★★★☆

Doctrine/Planning ★★★★★☆

»» Strategic objectives

- Ensure that it remains the only military nuclear power in the Middle East for as long as possible; to prevent Iran or any other state in the region from reaching the nuclear threshold or acquiring an atomic bomb.
- Unite a regional anti-Iran front (logic of the Abraham Accords).
- Do everything to avoid the creation of a Palestinian state while avoiding the outbreak of a new Intifada and securing the home front, by far the most fragile.
- Maintain the status of a privileged US ally in the region, with the exceptional military assistance that comes with this status, while preserving economic ties with China despite US pressure.
- Never be isolated in the UN by ensuring the simultaneous support of at least two permanent members of the Security Council and the neutrality of a majority of states (notably African) in the General Assembly.
- Put pressure on the European Union (Israel's largest trading partner), notably via the Netherlands, Hungary and the Czech Republic, to prevent it from supporting the economic boycott of Israeli products.

Foreign military presence in the country:

Invited by the ruling government:



United States: 110 troops at the Mount Keren radar warning station and at the Mashabim anti-missile base; heavy weapons and ammunition stored in Israel.

Mandated by the United Nations:



UNDOF: Disengagement Observation Force (since 1974): 1,100 blue berets deployed on the Golan Heights belonging to 5 states: Nepal, Fiji, India, Ireland, Ghana.



UNTSO: Truce Supervision Organization (since 1948): 150 blue berets from 16 states; major contributors: Finland, Australia, Switzerland, Norway, Ireland, Netherlands

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Nuclear deterrence and anti-missile defence systems.

Very high-level intelligence and cyber capabilities.

Powerful deep strike capabilities.

Highly trained elite and active units (3 armoured brigades, 2 shock infantry brigades, paratroopers, special forces, marine infantry, and combat swimmers).

An offensive state of mind enhanced by an inventive doctrine, and planning and forecasting capabilities unparalleled in the region.

Very high level of automation limiting the need for personnel.

VULNERABILITIES

Risk of having to fight simultaneously on several fronts: against Iran (nuclear programme); on the northern border (Hezbollah, Lebanon, Syria); at sea to protect offshore gas platforms; and on the home front against the Palestinians (Gaza and the West Bank); tensions with Israeli Arabs.

Obligation to protect the population as a priority; fairly low level of acceptability of civilian and military losses.

Superiority complex leading to underestimation of some threats.

Lack of recent experience in high-intensity combat; cumbersome logistics.

Unequal level of effectiveness of units according to their active or reserve status; younger generations are reluctant to join combat units and lack of training of conscripts leads to deficiencies.

'INVISIBLE' ASSETS

Long range surveillance and strategic intelligence gathering:

- **11 satellites:** 6 electro-optical recognition: Eros-B1 (2006), Ofeq-7 (2007), Ofeq-9 (2010), Ofeq-10 (2014), Ofeq-11 (2016), Ofeq-16 (2020, resolution below 50cm); 1 of radar imagery (TECSAR, 2008); 4 of communication: Amos-3 (2008), Amos-4 (2013), Amos-8 (2018), Amos-17 (2019)
- Many HALE and MALE UAVs (Heron, Heron-TP, Hunter, Hermes-450, Hermes-900)
- 5 early-warning aircraft (2 Boeing, 707 Phalcon, 3 Gulfstream G-550)
- 4 SIGINT aircraft (1 Boeing EC-707, 3 Gulfstream G-550)
- Units 8200 (SIGINT) and 9900 (synthesizing spatial and aerial imagery)
- Mossad + National Security Council (intelligence fusion) + Strategic Anticipation Services of the Ministries of Defence and Foreign Affairs

Potentially non-attributable actions:

- **Nuclear deterrent capability** (estimated): about 80 modernized and miniaturized nuclear warheads that could be delivered by F-35 or F-16I fighters, by Jericho-2 (3,000km) and Jericho-3 (6,000km) long-range ballistic missiles able to reach Iran, Pakistan and Russia, and probably by Popeye Turbo naval cruise missiles (1,500km range).
- High offensive cyber-warfare capability
- Stealth air strike capability thanks to 30 stealth F-35 fighters
- UAV strike capability (Hermes-450, Heron-TP, Harop)
- Submarine strike capability: **5 submarines** (3 Dolphin of upgraded Type-209; 2 Dolphin-2 of Type-212 ★★☆☆☆ with anaerobic capability, each probably capable of firing 4 Popeye Turbo naval cruise missiles)
- Combat swimmer sabotage capability (13th Flotilla)
- Clandestine operations capability: many infiltration units + Sayeret Maatkal

'VISIBLE' ASSETS

Ground forces:

- **12 divisions** (5 armored, 5 mechanized, 1 airmobile, 1 airborne) divided into 3 active divisions, 5 territorial defence and 4 reserve divisions]
- **4 independent brigades** : 1 from Nahal, 1 paratrooper, 1 mechanized (Kfir), 1 commando (Oz)]
- **1,300 Merkava-III/IV main battle tanks** ★★★★★☆ of 1st line (with whom 800 are stored for reservists)
- 1,400 other armoured fighting vehicles (M-113, Namer, Nagmachon, Nakpadon, Puma, Zeev) + 4,000 M-113 stored (reserves)

Portable surface-to-air missiles:

Stinger ★★★★★☆

Anti-tank missiles: Spike ★★★★★☆

Artillery:

- 300 M-109 self-propelled howitzers (155mm) and M-270 multiple rocket launchers MLRS (227 mm) + 300 stored guns

Long range strike capability: (+ 125 mi)

- 155 fighter bombers F-35I, F-15I & F-16I
- 12 air-to-air refuelling aircraft (2KC-46, 6 KC-707, 4 KC-130)
- 3 Gulfstream G-550 electronic warfare aircraft
- MALE UAVs (Hermes-450, Heron-TP)

Cruise missiles:

Delilah (range of 250 km) ★★★★★☆

Sea-launched cruise missiles from Dolphin-2:

PPopeye Turbo (range of 1,500 km) ★★★★★☆

Air assets:

- **265 combat aircraft** 155 of which are 1st line: 30 F-35I ★★★★★☆ 25 F-15I, 100 F-16I) ; 110 of 2nd line: 35 F-15C/D, 75 F-16C/D
- 40 AH-64 Apache attack helicopters
- Many armed UAVs including Harop kamikaze UAVs

Naval assets:

- 5 corvettes (2 Saar 6 / ★★★★★☆, 3 Saar 5)
- 8 missile patrol boats (Saar 4.5)
- 7 antisubmarine Panther helicopters

Anti-ship missiles:

Harpoon Block-2+, Gabriel Mk5 ★★★★★☆

Torpedoes: SeaHake DM2A4 ★★★★★☆

Force projection: (pledge)

- 18 C-130 Hercules transport aircraft
- 25 CH-53D Sea Stallion heavy lift helicopters
- 45 S-70 Black Hawk helicopters
- Special forces and airborne units
- 3 amphibious assault ships (LCVP)
- 1 marine infantry unit

3 divisions (36th and 162nd armored, 98th airmobile) and 2 brigades (35th paratroopers, Oz) ready to engage combat in Lebanon or Syria immediately, if necessary.

ANTI-ACCESS/AREA DENIAL (A2/AD)

Coastal defence: Gabriel Mk5 missiles ★★★★★☆

Anti-missile systems: Arrow-2/3 (very long range), David Sling (long range), Iron Dome (short range) ★★★★★★

Anti-aircraft systems: Patriot PAC-2, Barak-8 ★★★★★☆

GPS jamming capability and electronic warfare

Interceptors: F-15I & F-16I armed with air-to-air: AMRAAM & Python-5 missiles ★★★★★☆

»» Principal deliveries expected of military equipment



· 1 Dror-1 communication satellite (not yet delivered)



· 70 F-35I stealth fighters ★★★★★☆ (currently being delivered)



· 6 KC-46 Pegasus air refueling tankers (currently being delivered)



· 18 CH-53K heavy helicopters (not yet delivered)

»» Briefing note

Israel is characterised by a high standard of living and strong economic growth based on agri-food, industry, start-ups and high technology. This success, illustrated by a still positive migratory balance, nevertheless hides a real internal fragility linked to the conflict with the Palestinians (whose population is growing faster than that of the Jews), to tensions between increasingly diverse communities, to the increase in inequalities and to a certain form of rejection of the original pioneering spirit.

The Israeli authorities therefore seek to project an image of strength and power intended to dissuade their opponents from within as well as from outside, by maintaining the most powerful army in the region and by remaining for as long as possible the only state in the Middle East with nuclear weapons. Above all, they seek to avoid being involved in a major regional conflict whose lasting consequences (e.g., terrorism, missile strikes) would be unacceptable to a majority of the Israeli population and could be fatal to Arab regimes that have normalised their relations with Israel.

With their highly equipped and trained armed forces, Israeli officials have a formidable tool at their disposal, but they know that they cannot treat all security challenges by taking a sledgehammer to a nut. The Israeli armed forces are still lagging behind in their naval capabilities, which is pressuring it to increase its capacity to protect offshore gas installations that could easily be targeted by commandos and missile fire from Lebanon, Syria or even Iran.

»» Overview

Political system: **Presidential regime** (President Mahmoud Abbas)

Population: 5 million inhabitants (3 million in the West Bank, 2 million in the Gaza Strip)

Median age: 22 years old in West Bank; 18 years old in Gaza

GDP: \$15 billion (including international aid, such as from the European Union, UN and Qatar)

GDP/inhabitant: \$2,500 / 45% of the population of the Gaza Strip lives below the poverty line

Budget des forces de sécurité de l'Autorité palestinienne : \$1 billion

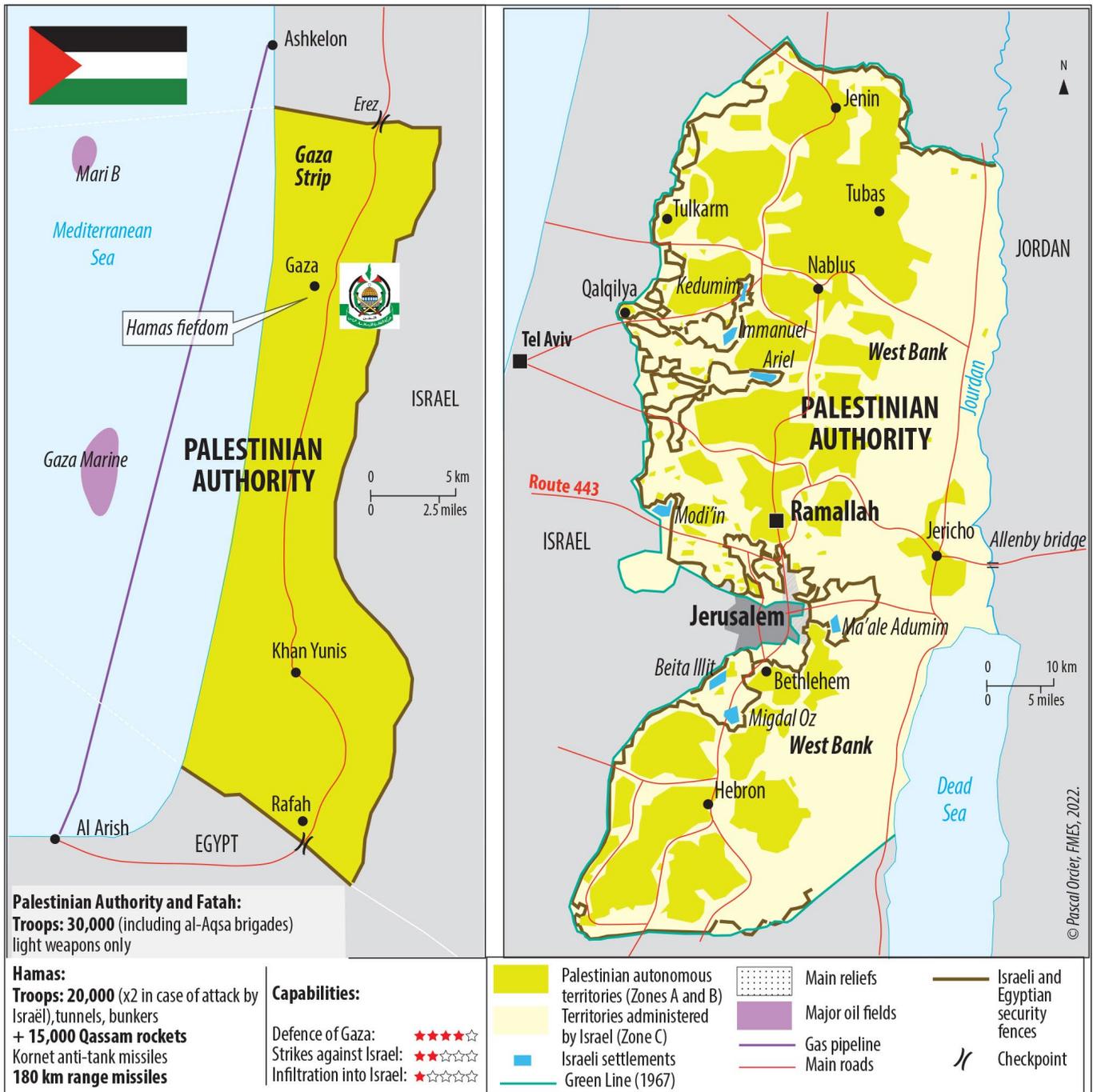
»» Geopolitical posture

The status of the Palestinian Authority is defined by the Oslo Accords (1993) under which the Israeli army administers Area C of the West Bank and controls the checkpoints in Area B, leaving the Palestinian Authority alone responsible for Area A. During the 2006 Palestinian elections, violent clashes within the Palestinian Authority led to the division of the Palestinian camp: Hamas took control of the Gaza Strip, advocating an autocratic political Islam close to the Muslim Brotherhood, and the internationally recognised Palestinian Authority, in which Fatah and the PLO predominate, kept control of the West Bank, where it advocates a less religious nationalist line.

Special relationships:

- **For the Palestinian Authority:** Egypt, Jordan, United States, European Union, Saudi Arabia
- **For the Hamas:** Turkey, Qatar, Iran, Egyptian intelligence service.

States with which the Palestinian Authority is experiencing high levels of political tension: Israel, Syria, Lebanon, United Arab Emirates.



»» Strategic objective of the Palestinian Authority (Ramallah):

Obtain the independence of Palestine by rallying maximum international support:

- To this end, relaunch the negotiations with Israel on the two-state solution, despite the weakening and division of the Arab camp (Abraham Accords) and the disenchantment of Palestinian society and the international community.
- Reunite Fatah and find a political compromise with Hamas.
- Failing that, procrastinate and postpone the elections in order to stay in power and continue to receive the international financial windfall.
- To not cross Israeli red lines in order to avoid a massive confrontation with Israel which would result in a new defeat and a weakening of its power as well as of the Palestinian cause.

Number of PA internal security forces in the West Bank: 32,000: presidential security (3,000), special forces (1,500), preventive security (4,000), national security forces (10,000) divided into **9 battalions**, police (9,500), former al-Aqsa Brigades cadres / headquarters in Ramallah / light weaponry only.

Number of Palestinian Authority internal security forces in Gaza: 33,000 (salaries paid by Ramallah, but these forces are demobilized and confined at their homes).

»» Strategic objectives of Hamas:

- Perpetuate Hamas' control over the Gaza Strip by curbing the jihadist factions.
- Take power in the West Bank so as to appear as the sole representative of the Palestinian people, in order to establish diplomatic relations with as many states as possible and to impose on Israel a balance of power that would force it to negotiate a compromise or to accept a costly military confrontation that would be very unpopular among Israelis.

To achieve this:

- Negotiate via Egypt a ceasefire of several years with Israel in order to strengthen itself, derive any profits from offshore gas fields, wait until Fatah is totally delegitimised and the Palestinian Authority leadership falls like a ripe fruit.
- Otherwise, to harass Israel (e.g. rocket attacks, bombings, incendiary attacks, kidnapping of soldiers) and to provoke a new Intifada in the West Bank.
- Ensure access to diverse sources of funding and armaments.
- Rely on the demographic weapon, thanks to a very young population, to increase the population differential on the continuum Israel-Palestinian territories in its favour (7 million Jews today compared to 7 million Palestinians, of whom 2 million live in Israel).

Number of Hamas «Islamic resistance» forces: 18,000 (x2 in case of an Israel attack); **6 Izz al-Din al-Qassam brigades** with 30 battalions of fighters, **1 special forces brigade**, Islamic Jihad Movement / Headquarters in Gaza.

- Budget: at least \$500 million (Iran, Qatar, Turkey); 80 generals
- Network of tunnels and bunkers; weapons production infrastructures
- Principal weapon systems:
 - +15,000 Qassam rockets
 - Kornet antitank missiles ★★☆☆☆
 - 120mm mortars and 122mm Grad multiple rocket launchers
 - R-160, Fajr-5, M302 Iranian missiles (range of 100 and 180km)

»» Briefing note

The Israeli-Palestinian conflict is more deadlocked than ever. The situation on the ground is frozen and none of the Palestinian factions, of roughly equal strength, is in a position to gain a lasting advantage. Israel no longer hides the fact that it will oppose the creation of an independent Palestinian state; it locks up the «West Bank archipelago» and is quite content with the division of the Palestinian camp as long as it does not lead to a new major confrontation with Israel. The leadership of the Palestinian Authority is aware that it will not succeed in regaining control of the Gaza Strip and that it is not armed to win a new Intifada against Israel. It is clinging to power and maintaining its privileges (230 generals!) with the support of its traditional allies. Hamas is betting on the long term and on the balance of demographic forces, aware that neither the Palestinian Authority, nor Israel, nor even Egypt are either capable or have the will to expel it from the Gaza Strip and to reoccupy this tiny landlocked territory in the long term.

»» Overview

Political system: **confessional parliamentary regime** (President Michel Aoun)

Population: 6.5 million inhabitants / 13th in the MENA region

Median age: 34 years old (no compulsory military service)

GDP: \$52 billion / 13th in the MENA region

Principal sources of wealth: trade, finance, agriculture

GDP/inhabitant: \$7,500 / 9th in the MENA region

Defence spending: \$2 billion (3.8% of GDP) / 14th in the MENA region

Total strength of armed forces: 65,000 / 11th in the MENA region

Breakdown of armed forces: Ground (61,500), Air (1,500), Navy (2,000)

Total strength of internal security forces: 20 000

»» Geopolitical posture

Relevant international/regional security organisations: None

Special relationships:

- **For the government:** USA, France, Cyprus, Italy, United Kingdom, Germany
- **For Hezbollah:** Iran, Syria

States in which the Lebanese armed forces have bases: None

States in which the Lebanese armed forces are deployed: None, but Hezbollah reportedly maintains 5,000 fighters in Syria and has sent advisors to Iraq and Yemen.

States with which Lebanon is experiencing high levels of political tension: Israel

Armed forces characteristics and capabilities

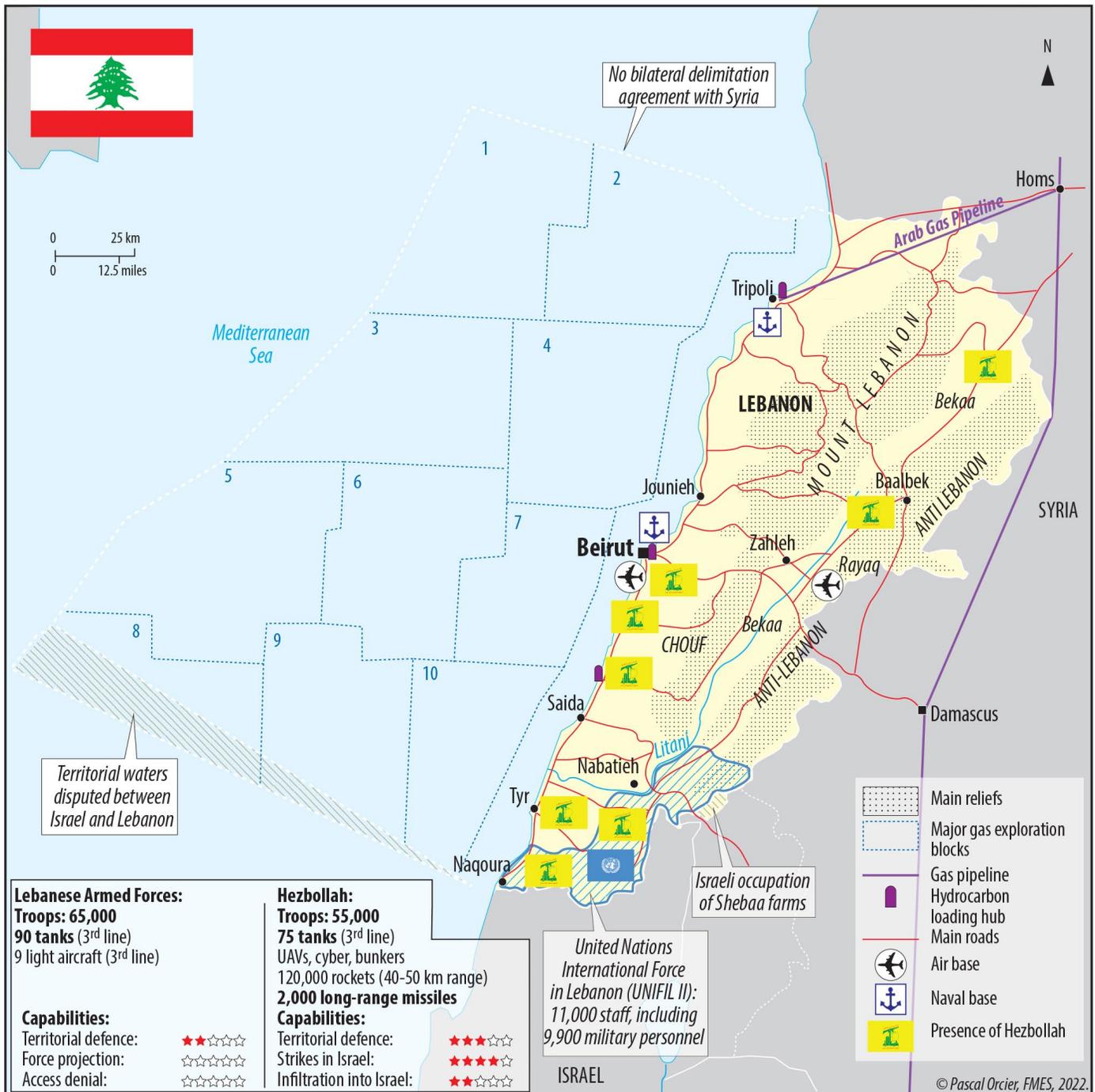
Motivation ★★☆☆☆

Equipment ★☆☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★☆☆☆☆

Doctrine/Planning ★☆☆☆☆



»» Strategic objectives

- Ensure the survival of a political system at the end of its tether, largely corrupt and incapable of reform, based on the distribution of the financial wealth between the large families that hold together the differing communities (Maronite Christian, Orthodox Christian, Sunni, Shiite, Druze) by maintaining the delicate balances agreed upon after the end of the civil war (Taif agreement of 1989), and then after the departure of the Syrian army following the assassination of the Prime Minister Rafic Hariri (2005)
- Maintain the balance between the country's two major political forces (the March 14th Alliance and the alliance of resistance) by negotiating with their respective international backers and avoiding any overt foreign military intervention.
- Find an agreement with Israel to delimit the maritime border between the two countries so as to allow the exploitation of offshore gas deposits, which should improve Lebanon's economic development and enrich the important families, and to limit the risks of confrontations with Israel of which the Lebanese population would be the main victims.

Hezbollah's specific objectives:

- Increase its influence on the domestic political scene and make it permanent in order to secure its influence and preserve the current confessional system by adapting it to its benefit.
- Manage the complex relationship with Iran in such a way as to retain its financial and logistical support, while at the same time displaying its autonomous decision-making capacity in order to distance itself from the image of a proxy subservient to the Iranian regime.
- To avoid a major confrontation with Israel which would inevitably impact the whole of Lebanon and from which Hezbollah would most probably emerge weakened.

»» Foreign military presence in the country:

Invited by the ruling government:



United States: military advisors



France: military advisors + 650 soldiers in UNIFIL II mission



Italy: military advisors + 1,000 soldiers in UNIFIL II mission



United Kingdom: military advisors

Invited by the Hezbollah:



Iran: Al-Qods Force Officers and military advisors (in Beit Mubarak and Bekaa camps) / Missile and UAV Experts / Intelligence Services



Syria: military advisors / intelligence service

Mandated by the United Nations:



UNIFIL: United Nations Interim Force in Lebanon (since 1978; UNIFIL II with a strengthened mandate since 2006): 11,000 personnel including 9,900 blue berets from 47 States; main contributors: Indonesia (1,250), Italy (1,000), Nepal (870), Ghana (860), Malaysia (820), India (775), France (650), Spain (630), China (420), South Korea (400), and Ireland (350); naval component consisting of 3 frigates and 3 rotating corvettes.



UNTSO: Truce Supervision Organization: 110 blue berets from 27 states (since 1948).

Occupation forces:



Israel: Detachment occupying the Shebaa farms area on the border between Israel, Lebanon and Syria

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Lebanese Armed Forces:

Inclusive interfaith character and strong legitimacy among the population.

Effective territorial networking to contain the terrorist threat.

American assistance.

Hezbollah :

Motivation, fighting spirit, hardiness, affinity with the Shiite population.

First-rate operational experience acquired over many years against Israel, and in Syria against Daech from 2013.

Mastery of defensive combat.

Firepower: long-range rockets and missiles capable of targeting most of Israeli territory (notably Tel Aviv and the Dimona nuclear power plant).

VULNERABILITIES

Lebanese Armed Forces:

Obsolete weaponry and very inadequate training.

Increasing logistical dependence on militias (Hezbollah and Lebanese Forces).

Inability to challenge Hezbollah's control over any issue related to territorial defence.

Inability to protect the population in case of Israeli strikes.

Hezbollah :

Dependence on Iranian and Syrian logistics.

War fatigue after eight years of constant fighting in Syria.

Inability to counter Israeli air raids.

'VISIBLE' ASSETS: Lebanese armed forces

Ground forces:

- **12 brigades** (1 from the presidential guard, 11 mechanized)
- 10 regiments (6 special forces, 1 airmobile, 1 commando, 1 armored, 1 marine infantry)
- **90 main battle tanks** : 10 M-60A2 ★★☆☆☆☆
80 M-48A5 Patton ★☆☆☆☆ (all 3rd line)
- 1,300 other armoured fighting vehicles (M2-A2 Bradley, VAB, M-113)

Air assets:

- **9 light counter-insurgency aircraft:**
6 Super Tucano ★☆☆☆☆ (3rd line), 3 AC-208
- 8 Gazelle attack helicopters ★☆☆☆☆
- 20 maneuvering helicopters (Puma, S-61, Bell-205 Iroquois)

Portable surface-to-air missiles:

Strela-2M ★☆☆☆☆

Anti-tank missiles:

Milan, TOW ★★☆☆☆

Artillery:

240 guns, howitzers and multiple rocket launchers (M-109, M-46, M-114, M-198, BM-21)

Naval assets:

- 8 patrol boats
- 2 light landing ships (EDIC)

No capability to deny access or strike Israeli territory

Surveillance and infiltration: military intelligence service:

Capacity for clandestine action through special forces and militias.

'INVISIBLE' ASSETS: Hezbollah

Chief: Hassan Nasrallah

Workforce: about 25,000 permanent staff + 30,000 on mobilisation = 55,000

Budget: at least \$1 billion (half of which comes from Iran): trafficking, profits from companies controlled by Hezbollah, «revolutionary taxes» levied on areas under its control, returns from the diaspora, especially in Africa.

Structure: 4 autonomous fronts (Beirut, South Lebanon, Bekaa Valley, Syria) linked by secure cyber networks of communication, command and coordination, supported by a whole set of media, including the Al Manar television network, and the setting up of a real electronic army of Hezbollah (extensive use of cyber and social networks for an informational war).

Defensive capabilities or area denial:

- Networks of tunnels, bunkers, arsenals, and underground infrastructures
- **75 main battle tanks** (T-72 ★★☆☆☆, T-62 and T-55) kept under cover in Syria
- A hundred armoured vehicles hidden in Lebanon
- Anti-tank missiles: RPG-29, Toophan, Kornet t ★★☆☆☆
- Portable surface-to-air missiles: SA-16/18/22, Misagh-2 ★★☆☆☆
- Anti-ship missiles: C-802, Yakhont (SSN-26) ★★☆☆☆

Offensive capabilities:

- Cyber warfare
- Clandestine action and infiltration into Israel / Commandos equipped with the same uniforms and weapons as Israeli infantrymen
- UAV strikes (Ayoub, Ababil-3, Mohajer-6 + Kamikazes UAV Shehab)
- + 120,000 rockets of 20-40 km range (Katyusha, Uragan, Oghab, Fajr-3/5, Shahin)
- 2,000 long-range missiles: 1,400 Nazeat & Zelzal-1 (150 km), 600 Zelzal-2 (350 km)
- Allegation of a dozen Scud-C missiles of 700 km range in Syria

Action by proxy militias: Amal Shiite Militia



No delivery expected due to the state's catastrophic financial and political situation in Lebanon.

»» Briefing note

The inability of the Lebanese authorities to manage political blockages, the deep economic crisis, the constantly postponed indispensable reforms and the difficult modernisation of the armed forces cast doubt on the relevance of the Lebanese model, even though the country of the cedar tree had long been considered as the Switzerland of the Middle East. This situation has long played into the hands of Syria, which is now a secondary player in Lebanon, and into the hands of Hezbollah and Iran, which are trying to impose themselves as the key players in the country, but also of Israel, which can strike at its opponents and violate Lebanese sovereignty without fearing international opprobrium.

This quasi-institutionalized procrastination is also the result of the relative balance of political forces between the March 14 Future (pro-Western and pro-Saudi) and the Alliance of resistance (pro-Syrian and pro-Iranian), which is illustrated by the military status quo between the Lebanese Armed Forces and Hezbollah. There is no doubt that only Hezbollah, a true clandestine army paradoxically modelled on the Jewish Haganah of the 1940s-50s, has the capacity to really defend Lebanon in case of aggression, whether it comes from Israel, armed jihadist groups or any other external actor. It is therefore illusory to expect Hezbollah to lay down its arms because this party draws its legitimacy from the act of “resistance». The only asset of the Lebanese Armed Forces is that they are interconfessional and are considered as one of the last factors of national unity. The challenge is therefore for them to incorporate, in one way or another, the cadres and fighting forces of Hezbollah, which Israel will not accept, thus prolonging the Lebanese status quo.

»» Overview

Political system: **Presidential regime** (President Bashar el-Assad)

Population: 17 million inhabitants / 9th in the MENA region

Median age: 24 years old (length of compulsory military service: 30 months)

GDP: about \$25 billion / 18th in the MENA region

Principal sources of wealth: Oil, agriculture

GDP/inhabitant: \$1,400 / 19th in the MENA region

Defence spending: about \$2,5 billion (10% of GDP) / 13th in the MENA region

Total strength of armed forces: 175,000 (+30,000 pro-regime militiamen) / 9th in the MENA region

Breakdown of armed forces: Ground (136,000), Air Defence (20,000), Air (15,000), Navy (4,000)

Total strength of internal security forces: 100,000

»» Geopolitical posture

Relevant international/regional security organisations: None, but privileged ally of Russia and Iran

Special relationships: Russie, Iran, Chine

States in which the Syrian armed forces have bases: None

States in which the Syrian armed forces are deployed: None

States with which Syria is experiencing high levels of political tension: Israel, Turkey, USA, United Kingdom, European Union, Iraq

States with which relations appear to be easing: Saudi Arabia, United Arab Emirates, Jordan, Qatar, Lebanon, Egypt

Armed forces characteristics and capabilities

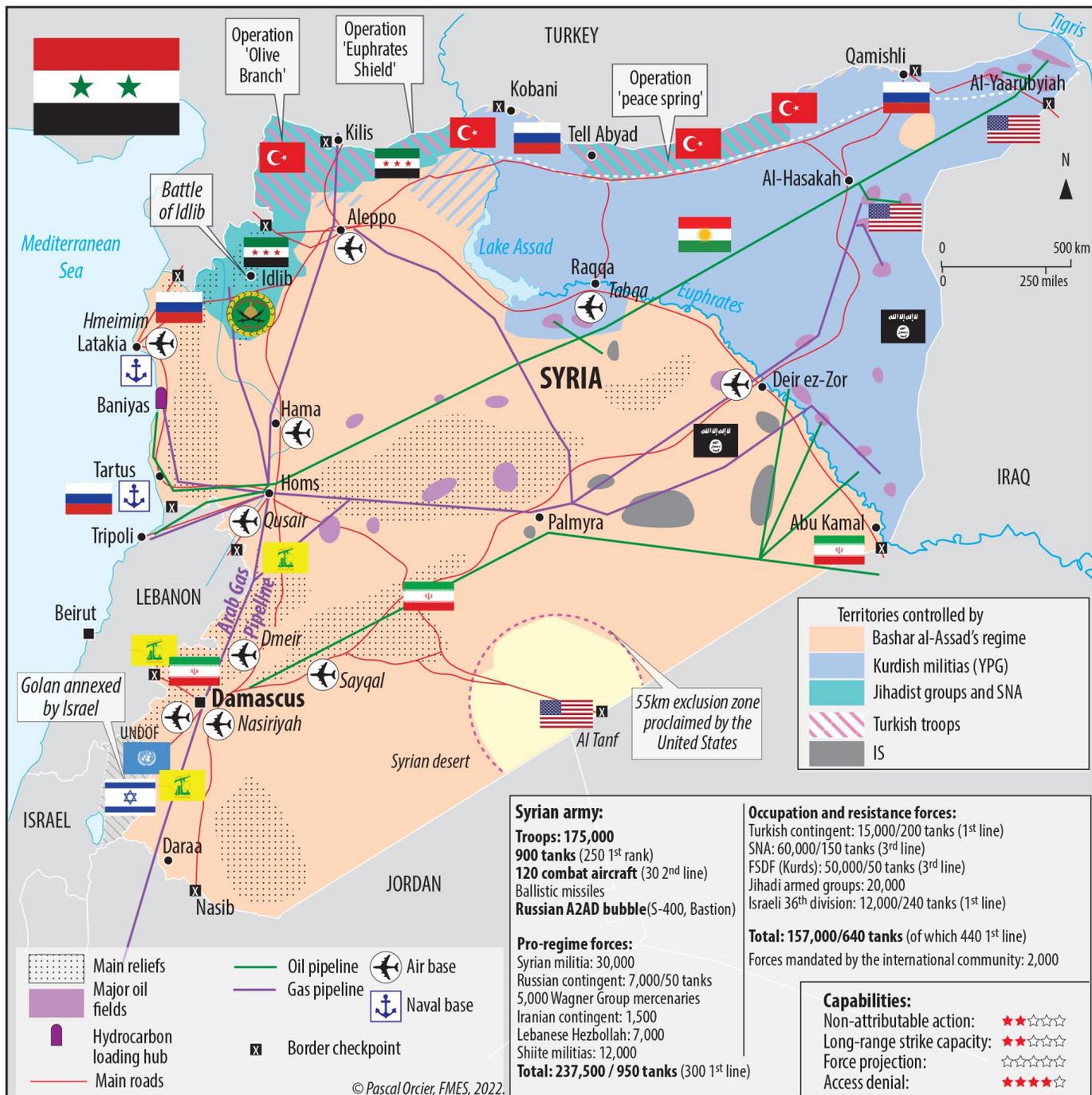
Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★★☆☆☆



»» Strategic objectives

- In the short term, to ensure the survival of the Alawite regime by any means necessary. In order to do this:
 - Eradicate all political opposition (linked in particular to the Muslim Brotherhood) or armed opposition (ANSL, FDS, armed jihadist groups) to Bashar al-Assad's regime.
 - Maintain full support from Russia and Iran; limit friction between Russian and pro-Iranian forces.
 - Keep the Syrian Kurds (PYD) under control while finding a compromise with them.
 - Respect the red lines defined by Israel for decades to avoid a massive intervention by Tsahal (no direct threat on the Golan Heights; no strikes on Israeli territory; no Iranian or Hezbollah presence near Israeli territory).
 - Renew links with the international community and the Arab-Muslim world in order to rebuild the Syrian economic model, attract investors and rebuild the largely destroyed country.
- In the medium term, reconquer all Syrian territory (excluding the Golan Heights), including the bridgeheads occupied by Turkey in northern Syria.
- In the long term, drive out the Iranians and Hezbollah, depending thereafter only on Russia, and find an agreement with Israel to resolve the Golan question.

»» Foreign military presence in the country:

Invited by the ruling government (+32,000):



Russia: 7,000 soldiers reinforced by **5,000 mercenaries** from the Wagner group: 1 mechanized brigade (50 T-90 tanks), 3 military police battalions, special forces, 1 ground-air defence regiment (S-400 & Pantsir-S2), electronic warfare and cyber offensive detachment, naval base, and coastal defence (Kalibr & Bastion missiles) in Tartous and Latakia, main air base in Hmemim (24 combat aircraft + 16 attack helicopters).



Iran: About 1,500 military advisors implementing UAVs, ballistic missiles, electronic warfare, and cyber offense targeting Israel from Al-Kiswah and Abu Kamal bases; mentoring of various Shiite militias engaged by Iran in Syria.



Lebanese Hezbollah: About 5,000 fighters (up to 12,000 fighters at the height of the Syrian civil war)



Shiite militias: About 12,000 militiamen from the Dhulfiqar Brigade (Iran), Syrian Shiites and Iraqi, Afghan and Pakistani Shiite brigades.

Resistance forces (130,000):



Kurds of the Syrian Democratic Forces: About 50,000 fighters scattered east of the Euphrates (have made a pact with the Syrian regime to ensure their survival).



Syrian National Army (SNA): About 60,000 militiamen in the areas of Idlib, Afrin, Kilis and Jarabulus (heavy weaponry + support from Turkey).



Jihadist armed groups: Hayat Tahrir al-Sham (ex-Al Qaeda, about 15,000 fighters) in the Idlib sector + Huras al-Din and the Turkestan Islamist Party (about 2,000 fighters) in the Kurdish area and in the southwest in the Deraa region (heavy weaponry + Turkish support).



Daech Katibas: (about 3,000 fighters) in southeastern Syria, near the Iraqi border.

Occupying forces (27,000):



Turkey: Turkish expeditionary force (15,000 troops and 200 Leopard-2 main battle tanks / 3 stars) in northern Syria as part of the framework of operations *Euphrates Shield* (2016), *Olive Branch* (2018), *Source of Peace* (2019), *Spring Shield* (2020).



Israel: Occupation (1967), then annexation (1981) of the Golan Heights; 36th armored division (12,000 soldiers and 240 Merkava IV+ main battle tanks ★★★★★☆) stationed there.

Mandated by the international community or the United Nations:



United States: 800 troops deployed in the framework of Operation Inherent Resolve to fight against ISIS: Army (1 mechanized infantry company) in the Tri-border region (Syria-Iraq-Jordan); Marine Corps (1 battalion) in the Hassakeh oil sector; Special Forces in the Kurdish area of Al Tanf.



United Kingdom: Special Forces as part of Operation Inherent Resolve to fight against ISIS.



France: Special Forces in the framework of Operation Chammal to fight against ISIS.



UNDOF (since 1974): 1,100 blue berets deployed on the Golan Heights belonging to 5 states: Nepal, Fiji, India, Ireland, Ghana.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Unwavering support from Russia and Iran.

10 years' experience of high-intensity warfare.

Highly experienced special forces and elite units (4th Armoured Division, Republican Guard).

Relaunch of military cooperation with other Arab states that are gradually normalising their relations with Damascus.

Deterrent presence of the Russian air force and navy which exert an A2AD bubble over Syria and the eastern Mediterranean.

VULNERABILITIES

Armed forces thinly spread to hold as much territory as possible against resistance forces, occupation forces and armed jihadist groups.

War fatigue, weariness and low morale, especially among militiamen and the many conscripts.

No force projection capability.

Aging weaponry, especially for the air force; total dependence on Russian and Iranian arms supplies.

Obsolete navy with no operational value.

'INVISIBLE' ASSETS

Long range surveillance and strategic intelligence gathering:

- Access to Russian space imagery and Iranian UAV images.

Potentially non-attributable actions:

- Electronic warfare and jamming capability
- Iranian-controlled UAV strike capability
- Glandestine action capability: secret services & special forces
- Manipulation of many militias active on the Syrian territory

'VISIBLE' ASSETS

Ground forces:

- 5 corps headquarters (1 per region)
- **9 divisions:** (3 armored, 3 mechanized, 2 special forces, 1 Republican Guard); 3 destroyed divisions (2 armored, 1 mechanized) being reconstituted
- **8 mechanized independent brigades**
- **900 main battle tanks :** 250 T-90 ★★☆☆☆ (1st line), 250 T-72B (2nd line), 400 T-62M (3rd line)
- 1,800 other armoured fighting vehicles (BMP-1, BMP-2, BRDM-2, BTR-82)

Portable surface-to-air missiles:

Igla-S ★★☆☆☆

Anti-tank missiles:

Kornet ★★☆☆☆

Artillery: 600 tubes of 122 mm (2S1, D-30), 130 mm (M-46), 152 mm (2S3) and 300 multiple rocket launchers (BM-21, BM-24, BM-27 Uragan, BM-30 Smerch, TOS-1, Khaibar, Fajr)

Long range strike capability (+ 125 mi)

- **About sixty ballistic missile vehicles** (2 brigades): Scud-C/D (range of 500-700 km), Fateh-110 & 9K79 Tochka (range of 250 km), Zelzal-2/3 (range of 200 km); a large part of the ballistic missile reserve was fired at the rebels during the civil war.
- **SS-N-26 sea-launched cruise missiles** ★★☆☆☆ (range of 300 km)

Air assets:

- **120 combat aircraft:** 30 MiG-29 ★★☆☆☆ (2nd line), 40 MiG-23, 30 MiG-21MF, 10 Su-24 and 10 Su-22M (3rd line)
- 50 attack helicopters: 25 Mi-24, 15 Mi-17, 10 Gazelle
- Russian and Iranian UAVs
- 9 transport planes (3 Il-76, 6 An-26) for the air bridge with Russia

Naval assets:

- 1 corvette Petya III
- 14 missile boats: 8 Osa-II, 6 Tir
- ASW helicopters (4 Ka-28, 4 Mi-14)

Anti-ship missiles:

C-802 ★★☆☆☆

ANTI-ACCESS/AREA DENIAL (A2/AD)

Coastal defence: K-300P Bastion & P-800 Yakhont ★★☆☆☆ (range of 300 km)

Anti-missile systems: S-400 ★★☆☆☆ of the Russian contingent

Anti-aircraft systems: S-300PMU2 ★★☆☆☆

GPS jamming capability (or electronic warfare)

Interceptors: MiG-29 armed with air-to-air missiles AA-11 Archer & AA-12 Adder ★★☆☆☆ ;
active presence of Russian Su-35 ★★☆☆☆

»» Principal deliveries expected of military equipment



· Constant flow of heavy armaments (main battle tanks, armored vehicles, helicopters, missiles, ammunition, fuel, logistics) to replace the destroyed equipment via the “Tartous Express”



· Armed UAVs (not yet delivery)

»» Briefing note

After ten years of a very deadly civil war during which all the global and regional players have clashed in Syria, directly or through militias, the Alawite regime of Bashar al-Assad seems to be on the way to winning the conflict. It has managed to maintain the balance between its allies and now controls most of its territory, even if it does not hold all of useful Syria, notably the agricultural areas occupied by the Turks in the north and the Kurds in the north-east, as well as the oil fields in the east controlled by the Kurds and their American backers. The clashes are now focused in the northwest in the Idlib region, a strategic crossroads between Syrian, Russian and Turkish influenced areas. The Russians have secured the Syrian coastline and the axis linking their bases in Tartous and Latakia to Damascus. The Turks occupy a border buffer strip in the north that allows them to cut off the PKK from its Syrian Kurdish supporters, while relocating some of the refugees who had previously settled in Turkey. The Iranians and their militias have secured a land corridor between the Iraqi border, Damascus and Lebanon. The status quo resulting from the Astana agreements between Russia, Iran and Turkey thus satisfies the main belligerents in the short term.

In order to regain the whole of its territory, the Syrian regime will first have to rebuild and modernise its army, which has been exhausted and weakened by ten years of incessant fighting. It is not certain that it is in the interest of its Russian and Iranian backers to help it fully accomplish this goal, even if the Kremlin seems to want to strengthen the Syrian army enough to diminish Iranian influence in the country. Bashar al-Assad's Syria is more than ever the hostage of the Middle Eastern strategies of Russia, Iran and Turkey.

»» Overview

Political system: **presidential system** (President Recep Tayyip Erdogan)

Population: 83.5 million inhabitants / 2nd in the MENA region

Median age: 32 years old (length of compulsory military service: 6 months)

GDP: \$720 billion / 2nd in the MENA region

Principal sources of wealth: Industry, food processing, textiles, air transport (Turkish Airlines)

GDP/inhabitant: \$8,900 / 8th in the MENA region

Defence spending: \$11 billion (1.5% of GDP) / 5th in the MENA region

Total strength of armed forces: **409,000 (including 368,000 military personnel)** / 3rd in the MENA region

Breakdown of armed forces: Ground (270,000), Air & Space (50,000), Navy (48,000)

Total strength of internal security forces: 157,000 (Coast Guard & Gendarmerie equipped with heavy weapons including 20,000 JÖH commandos specialized in the fight against the PKK)

»» Geopolitical posture

Relevant international/regional security organisations: ONATO, Astana Agreement (Russia, Turkey, Iran), Organization of Turkish States

Special relationships: Qatar, USA, Russia, Germany, China, Azerbaijan, Pakistan, Libya, United Kingdom, Spain, Ukraine, Hungary, Georgia

States in which the Turkish armed forces have bases: Northern Cyprus (35,000 soldiers), Qatar, Syria, Iraq, Libya, Somalia, Azerbaijan

States in which the Turkish armed forces are deployed: **Syria** (15,000), **Iraq** (1,500), **Libya** (1,000 + 3,000 mercenaries), **Azerbaijan**, **Afghanistan**, **Kosovo** (290 in KFOR), **Bosnia** (250 in the Althea mission), **Lebanon** (100 in UNIFIL II).

States with which Turkey is experiencing high levels of political tension: Syria, Greece, Armenia, Cyprus, France, Iraq; Germany & Russia depending on the time

States with which relations appear to be easing: United Arab Emirates, Egypt, Saudi Arabia, Israel



Armed forces characteristics and capabilities

Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★★☆☆☆

»» Strategic objectives

- Contain the jihadist threat and prevent the creation of an independent Kurdistan in the Middle East; keep the PKK under control by cutting it off from its bases in Syria and Iraq.
- In order to avoid a new military coup and to perpetuate the AKP's control in a strained economic context:
 - Continue the internal purges and muzzle the army.
 - Flatter Turkish nationalism by regaining influence in certain areas of the former Ottoman Empire (Balkans, Cyprus, Libya, Tunisia, Algeria, Sudan, Syria, Lebanon and Iraq); by stigmatising certain hereditary enemies (Greece and Armenia); and by developing Turkish influence in Europe, Africa and Afghanistan.
 - Promote the Islamo-nationalist agenda in Turkey and political Islam in the world by relying on Qatar and the Muslim Brotherhood networks, while keeping Iran, Egypt, Saudi Arabia and the United Arab Emirates at bay.
 - Guarantee President Erdogan's re-election by commemorating the 100th anniversary of the Turkish Republic in 2023 with a maximum of pomp and circumstance.
- Relaunch the economy by multiplying partnerships with China, Asia and Russia (nuclear power plants) and the Caucasus; by reinvesting massively in Libya; by continuing the economic conquest of Africa and the Middle East; and by establishing itself as a major hub for hydrocarbons (pipelines, off-shore gas in the Black Sea, and exploration in the Eastern Mediterranean).
- Assert the sovereignty of the Turkish nation through:
 - Weakening the European Union wherever possible while remaining an indispensable partner for NATO, especially in the context of the Ukrainian War.
 - Managing a delicate relationship with the US and Russia by giving them reassurances while keeping them at a distance to prevent them from interfering in Turkey's internal affairs and regional policy.
 - Continue the indigenisation of the Turkish defence industry.

» Foreign military presence in the country:

Invited by the ruling government:



USA: Contingent of 2,000 airmen and soldiers at the Incirlik air base and the Kürecik anti-ballistic missile network radar station.



Spain: 1 battery of Patriot PAC-2 missiles (150 soldiers).



NATO: Command of the Allied Land Forces at Izmir.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

NATO membership.

Strong operational experience (Syria, Libya, Afghanistan, and Nagorno-Karabakh), especially in the field of counter-insurgency and UAVs.

Excellent special forces.

Mastery of hybrid warfare.

Very mountainous terrain facilitating the defence of the territory in the event of external ground aggression, but offering sanctuaries to the PKK.

VULNERABILITIES

Successive purges have affected the morale of the armed forces and destroyed the capacity for initiative of the generals and the general staff; risk of officers overreacting to please the political power provoking air or naval clashes.

2nd rank air force; no 1st rank fighters and lack of well-trained pilots.

2nd rank Navy; deficiencies in detection and anti-submarine warfare.

Long-range anti-aircraft defence generally ageing.

Logistical stretch for units deployed in Libya, Qatar and Somalia.

'INVISIBLE' ASSETS

Long range surveillance and strategic intelligence gathering:

- **7 satellites:** Göktürk-1 (2016, metric resolution), Göktürk-2 and Rasat for observation; 4 for communication (Türksat 3A, Türksat 4A and Türksat 4B, Türksat-5A)
- Many MALE UAVs: Aksungur, Heron, Karayel, Anka-S
- 4 Boeing E-737 early-warning aircraft
- 8 SIGINT aircraft (C-160D Transall, Beech-350 King Air)
- MIT + Strategic Anticipation Service of the Ministry of Foreign Affairs

Potentially non-attributable actions:

- UAV strike capability (Anka-S, Bayraktar TB2, Kargu Kamikaze UAVs)
- Submarine strike capability: **11 submarines:** 1 Type-214 ★★☆☆☆, 8 Type 209/1400 ★★☆☆☆, 2 Type-209/1200 ★☆☆☆☆ (replaced by the 5 type-214 being delivered)
- Suspicion of underwater mine storage (MANTA, Rockan, Mk-60 Captor)
- Wattozz underwater UAV program (Ray Manta, under development)
- Combat swimmer sabotage capability (SAS : Su Alti Savunma ; SAT : Su Alti Taaruz)
- Capacity for clandestine action via infiltration of the diaspora and special forces (ÖKK: Özel Kuvvetler Komutanligi; MAK: Muharebe Arama Kurtarma)
- Interventions by proxy militias: Grey Wolves, many mercenaries (mostly Syrian), Syrian National Army (SNA), Hayat Tahrir al-Sham, Huras al-Din

'VISIBLE' ASSETS

Ground forces:

- 9 corps headquarters
- **4 divisions** (1 armored, 2 mechanized, 1 infantry)
- **38 brigades** (7 armored, 14 mechanized, 6 infantry, 6 commando, 2 airmobiles, 1 airborne, 1 mountain, 1 marine infantry)
- **1,900 main battle tanks** (300 of 1st line): 300 Leopard-2A4 ★★★★★☆ 350 Leopard-1 & 900 M-60 (2nd line), 350 M-48A5 (3rd line) [deployed in Northern Cyprus]
- 5,300 other armoured fighting vehicles (M-113, Akrep, Cobra, PARS, AIFV, Kirpi, Vuran)

Portable surface-to-air missiles:

Stinger ★★☆☆☆☆

Anti-tank missiles:

TOW II, Javelin, Kornet-E ★★★★★☆

Artillery:

1,000 guns and howitzers (M-52T, T-155 Firtina, Panter, Boran, M-114), 90 multiple rocket launchers (TR-300 Kasirga, M-270 MLRS, T-122)

Long range strike capability: (+ 125 mi)

- 60 ballistic missiles of J-600T Yildirim (300 to 900 km of range)
- 30 bombers of F-16 Block-50+ ★★★★★☆☆
- 7 KC-135 air-to-air refuelling aircraft
- 4 Global 6000 electronic warfare aircraft
- 150 armed MALE UAVs

Cruise missiles:

AGM-84K SLAM (range of 270 km) ★★★★★☆☆

Air assets:

- **250 combat aircraft:** 220 F-16 Block-50 ★★★★★☆☆ (2nd line), 30 F-16 Block-30
- 175 armed UAVs (including 160 armed MALE): 6 Aksungur, 20 Anka-S, 130 Bayraktar TB2, 10 Karayel, 9 Hero
- 80 attack helicopters: 45 T-129 Atak, 35 AH-1 Cobra

Naval assets:

- **16 frigates:** 8 Meko-200T ★★★★★☆☆, 8 class Oliver Hazard Perry ★★☆☆☆☆
- 8 corvettes: 4 Ada, 4 d'Estienne d'Orves
- 11 Lürssen missile boats
- 4 ATR-72 maritime patrol aircraft
- 18 Seahawk ASW helicopters
- 4 Dost coast guard corvettes

Anti-ship missiles:

Harpoon Block-2 & Atmaca ★★★★★☆☆

Torpedoes:

DM2A4 Seahake ★★★★★☆☆

Force projection:

- 10 A-400M strategic transport aircraft
- 10 CH-47 heavy lift helicopters
- 70 maneuvering helicopters (Cougar, Black Hawk)
- 1 airborne brigade
- 2 airmobile brigades
- 5 amphibious assault ships (LST)
- 2 refuelling tankers
- 1 amphibious assault unit (AMFIBI)
- 1 marine infantry brigade

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-aircraft systems: American Hawk upgraded ★★☆☆☆☆ / Russian S-400 ★★★★★☆

GPS jamming capability or electronic warfare

Interceptors: F-16 Block-50 armed with air-to-air missiles: AMRAAM & AIM-9X Sidewinder ★★★★★☆

Principal deliveries expected of military equipment



· Göktürk-3 reconnaissance satellite (not yet delivered)



· 40 F-16V fighters ★★★★★☆ (delivery under negotiation, to replace the F-35 stealth fighters whose order has been cancelled)



· Su-35 and Su-57 fighters ★★★★★☆ (delivery under negotiation)



· Additional S-400 anti-aircraft systems ★★★★★☆ (delivery under negotiation)



· 100 T-70 utility helicopters (Currently being delivered)



· T-155 Firtina armored and self-propelled artillery vehicles (Currently being delivered)



· Altay main battle tanks (currently under development with Germany)



· J-600T Yildirim IV ballistic missiles with a range of 2,500 km (currently under development)



· Bayraktar TB3 armed MALE UAVs (currently under development)



· Anadolu aircraft carrier (14 helicopters, 12 UAVs / ready in 2022-2023)



· 5 Type-214 submarines ★★★★★☆ (Currently being delivered)



· 4 Istanbul class frigates ★★★★★☆ (en cours de développement)

»» Briefing note

For the past decade, Turkey has adopted the strategy of the «intelligent disruptor» to test its rivals, move its chess pieces and maximise its gains. It has shifted from a pragmatic policy of good neighbourliness to a more ideological, autonomous and Eurasian policy that assumes the legacy of Ottomanism and aims for hegemony in the Eastern Mediterranean by challenging the treaties of the 1930s and promoting the Mavi Vatan (Blue Homeland) doctrine. Turkish leaders know that the US and Russia need them: the Americans to preserve their southern shield against Russia, Iran and China; the Russians to gain access to the Mediterranean via the Turkish straits. Neither Washington nor Moscow can afford to enter into direct confrontation with Ankara. Animated by a strong anti-Western sentiment, Turkish elites feel close to the revenge rhetoric of Russian, Iranian and Chinese leaders. With the presidential elections and the hundredth anniversary of modern Turkey (2023) approaching, there is a real risk of new destabilising actions, whether in Cyprus (annexation of North Cyprus), the Aegean Sea or the Balkans.

To satisfy this potentially offensive agenda, President Erdogan has excellent intelligence and clandestine action capabilities. He relies on a rehabilitated army which remains one of the most credible in the region in terms of its strength, its hybrid strategy, the excellence of its special forces and its strike and force projection capabilities. It wields both the stick (purges and the threat of trials against its leadership) and the carrot (operations against the PKK, modernisation of armaments, external operations as sources of prestige and experience). It also counts on a local defence industry capable of supplying 75% of the Turkish armed forces' armaments, mainly in the land, naval, UAV and missile sectors, even if Turkey remains dependent on the United States for its air force and on Germany for its submarines. Russia and China are options for the supply of advanced fighter aircraft and anti-aircraft systems.

»» Overview

Political system: **Parliamentary republic**; self-proclaimed secessionist republic in the north (Turkish Republic of Northern Cyprus).

Population: 1.2 million inhabitants / 25th of EU countries

Median age: 38 years old (length of compulsory military service: 14 months)

GDP: \$25 billion / 26th of EU countries

Principal sources of wealth: Tourism, agriculture, finance, maritime trade

GDP/inhabitant: \$23,000 / 15th of EU countries

Defence spending: \$438 billion (1.8% of GDP) / 23rd of EU countries

Total strength of armed forces: **12,000** (+60,000 trained reservists) / 20th of EU countries

Breakdown of armed forces: **All components** (ground, air and sea) **are integrated into the National Guard**

Total strength of internal security forces: 5,750

»» Geopolitical posture

Relevant international/regional security organisations: European Union

Special relationships: Greece, United Kingdom, Russia, France, Israel, Egypt, USA

States in which the Cypriot armed forces have bases: None

States in which the Cypriot armed forces are deployed: 2 observers in Lebanon in the framework of UNIFIL II.

States with which Cyprus is experiencing high levels of political tension: Turkey

Armed forces characteristics and capabilities

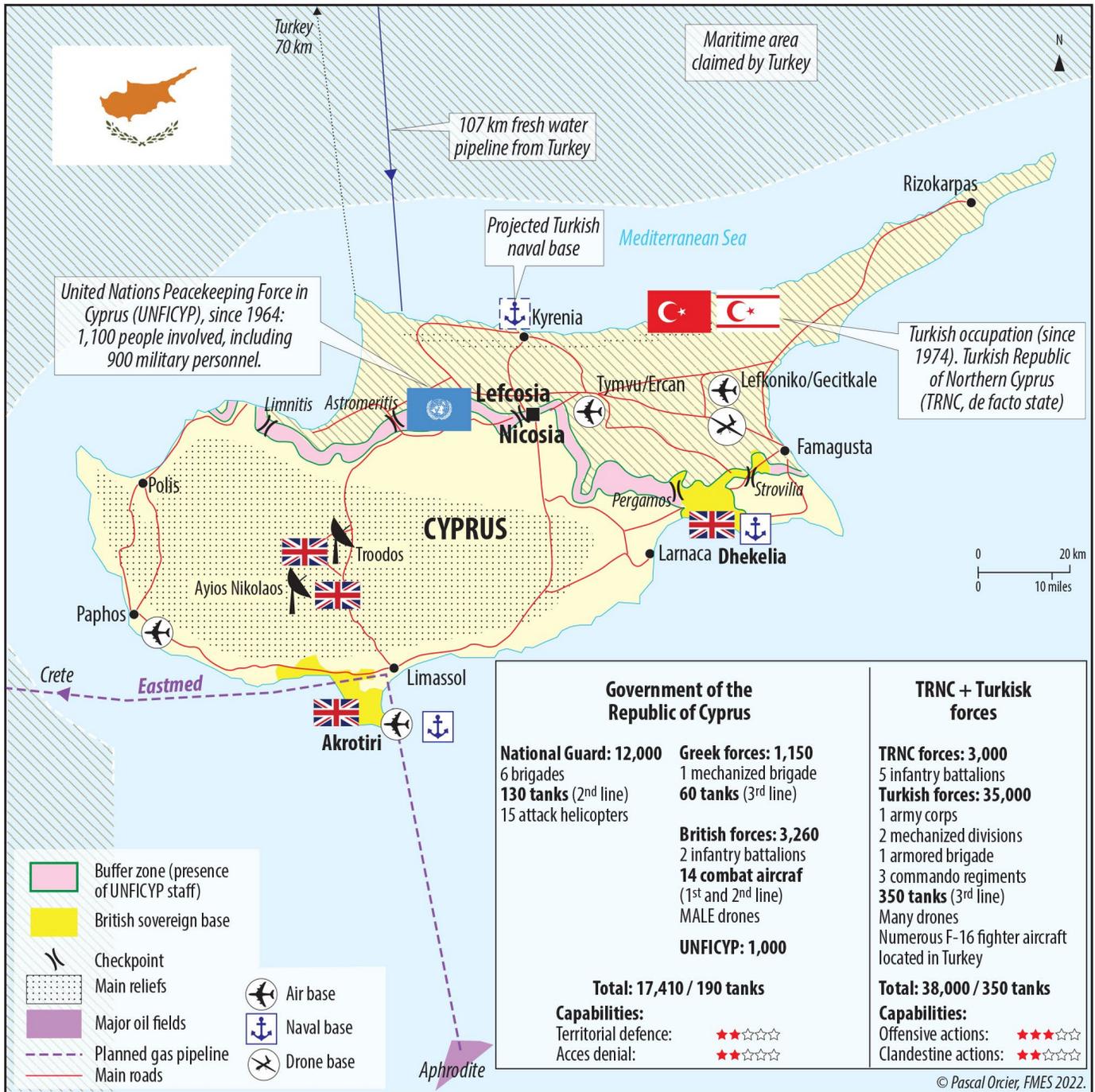
Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★★☆☆☆



»» Strategic objectives

- Achieve the reunification of the island through negotiations, counting on the support of the European Union, Russia (which has a strong presence there) and the United States.
- Dissuade Turkey from annexing the northern part of Cyprus, invading the southern part of the island or opposing the exploitation of Cyprus' offshore gas fields.
- Maintain the presence of the United Nations Interim Force in Cyprus (UNFICYP) and the British and Greek contingents as long as possible.
- Promote European solidarity and defence, while maintaining the Cypriot Republic's neutral posture and maintaining its proximity to Russia, Israel, Lebanon and Egypt.

»» Foreign military presence in the country:

Invited by the ruling government:



United Kingdom: 3,260 soldiers: 2 infantry battalions, listening stations at Troodos and Ayios Nikolaos, combat aircraft (Typhoon) + a support detachment (1 aerial refueling tanker, 2 transport aircraft, MALE UAVs) at Akrotiri air base.



Greece: 1,150 soldiers, including 250 officers integrated into the Cypriot National Guard; 1 reinforced mechanized battalion equipped with 60 M-48A5 main battle tanks and 80 Leonidas armoured vehicles.

Mandated by the United Nations:



United Nations Interim Force in Cyprus (UNFICYP) since 1974: 1,000 personnel, including **750 military observers** from 14 countries; main contributors: United Kingdom (260), Argentina (240), Slovakia (240).

Occupation forces (in the northern part of the island):



Turquie : 1 army corps with 35,000 men, 2 mechanized divisions, 1 armoured brigade, 3 commando regiments, 350 main battle tanks, 500 other armoured vehicles, 220 of 155 mm artillery tubes and armed UAVs; occasional presence of submarines and frigates.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

High motivation of both active and reserve personnel.

Various international sources of support; presence of British and Greek contingents, as well as a UN intervention force.

VULNERABILITIES

Inability effectively to protect the population in case of Turkish aggression.

Lack of strategic depth; capital (Nicosia) on the ceasefire line.

Lack of combat aircraft and ships, but also of UAVs and deep strike vectors.

Very unfavourable power ratio (1:3) against the TRNC and its Turkish allies.

Very low capability in the invisible domain:

Cyprus benefits from intelligence provided by Greece, the United Kingdom and various European agencies; its special forces can conduct clandestine missions in the north of the island.

'VISIBLE' ASSETS

Ground forces:

- **6 brigades** : 1 armored, 4 mechanized, 1 infantry
- 3 regiments: 1 of special forces, 2 of infantry.
- 130 main battle tanks : 80 T-80 ★★★★★ (2nd line), 50 AMX-30B2 (3rd line)
- 380 other armoured vehicles (BMP-3, Cascavel, Leonidas, VAB)

Portable surface-to-air missiles:

Mistral ★★★★★

Anti-tank missiles: Milan ★★★★★

Artillery: 48 tubes of 155 mm (Mk-F3, Nora B-52, Zuzana, TRF-1); 20 of 122 mm multiple rocket launcher

Air assets:

- **15 attack helicopters:** 11 Mi35P, 4 Gazelle Hot

Naval assets:

- 1 offshore patrol boat
- 4 light patrol boats
- 3 maritime surveillance helicopters

ANTI-ACCESS/AREA DENIAL (A2/AD)

Coastal defence: Exocet MM-40 Block-2 ★★☆☆☆

Anti-aircraft systems: SA-11 Buk M-1/2 ★★☆☆☆

Principal deliveries expected of military equipment



· UAVs



· Helicopters and anti-tank missiles

Turkish Republic of Northern Cyprus (self-proclaimed)

Self-proclaimed President: Ersin Tatar

Strength: 3,000 (+ 15,000 on mobilization) + 35,000 Turkish army

Budget: Financed by Turkey.

Units: 5 infantry battalions (+ 7 on mobilization) / Milan anti-tank missiles ★★☆☆☆
tinger portable ground-to-air missiles ★★☆☆☆

»» Briefing note

The Republic of Cyprus seeks to defend its sovereignty, both on land and at sea, against Turkey, which it still perceives as an existential threat and which has been militarily occupying the northern part of the island since 1974 (self-proclaimed Turkish Republic of Northern Cyprus). It counts on the commitment of the international community (European Union, United Nations, and United Kingdom) to maintain military deterrents on the island. Cyprus is home to the largest British air base (Akrotiri) facing the Middle East.

To limit the risks of escalation, the Turks and Greeks seem to have agreed to deploy only second and third line equipment in Cyprus. There is no doubt that in case of heightening of tensions with Turkey, Cyprus would not hesitate to ask its closest European partners (Greece, France) to preventively engage at its side to dissuade any attempt at Turkish destabilisation, as the ratio of forces present on the spot (1 to 3) is very unfavourable.

Long under an embargo on arms sales, the Cypriot National Guard, which is structurally defensive and supported by Greece, is equipped with old but well-maintained weapons. This would benefit from being developed in the naval, air and cyber fields.

»» Overview

Political system: **Parliamentary system**

Population: 11 million inhabitants / 9th of the EU countries

Median age: 45 years old (length of compulsory military service: 12 months)

GDP: \$205 billion / 16th of the EU countries

Principal sources of wealth: Tourism, merchant marine, agriculture

GDP/inhabitant: \$18,600 / 26th of the EU countries

Defence spending: 5 billion (2.5% of GDP) / 10th of the EU countries

Total strength of armed forces: 143,000 / 4th of the EU countries

Breakdown of armed forces: Ground (94,000), Air (22,000), Navy (16,000), Common services (11,000) + 220,000 reservists

Total strength of internal security forces: 65,000 (including 40,000 of National Guard)

»» Geopolitical posture

Relevant international/regional security organisations: NATO & European Union

Special relationships: USA, France, Cyprus, Israel, Egypt, United Arab Emirates (in progress)

States in which the Greek armed forces have bases: Chypre

States in which the Greek armed forces are deployed: **Cyprus** (1,150: military advisors + 1 mechanized brigade), **Bosnia and Mali** (EU missions), **Kosovo and Iraq** (NATO missions), **Lebanon** (UNIFIL II mission), **Saudi Arabia** (1 battery of Patriot-PAC2 anti-missile missiles) + **Sea Guardian** (NATO) and **Irini** (EU) maritime missions in the Mediterranean.

States with which Greece is experiencing high levels of political tension: Turkey

Armed forces characteristics and capabilities

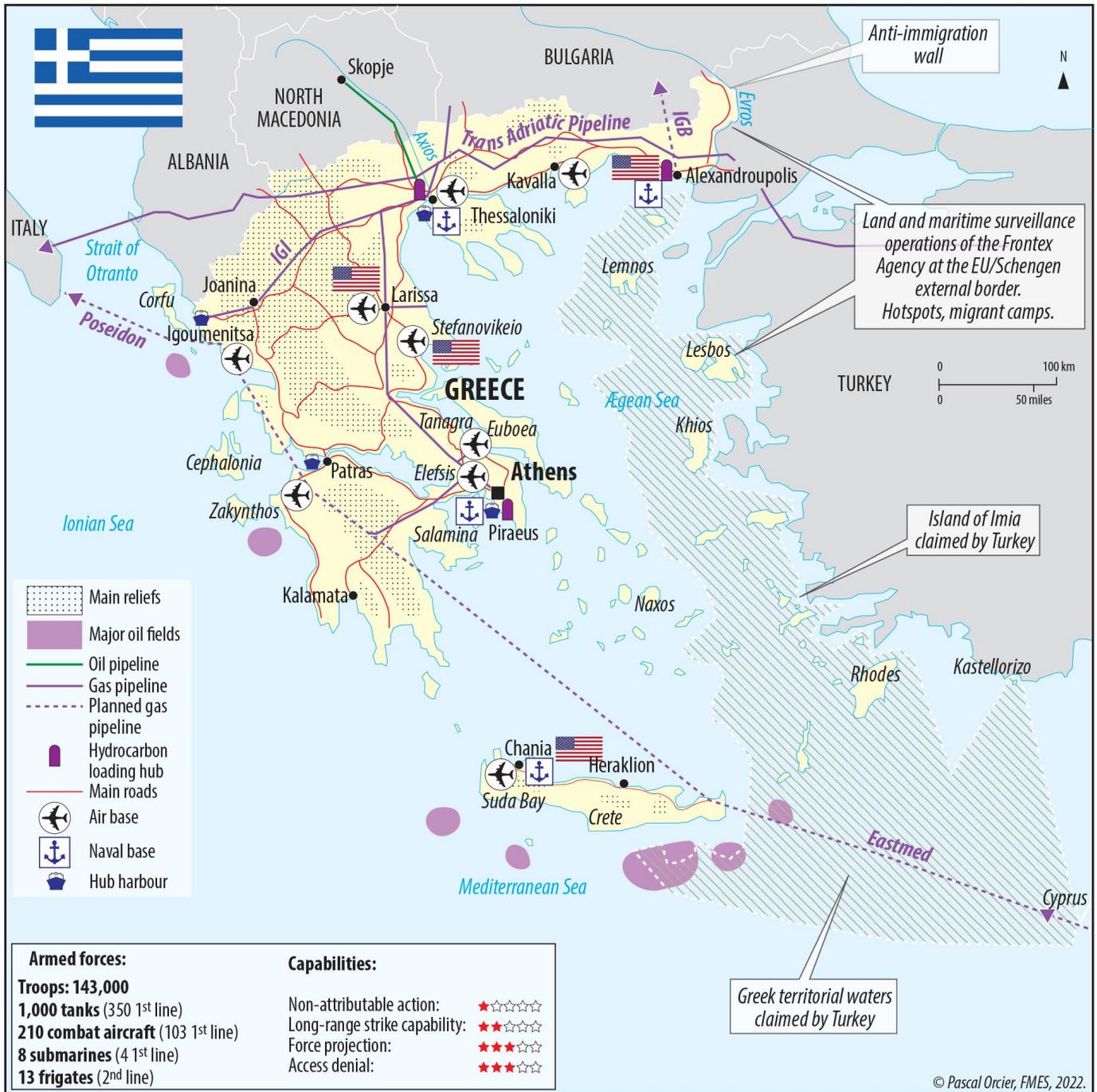
Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★★☆☆☆



»» Strategic objectives

- Dissuade Turkey from any aggressive action against Greece or Cyprus; defend Greek sovereignty over the territorial waters of the Aegean Sea by any means available; seek new allies (Israel, United Arab Emirates, or Egypt) against Turkey.
- Remain close to the US while strengthening economic ties with China and cultivating friendly links with Russia.
- Manage the migrant crisis and limit its negative impacts on Greece.
- Promote European defence without weakening NATO.
- Avoid interfering in the rivalries of the Arab-Muslim world; remain neutral on Middle East conflicts; develop energy partnerships with Israel and Egypt.

»» Foreign military presence in the country:

Invited by the ruling government:



USA: 500 soldiers spread over the 4 American bases (Souda Bay, Alexandroupolis, Larissa, Stefanovikis).



Israel: Israeli Air Force detachment at the Greek-Israeli flight school.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

NATO membership and close military cooperation with the US and Israel.

Strategic depth offered by the Aegean Sea and the countless islands that constitute points of resistance to Turkey.

Denial of access capability being modernised.

Better fighters and pilots than their Turkish counterparts.

Projection capability that theoretically allows for the recapture by force of any islands invaded by Turkey.

VULNERABILITIES

Weak operational experience outside NATO and EU missions, especially in the field of high-intensity combat.

Land forces handicapped by a heavy and rigid structure.

Numerous islands to defend.

Insufficient number of UAVs.

Lack of air-to-air refuelling aircraft.

Aging navy in need of major modernisation.

'INVISIBLE' ASSETS

Long range surveillance and strategic intelligence gathering:

- Access to imagery from the Helios-2A and Helios-2B reconnaissance satellites (resolution less than 40 cm, but at the end of their life)
- 4 Sperwer MALE UAVs + Heron UAVs rented by Israel
- 4 EMB-145 Erieye early warning aircraft

Potentially non-attributable actions:

- Submarine strike capability: **8 submarines** (4 Type-214 ★★★★★☆☆, 1 modernized Type-209/1200, 3 Type-209/1200) + 3 venerable Type-209/1100 without real operational value.
- Combat swimmer sabotage capability.

'VISIBLE' ASSETS

Ground forces:

- 2 corps headquarters
- **6 divisions:** (1 armored, 3 mechanized, 1 infantry, 1 National Guard)
- **7 autonomous brigades** (2 infantry, 2 airmobile, 1 airborne, 1 special forces, 1 marine infantry)
- **1,000 main battle tanks** : 350 Leopard-2 ★★★★★☆☆ (1st line), 500 Leopard-1 (2nd line), 150 M-48A5 (3rd line)
- 2 300 autres blindés (M-113, M-577, BMP-1, Leonidas)

Portable surface-to-air missiles:

Stinger ★★☆☆☆☆

Anti-tank missiles:

Milan, TOW II, Kornet-E ★★★★★☆☆

Artillery:

630 guns of 155 mm (M-109, M-114) and 140 multiple rocket launchers (RM-70, M-270 MLRS)

Air assets:

- **210 combat aircraft:** 88 F-16 Block-52+ ★★★★★☆☆ (1st line), 60 F-16 Block-30 and 40 Mirage 2000 (2nd line), 22 F-4E Phantom (3rd line)
- 85 attack helicopters (28 AH-64 Apache, 57 OH-58 Kiowa Warrior)
- 4 Sperwer armed UAVs

Naval assets:

- **13 frigates** : 4 Meko-200 ★★★★★☆☆, 9 Kortenaer Batch-2 (2nd line)
- 14 missile boats: 6 Super Vita, 7 Combattante III, 1 Tiger
- 11 S-70 ASW helicopters
- 3 P-3B Orion maritime patrol aircraft

Anti-ship missiles: Harpoon Block-1G, Exocet MM-40 Block-3 ★★★★★☆☆

Torpedoes: SeaHake DM2A4 ★★★★★☆☆

Long range strike capability: (+ 125 mi)

· 88 fighter bombers (88 F-16 Block-52+) ★★★★★

Cruise missiles:

Scalp EG (range of 500 km) ★★★★★

Force projection:

- 15 C-130 transport aircraft
- 25 CH-47 heavy lift helicopters
- 26 lift helicopters: 14 NH-90, 12 Super Puma
- 1 airborne unit
- 2 airmobile brigades
- 5 amphibious assault ships (LST)
- 1 marine infantry unit

ANTI-ACCESS/AREA DENIAL (A2/AD)

Coastal defence: Exocet MM-40 Block-3 ★★★★★

Anti-missile systems: Patriot-PAC2 ★★★★★

Anti-aircraft systems: Upgraded Hawk, Tor-M1, S-300 ★★★★★

Interceptors: F-16 Block-52+ armed with AMRAAM air-to-air missiles ★★★★★ +Rafale equipped with Air-Air Meteor missiles (to come)

Principal deliveries expected of military equipment

 · 18 Rafale fighters ★★★★★ (currently being delivered + 6 delivery under negotiation)

 · 3 FDI Belharra frigates ★★★★★ (delivery under negotiation)

  · MALE UAVs Archytas (currently under development)

»» Briefing note

On one hand, Greece refuses to take sides in the rivalries and conflicts that are tearing the Arab-Muslim world apart. On the other hand, it remains obsessed by Turkey, which it still perceives as a threat, especially after a series of provocations in 2020. It is therefore looking for credible partners ready to help it counter Turkey in the Aegean and Cyprus, whether within NATO (United States), the European Union (France) or the Middle East (Israel, Egypt, or the United Arab Emirates). Its very degraded financial situation limits its capacity to modernise its generally ageing armed forces. The latter, oriented towards the defensive, remain nevertheless motivated and ready to repel any Turkish military action, notably thanks to a well-equipped and well-trained air force capable of carrying out retaliatory strikes deep into Turkish territory.

»» Overview

Political system: **Parliamentary Republic**

Population: 500 000 inhabitants / 27th of the UE countries

Median age: 43 years old

GDP: \$15 billion / 27th of the UE countries

Principal sources of wealth: maritime trade, finance, tourism

GDP/inhabitant: \$30,000 / 10th of the UE countries

Defence spending: 80 million (0.5% of GDP) / 27th of the UE countries

Total strength of armed forces: 1,800 / 27th of the UE countries

Total strength of internal security forces: 2,300

»» Geopolitical posture

Relevant international/regional security organisations: European Union, NATO Partnership for Peace, 5 + 5 Defence

Special relationships: Italy, United Kingdom, Turkey, Libya, United States

States in which the Maltese armed forces have bases: None

States in which the Maltese armed forces are deployed: **Lebanon** (11, UNIFIL II), Spain (1 officer in the Operation Atalanta staff)

States with which Malta is experiencing high levels of political tension: None



»» Strategic objectives

- Manage the migrant crisis and limit migratory flows from North Africa (mainly from Libya and Tunisia); assisting shipwrecked illegal migrants, in coordination with Italy.
- Contribute to the resolution of the Libyan crisis, in order to reduce the flow of illegal migrants.
- Strengthen its position within the European Union and apply pressure on issues related to the control and management of migration flows, while maintaining its position of neutrality and its adherence to the Commonwealth.
- Maintain excellent relations with Italy and the UK, its two main historical partners.

No foreign military presence on Maltese territory.

'INVISIBLE' ASSETS

Malta benefits from the intelligence provided by Italy and the various agencies of the European Union.

'VISIBLE' ASSETS

Ground forces:

- **3 battalions** / light armament.
- 1 special forces company

Air and naval assets:

- 4 offshore patrol vessels
- 9 light patrol vessels
- 4 maritime patrol aircraft (3 Beech-200 King Air, 1 Islander)
- 6 helicopters (3 Alouette III, 3 AW-139)

NONE ANTI-ACCESS / AREA DENIAL (A2/AD)

Malta is de facto protected by Italy, with which it cooperates very closely in the field of maritime surveillance and the fight against illegal migrants.

»» Briefing note

A former British colony until 1964, the Maltese Republic remains very attached to the Commonwealth of which it is still a member, as well as to its neutral status, consistent with its support for the Order of Malta. Its central position in the Mediterranean makes it a partner of choice for Italy and the United Kingdom, as well as a favoured gateway for migrants from the North African coast. Its limited armed forces are therefore limited to the defence of the Maltese archipelago and are oriented towards the surveillance of its coasts and the assistance of shipwrecked migrants.

»» Overview

Political system: **Parliamentary system**

Population: 60 million inhabitants / 3rd of the UE countries

Median age: 47 years old (professional army, no conscription)

GDP: \$2,000 billion / 3rd of the UE countries

Principal sources of wealth: Industry, luxury, agriculture, tourism

GDP/inhabitant: \$33,000 / 12th of the UE countries

Defence spending: \$18 billion (0.9% of GDP) / 3rd of the UE countries

Total strength of armed forces: 166,000 (excluding carabinieri) + 18,000 reservists / 3rd of the UE countries, with a reduction plan to reach 150,000 by 2024

Breakdown of armed forces: Ground (97,000), Air & Space (40,000), Navy (29,000)

Total strength of internal security forces: 175,000 (including 110,000 carabinieri)

»» Geopolitical posture

Relevant international/regional security organisations: NATO & European union, 5+5 Defence

Special relationships: USA, France, Germany, United Kingdom, Libya

States in which the Italian armed forces have bases: Djibouti, Kuwait, Libya

States in which the Italian armed forces are deployed: **5,500 troops engaged in Lebanon** (1,000, UNIFIL II), **Iraq** (640, Operation Inherent Resolve + NMI), **Kosovo** (630, KFOR), **Libya** (400), **Niger** (300), **Kuwait** (250), **Somalia** (150, EUTM), **Egypt** (FMO), **Djibouti**, **Bosnia**, **Central African Republic**, **Latvia**, **Lithuania**, **Mali**, **Western Sahara** (MINURSO 2) ; **Sea Guardian** (NATO), **Atalanta and Iriini** (EU) maritime missions.

States with which Italy is experiencing high levels of political tension: None

Armed forces characteristics and capabilities

Motivation ★★☆☆☆

Equipment ★★★★★

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★★★★★



»» Strategic objectives

- Promote Italian industry and economic interests in the «wider Mediterranean» covering the Balkans, North Africa, the Sahel, the Middle East, the Persian Gulf and the Horn of Africa.
- Establish Italy as the key player in Mediterranean issues (Mare Nostrum), both for NATO and for the European Union, avoiding any divisive posture on sensitive or conflictual issues.
- Stabilise Libya by playing a major role in the political process, in order to secure Italian interests and contain the flow of migrants from the southern shore of the Mediterranean; secure the Balkans to limit the flow of migrants and organised crime.
- Ensure the US and NATO commitment and presence in Italy for as long as possible.
- Maintain good relations with Tunisia, Algeria and Turkey to secure energy supplies.

»» Foreign military presence in the country:

Invited by the ruling government:



USA: 15,000 soldiers including 1 airborne brigade, 2 US Navy headquarters (VI Fleet in Gaete, USNAVEUR in Naples), 1 marine infantry battalion, 2 squadrons of 24 F-16C/D fighters (Aviano), 1 squadron of HH-60G helicopters, 1 squadron of 4 P-8 Poseidon maritime patrol aircraft and 1 squadron of MQ-9A Reaper MALE UAVs (Sigonella).



NATO: NATO structures: 2 headquarters (Joint Forces Command in Naples, Deployable Air Command & Control Centre in Poggio Renatico), Defence College (NDC) in Rome.



European union: strategic level staff commanding the EUNAVFOR MED *Irini* operation in Rome.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

NATO membership and close cooperation with the US.
Overall good armament; good force selection and training process.
Central strategic position in the Mediterranean; 2nd largest navy in the Mediterranean in terms of size and European commitment.

VULNERABILITIES

Constitutional constraints make it very difficult to commit the armed forces to operations; low public interest in military and geopolitical issues.
Low motivation, fighting spirit and resilience; insufficient training.

Balanced armed forces with varied experience, except in the field of high intensity warfare.

Excellent knowledge and understanding of the North Africa & Middle East area.

Rigid system does not encourage initiative.

Insufficient number of UAVs.

Weaknesses in long-range maritime surveillance.

‘INVISIBLE’ ASSETS

Long range surveillance and strategic intelligence gathering:

- **6 satellites:** 3 for communications: 1 Athena-Fidus in cooperation with France, 2 Sicral; 3 for optical reconnaissance: 1 OPSAT-3000 (50 cm resolution); 1 COSMO-Skymed radar reconnaissance system (80 cm resolution), 1 CSG
- MALE UAVs: 6 MQ-9A Reaper, 6 RQ-1B Predator
- 2 Gulfstream G-550 early-warning aircraft
- 1 Beech-350 King Air SIGINT aircraft
- AISE + Strategic anticipation service of the Ministry of Defence

Potentially non-attributable actions:

- Stealth air strike capability: 15 F-35
- UAV strike capability (MQ-9A Reaper & RQ-1B Predator)
- Submarine strike capability: **8 submarine** (4 Type-212 Todaro ★★☆☆☆, 4 Pelosi ★★☆☆☆)
- MANTA underwater mines
- Combat swimmer sabotage capability (COMSUBIN)
- Clandestine operations capability: Special Action Group (*Gruppo operativo Incursori*)

‘VISIBLE’ ASSETS

Ground forces:

- 3 divisional headquarters (1 armored, 1 mechanized, 1 mountain)
- **11 brigades:** 5 mechanized, 2 armored, 2 alpine, 1 airborne, 1 airmobile

Air assets:

- **220 combat aircraft:** 15 F-35A ★★★★★ et 95 Typhoon (1st line), 60 Tornado (2nd line), 40 AMX et 10 AV-8B Harrier II (3rd line)
- 60 Mangusta attack helicopters and 12 armed UAVs

(Ground Forces)

- **4 independent regiments** (11 airborne, 1 alpine, 1 marine infantry, 1 special forces)
- **250 main battle tanks** Ariete ★★☆☆☆ (2nd line)
- 1,150 other armoured vehicles (Centauro, Dardo, Freccia, Puma, Bv-206, Orso)

Portable surface-to-air missiles:

Stinger ★★☆☆☆

Anti-tank missiles: Tow-II, Spike ★★★★★☆

Artillery:

230 tubes of 155 mm (PzH-2000, FH-70), 22 MLRS multiple rocket launchers multiple of 227 mm

Long range strike capability: (+ 125 mi)

- 15 F-35A stealth fighters ★★★★★☆
- 30 Tornado IDS fighters ★★☆☆☆
- 15 Tornado ECR electronic warfare aircraft
- 6 air-to-air refuelling aircraft (4 KC-767, 2 KC-130)
- 12 MALE UAVs Reaper & Predator

Cruise missiles:

Storm Shadow (+500 km de portée) ★★★★★☆

Naval assets:

- **1 aircraft carrier** and assault ships (8 fighters with vertical take-off) type AV-8B Harrier II (to become F-35B) and NH-90 helicopters
- **15 destroyers & frigates:** 2 Andrea Doria and 8 FREMM ★★★★★☆ (1st line), 3 Maestrale and 2 Luigi de la Penne (2nd line)
- 10 deep-sea patrol boats
- 40 ASW helicopters (NH-90, Merlin, Bell-212)
- 4 ATR-72MP maritime patrol aircraft

Anti-ship missiles: Otomat Mk-2 ★★★★★☆

Torpedoes: Black Shark ★★★★★☆

Force projection:

- 18 C-130 transport aircraft
- 18 CH-47 heavy lift helicopters
- 60 NH-90 helicopters
- 1 airborne unit
- 1 aeromobile unit
- 3 amphibious assault ships (LHD)
- 1 marine infantry units
- 1 special forces regiment

ANTI-ACCESS/AREA DENIAL (A2/AD)

Systèmes antimissiles et antiaériens : SAMP/T ★★★★★☆

Interceptors: Typhoon armed with AMRAAM air-to-air missiles ★★★★★☆

»» Principal deliveries expected of military equipment



· 75 F-35 stealth fighters (including 15 vertical take-off F-35B) ★★★★★☆ (Currently being delivered)



· 4 upgraded Type-212 submarines ★★★★★☆ (not yet delivered)



· 2 FREMM frigates ★★★★★☆ (not yet delivered)

»» Briefing note

Italy perceives itself as the legitimate actor in the Mediterranean basin, seeking stability in the region, especially in Libya but also in the Balkans, by establishing itself as an indispensable interlocutor, without however wishing to carry the political weight of this role.

This posture allows it to promote its industry and win important contracts. As a result, it has great difficulty in choosing a side and committing itself militarily, especially as the parliamentary process of authorising its participation in external operations is long and unpredictable. Italy, whose defence is based on NATO, is very attached to the balance between the Atlantic Alliance and the EU and conceives European strategic autonomy only in perfect transparency and complementarity with NATO, as long as this does not put it in a head-on collision with Turkey. Until now, it is unlikely that its navy, although very well equipped and considered the second largest fleet in the Mediterranean, would engage in the Eastern Mediterranean in case of rising tensions around Cyprus or Greece; the Quirinal Treaty between Italy and France (26 November 2021), which contains an important maritime dimension, could however change the situation, especially since the Italian navy is now deploying beyond the Mediterranean (Gulf of Guinea, Gulf of Aden, and Persian Gulf).

The rest of the armed forces are mainly defensive (armoured and mechanised units) and expeditionary (light and elite units) to honour Italy's commitments within NATO and the EU. While the bulk of these forces are on the whole well equipped, their motivation, fighting spirit and resilience are questionable.

»» Overview

Political system: **Parliamentary Monarchy** (King Felipe VI)

Population: 47 million inhabitants / 4th of the EU countries

Median age: 44 years old (professional army; no conscription)

GDP: \$1,400 billion / 4th of the EU countries

Principal sources of wealth: agriculture, industry, tourism

GDP/inhabitant: \$29,600 / 17th of the EU countries

Defence spending: \$13 billion (0.9% of GDP) / 4th of the EU countries

Total strength of armed forces: 123,000 (15,000 trained reservists) / 5th of the EU countries

Breakdown of armed forces: Ground (71,000), Air (20,000), Navy (20,000), Common Services (12,000)

Total strength of internal security forces: 237,000 (including 75,000 of the Guardia Civil)

»» Geopolitical posture

Relevant international/regional security organisations: OTAN & Union européenne, 5+5 Defence

Special relationships: États-Unis, France, Allemagne, Pays d'Amérique latine, Turquie

States in which the Spanish armed forces have bases: None

States in which the Spanish armed forces are deployed: **2,900 military personnel deployed in foreign operations: Lebanon** (630 in UNIFIL II), **Mali** (500 / EU), **Latvia** (350 / NATO), **Iraq** (150 in *Inherent Resolve* operation and NMI), **Turkey** (150, 1 Patriot PAC-2 battery), **Senegal** (60, Barkhane), **270 in EU operations in Central African Republic, Bosnia and Somalia + contributions to NATO** (*Sea Guardian*) and EU (*Atalanta, Irini*) naval operations.

States with which Spain is experiencing high levels of political tension: Morocco

Armed forces characteristics and capabilities

Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★★☆☆☆



»» Strategic objectives

- Guarantee the unity of the kingdom weakened by independence forces and irredentist movements; to restore the reputation of the monarchy tarnished by the previous monarch.
- Ensure the commitment and presence of the United States and NATO in Spain, as a guarantee of security and financial income, while promoting the European development.
- Manage the complex and often tense relations with Morocco (migrants, enclaves of Ceuta and Melilla, Perejil Island, Canary Islands, and Western Sahara) and the United Kingdom (Gibraltar); contribute to securing the Strait of Gibraltar and combat traffickers and the flow of illegal migrants.
- Secure energy supplies from Algeria by maintaining good relations with that country.
- Develop the Spanish naval industry, especially in the face of French, German and Italian competition, notably by strengthening military cooperation with Turkey.

»» Foreign military presence in the country:

Invited by the ruling government:



USA: 3,500 military personnel spread over the Rota naval base, which houses the part of the VI Fleet dedicated to anti-missile defence, and the Moron logistic air base.



NATO: Combined Air Operations Center in Torrejon.



European union: Strategic level staff commanding Operation Atalanta in Rota; satellite intelligence center in Torrejon.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

NATO membership.

Strong esprit de corps contributing to the resilience of the military institution.

Extensive special forces experience in Iraq, Afghanistan, and Mali.

VULNERABILITIES

Low support of a rather anti-militaristic population for military and geopolitical issues.

Independence and autonomist tensions do not contribute to the homogeneity and combat effectiveness of the armed forces; priority given to the Guardia Civil and internal security.

Well-equipped and trained army with good air projection capabilities.

Navy currently very weak, but in the process of being modernised.

Defence budget insufficient to finance the modernisation of the armed forces.

Problems in maintaining equipment in operational condition, aggravated by the ageing of main items of equipment.

Deficiencies in the field of UAVs, cyber and satellites.

'INVISIBLE' ASSETS

Long range surveillance and strategic intelligence gathering:

- **3 satellites:** 2 communication satellites (SpainSat, Xtar) at the end of their lives, 1 reconnaissance satellite (Paz, 2018, metric resolution); access to imagery from the French Helios 2A and 2B satellites.
- 4 MQ-9A Reaper MALE UAVs
- Strategic anticipation service attached to the Ministry of Defence

Potentially non-attributable actions:

- Attack submarine capability: **2 submarines** (1 Type S-80 ★★☆☆, 1 Type Agosta ★☆☆☆☆)
- SAES underwater mines
- Combat swimmer sabotage capability (Groupe UOE)
- Discreet support to the Polisario Front

'VISIBLE' ASSETS

Ground forces:

- 2 divisional headquarters
- **11 brigades:** 4 armored, 2 mechanized, 1 Foreign Legion, 1 paratrooper, 3 territorial infantry (Canaries, Ceuta, Melilla)
- **2 independent regiments:** 1 special forces, 1 mountain
- **320 Leopard 2A4/E main battle tanks** ★★☆☆ (1st line)
- 2,500 other armoured vehicles: (Centauro, VEC-M1, Pizarro, M-113, BMR-600, Piranha, AAV-7)

Air assets:

- **150 combat aircraft:** 70 Typhoon ★★☆☆ (1st line), 80 F-18A/B Hornet (2nd line)
- 18 Tigre attack helicopters
- 4 MQ-9A Reaper UAVs

Naval assets:

- **1 aircraft carrier** *Juan Carlos* (12 AV-8B Harrier II, 6 helicopters SH-3D & SH-60F)

(Ground forces)

Portable surface-to-air missiles:

Mistral ★★☆☆☆

Anti-tank missiles: Spike ★★★★★

Artillery: 150 tubes of 155 mm (M-109, SBT-155 SIAC)

Long range strike capability: (+ 125 mi)

- Fighters: Typhoon and F-18A/B
- 3 MRTT air-to-air refueling aircraft
- 3 electronic warfare aircraft (1 C-212, 2 Falcon-20D)

Cruise missiles:

KEPD-350 Taurus (range of 500 km) ★★☆☆☆

(Naval assets)

• 11 frigates : 5 Alvaro de Bazan ★★☆☆☆, 6 Santa Maria (1^{er} rang)

• 11 offshore patrol boats (5 Descubertia, 6 Meteoero)

• 3 P-3M Orion maritime patrol aircraft

• 16 Seahawk ASW helicopters

Anti-ship missiles: Harpoon Block-1D ★★☆☆☆

Torpedoes: DM2A4 (pour S-80) ★★★★★

Force projection:

• 11 A-400M strategic transport aircraft

• 17 CH-47 heavy lift helicopters

• 62 helicopters (14 NH-90, 30 Super Puma, 18 Cougar)

• 1 airborne unit

• 1 aircraft carrier and 2 amphibious assault ships (LPD)

• 1 marine infantry unit

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-missile and anti-aircraft systems: Patriot PAC-2 ★★☆☆☆

Interceptors: Typhoon armed with AMRAAM air-to-air missiles ★★☆☆☆

Principal deliveries expected of military equipment



• 2 Spainsat NG-1 & 2 satellites of communication (not yet delivered)



• 3 Type S-80 submarines ★★☆☆☆ (not yet delivered)



• 5 F-110 frigates ★★★★★ (en attente de construction)

AIRBUS

• 12 MALE RPAS UAVs (Airbus / program in progress)

»» Briefing note

Spain seeks above all to maintain its national cohesion, its internal security and the integrity of its overseas territories (Balearic Islands, Canary Islands, Ceuta, and Melilla), while strengthening its influence in Latin America and maintaining its membership of NATO and the EU. As a result, it looks much more towards the Atlantic and the Gulf of Guinea than towards the Mediterranean basin or the Middle East. Its strategic interests in this region are limited to the Western Mediterranean, Morocco and Algeria. Thanks to a dynamic policy of support for the arms industry (in partnership with Turkey in particular), Spain has risen to 7th place among arms exporting countries. Due to a lack of budget for the armed forces, new equipment is destined primarily for export, delaying the essential modernisation of the navy and air force.

The Spanish armed forces, structurally defensive, are organised to respond to the security challenges of the kingdom. They participate in NATO and EU operations, which are a guarantee of its credibility within these two organisations. A small, highly mobile and well-trained expeditionary force (Tercio, special forces, airborne, airmobile and amphibious troops) has the mission of retaking and securing overseas territories in case of aggression.

THE STATES OF THE ARABIAN PENINSULA AND THE PERSIAN GULF

The Arabian Peninsula and the Persian Gulf form the heart of the Middle East. This vast arid and largely deserted area, the world's largest reserve of hydrocarbons, represents an ethnic mosaic that is a source of conflict and tension, particularly for the Kurds seeking independence. This part of the Middle East encompasses ten states: seven monarchies (four of which are absolute) and three republics (one of which, Iran, is Islamic), which together account for 70% of its population. In many respects, power rivalries are much more prevalent than religious rivalries, which are largely exploited by the powers that be, between a predominantly Shiite north and a predominantly Sunni south.

With the exception of Iran, which is several thousand years old, all these recent states gained independence in two waves: firstly, after the First World War, rising out of the ruins of the Ottoman Empire, then in 1971 after the departure of the British from the region. Since Saddam Hussein's Baathist Iraq was dismantled and became the sick man of the Gulf, the two most influential regional players remain Iran and Saudi Arabia, which look across at each other from either side of the Persian Gulf.

This region, that for a long time was vital for the United States and Europe which drew most of their oil resources from it, is no longer really so today, at least not for reasons of energy security. The world's supply of hydrocarbons has diversified and developed. It is the maritime routes along the Arabian Peninsula that remain important for the West in that they shorten trade. Today, it is China and the Asian powers (India, Indonesia, Japan and South Korea) that depend on Middle Eastern hydrocarbons to support their economic growth (80% of the region's oil and natural gas exports are accounted for by these Asian countries). But for the time being, it is still the United States and some Westerners (the United Kingdom, France and Australia) who protect the Arabian Peninsula and secure the Straits of Hormuz and Bab el-Mandeb, as well as the hubs of the United Arab Emirates and the Sultanate of Oman through which hydrocarbons bound for Asia transit.

If China wants to perpetuate its New Silk Roads and guarantee its energy supplies from the Middle East (half of its oil needs), it will have to become more involved in the security of the region. This is perfectly understood by most of the leaders on both sides of the Persian Gulf who are vying to attract as much Chinese investment as possible, without crossing the red line that would put them on a head-on collision course with the United States. The Arabian Peninsula and the Persian Gulf are now at the crossroads of the strategic rivalry between Washington and Beijing.



»» Overview

Political system: **Constitutional monarchy** (King Abdullah II)

Population: 10 million inhabitants / 11th in the MENA region

Median age: 24 years old (no military service)

GDP: \$44.5 billion / 14th in the MENA region

Principal sources of wealth: phosphate

GDP/inhabitant: \$4,400 / 13th in the MENA region

Defence spending: \$1.7 billion (3.8% of GDP) / 17th in the MENA region

Total strength of armed forces: 100,000 / 10th in the MENA region

Breakdown of armed forces: Ground (85,000), Air (14,500), Navy (500)

Total strength of internal security forces: 15,000

»» Geopolitical posture

Relevant international/regional security organisations: Major US ally status

Special relationships: USA, United Kingdom, United Arab Emirates, France, Morocco

States in which the Jordanian armed forces have bases: None

States in which the Jordanian armed forces are deployed: **Saudi Arabia** (6 F-16 fighters as part of operation *Restoring Hope*); 90 military personnel engaged as UN observers in missions in **Mali**, in the **Democratic Republic of Congo**, in the **Central African Republic**, *in* **Sudan** and in the **Western Sahara**.

States with which Jordan is experiencing high levels of political tension: Syria, Iran

Armed forces characteristics and capabilities

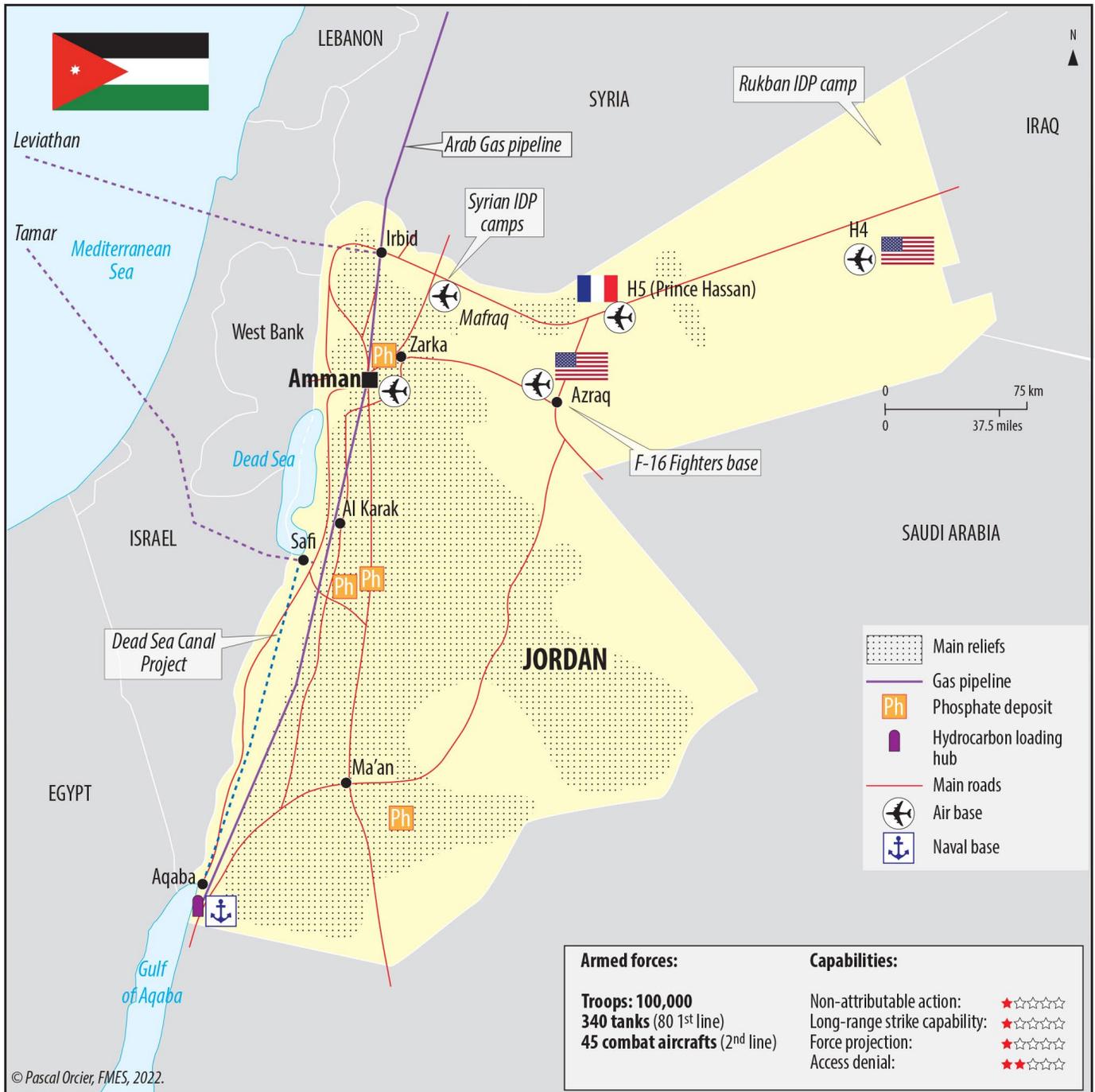
Motivation ★★★★★☆

Equipment ★★☆☆☆☆

Resilience ★★★★★☆

Combat effectiveness ★★★★★☆

Doctrine/Planning ★☆☆☆☆☆



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»» Strategic objectives

- Guarantee the stability of the kingdom and the continuity of the Hashemite monarchy in a very tense regional environment, by:
 - Maintaining a balanced diplomacy between the US, European countries, Russia and the Arab monarchies.
 - Avoiding the creation of a Palestinian state in Jordan by emphasising the king's role as guardian of the holy places in Jerusalem.
 - Contributing to the stabilisation of Syria and Iraq in order to send home Syrian and Iraqi refugees whose presence increases the risks of socio-economic destabilisation in the kingdom.
 - Keeping Saudi Arabia at a distance as it is considered too intrusive in the kingdom's affairs.
 - Managing the very complex relationship with Israel in a context where the majority of the population questions the benefits of the 1994 peace treaty.
 - Contain (with the support of the United Arab Emirates) the growing demands of the Muslim Brotherhood and radicalised Palestinians, whose audience is growing within the Jordanian population of overwhelmingly Palestinian origin.

»» Foreign military presence in the country:

Invited by the King:



USA: 3,000 soldiers and airmen (12 F-15E fighters, 12 MALE Reaper UAVs, 2 batteries of Patriot PAC-3 surface-to-air missiles) on the air bases of El Azrak and H4 (operation *Inherent Resolve*) and on the Iraqi Syrian border.



France : 300 airmen, 4 Rafale fighters and a Mamba surface-to-air missile system at H5 air base as part of the *Chammal* mission to fight against ISIS.



United Kingdom: Detachment of the 16th British Air Mobile Brigade as part of the Jordanian Quick Reaction Force.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Loyalty, strong motivation and resilience of a professional army, recruited mainly from Bedouin tribes loyal to the King.

Very high professionalism of Jordanian special and airborne forces (engagement in Afghanistan, Yemen and Syria) which explains the creation of an international centre: King Abdullah Special Operations Training Centre (KASOTC).

Mastery of armoured-mechanised combat.

VULNERABILITIES

Generally ageing armament.

Risks of destabilisation due to the presence of a growing number of radical Islamists and Syrian refugee camps hosting armed groups acting as warlords.

Difficulty in covering the whole of a largely deserted territory offering opportunities to armed jihadist groups or terrorist organisations.

Lack of air force resources (no MALE drones in particular) and absence of a navy worthy of the name, given the regional threats.

'INVISIBLE' ASSETS

- Clandestine action capability of special forces and Bedouin infiltration units in the desert environment.

'VISIBLE' ASSETS

Ground forces:

- **15 brigades** (1 royal guard, 2 armored, 8 mechanized, 1 special forces, 1 airborne, 2 infantry)
- **340 main battle tanks** : 80 Leclerc (ex-UAE) ★★★★★ (1st line), 80 Challenger 1, 180 M-60A3 (2nd line)
- 1,400 other armoured fighting vehicles (Centauro, Marder, Ratel, M-113, M-577)

Portable surface-to-air missiles:

Igla-S ★★★★★

Air assets:

- **45 combat aircraft**: 40 F-16C/D ★★★★★ (2nd line), 5 AT-802 (ex-UAE)
- 40 AH-1 Cobra attack helicopters
- 10 S-100 Camcopter tactical UAVs

Naval assets:

- 9 light patrol boats

Anti-tank missiles:

Javelin, TOW-2, Kornet ★★☆☆☆

Artillery:

500 guns and howitzers, mainly M-109 (155 mm) and M-110 (203 mm)

Long range strike capability: (+ 125 mi)

· 20 F-16D fighters ★★☆☆☆

Force projection:

- 3 C-130 Hercules transport aircraft
- 4 Mi-26 heavy lift helicopters
- 30 helicopters (10 Super Puma & 20 Black Hawk)
- 2 airborne battalions
- 1 special forces battalion

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-aircraft systems: upgraded Hawk ★★☆☆☆; presence of American Patriot PAC-3

Interceptors: F-16C/D armed with AMRAAM air-to-air missiles ★★☆☆☆

Principal deliveries expected of military equipment



· M1-A3 Abrams main battle tanks (ex-USMC, delivery under negotiation) ★★★★★



· F-16V fighters (delivery under negotiation) ★★★★★



· MALE UAVs (delivery under negotiation)

»» Briefing note

Jordan remains for the moment in the eye of the storm that threatens its neighbouring countries. While it remains courted by the main global and regional players who guarantee its external security, it is fragile from within. The king's main objective is therefore to guarantee the durability of the monarchy and the stability of the country in the face of all those who would like to see it transformed into a Palestinian state in order to resolve a century-old conflict.

While equipped and trained for high-intensity combat and offensive action, the Jordanian army is mainly used for defensive purposes to face any eventuality – threats can arise from all directions – and to secure the north-south axis of «useful Jordan» linking Irbid (in the north), Amman, the phosphate fields, and the port of Aqaba (in the south). Despite its ageing weaponry, its professionalism is recognised, and its special forces are among the best in the region.

»» Overview

Political system: **Absolute monarchy** (King Salman ben Abdelaziz Al Saud; Crown Prince Mohammed bin Salman)

Population: 34 million inhabitants (including 21 million Saudis) / 8th in the MENA region

Median age: 30 years old (no mandatory military service)

GDP: \$792 billion / 1st in the MENA region

Principal sources of wealth: Oil

GDP/inhabitant: \$30,000 / 5th in the MENA region

Defence spending: \$48,5 billion (6% of GDP) / 1st in the MENA region

Total strength of armed forces: **227,000** / 5th in the MENA region

Breakdown of armed forces: National Guard (100,000 including 27,000 tribal levies), Ground (75,000), Air (20,000), Air Defence (16,000), Navy (13,500), Ballistic missile forces (2,500)

Total strength of internal security forces: 25,000

»» Geopolitical posture

Relevant international/regional security organisations: Gulf Cooperation Council (GCC); bilateral defence agreement with the USA

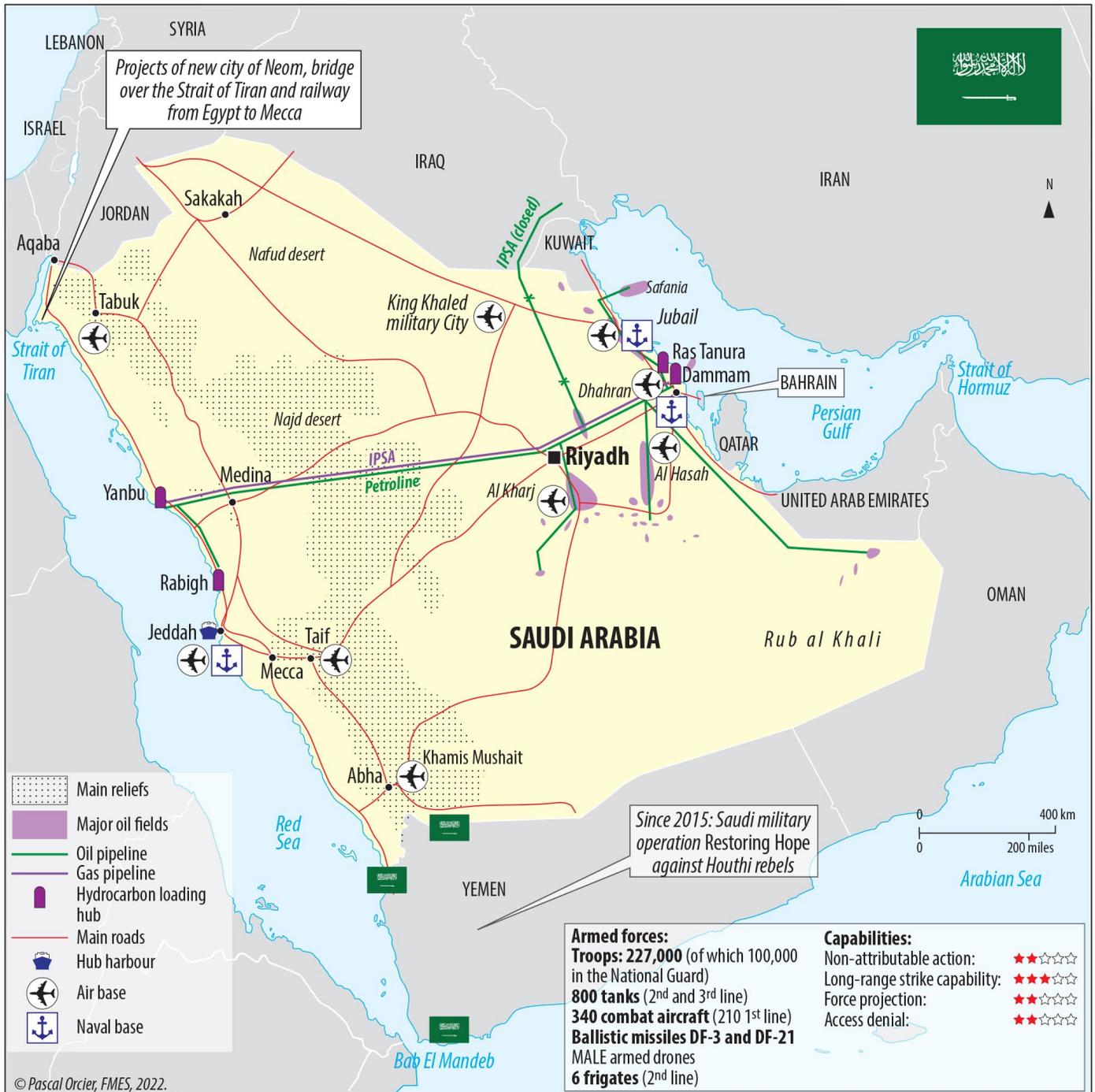
Special relationships: USA, United Arab Emirates, China, United Kingdom, France, Pakistan, Bahrain, Egypt

States in which the Saudi armed forces have bases: Yemen

States in which the Saudi armed forces are deployed: **Yemen**

States with which Saudi Arabia is experiencing high levels of political tension: Iran, Lebanon, Syria, Iraq

States with which relations appear to be easing: Oman, Qatar, Turkey



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Armed forces characteristics and capabilities



The motivation, combat readiness, and resilience of National Guard units may be credited with an additional star.

»» Strategic objectives

- Ensure the continued existence of the absolute monarchy and the control of the current branch of the royal family over power; buying off, neutralising or eliminating opponents of the regime while promoting actions perceived as reformist and modernist in order to regain the support of the youth and the West, especially the US.
- Keep Iran at bay while finding a compromise with Tehran to avoid a military confrontation [catastrophic for Saudi Arabia], to facilitate a way out of the crisis in Yemen and to define areas of reciprocal influence in the region.
- End the war in Yemen in which Saudi Arabia has been mired since 2015 by finding an honourable way out for Riyadh.
- Avoid the intrusion and establishment of armed jihadist groups from Iraq, the Levant (Syria, Jordan, and Egypt), Sudan and Yemen that could threaten the holy places as well as the stability of the Sunni monarchy, guardian of the two Holy Mosques.
- Establish itself as the natural Arab leader of the Arabian Peninsula while contributing to the security of the three indispensable transit points: the Bab-el Mandeb Strait, the Strait of Hormuz and the Suez Canal; to maintain good relations with Egypt which could play a key role in the survival of the Saudi regime if it were to be threatened.

» Foreign military presence in the country:

Invited by the ruling government:



USA: 1,000 military advisors and technical personnel; the United States withdrew in September 2021 the 3 THAAD and Patriot PAC-3 anti-missile batteries that had been deployed there in 2019.



UAE: 12 F-16 Block-60 fighters as part of operation *Restoring Hope* in Yemen.



Kuwait: 4 F-18A fighters as part of operation *Restoring Hope* in Yemen.



Jordan: 6 F-16C fighters in operation *Restoring Hope* in Yemen.



Bahrain: 6 F-16C fighters as part of operation *Restoring Hope* in Yemen; artillery and special forces detachment.



Egypt: 6 F-16C fighters as part of operation *Restoring Hope* in Yemen; special forces detachment.



Greece: 1 battery of Patriot-PAC2 missiles.



United Kingdom: military advisors.



France: military advisors.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

- Largest military budget in the North Africa & Middle East region.
- Air force equipped with numerous air-to-air refuelling aircraft and first line fighter aircraft.
- High theoretical capacity for deep strikes (ballistic missiles, fighter-bombers, armed UAVs).
- Strategic depth; limited areas to be defended (capital, holy places, Petroline [oil pipeline], oil fields, and airport facilities).
- Clandestine action capability.
- Strong operational experience of special forces.

VULNERABILITIES

- War fatigue caused by six years of unsuccessful operations in Yemen, causing Saudi Arabia to lose many international supporters, including the United States.
- Inability to effectively protect the population and strategic sites targeted by hostile UAV and missile strikes.
- Competition between the regular army with the most powerful, but aging, equipment (tanks, armour, and artillery), and the National Guard with the most loyal fighters and the most recent weaponry.
- Insufficient training; total verticality of power does not encourage initiative-taking and the development of joint planning and operational capabilities.
- Maintenance of equipment in operational condition is very worrying; at least two-thirds of the equipment, immobilised in vast depots, is reckoned to be no longer operational.
- Massive recourse to numerous foreign contractors, pilots and technicians with very uncertain motivation.

'INVISIBLE' ASSETS

Long range surveillance and strategic intelligence gathering:

- Wing Loong I and CH-4 Rainbow MALE UAVs (Chinese)
- 5 early-warning aircraft: E-3A AWACS and 2 Saab Erieye
- 2 RE-3 SIGINT aircraft
- Information provided by the United States and the United Arab Emirates.

Potentially non-attributable actions:

- UAV strike capability: Wing Loong I and CH-4 Rainbow
- Special forces capable of clandestine action, especially in the Persian Gulf and the Red Sea
- Interventions by proxy militias: Sunni militias in Yemen, Iraq, Syria and Iran

‘VISIBLE’ ASSETS

Ground forces:

Regular Army

- **14 brigades:** 5 armored, 6 mechanized, 1 airmobile, 1 Guard, 1 special forces
- 1 Royal Guard regiment
- **800 main battle tanks :** 450 M-1A2S Abrams ★★★★★☆☆ [1st line], 350 M-60A3 [2nd line]
- 3,000 other armoured vehicles (M-2 Bradley, M-113) + 1,500 Humvee
- 330 artillery tubes of 155 mm (M-109, AUF-1, PLZ-45, M-114, M-198) and 200 multiple rocket launchers (M-270, Astros-II, TOS-1).

National Guard

- **15 brigades:** 5 mechanized, 5 infantry (guarding the holy places and strategic sites), 3 rapid intervention, 2 special forces
- 1,800 armored vehicles (LAV-I/II/III, LAV-25, LAV 6.0)
- 190 artillery tubes of 155 mm including 136 self-propelled guns CAESAR

Portable surface-to-air missiles:

Stinger ★★☆☆☆☆

Anti-tank missiles:

TOW-2 ★★★★★☆☆

Air assets:

- **340 combat aircraft:** 140 F-15ES ★★★★★☆☆ et 70 Typhoon (1st line), 70 F-15C/D et 60 Tornado (2nd line)
- 45 AH-64 attack helicopters (attached to the Regular Army and the National Guard)
- Wing Loong I and CH-4 Rainbow UAVs

Naval assets:

- **6 frigates:** 3 FLF la Fayette ★★☆☆☆☆, 3 F-2000 (all of 2nd line)
- 4 corvettes
- 9 missile boats
- 20 helicopters (5 Dauphin, 15 Panther) for ASW and maritime surveillance

Anti-ship missiles:

Harpoon Block-1B/2 and Exocet MM-40 Block-2 ★★★★★☆☆

Force projection:

- 6 A-330 MRTT strategic transport aircraft
- 30 C-130 transport aircraft
- 110 transport helicopters: 90 Black Hawk, 10 Cougar, 10 Super Puma
- 1 airmobile brigade and 6 commando battalions

Long range strike capability (+ 125 mi)

- About 60 DF-3 ballistic missile launchers ★★☆☆☆ (range of 4,000 km) and DF-21 ★★☆☆☆ (range of 1,700 km)
- 190 fighter bombers: 140 F-15ES ★★★★★ and 50 Tornado IDS ★★★★★
- 10 Tornado fighters specialized in attacking Air Defence systems
- 20 air-to-air refueling aircraft (6 A-330M RTT, 7 Boeing KE-3, 7 KC-130)
- Wing Loong I & CH-4 Rainbow UAVs

Cruise missiles:

- Storm Shadow (range of 400 km) ★★★★★

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-missile and anti-aircraft systems: Patriot PAC-2/3 ★★★★★

Interceptors: F-15C/D and Typhoon armed with AIM-9X and AMRAAM air-to-air missiles ★★★★★

»» Principal deliveries expected of military equipment



· 44 THAAD anti-missile systems ★★★★★ (not yet delivered)

»» Briefing note

Embroiled in the Yemeni conflict since 2015, Saudi Arabia has made one mistake after another (blockade of Qatar, assassination of the journalist Jamal Khashoggi in Turkey, indirect confrontation with Iran, weakening of Lebanon, probable infringement of Jordan's sovereignty, and unqualified support for Donald Trump while refusing to join the Abraham Accords) which have marginalised it and explain the partial disengagement of American protection from it. Everything seems to indicate a strategic vision limited to the Arabian Peninsula and the Persian Gulf, whereas its Emirati neighbours, who have embraced globalisation, and its Turkish and Iranian rivals have developed a global vision extending far beyond the Middle East alone. Like many Middle Eastern states, Saudi Arabia is also caught up in the strategic rivalry between the United States and China, upon which it depends for different reasons: protection on the one hand and economic development on the other.

As the guardian of the holy places of Mecca and Medina, Saudi Arabia is seeking to break out of its isolation, to dissuade Iran from pushing its positional advantage too far, but also to prevent armed jihadist groups from taking root on its territory. Its regular army therefore aims to fulfil the first mission while the National Guard, the ultimate insurance of the royal family and controlled by the Crown Prince's supporters, fulfils the second by being ready to intervene against any regular or irregular unit that would seek to overthrow the regime. Although impressively equipped on paper, Saudi forces remain structurally weak; they proved unable to intercept Iranian strikes on their oil facilities in 2019, just as they have been unable to overcome the Houthi resistance in Yemen. It is highly unlikely that they would be able to challenge Iran if tensions escalate.

»» Overview

Political system: **Presidential regime** (President Abdrabbo Mansour Hadi) / **Civil war on going**

Population: 30 million inhabitants / 7th in the MENA region

Median age: 20 years old

GDP: \$22 billion / 19th in the MENA region

Principal sources of wealth: Oil, natural gas, agriculture, fisheries

GDP/inhabitant: \$775 / 20th in the MENA regio

»» Geopolitical posture

Relevant international/regional security organisations: None

Special relationships:

For the government: Saudi Arabia, Restoring Hope coalition Arab states (Bahrain, UAE, Kuwait, Jordan, Egypt, Sudan) and Oman (neutral)

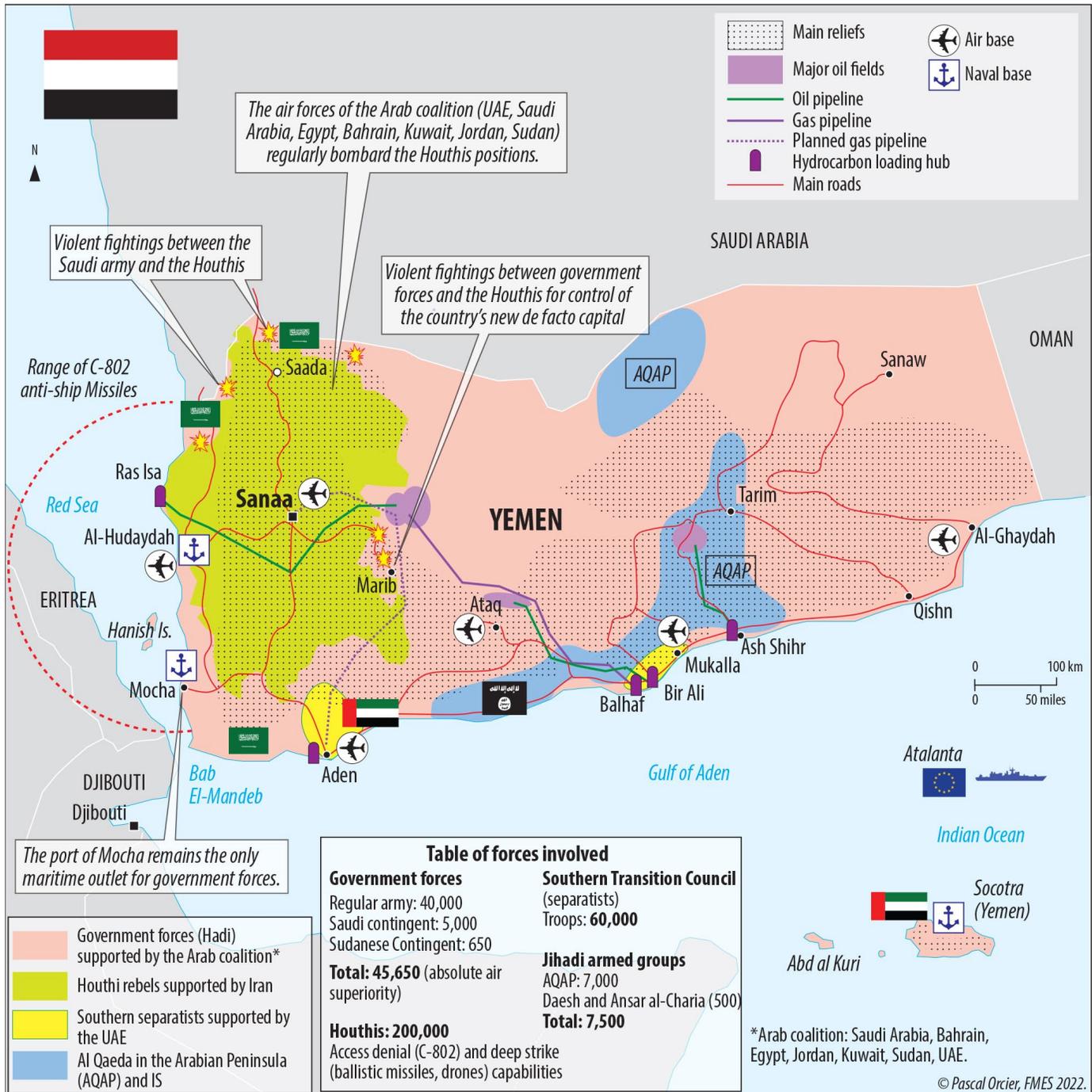
For the Houthis: Iran, Lebanese Hezbollah, Syria, North Korea

For the separatists of the Southern Transitional Council: United Arab Emirates, Eritrea, Somaliland, Russia

States in which the Yemeni armed forces have bases: None

States in which the Yemeni armed forces are deployed: None, except in Yemen

States with which Yemen is experiencing high levels of political tension: Iran, Syria, Eritrea, North Korea



»» Strategic objectives

- Put an end to the civil war that has ravaged the country since 2014; find an inclusive compromise with the Houthis, the Tribal Alliance and the Southern Transitional Council, probably via a new federal constitution and finding a solution for the distribution of hydrocarbon revenues; negotiate an honourable way out of the conflict with Iran, which has actively supported the Houthis.
- Preserve the unity of Yemen to prevent it from being divided once again into two separate states (North and South); reach an agreement with Aden, the United Arab Emirates and the regional actors who are covertly supporting Yemen's partition.
- Drive out or neutralise the armed jihadist groups that control a strategic part of Yemen.
- Stop the humanitarian catastrophe that has affected Yemen since the start of the civil war; relaunch the economy and attract foreign investors.

»» Foreign military presence in the country:

Invited by the ruling government:



Saudi Arabia: 5,000 troops; 2 armored and 1 mechanized brigade; special forces; AH-64 Apache helicopter gunships; PAC-2/3 Patriot missile batteries.



Sudan: 650 troops; 1 mechanized battalion with T-72 main battle tanks and BTR-70M and Kobra-2 armor fighting vehicles.

At the Houthis' request:



Iran: Many military advisors, particularly in the field of UAVs and ballistic missiles



Shiite Militias: Several hundred militiamen from Afghanistan, Pakistan, Syria, Lebanon and Iraq

At the request of the separatists of the Southern Transitional Council:



United Arab Emirates: Military advisors; UAE base and garrison in Socotra Island.

» Regular armed forces characteristics and capabilities:

Defence spending: about \$1.8 billion (8% of GDP) / 16th in the MENA region

Strength: about 40,000 troops (reinforced by the Alliance of Yemeni tribes Al-Islah, close to the Muslim brothers) divided into a dozen of brigades.

Main equipment: A few dozen T-72 ★★☆☆☆, T-62 et T-55 ★☆☆☆☆ ; main battle tanks; about a hundred armoured vehicles of Russian origin (BMP-2, BRDM-2, BTR-80); a dozen 2S1 self-propelled artillery howitzers of 122 mm; several thousand trucks and pickups; TOW anti-tank missiles ★★☆☆☆ donated by Saudi Arabia; the regular army's aviation and combat helicopters of Soviet origin all seem to be out of action, but the regular forces are receiving air support from the Arab coalition: Saudi air force + 36 Egyptian, Jordanian, UAE and Bahraini F-16s and 4 Kuwaiti F-18s.

Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

» Houthi forces characteristics and capabilities:

Strength: about 200,000 troops (including 70,000 deserters from the regular army and 30,000 child soldiers) divided into some 20 brigades and controlling the capital Sana'a as well as the most populous third of the country.

Main equipment: about 100 main battle tanks (T-72, T-62 and T-55), armored vehicles (BMP-2, BRDM-2, BTR-80) and Russian self-propelled artillery captured from the regular army; several thousand trucks and pickups; rocket launchers and anti-tank missiles of Iranian origin (Towsan, Dehlavieh); no aircraft, but many ballistic missiles (SS-21 Scarab, North Korean Hwasong and Iranian versions of the SS-1B/C/D Scud, Qaher, Al Qods) and UAVs (Qasef-1/2, Sammad-2/3) equipped with explosives devices to act as missiles; coastal defence (near Al-Hudaydah) equipped with C-802 anti-ship missiles ★★☆☆☆.

Motivation ★★☆☆☆

Equipment ★★☆☆☆

Anti-Access/Area Denial ★★☆☆☆

Combat effectiveness ★★☆☆☆

Resilience ★★☆☆☆

Long range strike capability ★★☆☆☆

»» Southern Transitional Council separatist forces characteristics and capabilities:

Strength: about 60,000 troops from the south who have seceded from the regular army, reinforced by the popular resistance committees and many local groups, divided into a dozen brigades grouped around Aden and the ports of the southern coast.

Main equipment: A few dozen T-72 ★★☆☆☆☆, T-62 et T-55 ★☆☆☆☆; main battle tanks; several hundred trucks and pickups; light armor, artillery, anti-tank missiles, anti-aircraft missiles and 6 AT-802 Air Tractor light fire support aircraft delivered by the United Arab Emirates; 2 Tarentul corvettes and a few OSA missile patrol boats in the port of Aden (probably out of service); refuelling and maritime security provided by the United Arab Emirates, especially from their base in Socotra.

Motivation ★★☆☆☆☆

Equipment ★★☆☆☆☆

Resilience ★★☆☆☆☆

Combat effectiveness ★★☆☆☆☆

»» Armed Jihadist Groups:

Al Qaeda in the Arabian Peninsula (AQAP): about 7,000 fighters

Islamic State Yemen Province (ISIS & Ansar al-Sharia): about 500 fighters.

»» Briefing note

After seven years of a new civil war that has ravaged the country since 2014 (following those of 1962-1970, 1972, 1978-1982, 1986, 1994, 2005, 2009 and 2011), Yemen is controlled by four major competing factions: the pro-government camp in a weak position, supported by Saudi Arabia and the Arab coalition; the Houthis in a strong position, supported by Iran; the separatists of the Southern Transitional Council supported by the United Arab Emirates, in an arbitration position; and armed jihadist groups seeking to increase their hold on a part of the country containing valuable hydrocarbon resources. The most violent fighting is currently concentrated around Marib (the alternative capital of the loyalists) between Houthis and government forces, but also on the northern border between Houthis and Saudi forces. The status quo seems to prevail in the west (Al-Hudaydah region), the south (Aden region) and the south-east (Tarim and coastal strip).

Despite the terrible civil war, the Yemeni population has continued to grow, showing that the warring parties are all trying to use the demographic weapon to their advantage, as shown by the massive use of child soldiers by several of the fighting factions. Yemen is still the demographic reservoir of the Arabian Peninsula, since its very young population, which is very receptive to radicalised Islam, is more numerous than the sum of the citizens of all the Gulf monarchies (30 million against 28 million). This observation explains the nervousness of the neighbouring Saudi monarchy, which has always considered Yemen as its backyard and its reservoir of cheap labour.

The belligerents only have more or less obsolete 2nd and 3rd line weaponry, limiting the effectiveness of the offensives which remain first and foremost infantry and militia battles. Thanks to the support of Saudi Arabia and the Arab coalition, the government forces benefit from complete air superiority that allows them to compensate for their numerical inferiority and to break the enemy offensives with no consideration for civilian losses. The Houthis, on the other hand, have significant firepower thanks to their rockets, UAVs and ballistic missiles capable of hitting concentrations of loyalist forces, but also of striking deep into Saudi territory and putting pressure on Riyadh. The Houthis also have C-802 anti-ship missiles and drones capable of harassing shipping through the Bab el-Mandeb Strait, knowing that global actors will not tolerate direct or repeated attacks along this highly strategic maritime corridor. They also know that Iran could sacrifice them on the altar of reconciliation with Saudi Arabia.

Unless there is a negotiated settlement to the conflict or the collapse of the loyalist camp, there is every reason to believe that the civil war may last for years to come.

»» Overview

Political system: **Absolute monarchy** (Sultan Haitham ibn Taimour)

Population: 4.5 million inhabitants (including 3 million Omanis) / 16th in the MENA region

Median age: 26 years old (no conscription)

GDP: 76 billion / 12th in the MENA region

Principal sources of wealth: Oil, natural gas

GDP/inhabitant: \$28,000 / 6th in the MENA region

Defence spending: \$7.5 billion (9.8% of GDP) / 9th in the MENA region

Total strength of armed forces: 57,000 / 14th in the MENA region

Breakdown of armed forces: Ground (40,000 including 3,000 of special forces), Royal Guard (6,500), Air (6,000), Navy (4,500)

Total strength of internal security forces: 30,000 (including 6,000 from Dhofar tribal militias)

»» Geopolitical posture

Relevant international/regional security organisations: gulf Cooperation Council (GCC)

Special relationships: USA, United Kingdom, India

States in which the Omani armed forces have bases: None

States in which the Omani armed forces are deployed: None

States with which Oman is experiencing high levels of political tension: Émirats arabes unis

Armed forces characteristics and capabilities

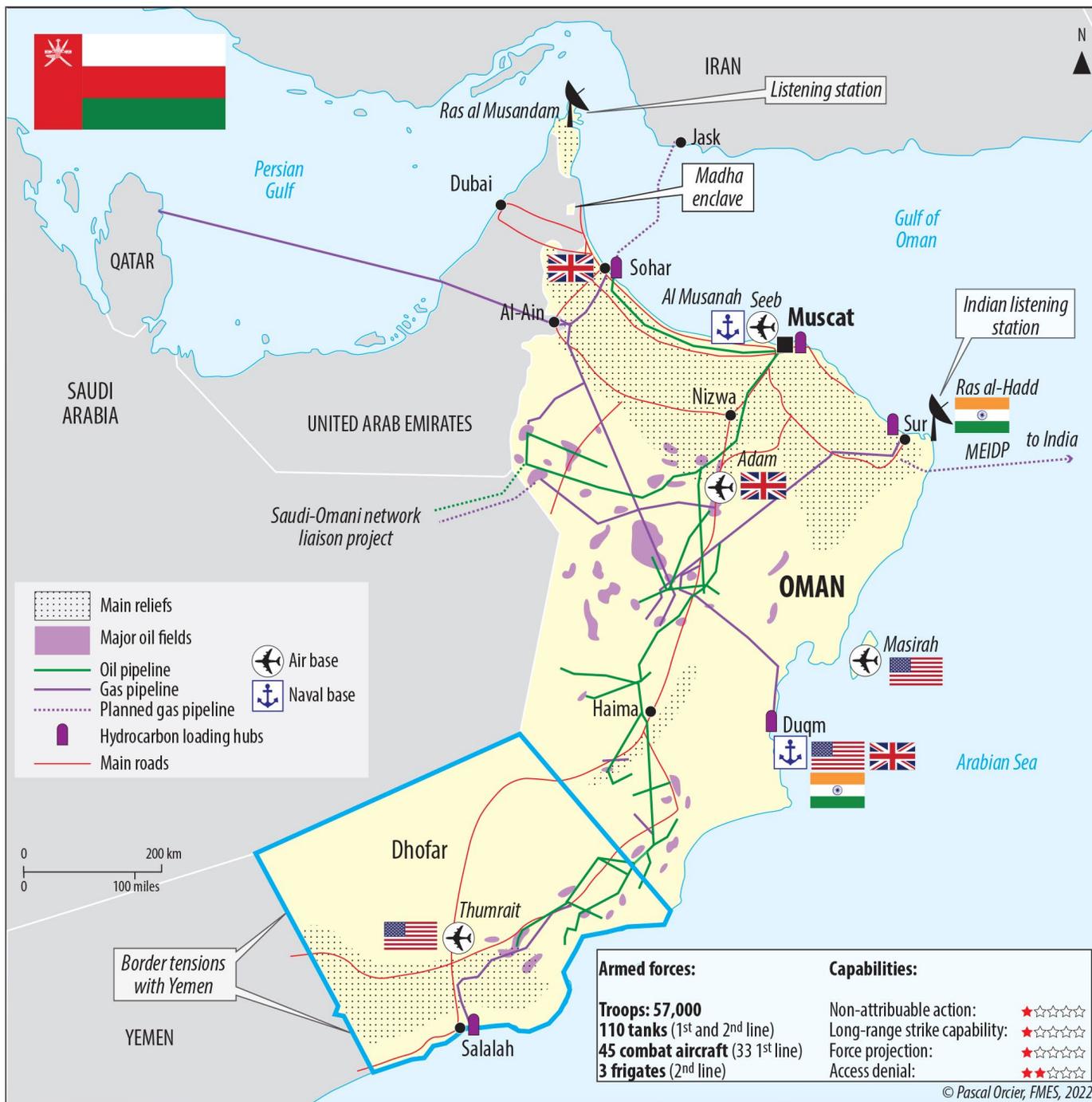
Motivation ★★★★★☆

Equipment ★★★★★☆

Resilience ★★★★★☆

Combat effectiveness ★★☆☆☆☆

Doctrine/Planning ★★☆☆☆☆



»» Strategic objectives

- Maintain the strategic neutrality that has been the strength of the Sultanate of Oman since 1971; ease tensions and establish itself as a key intermediary to contribute to the appeasement of regional conflicts.
- Maintain dual American and British protection; keep at bay the United Arab Emirates and Saudi Arabia, often eager to interfere in the Sultanate's internal affairs.
- Defend the moderate Ibadite Islam that is in the majority in Oman, allowing the Sultanate to reject any radicalisation and to engage in dialogue with Shiites and Sunnis.
- Diversify the economy and focus on the Omani workforce to reduce dependence on foreign workers; establish Duqm as a preferred hub for the export of hydrocarbons from the Arabian Peninsula.
- Maintain the balance between the US and China while making the most of their investment capacities.

»» Foreign military presence in the country:

Invited by the ruling government:



USA: 600 military personnel in the naval base of Duqm (major hub for the ships of the V and VI Fleets), the ports of Muscat and Salalah and the air bases of Thumrait and Masirah; American military equipment prepositioned in Thumrait.



United Kingdom: many military advisors; joint training facilities; naval bases in Sohar and Duqm; 6th and 8th fighter squadrons (UK-Oman) respectively equipped with Hawk Mk-203 (Masirah base) and Typhoon (Adam base); plans to transfer a British armoured detachment from Canada to the Duqm hub to contribute to its security.



India: Listening station in Ras al-Hadd; naval facilities in Muscat and Duqm.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Effective protection from US and UK; central position of Duqm hub.

Neutrality status that reduces risk of friction with neighbours and allows negotiations with all regional actors, including AQPA; good relations with Iran.

Strategic depth that allows trading territory for time in the event of foreign aggression.

Motivated and well-trained armed forces totally devoted to the Sultan.

Concept of tribal militias (*firqat*) that ensure very effective territorial control, especially in Dhofar province.

VULNERABILITIES

No real operational experience since the Dhofar war.

Very large territory difficult to cover, leading to logistical constraints.

Irridentist tendency in the Dhofar region; tensions between Ibadites (majority) and Sunnis (minority); destabilised Yemeni neighbourhood.

Insufficient artillery; not enough tanks; no attack helicopters.

Weak deep strike capability (no air-to-air refuelling aircraft, no cruise missiles, no armed UAVs).

Weak denial capability, especially anti-aircraft; no anti-missile systems; no coastal defence; no anti-submarine warfare capability.

'INVISIBLE' ASSETS

Limited abilities in the field of the invisible:

- Information provided by the USA and the United Kingdom
- Electromagnetic listening station in Ras al Musandam
- Strategic anticipation service attached to the Royal Household
- Special Forces capable of undercover missions and interoperable with US and UK Special Forces

'VISIBLE' ASSETS

Ground forces:

- **4 brigades** : 1 armored, 1 mechanized, 1 infantry, 1 Royal Guard
- **5 regiments**: 2 infantry (including 1 for the guard of Ras al Musandam), 2 special forces, 1 airborne
- **110 main battle tanks** : 35 Challenger 2 ★★★★★ [1st line], 75 M-60A1/3 [2nd line]
- 380 other armoured fighting vehicles (Scorpion, Sultan, Pars III, Piranha, Stormer, Spartan)

Portable surface-to-air missiles:

Mistral ★★★★★

Anti-tank missiles:

Javelin ★★★★★

Artillery:

36 tubes de 155 mm (G-6, FH-70)

Long range strike capability: (+ 125 mi)

- 20 F-16 fighters of Block-50 ★★★★★

Air assets:

- **45 combat aircraft**: 12 Typhoon ★★★★★, 21 F-16 Block-50 ★★★★★ [all of 1st line], 12 Hawk Mk-203 [3rd line]

Naval assets:

- **3 Al-Shamikh frigates** ★★★★★ [2nd line]
- 10 corvettes
- 4 C-295 aircraft and 12 Super Lynx maritime patrol helicopters

Anti-ship missiles:

Exocet MM-40 Block-3 ★★★★★

Force projection:

- 5 C-130 transport aircraft
- 20 NH-90 transport helicopters
- 1 airborne unit
- 1 amphibious assault ship (LST)

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-aircraft systems: NASAMS ★★★★★

Interceptors: Typhoon and F-16 Block-50 armed with AIM-9X and ASRAAM air-to-air missiles ★★★★★

»» Briefing note

Located at the eastern end of the Arabian Peninsula, the Sultanate of Oman, a former British protectorate, is neutral and tolerant, benefiting from a variety of cultural influences (Arab, Persian, African, Indian, Western). As the guardian of the Strait of Hormuz, Oman remains a haven of stability in a region that is fairly troubled. Its strategic position makes it one of the gateways to the Middle East for hydrocarbons, as well as the main bridgehead for the United States to access the region from the Indian Ocean in the event that threats in the Mediterranean and the Red Sea limit access to Israel and Jordan. This explains the US commitment to protecting Oman, this allowing it to limit China's access to Middle Eastern hydrocarbons if this should prove necessary. As for most states in the region, the main challenge for its leaders is to find a balance between China and the United States.

The Omani armed forces are among the best in the region, highly professional and well-trained, although they lack experience, and their generally ageing weaponry would benefit from modernisation (except for the recently upgraded air force). In line with the Sultanate's posture of neutrality, they remain structurally defensive and serve as a pool of employment to reduce youth unemployment. The elite units (Royal Guard, Airborne Regiment, Special Forces) and the tribal militias remain the pillars of the regime.

»» Overview

Political system: **Federal state dominated by the Emirate of Abu Dhabi** / Absolute monarchy (Crown Prince Mohammed Ben Zayed Al Nahyane, Minister of Defence and strongman of the UAE)

Population: 9.7 million inhabitants (including 1.2 million Emiratis) / 18th in the MENA region

Median age: 38 years old (length of compulsory military service: 16 to 24 months, open to women)

GDP: \$425 billion / 4th in the MENA region

Principal sources of wealth: Oil, trade and services (Dubai), air transport (Emirates & Etihad) and port transit (Jebel Ali)

GDP/inhabitant: \$70,000 / 2nd in the MENA region

Defence spending: around \$20 billion (4.7% of GDP) / 3rd in the MENA region

Total strength of armed forces: **65,000** / 12th in the MENA region

Breakdown of armed forces: Ground (45,000), Presidential Guard (12,000) Air (5,500), Navy (2,500)

Total strength of internal security forces: 75,000 (strong technological monitoring)

»» Geopolitical posture

Relevant international/regional security organisations: Abraham Agreements with the USA, Israel, and Morocco; Bilateral defence agreements with the USA and France; Gulf Cooperation Council (GCC)

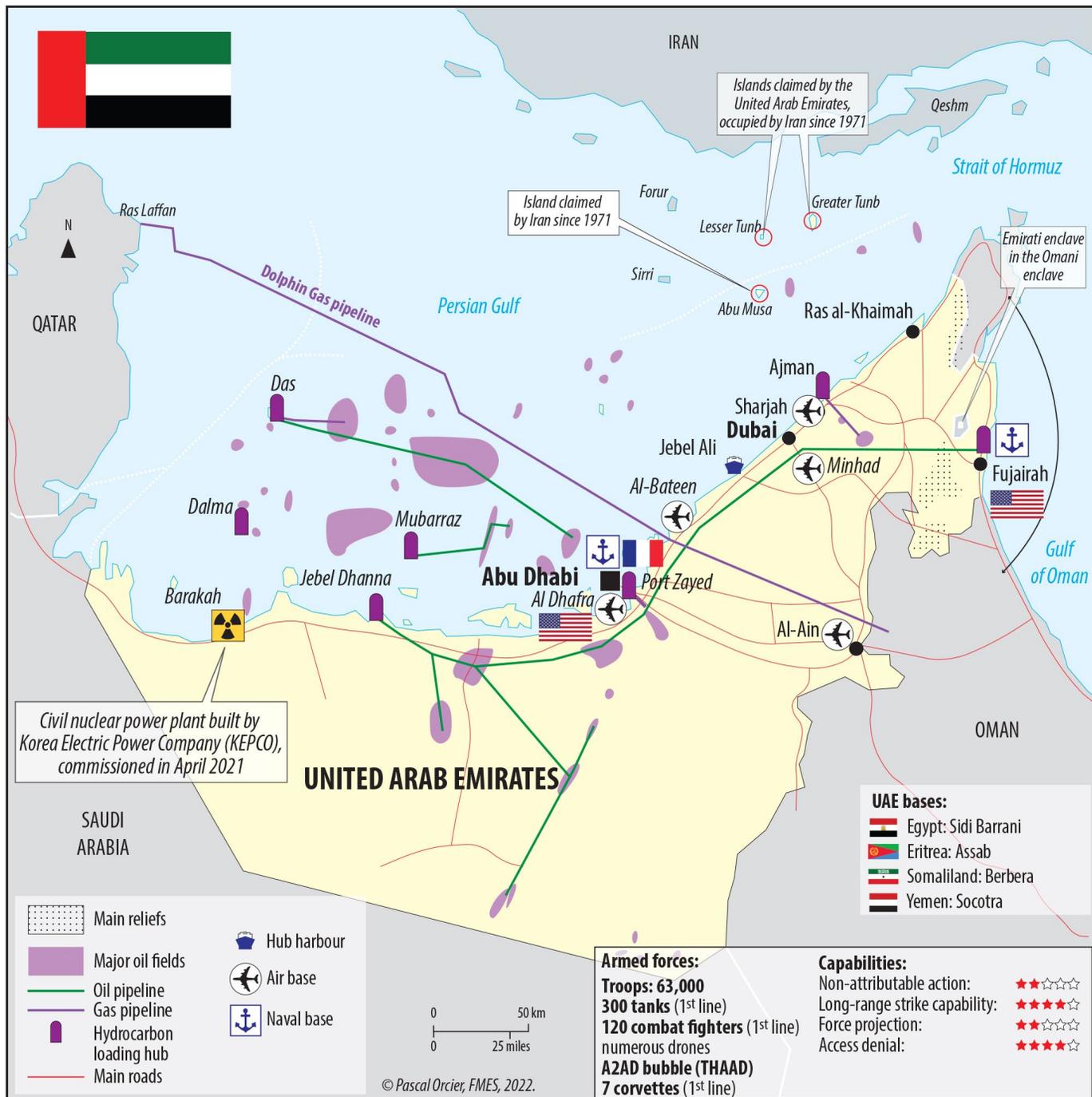
Special relationships: France, USA, China, South Korea, Australia, Egypt, Saudi Arabia, Jordan, Israel, Greece

States in which the Emirati armed forces have bases: Egypt (300 airmen deployed at Sidi Barrani base with Mirage 2000-9s, F-16 Block-60s and UAVs Wing Loong II MALE UAVs; ability to deploy to the Libyan forward airbase of Al-Khadim), Eritrea (500 troops at Assab base with helicopters, transport aircraft, UAVs and 2 corvettes), Yemen (special forces), Socotra Island (Yemen), Berbera (Somaliland), occasional presence of F-16 Block-60 fighters in Crete (Greece).

States in which the Emirati armed forces are deployed: Egypt, Libya, Yemen, Saudi Arabia Saudi Arabia (12 F-16 Block-60 fighters engaged in operation *Restoring Hope*)

States with which UAE is experiencing high levels of political tension: Qatar, Iran, Libya, Houthis (Yemen)

States with which relations appear to be easing: Turkey, Syria, Oman



Armed forces characteristics and capabilities



»» Strategic objectives

- Dissuade Iran and find a compromise with its leaders to continue the de-escalation of tensions and settle the dispute over the Tunb and Abu Musa islands; at the same time, perpetuate the deterrent presence of American and French forces on Emirati territory by awarding major contracts to the US and France.
- Strengthen the UAE's strategic autonomy by multiplying industrial and technological partnerships with China, South Korea, Israel and Russia, without jeopardising American protection; find the balance between Washington and Beijing in the context of Sino-American rivalry.
- Impose itself as a key player in stabilising the Persian Gulf region, multiplying economic partnerships, promoting a globalised Middle East (the UAE's population is 86% expat) and reinforcing the Emirati presence in the port hubs, wherever possible.
- Fight Muslim extremism, political Islam and the activism of the Muslim Brotherhood who all wish to establish Islamic republics (an existential threat to absolute monarchies) wherever they see fit; keep the Qatari rival accused of supporting them at arm's length.

» Foreign military presence in the country:

Invited by the ruling government:



USA: 3,000 military personnel located at Al Dhafra Air Base, Fujairah naval base, and Jebel Ali airport hub; air detachment comprising 12 F-35A stealth fighters, 4 U-2S spy planes, 4 E-3G AWACS aircraft, 12 KC-10 air-to-air refueling aircraft, 12 RQ-4 Global Hawk MALE UAVs; 2 batteries of PAC-3 Patriot anti-missile systems.



France: 750-1,000 troops at the Abu Dhabi joint base; 1 joint battle group (main battle tanks, infantry artillery, engineers); a detachment of six Rafale fighters and one KC-135F air-to-air refuelling aircraft; one Atlantic-2 maritime patrol aircraft and one frigate as part of the EU *Agenor* mission to monitor the Strait of Hormuz.



Australia: Detachment of C-130 transport aircraft to al-Minhad base; naval facilities for Australian frigates on patrol in the Gulf of Oman.



Israel: Alleged presence of an Israeli listening base and special forces following the Abraham Accords; suspicion of joint bases in Socotra and Eritrea.



China: Alleged presence of a listening base covering part of the Middle East and the Indian Ocean.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Deterrent presence of US and French forces.

Strategic vision and effective understanding of the regional environment.

Strong operational experience (coalition against IS, Afghanistan, Yemen, and Libya); overall well-trained forces; real capabilities in the Invisible assets.

Very good armament in all areas.

Very modern aviation; many UAVs; good denial of access capability.

VULNERABILITIES

Vulnerability of Dubai (World Expo) very exposed to possible Iranian strikes or clandestine actions.

Verticality of power does not encourage initiative.

Lack of qualified personnel requiring the use of foreign mercenaries and contractors.

Shortcomings in maritime security.

Inadequate maintenance of equipment to operational readiness standards.

'INVISIBLE' ASSETS

Long range surveillance and strategic intelligence gathering:

- **4 satellites:** 3 Yahsat for communication, 1 Falcon Eye 2 for reconnaissance (2020, sub-metric resolution image)
- Many new Chinese MALE UAVs: Wing Loong I & II
- 4 early-warning aircraft (2 Global Eye and 2 Saab-340 Erieye)
- 1 Global-6000 SIGINT aircraft
- Strategic anticipation service attached to the Ministry of Defence
- Infiltration capability of special forces on observation missions

Potentially non-attributable actions:

- UAV strike capability: Wing Loong I & II and RQ-1E Predator XP
- Special forces capable of clandestine operation
- Action by proxy mercenaries (Sudanese, Chadian, Yemeni, Pakistani), especially in Libya and Yemen

'VISIBLE' ASSETS

Ground forces:

Army

- **5 brigades** (2 armored, 2 mechanized, 1 infantry)
- **300 Leclerc main battle tanks** ★★★★★☆ (1st line)
- 1,500 other armoured vehicles (Scorpion, BMP-3, BTR-3U, AML-90, AMV-8x8, Rabdan, Caiman, Urutu, Nimr)

Presidential Guard

- **1 mechanized brigade**
- 2 special forces battalions
- 1 marine infantry battalion

Portable surface-to-air missiles:

Mistral ★★★★★☆

Anti-tank missiles:

Milan, Kornet-E, Javelin ★★★★★☆

Artillery: 180 tubes of 155 mm (G-6, M-109, Mk-F3, AH-4) and 40 multiple rockets launchers (Firos-25, M-142, Smerch)

Long range strike capability: (+ 125 mi)

- 40 fighters: Mirage 2000-9 and F-16 Block-60 (★★★★☆)
- 3 Airbus MRTT air-to-air refueling aircraft
- 6 Mirage 2000 RAD fighters for electronic warfare and SEAD missions
- Armed MALE UAVs: Wing Loong I & II and RQ-1E Predator XP

Cruise missiles:

Black Shaheen / SCALP-EG ★★★★★☆ (range of 450 km)

Air assets:

- **126 combat aircraft:** 60 Mirage 2000-9 and 60 F-16 Block-60 ★★★★★☆ (1st line), 6 Mirage 2000 RAD (2nd line)
- 24 light fire support aircraft (Archangel, AT-802 Air Tractor)
- 25 AH-64 Apache attack helicopters
- Armed UAVs: Wing Loong I & II and RQ-1E Predator XP

Naval assets:

- **7 light frigates:** 6 Baynunah, 1 Abu Dhabi ★★★★★☆ (2nd line)
- 6 Lurssen missile boats
- 4 Dash-8 maritime patrol aircraft
- 5 Super Puma anti-submarine warfare helicopters

Anti-ship missiles:

Exocet MM-40 Block-3 ★★★★★☆

Force projection:

- 7 C-17 strategic transport aircraft
- 20 CH-47 heavy lift helicopters
- 50 Black Hawk lift helicopters
- 2 special forces battalions
- 2 amphibious assault ships (LST)
- 1 marine infantry unit

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-missile systems: 12 THAAD batteries ★★★★★

Anti-aircraft systems: Patriot PAC-3 ★★★★★☆

GPS jamming capability or electronic warfare

Interceptors: Mirage 2000-9 and F-16 Block-60 armed with MICA & AMRAAM air-to-air missiles ★★★★★☆

»» Principal deliveries expected of military equipment



· Cheongung Air Defence systems ★★★★★☆ (not yet delivered)



· 12 Caracal helicopters (not yet delivered)



· 80 Rafale F4 fighters ★★★★★☆ (not delivered before 2027-2031)



· 18 MQ-9 Reaper armed MALE UAVs (delivery under negotiation)



· 50 F-35 stealthy fighters ★★★★★☆ (delivery under negotiation)

»» Briefing note

After a decade of confrontation with uneven results on multiple fronts, which earned them the nickname of the «Little Sparta of the Gulf», the United Arab Emirates now seem to be promoting dialogue and cooperation by rebuilding bridges with states with which they were at odds (Syria and Israel), in rivalry (Qatar and Oman), or even in a situation of confrontation (Iran, Houthis in Yemen, Turkey and the National Unity Government in Libya). This development could rekindle rivalries with Saudi Arabia which is distancing itself from Abu Dhabi. The two other priorities of the United Arab Emirates consist in developing their defence industry and accelerating their economic development to gain strategic autonomy, thanks in particular to Chinese and South Korean investments (civil nuclear) and to a proactive policy in maritime issues. The United Arab Emirates are resolutely projecting themselves into a globalised and interconnected world.

In the end, the major challenge for the UAE leaders will be to find the dual equilibrium between the United States and China, Israel and Iran; in this respect, France and Russia no doubt have a card to play.

The UAE's armed forces are unquestionably among the best in the region. They are very well equipped, properly trained and have undeniable operational experience. By his posture of dialogue and his choices of acquisition reinforcing his capacities of detection (satellites), of deep strikes (aviation, UAVs) and of denial of access (cyber, THAAD anti-missile systems), the Crown Prince seems to indicate that he is already working on the hypothesis of an Iran with a military nuclear capacity.

»» Overview

Political system: **Absolute monarchy** (Emir Tamim Bin Hamad Al Thani)

Population: 2.5 million inhabitants (including only 280,000 Qataris) / 20th in the MENA region

Median age: 33 years old (military service of 12 months: volunteering)

GDP: \$176 billion / 8th in the MENA region

Principal sources of wealth: natural gas, air transport (Qatar Airways)

GDP/inhabitant: \$95,000 / 1st in the MENA region

Defence spending: estimated around 6.5 billion (3.7% of GDP) / 10th in the MENA region

Total strength of armed forces: 16,500 / 18th in the MENA region

Breakdown of armed forces: Ground (12,000), Air (2,000), Navy (2,500)

Total strength of internal security forces: 5,000

»» Geopolitical posture

Relevant international/regional security organisations: Gulf Cooperation Council (GCC)

Special relationships: USA, Turkey, France, Italy, UK, Germany, Pakistan

States in which the Qatari armed forces have bases: None

States in which the Qatari armed forces are deployed: **Afghanistan** (200)

States with which Qatar is experiencing high levels of political tension: Émirats arabes unis, Arabie saoudite, Bahreïn

Armed forces characteristics and capabilities

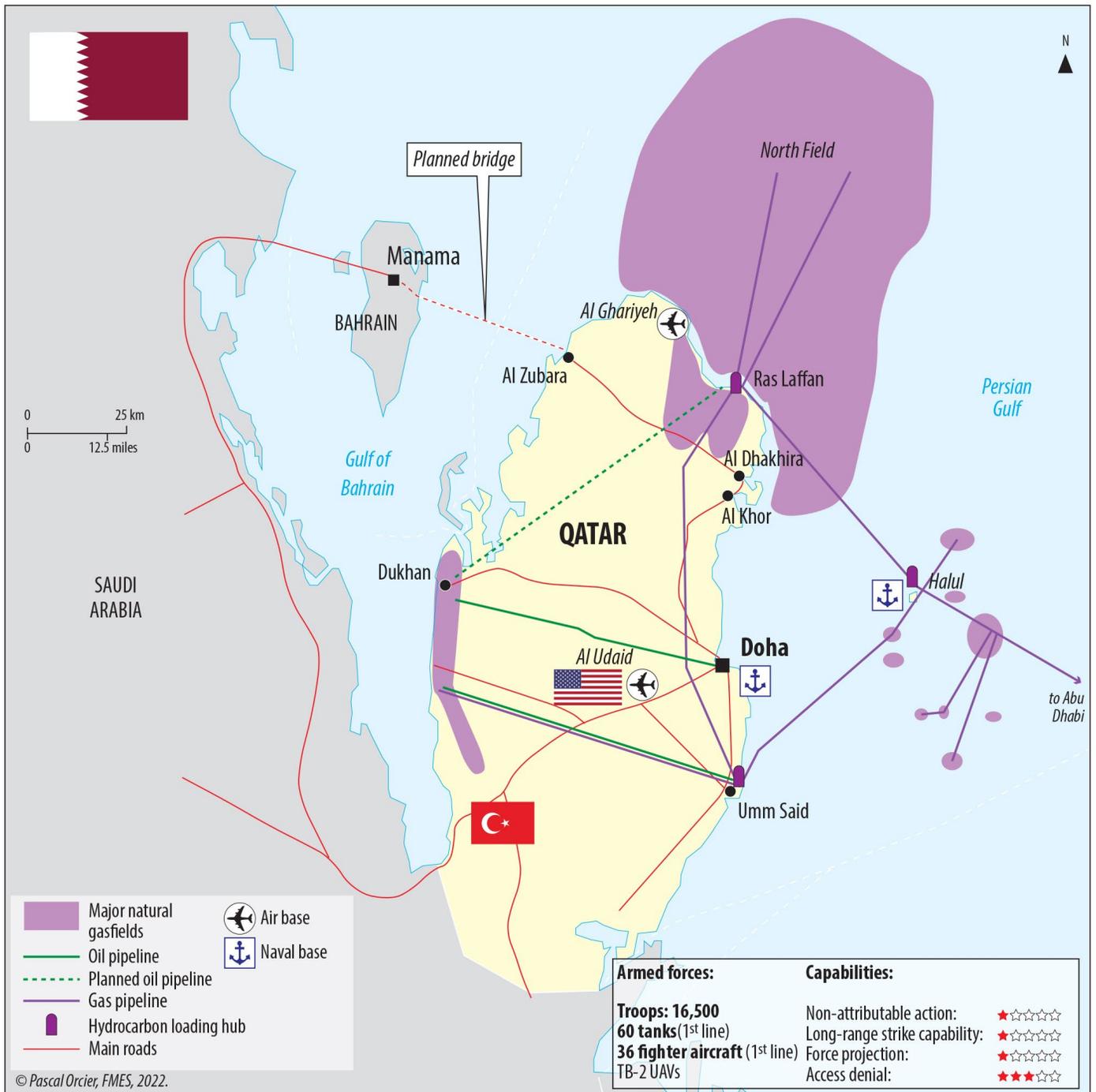
Motivation ★★☆☆☆

Equipment ★★★★★

Resilience ★☆☆☆☆

Combat effectiveness ★☆☆☆☆

Doctrine/Planning ★☆☆☆☆



»» Strategic objectives

- Broaden strategic partnerships (via arms and gas contracts) to diversify protectors and guarantee the emirate's sovereignty in the long term.
- Establish itself as the US's preferred intermediary in the region, thanks to the empathy of the US Democratic Party (Qatar represents US interests in Afghanistan).
- Maintain good relations with Iran, with which it shares one of the world's largest offshore gas fields, while re-establishing a working relationship with Saudi Arabia and supporting the Palestinians.
- Keep the United Arab Emirates at arm's length.
- Support Turkey and the concept of political Islam, including the Muslim Brotherhood, where possible, and place itself in a leadership position in the field of Arab-Muslim soft power.

»» Foreign military presence in the country:

At the invitation of the Emir:



USA: Contingent of 6,000 soldiers and airmen at the Al Udeid base, which houses the Middle East Air Operations Coordination Centre (CAOC) and one expeditionary wing



Turkey: A base housing 400 military personnel (infrastructure that can accommodate 1,500 military personnel from time to time).



France: Presence of military advisors.



United Kingdom: Presence of military advisors.



Italy: Presence of military advisors.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

- High quality weaponry.
- Ability to project its forces, including special forces, and to conduct clandestine operations.
- Impressive development of the air force.
- Emergence of a real patriotic feeling after the 2017 crisis with Saudi Arabia, the UAE and Bahrain.

VULNERABILITIES

- Weak planning and employment of units, except for the air force and special forces.
- Insufficient training and limited operational experience (Libya 2011, Yemen 2015, and Afghanistan 2021).
- Critical shortage of qualified personnel, requiring recourse to foreign personnel.
- Lack of homogeneity of equipment leading to serious logistical and maintenance problems.

'INVISIBLE' ASSETS

Non-attributable actions:

- Clandestine action capability (Special Forces)
- UAV strike capability (Bayraktar TB2)

'VISIBLE' ASSETS

Ground forces:

- **4 brigades** (1 armored, 2 mechanized and 1 Guard attached directly to the emir)
- **60 Leopard-2A7 main battle tanks** ★★★★★☆ (1st line)
- 460 other armoured vehicles (Piranha, VAB, AMX-10RC, Fenek, VBL, Yalcin, Kirpi)

Portable surface-to-air missiles:

Igla-S, Stinger, Mistral ★★★★★☆

Air assets:

- **24 Rafale combat aircraft** ★★★★★☆
- 24 AH-64E Apache attack helicopters
- 6 Bayraktar TB armed UAVs

Naval assets:

- 7 missile boats (4 Barzan & 3 Combattante III)

Anti-ship missiles:

Exocet MM-40 Block-3 ★★★★★☆

'VISIBLE' ASSETS

Anti-tank missiles:

Kornet-EM, Javelin, Milan ★★★★★☆

Artillery: 65 guns and multiple rocket launchers (PzH-2000, G-5, ASTROS-II)

Long range strike capability: (+ 125 mi)

· Rafale fighters ★★★★★☆

· 2 BP-12A ballistic missile launchers (Chinese) with a range of 300 km

Force projection:

· 8 C-17 strategic transport aircraft

· battalion of special forces

· 1 battalion of Leopard-2A7 main battle tanks

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-missile and Air Defence systems: Patriot PAC-2/3 ★★★★★☆☆

Ad hoc deployment of THAAD systems ★★★★★★ by the United States, in addition of Patriot PAC-3, to protect the Al Udeid base.

Interceptors: Rafale armed with MICA and Meteor air-to-air missiles ★★★★★☆ ; occasional presence of American F-15E fighters ★★★★★☆

Principal deliveries expected of military equipment



· 12 Rafale fighters (Currently being delivered) ★★★★★☆



· 24 Typhoon (fighters) (not yet delivered) ★★★★★☆☆



· 36 F-15E fighters (not yet delivered) ★★★★★☆☆



· 12 THAAD anti-missile systems ★★★★★★ (delivery under negotiation)



· 28 NH-90 helicopters including 12 ASW ones (not yet delivered)



· 4 Air Defence missile corvettes (ASTER-30) ★★★★★☆☆



· 2 patrol boats and 1 amphibious assault ship (not yet delivered)

»» Briefing note

The Emirate of Qatar seeks to dissuade neighbouring monarchies from interfering in its internal affairs. It relies on its soft power, notably through the Al Jazeera TV channel, on the American and Turkish military presence, as well as on its multiple strategic partnerships to ensure its defence. Its armed forces, equipped with very modern weaponry, are not very capable of combat and remain focused on territorial defence. They nevertheless have a real denial of access capacity, but also a capacity for deep strike and force projection that the current Emir does not seem to want to use, unlike his father; he is nonetheless giving his armed forces with a small maritime projection capability, while dramatically strengthening air power to the point where it is unclear how he will manage to find the human resources to pilot and operate the 96 fourth-generation strike aircraft that will eventually equip his air force, apart from a massive use of foreign contractors.

»» Overview

Political system: **Constitutional monarchy** (King Hamad ben Issa Al Khalifa)

Population: 1.6 million inhabitants (including 1 million Bahrainis) / 19th in the MENA region

Median age: 33 years old (no conscription)

GDP: \$38 billion / 17th in the MENA region

Principal sources of wealth: Oil, finance

GDP/inhabitant: \$27,500 / 7th in the MENA region

Defence spending: \$1.4 billion (3.7% of GDP) / 18th in the MENA region

Total strength of armed forces: 8,500 / 20th in the MENA region

Breakdown of armed forces: Ground (6,000), Air (1,500), Navy (1,000)

Total strength of internal security forces: 11,000

»» Geopolitical posture

Relevant international/regional security organisations: Gulf Cooperation Council (GCC); Abraham Accords with the USA, the United Arab Emirates, Morocco and Israel; status as a major US ally

Special relationships: USA, United Kingdom, Saudi Arabia

States in which the Bahraini armed forces have bases: None

States in which the Bahraini armed forces are deployed: Saudi Arabia (250 soldiers including 1 special forces group and 6 F-16C fighters as part of operation *Restoring Hope*)

States with which Bahrain is experiencing high levels of political tension: Iran, Qatar

Armed forces characteristics and capabilities

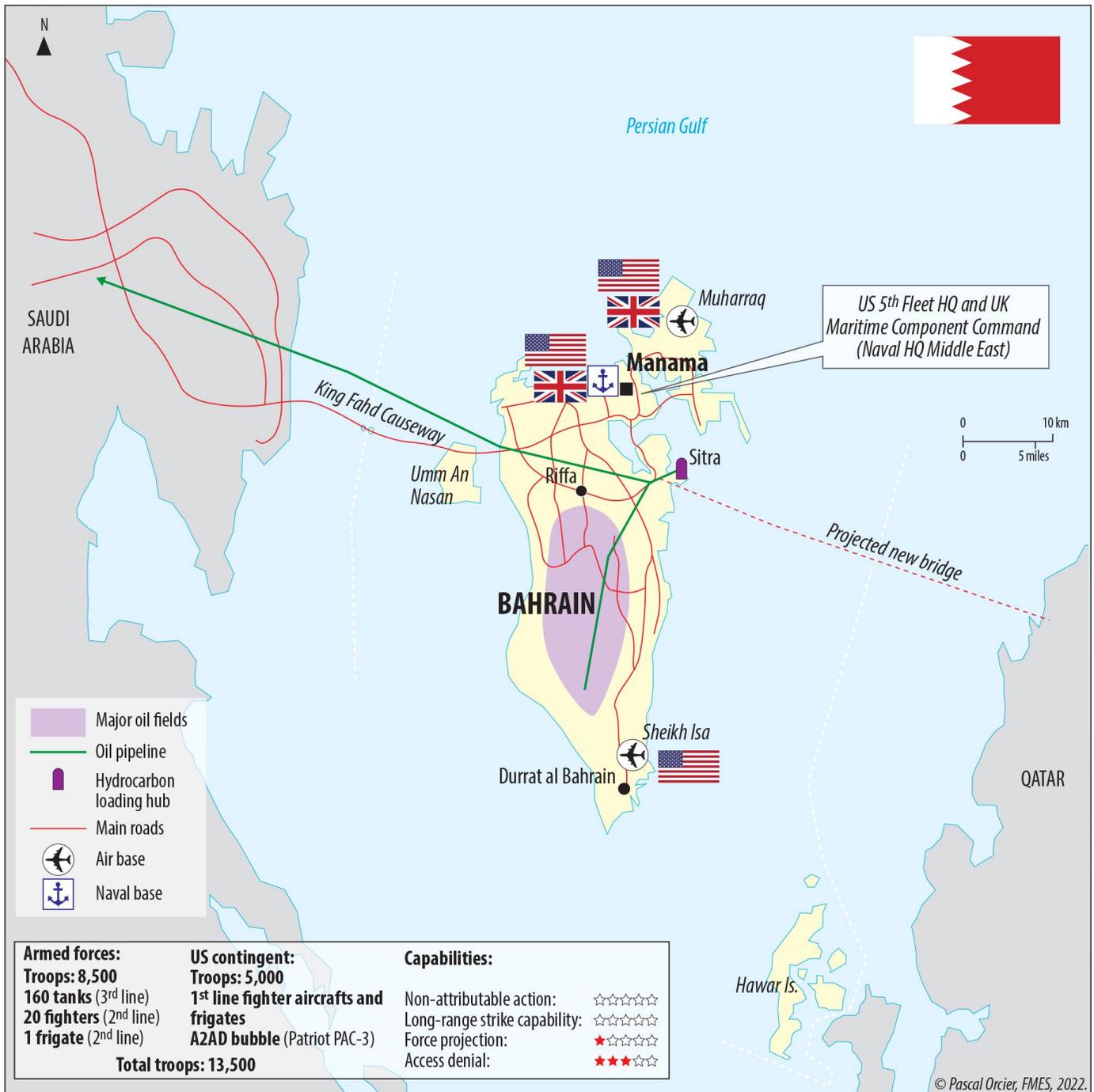
Motivation ★☆☆☆☆

Equipment ★★☆☆☆

Resilience ★☆☆☆☆

Combat effectiveness ★☆☆☆☆

Doctrine/Planning ★☆☆☆☆



»» Strategic objectives

- Ensure the survival of the fragile monarchy from within (reformist opposition and majority Shiite population) and from outside (Iran, and Qatar).
- Maintain the alliance with the US and Saudi Arabia for as long as possible; maintain the deterrent presence of US naval aviation and British naval forces.
- Focus on the diversification of resources to prepare for the post-oil era, by favouring finance and services, by establishing itself as an international hub and as the Singapore of the Persian Gulf, hence the establishment since 2003 of the Manama Dialogue (along the lines of the Shangri-La Dialogue in Singapore).
- Find common ground with Iran (which sees Bahrain as an advanced US-Saudi beachhead in the Persian Gulf) and Qatar (dynastic feud), in order to stabilise the monarchy.

»» Foreign military presence in the country:

Invited by the ruling government:



USA: 5,000 military personnel: HQ of the V Fleet and Combined Task Force 53; Manama naval base; Sheikh Isa and Muharraq air bases with detachments of F-16C/D, F-18E/F and F-35B/C fighters, 5 P-8 Poseidon maritime patrol aircraft, 2 EP-3E Aries electromagnetic listening aircraft, 2 Patriot PAC-3 anti-missile batteries.



United Kingdom: 200 troops: naval (Mina Salman) and air (Muharraq) bases; British Maritime Component Command for the Middle East; Manama Strategic Dialogue organized by the IISS in London with the support of the United Kingdom.



Saudi Arabia: military advisors; detachments as part of the GCC *Peninsula Shield Force*.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

- Triple protection from the US, UK and Saudi Arabia.
- Proximity to Saudi territory thanks to the King Fahd Bridge, allowing the rapid arrival of GCC reinforcements.
- Small territory easy to defend.

VULNERABILITIES

- Majority Shiite population (70%) hostile to Israel and pro-Palestinian, poorly managed by a Sunni monarchy exercising absolute power in practice.
- Very little operational experience, except in the field of internal security.
- Generally obsolete weaponry being modernised; no UAVs.
- Low level of operational maintenance, carried out almost exclusively by foreign contractual personnel.

'INVISIBLE' ASSETS

Very limited capacities in the field of the invisible

- Information provided by the USA, the United Kingdom and Saudi Arabia

'VISIBLE' ASSETS

Ground forces:

- **2 brigades** (1 armored, 1 mechanized)
- 5 battalions (1 special forces, 1 Royal Guard, 3 National Guard)
- **160 M-60A3 main battle tanks** ★★☆☆☆ (3rd line)
- 360 other armoured vehicles (M-113, AIFV-B/C, AML-90)

Portable surface-to-air missiles:

Stinger, RBS ★★☆☆☆

Air assets:

- **20 combat aircraft:** 20 F-16 Block-40 ★★☆☆☆ (2nd line)
- 25 AH-1 Cobra attack helicopters

Naval assets:

- **1 upgraded OH Perry frigates** ★★☆☆☆ (2nd line)
- 1 offshore patrol boat
- 6 upgraded Lurssen missile boats

Anti-tank missiles:

Kornet-EM ★★★★★☆

Artillery:

40 tubes of 155 mm (M-109, M-198) and 12 multiple rocket launchers of 220/227 mm (M-270, SR-5)

Force projection

- 2 C-130 transport aircraft
- 12 Black Hawk transport helicopters
- 1 special forces battalion

Anti-ship missiles:

Harpoon Block-1B, MM-40 Block-1 ★★★★★☆

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-aircraft systems: upgraded Hawk ★★☆☆☆☆ likely to be replaced by Patriot PAC-3 anti-missile systems ★★★★★☆

Interceptors: F-16 Block-40 armed with AIM-9P and AMRAAM air-to-air missiles ★★★★★☆

»» Principal deliveries expected of military equipment



· 16 F-16 Block-70 fighters ★★★★★☆ [not yet delivered]



· Patriot PAC-3 anti-missile systems ★★★★★☆ [delivery under negotiation]

· 8x8 armored vehicles [delivery under negotiation with multiple suppliers]

»» Briefing note

A former British protectorate (until 1971), the emirate of Bahrain remains very fragile internally, as shown by the deployment in 2011 of contingents from the GCC's 'Peninsula Shield' force to save the monarchy in great difficulty. Its armed forces, equipped with ageing weapons, are therefore mainly focused on internal security and the defence of the Hawar Islands from Qatar. The air and naval forces, currently being modernised, should allow the emirate to participate visibly in international coalitions alongside the United States or Saudi Arabia, its two key protectors who guarantee the emirate's sovereignty.

»» Overview

Political system: **Constitutional Monarchy** (Amir Nawaf al-Ahmad Al-Sabah)

Population: 4.5 million inhabitants (of which only 1.4 million are Kuwaitis) / 17th in the MENA region

Median age: 30 years old (12 months of military service: volunteering)

GDP: \$135 billion / 10th in the MENA region

Principal sources of wealth: Oil

GDP/inhabitant: \$52,000 / 3rd in the MENA region

Defence spending: \$7.7 billion (5.7% of GDP) / 8th in the MENA region

Total strength of armed forces: 17,500 / 17th in the MENA region

Breakdown of armed forces: Ground (11,500), Air (2,500), Navy (2,000), Emirati Guard (1,500)

Total strength of internal security forces: 7,500

»» Geopolitical posture

Relevant international/regional security organisations: Gulf Cooperation Council (GCC); status as a major US ally reinforced by a bilateral defence agreement

Special relationships: USA, United Kingdom, Saudi Arabia, France, Italy, Oman

States in which the Kuwaiti armed forces have bases: None, but occasional deployments in Saudi Arabia

States in which the Kuwaiti armed forces are deployed: Saudi Arabia and Yemen as part of operation *Restoring Hope*

States with which Kuwait is experiencing high levels of political tension: Iraq

Armed forces characteristics and capabilities

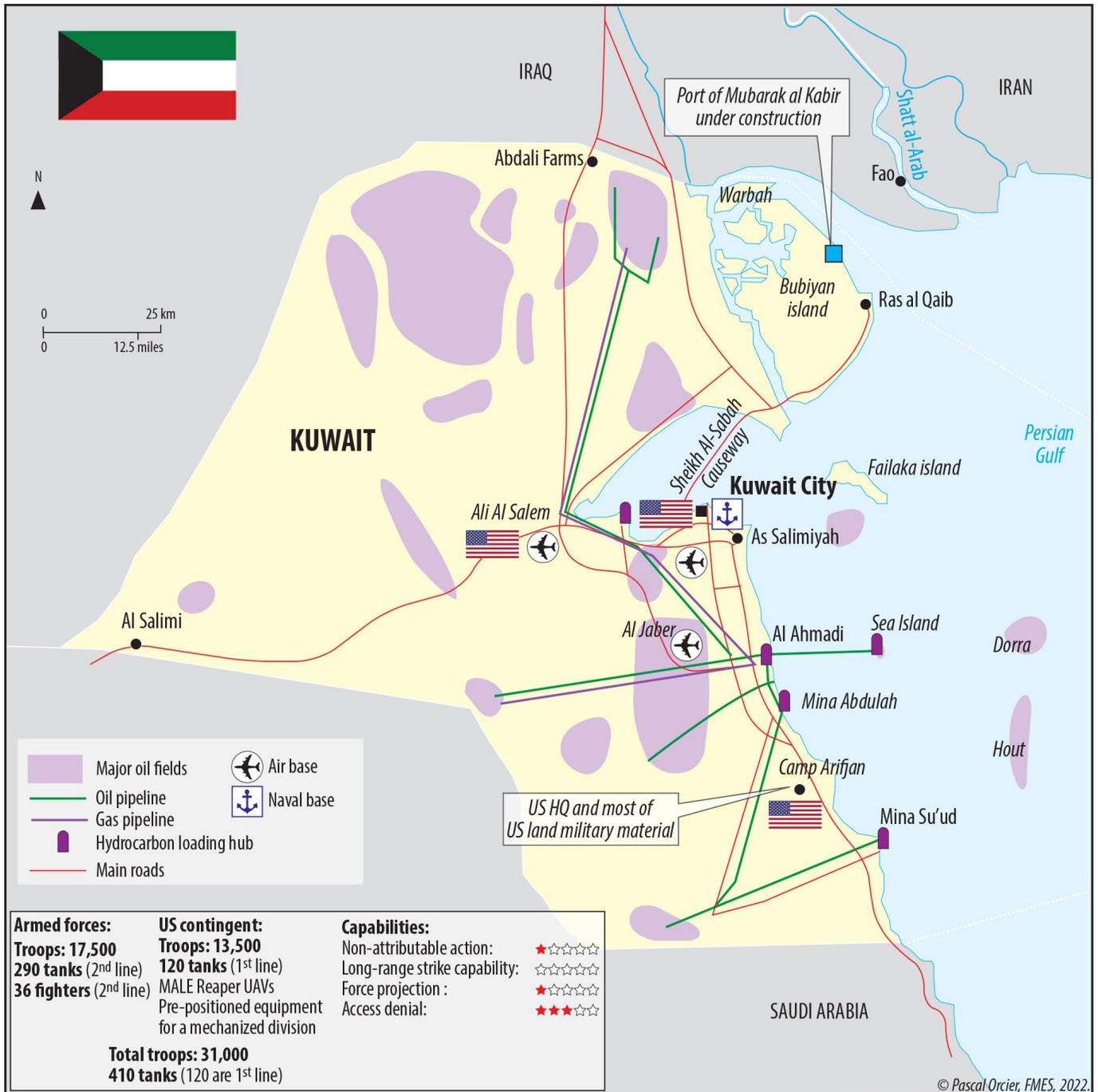
Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★☆☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★☆☆☆☆



»» Strategic objectives

- Guarantee the sovereignty of the emirate in a tense regional context by dissuading Iraq, which has always considered Kuwait as a former Iraqi province, from any intrusion; the trauma of Saddam Hussein's invasion of Kuwait (1990-1991) remains very strong within the Kuwaiti ruling elites
- Maintain the large US military presence as a deterrent for as long as possible.
- Maintain a posture of regional neutrality by maintaining good relations with Iran and the other monarchies of the Gulf Cooperation Council (GCC); maintain the role of a credible mediator between the two shores of the Persian Gulf, in the same way as the Sultanate of Oman and Qatar.
- Avoid a regional conflict that would weaken and threaten the emirate.
- Maintain internal stability in a difficult socio-economic context (impact of the oil and health crises), with a fragmented parliament and divided communities (Arabs and non-Arabs, Sunnis and Shiites); thus promote the Palestinian cause, which is still very popular in Kuwait.

»» Foreign military presence in the country:

Invited by the ruling government:



USA: 13,500 military personnel: 1 armored brigade (120 M-1A5 main battle tanks), 1 combat helicopter brigade (AH-64D Apache) special forces, 3 Patriot PAC-3 anti-missile batteries and 1 squadron of 12 MQ-9A Reaper armed MALE UAVs at Ali Al-Salem airbase; ARCENT HQ (CENTCOM ground segment), operation Inherent Resolve operational HQ and equipment pre-positioned for 1 armored brigade and 1 mechanized brigade at Camp Arifjan.



United Kingdom: 80 military personnel: 1 squadron of 8 MQ-9A Reaper armed MALE UAVs; supervision of the Joint Command and Staff College.



France : about thirty military personnel inserted in the operation Inherent Resolve staff; several dozen contracted aviation experts working for the Kuwaiti MINDEF.

Operation *Inherent Resolve* (fight against ISIS): 350 troops from Italy, Canada, Denmark and Singapore; 250 Italian troops: 4 Tornado ECR fighters, 2 MQ-9A Reaper armed MALE UAVs, 1 KC-767 air-to-air refuelling aircraft.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

- Protection of the US.
- Neutral stance limiting friction with regional actors.
- Excellent knowledge of the regional environment and good understanding of strategic issues.
- Strong motivation to keep Iraq, Iran and Saudi Arabia at arm's length.
- Progressive modernisation of air assets and denial of access capabilities.

VULNERABILITIES

- Weak operational experience.
- Inadequate maintenance of operational readiness.
- No strategic depth; forces spread out to defend oil installations spread throughout the emirate.
- No 1st line tanks (conversion of Abrams tanks to M-1A2K standard).
- No UAVs (except those deployed by the US, UK and Italy).

'INVISIBLE' ASSETS

Very limited capacities in the field of the invisible

- Intelligence provided by the USA and other allies
- Strategic anticipation service attached to the Emir
- Clandestine actions that could be conducted by the special forces regiment

'VISIBLE' ASSETS

Ground forces:

- **8 brigades** (3 armored, 3 mechanized, 1 commando, 1 of the Emirati Guard)
- 1 special forces regiment
- **290 main battle tanks:** 215 M-1A2 Abrams ★★☆☆☆, 75 M-84B (all of 2nd line)
- 800 other armoured vehicles (BMP-2, BMP-3, Desert Warrior, M-113, Sherpa)

Air assets:

- **36 F-18C/D Hornet fighter** ★★☆☆☆ (2nd line)
- 25 attack helicopters: 15 AH-64D Apache, 10 Gazelle Hot

Naval assets:

- 10 missile boats: 2 Lurssen, 8 Combattante III P-37
- 10 Pegasus light patrol boats

Portable surface-to-air missiles:

Stinger ★★☆☆☆

Anti-tank missiles: Tow-II, Kornet ★★☆☆☆

Artillery: 90 tubes of 155 mm (M-109, PLZ-45, Mk-F3) and 25 multiple rocket launchers of 300 mm (9A52 Smerch)

Anti-ship missiles:

· Exocet MM-40 Block-2 ★★☆☆☆

Force projection

- 2 C-17 strategic transport aircraft
- 3 KC-130 aerial refuelling tankers
- 30 H-225M Caracal transport helicopters (currently being delivered)
- 2 amphibious assault ships (LCT)
- Special forces regiment and commando battalions

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-missile and anti-aircraft systems: Patriot PAC-2 ★★☆☆☆ (currently being upgraded to PAC-3 standard); presence of American Patriot PAC-3 batteries ★★☆☆☆

Interceptors: F-18C/D Hornet armed with AIM-9L and AMRAAM air-to-air missiles ★★☆☆☆

»» Principal deliveries expected of military equipment



· 25 additional M-1A2K Abrams main battle tanks (Currently being delivered)



· 28 F-18E/F Super Hornet fighters ★★☆☆☆ (not yet delivered, to replace the F-18C/D)



· 28 Typhoon Block-3A fighters ★★☆☆☆ (Currently being delivered)



· 420 Sherpa light armored vehicles (Currently being delivered)



· BMP2 armor and BM-30 rocket launchers (not yet delivered)

»» Briefing note

Kuwait seeks to guarantee its sovereignty by every means possible, the safest of which are the maintenance of American protection, the display of its posture of neutrality which gives it a role as a respected interlocutor, and its charitable diplomacy which has won it many friends. Its armed forces are thus structured defensively and are deliberately not equipped with any truly offensive or deep strike capability. Its denial of access capabilities, reinforced by the American presence, are on the other hand credible and dissuasive. Its modest force projection capabilities are as much about ensuring sovereignty over the offshore platforms and the Kuwaiti islands of Failaka, Bubiyan and Warbah as they are about sending humanitarian aid or a contingent as part of a possible international peace-making coalition.

»» Overview

Political system: Federal and communitarian parliamentary system
(Prime Minister Mustafa al-Kazimi)

Population: 39 million inhabitants / 5th in the MENA region

Median age: 22 years old (length of compulsory military service: 18 to 24 months)

GDP: \$223 billion (30% to the autonomous Kurdistan) / 7th in the MENA region

Principal sources of wealth: Oil and natural gas

GDP/inhabitant: \$5,600 / 12th in the MENA region

Defence spending: \$10.5 billion (4.6% of GDP) / 6th in the MENA region

Total strength of armed forces: 193,000 / 7th in the MENA region

Breakdown of armed forces: Ground (180,000), Air (5,000), Air Defence (5,000), Navy (3,000)

Total strength of internal security forces: 50,000

Popular militias (Hachd al-Chaabi): 150,000, including about 60,000 closely linked to Iran, including the Badr militia (20,000), Kataëb Hezbollah (10,000), Asaib Ahl al-Haq (10,000), Kataëb Imam Ali (8,000) and Hezbollah al Nujaba (5,000).

»» Geopolitical posture

Relevant international/regional security organisations: None

Special relationships: Iran, USA, China, France, Italy, United Kingdom, Jordan

States in which the Iraqi Armed Forces have bases: None

States in which the Iraqi armed forces are deployed: None, except Iraq

States with which Iraq is experiencing high levels of political tension: Turquie, Koweït

States with which relations appear to be easing: Saudi Arabia, Syria



Armed forces characteristics and capabilities

Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★☆☆☆

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★☆☆☆☆

»» Strategic objectives

- Rebuild national unity by promoting a nationalist debate capable of federating the different communities (Shiites, Sunnis, Kurds, and Chaldeans) and distracting from domestic difficulties; in the long term achieve the departure of the foreign military contingents present in Iraq, in particular Americans, Iranians and Turks.
- In the meantime, focus on a balanced posture showing each of the international players that Iraq is not putting all its eggs in one basket and wishes to stay out of any power games, so as not to be drawn into a regional conflict.
- Consolidate, thanks to oil revenues, the armed forces so that they can eradicate the armed Jihadi groups active on Iraqi territory; dissuade their neighbours; and contain Kurdish irredentism; by:
 - Taking the necessary measures to prevent these armed Jihadi groups from taking root in the country over the longer term.
 - Disarming the militias and partially assimilating them into the regular army, making it more effective and preventing it from becoming a communitarian army.
 - Modernising the land forces and developing aviation, cyber, joint structures, UAVs and independent strategic intelligence.
- Reconstruct and modernise Iraq, revive its economy by attracting foreign investment, particularly from Asia, and eventually become one of the most influential states in the Arab world.
- Managing the complex relationship with Kuwait in a way that favours Baghdad.

» Foreign military presence in the country:

Invited by the ruling government:



Iran: many military advisors, detachment of the Al Quds Force, UAV bases near Baghdad and in the provinces of Al-Anbar and Saladin, supervision of certain Shiite militias.



USA: 2,500 troops in operation Inherent Resolve; Al-Tawheed al-Thalith camp in the Green Zone of Baghdad: special forces, 1 airmobile brigade; 3 air bases (Al-Asad, Erbil, Baghdad): 1 squadron of armed UAVs MQ-9A Reaper, 1 battalion of AH-64D Apache combat helicopters, 4 batteries of Patriot PAC-3 anti-missile systems; very important air support based in Qatar.



France: Advisors + 600 military personnel in operation Chammal, the French component of operation Inherent Resolve; special forces detachment; air support based in Jordan, in the United Arab Emirates and at sea in case of presence of the naval air group.



Italy: 640 troops in operations Inherent Resolve and NMI; 1 infantry regiment and 4 NH-90 helicopters.

Occupation forces:



Turkey: 2,000 soldiers; 1 brigade of commandos equipped with main battle tanks, armored vehicles, UAVs and artillery in the Dahuk and Bamarni (Iraqi-Turkish border) sector to fight against both ISIS and PKK rear bases.



ISIS: about 7,000 fighters still active in Iraq, especially in the Sunni triangle and western desert areas near the Syrian border; punctual attacks in major Sunni cities including Baghdad.

Mandated by the United Nations:

Operation Inherent Resolve to fight against ISIS since 2014: 5,250 troops; main contributors: USA (2,500), France (600), Italy (600), United Kingdom (400), Denmark (210), Hungary (170), Germany (150), Spain (150), Poland (150), Australia (110).



NATO: 430 military trainers in the NATO mission in Iraq (NMI) since 2018; major contributors: Canada (250), Poland (65), Slovakia (50).



UN: 600 (including 320 military personnel on protection missions) in the framework of the «Nation Building» mission UN Assistance Mission for Iraq (UNAMI) for Iraq (UNAMI); main contributors: Fiji (167) and Nepal (77).

Iraqi Autonomous Kurdistan Forces (Kurds have held the presidency of the Federal Republic of Iraq since 2005):

Peshmerga budget: at least \$3.5 billion taken mostly from Kurdish oil revenues

Armament: several dozen of main battle tanks (T-72, T-62, T-55) and a hundred armoured vehicles recovered from Saddam Hussein's former army, artillery and multiple rocket launchers, tactical UAVs.

Regional brigades (apolitical, attached to the Ministry of Peshmergas): **40,000**

Kurdish Democratic Party (KDP / Barzani family): **120,000** (+ many reservists)

Patriotic Union of Kurdistan (PUK / Talabani family): **60,000** (+ many reservists)

Yezidis: **5,000**

Total : **225,000 peshmergas** (5% of the Kurdish population of Iraq, or one-third of the male population of military age; capacity to mobilize about 100,000 reservists in case of general mobilization).

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Support from Iran and the US (until their expected withdrawal).
Large budget allowing for gradual modernisation of the armed forces, provided that widespread prevarication can be overcome.
Real operational experience; hardy fighters.
Ideal location in the centre of the Middle East, reinforced by an excellent understanding of regional issues.

VULNERABILITIES

Low motivation and resilience; very unevenly matched units, exhausted by nearly 20 years of constant fighting.
Aging weaponry; poor operational maintenance.
The army does not have a monopoly on armed force on its territory due to militias.
No force projection capability; very limited deep strike capability.
No air-to-air refuelling capability; gap in UAV provision.
Very weak denial of access capabilities (air and sea).

'INVISIBLE' ASSETS

Limited capabilities in the invisible domain:

- 10 Chinese CH-4 Rainbow MALE UAVs (grounded for lack of spare parts)
- 6 Beech-350ER King Air electromagnetic listening aircraft
- Special Forces capable of infiltration into hostile territory
- Clandestine actions via many militias (Hachd al-Shaabi)

'VISIBLE' ASSETS

Ground forces:

- **13 divisions** (1 armored, 4 mechanized, 2 motorized, 4 infantry, 1 commando, 1 regime protection)
- **4 independent brigades** (3 special forces, 1 commando)
- 2 marine infantry battalions
- **330 main battle tanks** : 70 T-90S ★★★★★ (1st line), 100 M-1A1 Abrams and 160 T-72M (2nd line)
- 2000 other armoured fighting vehicles (BMP-3, BMP-1, BRDM-2, BTR-80, M-113, MTLB, Akrep, Cascavel)

Portable surface-to-air missiles:

Igla-S ★★★★★

Anti-tank missiles: Kornet ★★★★★

Artillery: 100 tubes of 155 mm (M-109, Type-83, M-198, D-20) and 18 multiple rockets launchers (TOS-1, BM-21)

Long range strike capability (+ 125 mi)

- F-16C/D fighters ★★★★★

Air assets:

- **60 combat aircraft:** 30 F-16C/D ★★★★★ (2nd line), 20 Su-25 et 10 L-159 (3rd line)
- 35 attack helicopters (15 Mi-28, 20 Mi-35)

Naval assets:

- 26 light patrol boats

ANTI-ACCESS/AREA DENIAL (A2/AD)

Anti-aircraft systems: SA-22 Pantsir ★★★★★ (short and medium range)

Interceptors: F-16C/D armed with AIM-9M Sidewinder air-to-air missiles ★★★★★

No major military deliveries expected in the near term.

»» Briefing note

Iraq has been in a state of quasi-permanent war or insurgency for four decades. It appears increasingly fragile and fragmented. Many even question its relevance as a state. In this deleterious context, aggravated by community hatreds and frustrations, religious rivalries and the resulting desire for revenge, a majority of the exhausted population and the elites aspire to the easing of tensions and economic development.

However, as in Syria, Yemen and Libya, the Iraqi civil war remains a theatre of confrontation and an adjustment variable between global and regional actors. Therefore, the future of Iraq will depend on the geopolitical realignments underway in the region and in particular on the ability of the American and Saudi leaders to reach an agreement with their Iranian counterparts. If the negotiations and bilateral discussions fail, Iraq could once again become a proxy battlefield between Iranians, Americans, Saudis, Kurds, Turks and militias of all colours.

The Iraqi leaders therefore do not hold all the cards, especially since they remain very divided between those who have survived four decades of confrontation and have thus acquired unparalleled experience in the Arab world, those who were put in place by the Americans after the fall of Saddam Hussein in 2003, those who were pushed to the forefront by the Iranians in 2011 after the end of the American military occupation, those who consider that Iraq remains the historical home of Shiism (Najaf and Karbala), and the nationalists who want to expel all foreign contingents.

The Iraqi armed forces reflect these ambiguities in their structure, equipment, training and modes of action. This does not contribute to their homogeneity and effectiveness. The ground forces, numerous but counterbalanced by popular militias, are still equipped with ageing equipment and are divided between the different factions. The air force remains under-equipped; the United States, which had re-equipped it, has stopped all re-equipment, understanding that it may have to leave Iraq soon. The navy is almost non-existent and none of Iraq's neighbours seem to have any interest in seeing it resurrected.

»» Overview

Political system: **Theocratic regime / Islamic Republic** (Supreme Leader Ali Khamenei)

Population: 83 million inhabitants / 3rd in the MENA region

Median age: 32 years old (length of compulsory military service: 18-21 months, according to the services)

GDP: \$585 billion / 3rd in the MENA region

Principal sources of wealth: Oil, pistachios, carpets, local industry

GDP/inhabitant: \$7,000 / 10th in the MENA region

Defence spending: \$15 billion (2.5% of GDP) / 4th in the MENA region

Total strength of armed forces: **630,000** / 1st in the MENA region

Revolutionary Guard Corps (Sepah / Pasdaran): **190,000** (including 90,000 conscripts)

Distribution: Ground component (155,000), space and ballistic missile force (15,000), naval component (20,000)

Reserve (Basij Corps): 520,000 in case of general mobilization; each pasdaran unit is paired with several battalions of Basijis which serve as a reservoir of forces to make up for losses.

Regular Army (Artesh): **400,000** (including 240,000 conscripts)

Distribution: Ground (350,000), Air (20,000), Anti-Aircraft (12,000), Navy (18,000)

Reservists: 350,000 in case of general mobilization

Border guards: **40,000**

Total military forces in case of general mobilization: **1,500,000**

»» Geopolitical posture

Relevant international/regional security organisations: Astana Agreements with Russia and Turkey; Shanghai Cooperation Organization (SCO)

Special relationships: Hezbollah, China, Russia (even if there are occasional tensions), Syria, Lebanon, Iraq, Oman, Venezuela, Armenia, Turkmenistan, India, Indonesia

States in which the Iranian armed forces have bases: Iraq, Syria

States in which the Iranian armed forces are deployed: Iraq, Syria, Yemen (Houthis) + active support to Lebanese Hezbollah

States with which Iran is experiencing high levels of political tension: Israel, USA, European Union, Bahrain, Saudi Arabia, United Arab Emirates, Yemen, Morocco, Egypt

States with which relations appear to be easing: Azerbaijan, Pakistan, Afghanistan (Taliban)

Armed forces characteristics and capabilities

Motivation ★★☆☆

Equipment ★★☆☆

Resilience ★★☆☆

Combat effectiveness ★★☆☆

Doctrine/Planning ★★☆☆

The motivation and doctrine of the pasdaran can be credited with an additional star.

»» Strategic objectives

- Guarantee Iran's independence and the survival of the regime, by
 - Relaunching the economy by reaching agreement with the US on the nuclear issue and regional influence so as to remove the bulk of US sanctions.
 - Increasing Asian investment (China and Shanghai Cooperation Organisation, India and Indonesia, South Korea and Japan with the consent of the US) without falling under Chinese control.
 - Eliminating or neutralise internal opposition so as to guarantee the clergy's control over institutions for as long as possible.
 - Dealing with the most crucial issues: environmental challenges (desertification, desertification, and access to fresh water), housing construction, and job creation; minimal reform to buy social peace and avoid the implosion of Iranian society.
 - Keeping at arm's length: Israel (everywhere), Russia (in Syria), Turkey (in Iraq) and China (in Iran and the Gulf monarchies).

Negotiate bilaterally with all neighbours (especially Saudi Arabia and the United Arab Emirates) to stabilise the region and promote an inclusive collective security system that recognises Iran's central role.

- Drive the US out of Iraq and reduce the US military presence in the Middle East.
- Modernise the armed forces, especially the air force and the navy, taking advantage of the competition between Russia (preferred supplier) and China.

No foreign military presence on the territory.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS

Strong Invisible assets, cyber and clandestine capabilities, although inferior to Israeli and Western capabilities.

Intermediate-range ballistic (1,500-2,000 km) and cruise missile arsenals giving Iran a very credible conventional deterrence capability (retaliatory strikes).

Strong operational experience; feedback from Hezbollah and the Houthis which makes it easier to target Israel and Saudi Arabia.

Vast and mountainous territory offering great strategic depth, easy to defend and very difficult to conquer.

“Mosaic” defensive doctrine based on asymmetric and decentralised combat, enabling fierce resistance to any external aggression.

Capacity to saturate a Carrier Strike Group present inside the Persian Gulf in the event of a confrontation (missiles + 2,000 armed light patrol boats).

VULNERABILITIES

Weak Visible assets; generally obsolete weaponry, except for missiles (cruise and ballistic) and UAVs.

Under-equipped air force and navy in relation to Iran’s regional ambitions.

Insufficient denial of access capabilities: inability to effectively protect all sensitive sites.

Lack of spare parts for US equipment delivered during the Shah’s regime; low operational capability of this equipment, especially for fighters, helicopters, armoured vehicles and self-propelled artillery.

Major internal disputes, offset by heightened nationalism.

Coexistence of two parallel armed forces, source of friction.

‘INVISIBLE’ ASSETS

Long range surveillance and strategic intelligence gathering:

- 2 reconnaissance satellites: Noor-1 (2020, most likely out of control) and Noor-2 (launched successfully in March 2022); awaiting delivery of a Russian Kanopus-V reconnaissance satellite (metric resolution)
- MALE UAVs: Mohajer-4/A/B, Mohajer-6, Fotros, Saegheh, Hamaseh, Shahed-129, Shahed-149 Gaza (operational status uncertain)
- 6 RF-4E Phantom reconnaissance aircraft

- 1 Boeing-707 SIGINT aircraft
- Strategic anticipation service attached to the Supreme Leader; research centers attached to the Presidency of the Republic, the Ministry of Foreign Affairs, and the Pasdaran Corps

Potentially non-attributable actions:

- **Suspicious nuclear program** placed under International Atomic Energy Agency control through the agreement (JCPOA) of July 2015, later denounced by Donald Trump; negotiations underway to try to save this agreement.
- Long range discrete strike capability (see below)
- Offensive cyber-warfare capability
- Attack submarine capability: **2 submarines**: 1 Kilo ★★☆☆☆☆ of 2nd line (2 others out of order) and 1 Fateh ★★☆☆☆☆ 3rd line; 15 pocket submarines (armed with only 2 torpedoes): 14 Ghadir, 1 Nahang
- Several thousand underwater mines: Chinese EM-52, locally manufactured mines, suspected Italian MANTA MP-80 mines
- Combat swimmer sabotage capability
- Clandestine operations capability: VEVAK Action Service, Al-Quds Force
- Interventions by proxy militias: Hezbollah (Lebanon and Israel), Hamas (Israel), Shia militias (Syria), Hachd al-Shaabi (Iraq), Houthis (Yemen)

‘VISIBLE’ ASSETS

Ground forces:

Pasdaran:

- Al-Quds Force (special forces for external action, executive trainers, military advisors)
- **12 divisions** : 2 armored, 2 mechanized, 8 infantry (possibility to create 14 additional infantry divisions in case of general mobilization)
- 1 airmobile brigade
- 33 «Saberin» (rapid reaction battalion): 1 per province, 2 for Tehran

Regular Army:

- 5 army corps headquarters

- **12 divisions**: 4 armored (reduced size), 3 mechanized, 3 infantry, 2 commandos

- 8 independent brigades: 5 commandos, 1 paratrooper, 1 airmobile airmobile, 1 special forces

Main armored vehicles: (The best and most modern ones are pre-empted by the Corps of the pasdaran):

- **1,250 main battle tanks** : 450 upgraded T-72S ★★☆☆☆☆ and 100 Zulfiqar-3(2nd line), 120 M-60A1, 80 Chieftain Mk5 and 500 T-62/Type-59/Safir-74 (all of 3rd line)
- 1,500 other armoured vehicles (BMP-2, BMP-1, Cascavel, Scorpion, BMT-2 Cobra, Boragh, M-113, BTR-60)

Portable surface-to-air missiles:

Misagh-2, Iglá-S ★★☆☆☆

Anti-tank missiles:

Kornet ★★☆☆☆, Konkurs, Toophan-2

Artillery: 1,300 tubes of 122 mm (2S1 Raad-1, D-30), 130 mm (M-46) and 155 mm (M-109 Raad-2, M-114, GHN-45, Type-88) & 200 multiple rocket launchers (BM-11, BM-21, Arash, Hadid and Fajr-3/5); Fajr-3 and Zelzal-1 ground-to-ground missiles (75-100 km range)

Air assets:

- **170 combat aircraft:** 35 MiG-29 ★★☆☆☆ and 20 Su-24MK (2nd line), 10 F-14 Tomcat, 40 F-4E Phantom, 40 F-5E Tigre & Saeqeh (upgraded F-5E), 10 Su-22M, 10 F-7 and 5 Mirage F-1EQ5 (all of 3rd line)
- 40 AH-1J Cobra attack helicopters
- A hundred UAVs

Regular naval assets:

- **1 supertanker (Makran) transformed into a hybrid command ship carrying helicopters and UAVs, missile launcher and capable of carrying missile boats.**

- **4 Jamaran light frigates** ★★☆☆☆ (3rd line)
- 3 Alvand corvettes
- 14 missile boats (4 Sina, 10 Combattante II)
- 4 amphibious assault ships (LST)
- **2 marine infantry brigades**
- 3 P-3 Orion maritime patrol aircraft
- 9 Sea King ASW helicopters
- 3 Sea Stallion minesweeper helicopters

Pasdaran naval assets:

- **50 missile boats:** 10 Houdong (C-802A), 35 Peykaap II and Nasr (C-704), 5 C-14 (C-701)
- 3 Hormuz-24 amphibious assault ships (LST) for commercial purposes
- **1 marine infantry brigade**
- 2 Hormuz-21 minesweepers

Anti-ship missiles:

C-801K, C-802A ★★☆☆☆

Force projection (pledge in the Gulf)

- 12 Il-76 and 2 Boeing-747 strategic transport aircraft
- 18 C-130 transport aircraft
- 20 CH-47 heavy lift helicopters
- 1 paratrooper brigade
- 2 airborne brigades
- 7 amphibious assault ships LST, 6 LSM & 8 hovercrafts
- 3 marine infantry brigades

Long range strike capability (+ 125 mi)

· 20 Su-24 MK bombers ★★☆☆☆

· 5 air-to-air refuelling aircraft (3 Boeing-747 and 2 modified Boeing-707)

· Many dozen armed MALE UAVs Mohajer-4B, Mohajer-6, Fotros and Shahed-129

Cruise missiles: Soumar ★★☆☆☆ (range of 2,000 km), Yaali/Quds-1 (range of 700 km) ★★☆☆☆

Sea-launched cruise missiles (Makran, Jamaran frigates, Kilo submarine): Abu-Mahdi (range of 1,000 km) ★★☆☆☆

Conventional Deterrence Aerospace Force:

· **More than 150 ballistic missile vehicles launchers** protected in underground installations; probably about 60 silos, some of which would be deeply buried, notably near Bandar Abbas (to pose a threat to the American fleet as well as Saudi and Emirati strategic sites) and Tehran.

· **More than 1,000 short-range ballistic missiles:** Zelzal-2 & Fateh-110 (range of 200 km), Shahab-2 (range of 500 km), Zolfaghar (range of 700 km) and Qiyam-1 (range of 800 km).

· **More than 1,000 intermediate-range ballistic missiles:** Shahab-3 (range of 1,300 km), Haaj-Qassem (solid fuel, therefore, faster to use, range of 1,400 km), Shahab-3B (range of 1,500 km), Emad-1 (range of 1,700 km), Ghadr-1 and Sajjil-1 (range of 2,000 km).

· **Sajjil-2 and Khorramshar missiles** (solid fuel, range over 2,000 km) under development.

ANTI-ACCESS/AREA DENIAL (A2/AD)

Coastal defence: C-802A ★★☆☆☆

Anti-missile and anti-aircraft systems: Bavar-373, S-300PMU2 ★★☆☆☆

GPS jamming capability and electronic warfare

Interceptors: MiG-29 armed with AA-10 Alamo and AA-11 Archer air-to-air missiles ★★☆☆☆ ; some venerable F-14 Tomcat

Principal deliveries expected of military equipment



· Large arms contracts being negotiated with Russia and China

»» Briefing note

If the Islamic Republic of Iran remains very fragile on the domestic front, it has managed to strengthen its position and influence abroad, since it is now a key player recognised as such by its neighbours and rivals. Its main concern is to remain independent (from the West as well as from China and Russia, with which it cooperates closely) and to keep all its rivals at a distance through an effective deterrence strategy. For the time being, Iran is succeeding in doing so thanks to an asymmetrical conventional deterrence based on regional influence, a network of proxies in its hands (Shiite militias in Iraq, Syria, Lebanon and Yemen) and an arsenal of ballistic missiles and UAVs sufficiently precise to carry out massive retaliation, if necessary. Failing to maintain this form of deterrence, Iran could accelerate its nuclear programme to acquire a military capability that some Iranian leaders perceive as the only way to negotiate effectively with Washington, Moscow, Beijing, Islamabad (and Jerusalem in the long term). In the meantime, the pursuit of its nuclear programme allows it to raise the stakes.

Militarily, the Islamic Republic has two parallel and complementary armies. On the one hand, the Corps of Guardians of the Revolution (Pasdaran) responsible for guaranteeing the survival of the regime (hence its scattering among the provinces and the main cities of the country) while defending its interests abroad (notably via the Al-Quds Force). This Praetorian Guard, responsible for the defence of the most sensitive sites (nuclear, ballistic and related to power), captures the bulk of the military budget, the best educated conscripts, all the ballistic missiles as well as the least dated armaments; it also has a vast reservoir of forces through the Basij Resistance Force. On the other hand, the regular army is responsible for the defence of the frontiers, air space and maritime approaches. Its largely obsolete equipment limits its offensive capabilities. Iran has developed an efficient arms industry to copy and improve existing equipment, but this does not yet allow it to design radically new weapons, except in the field of ballistic missiles and UAVs.

On balance, the Iranian armed forces are not in a position to invade or occupy their neighbours. They can, however, interdict the Persian Gulf, conduct retaliatory strikes against all their rivals, and conduct limited raids (including air-to-ground) in Iraq, Afghanistan, and Azerbaijan, while sending a small expeditionary force to Syria or Lebanon if necessary. They rely more on their militias and proxies to put pressure on their opponents. In the Persian Gulf, they retain real amphibious and airmobile capabilities to take hostages and then negotiate if necessary, but also to harass maritime traffic on a long-term basis (or prohibit it from time to time), even if Iran is now campaigning for freedom of maritime movement in order to gain easier access to Syria, Venezuela and the Asian powers.

THE FIVE GLOBAL ACTORS IN THE MIDDLE EAST AND NORTH AFRICA

The Mediterranean Rim and the Middle East, key areas in terms of energy and economic exchange routes, are at the heart of the attention of the five permanent members of the United Nations Security Council.

For China, which is aiming to become the world's leading economic power, the Red Sea and the Mediterranean play an essential role: they are the shortest route for trade with Europe, its main trading partner. But it is above all the Middle East that is of vital interest to this country which is now the world's largest importer of hydrocarbons: the region provides half of its supplies. It is therefore imperative for China to guarantee access to oil from the Gulf and, if possible, to keep the route to Europe open via the Mediterranean and the Red Sea. Its base in Djibouti is ideally placed to do this. In the longer term, control of these spaces would allow it to progressively isolate the United States, the ultimate Chinese objective.

Russia attaches historical importance to the Mediterranean, which gives it permanent access to the warm seas and oceans, essential for its diplomacy. However, a few conditions must be met to guarantee this access: control of the Black Sea (Crimea), sufficiently peaceful relations with Turkey to facilitate the passage of the Turkish straits (frequent Putin-Erdogan contacts), and home ports (Tartous and Port Sudan) to allow long-term deployments. For Russia, stuck in its war in Ukraine, this access is above all of geopolitical interest, allowing it to put pressure on the Europeans in Africa, the Mediterranean and the Middle East, in a pincer movement with its European and Caucasian policy.

For the United States, the stakes reflect the two previous ones. As a hydrocarbon exporting country, it no longer needs oil from the Gulf. The threat of Islamic terrorism has become less significant since 2001 and if the fate of Israel remains an issue of domestic policy in the United States, its importance is less than in previous years. The Mediterranean and the Middle East are therefore perceived above all as an interface zone with China and Russia. In addition to the global missile defence system, the American objective is to hinder their access to these areas, to threaten their deployment capabilities and influence the future balance of power. The large number of US military bases in this region should therefore remain despite the shift towards Asia. As a thalassocracy, a maritime empire, the United States wishes to preserve as much as possible the use of the sea routes that allow it to maintain economic and political ties with its Asian partners.

France and the United Kingdom continue to play their role of global middle powers in this area. In order to carry weight, even if only slightly in the coming balance of power, these two countries must be able permanently to deploy resources far from their mainland, which requires support bases (Cyprus, Bahrain and Oman for the United Kingdom; Jordan, Djibouti and the United Arab Emirates for France), and operational capabilities that the other European countries do not possess. France has two particular reasons for wanting to be heard in the region: it is home to large diasporas from the Maghreb, it has very large diasporas in Lebanon and Israel, it has territories in the Indian Ocean, and it carries the economic and strategic interests of the European Union in the area, both in terms of access to hydrocarbons and in terms of economic links with Asia.

»» Overview

Political system: Federation/ democratic presidential system

Population: 332 million inhabitants / 3rd in the world

GDP: 21,000 billion / 1st in the world

Defence spending: \$738 billion (3.4% of GDP) / 1st in the world

Total strength of armed forces: 1,380,000 / 3rd in the world

Breakdown of armed forces: Ground (480,000 / 20 divisions / 2,400 main battle tanks), Air & Space (335,000 / 2,200 combat aircraft), Navy (340,000 / 53 nuclear attack submarines, 11 aircraft carriers, 24 cruisers, 65 destroyers, 20 frigates + 700 combat aircraft), US Marine Corps (186,000 / 3 divisions + 10 independent units, 400 main battle tanks, 400 combat aircraft), Coast Guard (39,000) + 850,000 reservists.

Nuclear arsenal: about 3,800 nuclear warheads divided into 400 land-based silos of Minuteman III intercontinental missiles armed with several warheads each, 14 Ohio SSBN nuclear submarines each armed with 20 Trident D-5LE intercontinental missiles; the remainder in airborne delivery systems, including AGM-86B cruise missiles with a range of 1200 km.

Relevant international/regional security organisations: “Fives Eyes”, NATO, AUKUS, QUAD.

States in which the American armed forces have bases: Spain (Rota, Moron), Italy (Aviano, Vicenza, Gaete, Naples, Sigonella), Greece (Suda Bay, Larissa, Stefanovikis, Alexandroupolis), Turkey (Incirlik, Kürecik), Israel (Mount Keren), Jordan (H4, El-Azrak), Iraq (Baghdad, Al-Asad, Erbil), Kuwait (Al-Salem, Kuwait City, Camp Arifjan), Bahrain (Manama, Muharraq, Sheikh Isa), Qatar (Al-Udeid), United Arab Emirates (Al-Dhafra, Fujeirah), Oman (Masirah, Duqm, Thumrait), Djibouti and Diego Garcia; Souda Bay, Duqm, Diego Garcia are equipped for nuclear attack submarines.

States in which the American armed forces are deployed: Italy (15,000 troops), Kuwait (13,500), Qatar (6,000), Bahrain (5,000), Djibouti (4,700), Spain (3,500), Jordan (3,000), United Arab Emirates (3,000), Iraq-Syria (2,500), Turkey (2,000), Saudi Arabia (1,000), Oman (600), Greece (500), Egypt (275), Israel (110).

International missions in which US armed forces are engaged in the region: Egypt (455 observers, FMO), *Sea Guardian* naval mission in the Mediterranean (NATO), mission to secure the Strait of Hormuz, *Task Force 150* in the Arabian Sea.



Armed forces characteristics and capabilities

Motivation ★★☆☆☆

Equipment ★★★★★

Resilience ★★★★★☆

Combat effectiveness ★★★★★☆

Doctrine/Planning ★★★★★

»» Strategic objectives for the Mediterranean & Middle East region:

- Deploy the southern part of the missile defence shield against Russia.
- Ensure freedom of maritime movement in the region by securing the Suez Canal and the Straits of Gibraltar, Bab el-Mandeb and Hormuz; protect US citizens and economic interests throughout the region.
- Defend US positions in the region by containing Russian and Chinese expansion; rely on Turkey and NATO to counter Moscow and Beijing's ambitions; if necessary, prevent the Chinese Navy's access to the oil hubs of the Middle East (especially in case of an invasion of Taiwan).
- Ensure the security of Israel and major US allies in the region; prevent any state in the region (other than Israel) from acquiring nuclear weapons or demanding a military nuclear capability for as long as possible.
- Contain Iran until there is regime change in Tehran.
- Promote the liberalisation of the region by supporting civil societies and focusing on political Islam, especially the movements close to the Muslim Brotherhood.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS OF THE FORCES DEPLOYED IN THE REGION

Almost unlimited financial and material resources; support from Congress.

Highly effective weaponry.

Very strong operational experience.

VULNERABILITIES OF THE FORCES DEPLOYED IN THE REGION

Internal tensions, war fatigue and weariness after twenty years of wars in the region.

Imperfect understanding of the region and cognitive biases leading to errors in analysis and behaviour; overemphasis on technology over the human factor.

Excellent capabilities in invisible assets (cyber, counter-influence, clandestine actions, and underwater operations).

Exceptional deep strike and force projection capabilities.

Excellent network of bases (33 in the region and its periphery) guaranteeing efficient logistics and allowing rapid deployment of reinforcements if necessary.

Negative perception of US forces in most countries in the region, especially in Iraq where they are particularly vulnerable to harassment by various militias.

Low resilience of troops once they leave their protective cocoon.

Forces deployed in the region on a permanent basis:

Ground forces attached to the 3 commands CENTCOM, EUCOM & AFRICOM:

5 active brigades (1 armored, 1 airborne, 1 airmobile, 1 attack helicopter, 1 marine infantry) + pre-positioned equipment for 3 brigades (1 armored, 2 mechanized); many special forces; **300 M-1A2+ Abrams tanks** ★★★★★☆; 1100 AH-64D Apache attack helicopter; Javelin antitank missiles ★★★★★☆; Avenger man-portable surface-to-air missiles ★★★★★☆

Air forces attached to the 3 commands CENTCOM, EUCOM & AFRICOM:

108 combat aircraft (18 F-35A ★★★★★ 24 F-15E ★★★★★☆, 54 F-16C/D, 12 F-18E ★★★★★☆), **72 UAVs** (60 MQ-9A Reaper armed MALE & 12 RQ-4 Global Hawk HALE), 32 KC-10 and KC-135 air-to-air refueling aircraft, 9 P-8 Poseidon maritime patrol aircraft, 4 EP-3E Aries electromagnetic listening aircraft, U-2S spy plane detachment; 15 anti-missile batteries (2 THAAD, 13 Patriot PAC-3).

Naval forces attached to the Vth and VIth Fleets:

2 nuclear attack submarines (1 Virginia and 1 Seawolf ★★★★★), 1 Nimitz aircraft carrier (**72 F-35C & F-18E embarked fighters**), 2 Ticonderoga cruisers ★★★★★, 7 Arleigh Burke destroyers ★★★★★, command ship Mount Whitney, 10 Cyclone missile boats, 6 coast guard patrol boats, 4 minehunters, 3 amphibious assault ships LHD and LPD (**12 F-35B embarked fighters**), supply tankers; Harpoon Block-1C anti-ship missiles ★★★★★ and Mk-48 ADCAP torpedoes mod 6/7 ★★★★★.

Anti-Access/Area Denial (A2/AD): THAAD anti-missile systems ★★★★★; Tomahawk Block-IV long-range anti-ship missiles ★★★★★☆; Tomahawk Block-IV long-range anti-ship missiles ★★★★★; electronic warfare and GPS jamming; SLMM and Quickstrike naval mines; Manta Ray, Remus 600, ULRM & ACTUV underwater UAVs.

Long range strike capability

- **B-1 & B-2 bombers** ★★★★★☆ and B-52H ★★☆☆☆☆ (based in Diego Garcia, United Kingdom and United States) armed with AGM-158B JASSM-ER cruise missiles (range of 930 km) ★★★★★☆ refueled in the air by a fleet of KC-10 / KC-46.
- **F-35A/B/C stealth fighter-bombers** ★★★★★★ and F-15E fighters ★★★★★☆
- **MQ-9A Reaper armed MALE UAVs**
- **Sea-launched cruise missiles: Tomahawk** (range of 1,600 km) ★★★★★☆

Airborne, airmobile and amphibious force projection:

- 180 strategic transport aircraft (35 C-5, 145 C-17)
- 585 heavy lift helicopters (450 CH-47, 135 CH-53 Sea Stallion)
- 32 amphibious assault ships: LHA, LHD, LPD and LSD

Short notice reinforcement capabilities

Ground forces:

5 divisions (1st Armored, 25th Light infantry, 82nd Airborne, 101st Airmobile, 1 US Marine infantry) + special forces; **300 M-1A2+ Abrams main battle tanks**, 1,200 other armored vehicles, 240 combat helicopters (Apache and Super Cobra).

Air assets:

3 expeditionary air wings with 168 combat aircraft (24 F-22 Raptor ★★★★★★, 24 F-15C, 48 F-15E, 48 F-16C/D, 24 A-10) and **36 MQ-9A Reaper UAVs**.

Naval assets:

1 Carrier Strike Group (1 Virginia nuclear attack submarine, 1 Gerald Ford aircraft carrier carrying **75 F-35C and F-18E fighters**, 1 Ticonderoga cruiser, 4 Arleigh Burke destroyers, 3 supply tankers); **1 amphibious group** (4 LHD/LPD amphibious assault ships carrying 12 F-35B fighters, 1 Ticonderoga cruiser, 4 Arleigh Burke destroyers, 3 oil tankers); **1 Ohio nuclear submarine modified for saturation strikes** (154 Tomahawks).

1 more Carrier Strike Group within six weeks.

»» Briefing note

The United States faces a number of dilemmas in the Mediterranean Rim and the Middle East: how to coordinate forces attached to three separate, highly autonomous commands (CENTCOM, EUCOM, AFRICOM)? How to effectively contain China, Russia and Iran at the same time, even though their principal partners are in discussions or are ready to come to an agreement with some of them? Which adversary should be prioritised? How to become more involved with China in the Indo-Pacific area without giving the impression of abandoning the Gulf monarchies? How to support certain local autocrats while claiming to defend liberal and democratic values? Faced with these dilemmas, US leaders, who tend to globalise the problems and have only a fragmented understanding of the region, are finding it difficult to define a coherent regional strategy, even though their armed forces remain highly credible and feared.

The United States still deploys 85,000 troops in this vast region: 60,000 ground and air forces and 25,000 sailors from the Fifth and Sixth Fleets (Bahrain and Gaete), supported by 300 main battle tanks, 100 attack helicopters, 200 combat aircraft and 72 UAVs. Although they have reduced their force, it would be wrong to say that the United States has abandoned the region. Within three months and after sending massive reinforcements, the US armed forces could deploy more than 250,000 troops, the equivalent of seven divisions (600 tanks and 340 combat helicopters), 530 combat aircraft, 120 UAVs, major denial of access capabilities and 60 warships, including five nuclear submarines, three aircraft carriers and seven amphibious assault ships.

»» Overview

Political system: Communist regime turned presidential (president Xi Jinping)

Population: 1.4 billion inhabitants / 1st in the world

GDP: \$14,700 billion / 2nd in the world

Defence spending: \$195 billion (1.4% of GDP) / 2nd in the world

Total strength of armed forces: 2 million / 1st in the world

Breakdown of armed forces: Ground (1,000,000, equivalent to **40 active divisions** + 20 reserve divisions / **5,000 main battle tanks**), Air & Space (400,000 / **2,000 fighter aircraft**), Navy (260,000 / 55 attack submarines, 2 aircraft carriers (+ 2 others under construction), 4 cruisers, 36 destroyers, 50 frigates, 45 corvettes), Strategic Missiles (120,000), Support (220,000)

Nuclear arsenal: About **500 nuclear warheads** (number which could double by 2030) divided into 240 silos and land-based mobile launchers (intercontinental missiles), 48 CH-SSN-14 ballistic missiles armed with several warheads each embarked on 4 Type-94 SSBN nuclear submarines; the remainder in airborne delivery systems.

Relevant international/regional security organisations: Shanghai Cooperation Organization (SCO).

States in which the Chinese armed forces have bases or are deployed: **Djibouti** (+2,000 troops), **Pakistan** (Gwadar), **Lebanon** (UNIFIL II, 420 troops), **Israel** (UNTSO, 5 observers), **Western Sahara** (MINURSO, 12 observers); naval contribution to the anti-piracy mission in the Gulf of Aden.

Armed forces characteristics and capabilities

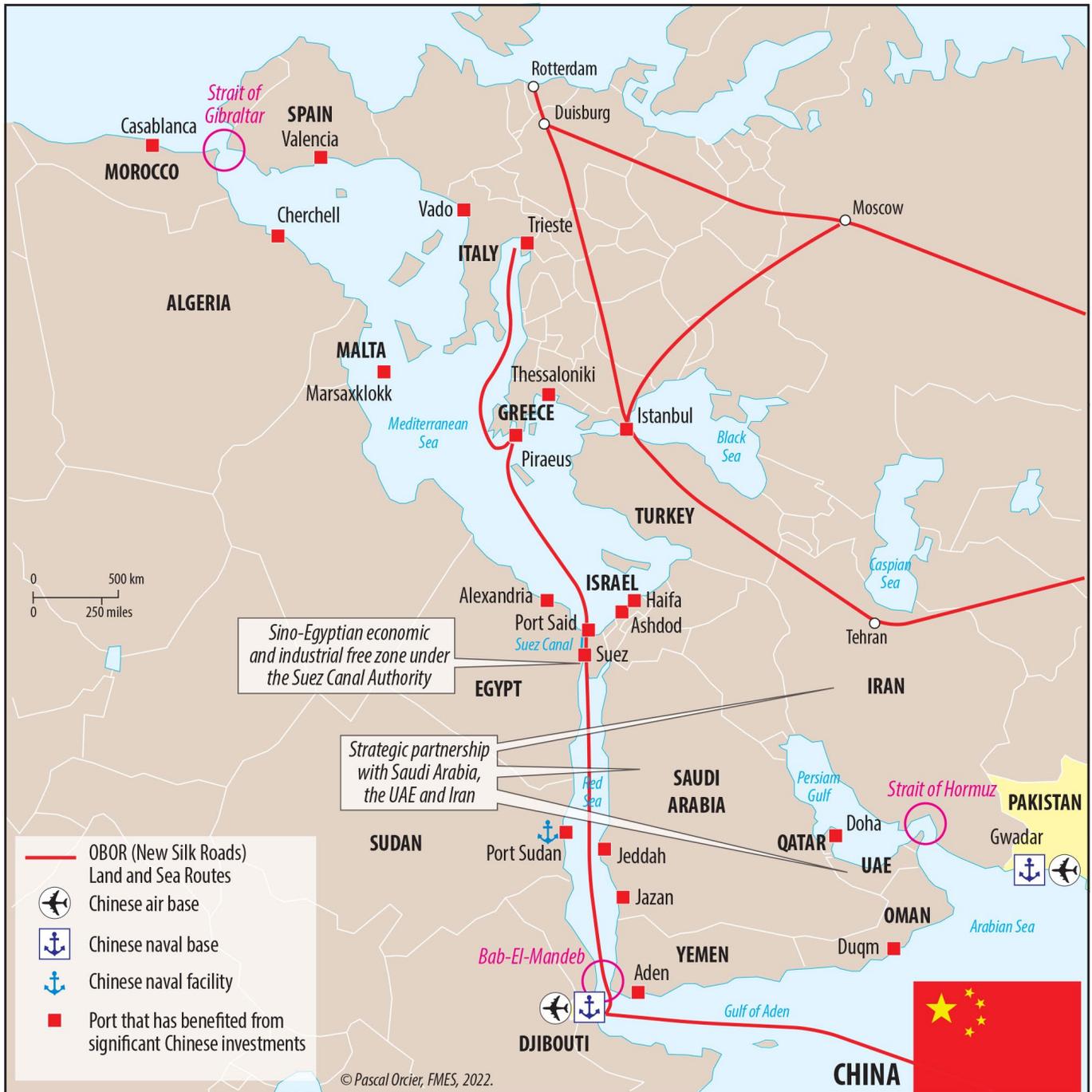
Motivation ★★★★★

Equipment ★★★★★

Resilience ★★★★★

Combat effectiveness ★★★★★

Doctrine/Planning ★★★★★



»» Strategic objectives for the Mediterranean & Middle East region:

- Ensure access to oil and natural gas hubs in the Persian Gulf and Arabian Peninsula to secure China's hydrocarbon supply.
- Be able to respond to any attempts to restrict maritime oil traffic between the Persian Gulf and China.
- Avoid direct military confrontation with the US at all costs.
- Increase economic and political control over as many Middle Eastern countries as possible, notably Iran, Oman and the United Arab Emirates so as to secure the Strait of Hormuz (in addition to the Gwadar base in Pakistan), but also over Egypt and Turkey so as to gain access to the Mediterranean.
- To present itself as a credible alternative to the US and Russia by presenting itself as a stabilising factor in the Middle East as a means of pursuing China's grand strategy towards the West, especially along the Mediterranean segment.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS OF THE FORCES DEPLOYED IN THE REGION

Colossal capacity for cash investment allowing it to buy or bribe many local actors.

Highly modern, first-rate weaponry.

Very good capabilities in cyber, electronic, and anti-satellite warfare, strategic intelligence, and denial of access.

Numerous civilian support points at air and port hubs, especially in the Mediterranean Rim.

No negative preconceived perception of Chinese military presence as there is no colonial history in the region.

VULNERABILITIES OF THE FORCES DEPLOYED IN THE REGION

No bases located in the region; only 2 bases located around it; no base specifically dedicated to submarines in the Indian Ocean.

Extended logistical and communication routes across the Indian Ocean and Central Asia.

No real experience of high-intensity combat or air-sea combat.

Questionable motivation and training; centralised and rigid employment doctrine.

Patchy understanding of Middle Eastern context and regional actors.

Forces deployed in the region on a permanent basis:

Ground forces:

- **A joint brigade in Djibouti** (infantry, main battle tanks, armor, artillery, engineers) of about 2,000 combatants and support personnel (with a capacity of up to 15,000 soldiers).
- Best battle tank: Type-99 ★★★★★☆ (1st line)
- Best Combat Helicopter: Z-10
- Anti-tank missiles: HJ-12 ★★★★★☆
- Portable surface-to-air missiles: FN-6 Flying Crossbow ★★★★★☆

Air assets:

- Wing Loong-II armed MALE UAVs and Rainbow-5 CASC based in Djibouti and Gwadar.
- J-10 and J-11 fighters ★★★★★ likely to be based in Djibouti and Gwadar.
- Best fighter aircraft: J-200 ★★★★★☆

Naval assets:

- 1 surface action group (1 Type-52D destroyer, 1 Type-54A frigate and 1 supply tanker) based in Djibouti, patrolling the Gulf of Aden and the Red Sea.
- 1 surface action group (2-3 destroyers and frigates, 1 oil tanker) based in Gwadar; 1 or 2 conventional attack submarines (SSK) occasionally on patrol near the Gulf of Aden and the Gulf of Oman.
- Best conventional attack submarine: upgraded Kilo class ★★★★★☆
- Best surface combatant: Type-55 cruisers and Type-52D destroyers ★★★★★☆
- Best naval fighter: J-15 ★★★★★☆
- Best anti-ship missile: CH-SS-N-13 ★★★★★☆
- Underwater UAVs: HN-1 and HSU-01

Anti-Access/Area Denial (A2/AD):

- S-400 & HQ-9B anti-aircraft systems ★★★★★☆; YJ-12 supersonic anti-ship missiles ★★★★★☆

Long range strike capability:

- **DF-65 and DF-21 conventional ballistic missiles** (respective ranges of 1,000 and 1,700 km)
- **DF-21D and DF-26 anti-ship ballistic missiles** (respective ranges of 1,500 and 5,000 km)
- **H-6M bombers** ★★☆☆☆ armed with CJ-20 cruise missiles (range +1,500 km) ★★☆☆☆ air-to-air refuelling by H-6U aircraft
- **Sea-launched cruise missiles:** CJ-10 (range of more than 1,500 km) ★★☆☆☆
- **Armed MALE UAVs:** Wing Loong-II and Rainbow-5

Airborne, airmobile and amphibious force projection:

- 30 Il-76/78 strategic transport aircraft
- 100 Z-8 heavy lift helicopters
- 36 amphibious assault ships: 1 LHD (Type-75), 8 LPD (Type-71), 27 LSD-LST (Type-72)

Short notice reinforcement capabilities:

Ground forces:

5 brigades (2 airborne, 2 marine infantry, 1 armored) + special forces; most of the other assault units remained massed in front of Taiwan.

Air assets:

1 mixed air wing equipped with about 50 stealthy J-10, J-11 and J-20 fighters, KQ-200 ASM aircraft, KJ-200 early warning aircraft and armed MALE UAVs.

Naval assets:

1 naval air group (1 Liaoning class aircraft carrier carrying 24 fighters, 1 Type-55 cruiser, 2 Type-52D destroyers, 2 Type-54A frigates, 2 oil tankers, 1 Type-93A nuclear attack submarine ★★☆☆☆; **1 amphibious group** (2-3 amphibious assault ships, 3 Type-52A destroyers, 3 Type-54A frigates, 2 oil tankers); **1 flotilla of attack submarines.**

»» Briefing note

China's interests in the Mediterranean Rim and Middle East region remain primarily energy and economic. Militarily, the Chinese leadership knows that it is not yet in a position to challenge US forces in the region, nor is it in a position to replace the US security guarantee to the Arab states. Their strategy is therefore to strengthen their positions on the northern shore of the Persian Gulf and along the Strait of Hormuz, focusing particularly on Iran, the United Arab Emirates and Oman to increase their influence there and deter any American desire to place a stranglehold on the vital hydrocarbon traffic to China. The Red Sea and the Mediterranean Rim are likely to come later, if China is able to reach an agreement with the US and thereby secure its energy supplies.

» Overview

Political system: **Autocratic presidential regime** (President Vladimir Putin)

Population: 144 million inhabitants / 10th in the world

GDP: \$1,500 billions / 11th in the world

Defence spending: \$65 billions (4% of GDP) / 4th in the world

Total strength of armed forces: **900,000** / 5th in the world

Breakdown of armed forces: Ground (325,000 / equivalent of **20 divisions / 2,800 main battle tanks**), Air & Space (165,000 / **1,050 combat aircraft**, including 180 from the Naval Aviation), Navy (150,000 / 35 attack submarines, 1 aircraft carrier undergoing major refit, 4 cruisers, 12 destroyers, 15 frigates, 50 corvettes), Strategic Forces (50,000), Joint Services (210,000) + 2 million reservists

Nuclear arsenal: **Approximately 4,500 nuclear warheads** divided into 350 land-based silos (RS-12M, RS-18, RS-20 and RS-24 intercontinental ballistic missiles), 160 ballistic missiles (R-29RK/M and Bulava) armed with several warheads each embarked on 10 nuclear-powered SSBN submarines (Delta III-IV and Borey); the remainder in airborne vectors, in particular Kh-55SM cruise missiles with a range of 2,500 km.

Security structures of reference: Collective Security Treaty Organization (CSTO), Astana Agreements (with Turkey and Iran), Shanghai Cooperation Organization (SCO).

States of the region or its periphery in which the Russian armed forces have bases: **Crimea** (Sevastopol base), **Armenia** (102nd ground base in Gyumri, air base in Erebuni), **Syria** (Tartus naval base, Hmeimim air base) and **Sudan** (Port Sudan naval base).

States of the region offering naval facilities to Russia: **Cyprus** (Limassol), **Egypt** (Alexandria), **Libya** (Tobruk), **Malta** (Valletta), **Algeria** (Annaba).

States of the region in which Russian armed forces are operating: **Syria** (7,000 military + 5,000 Wagner mercenaries), **Libya** (military advisors + 1,000 Wagner mercenaries + 2,000 Syrian mercenaries), **Western Sahara** (MINURSO, 14 observers), **Israel** (UNTSO, 4 observers).

Armed forces characteristics and capabilities

Motivation ★★☆☆☆

Equipment ★★☆☆☆

Resilience ★★★★★

Combat effectiveness ★★☆☆☆

Doctrine/Planning ★★☆☆☆



»» Strategic objectives for the Mediterranean & Middle East region:

- Regain the permanent access to the warm seas lost with the collapse of the USSR; secure Syrian bases and develop a network of bases allowing Russia to use its armed forces for geopolitical purposes as instruments of crisis management, especially in the context of the war in Ukraine.
- Reach agreement with Turkey, despite the numerous regional frictions (South Caucasus, Ukraine, Syria, Cyprus, Libya, and Sahel Africa), to secure long-term access to the Mediterranean via the Turkish straits, in compliance with the treaties in force; strengthen economic cooperation with Ankara.
- Eliminate as many Jihadis as possible in the region to prevent their return to Russia and the North Caucasus.
- Portray the Kremlin as a credible and secure alternative to all autocrats in the region who doubt the reliability of the United States; to maintain the balance between regional actors in the Middle East.
- Defend Russia's grand energy strategy in the region (natural gas, oil, and civil nuclear energy) by multiplying partnerships with local and national companies in order to exert leverage on European countries.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS OF THE FORCES DEPLOYED IN THE REGION

Strong deep strike and force projection capabilities.

Very high denial of access capability.

Strong Invisible assets (information warfare, cyber offensive, ASAT, covert action, electronic warfare, mines and underwater drones).

Strong operational experience; hardened and resilient fighters.

Excellent knowledge and understanding of regional actors.

VULNERABILITIES OF THE FORCES DEPLOYED IN THE REGION

Insufficient number of bases in relation to the stated ambitions.

Strong budgetary constraints. Burden of the war in Ukraine.

Aging armament (except for nuclear forces and light naval forces).

Stretched logistics and insufficient maintenance of equipment to operational readiness.

Uncertain motivation (low salaries, and high number of conscripts); rigid employment doctrine.

Forces deployed in the region on a permanent basis:

Ground forces:

- **Syria: 1 mechanized brigade** (50 T-90 main battle tanks ★★★★★; 16 Ka-52 and Mi-24 combat helicopters; 3 military police battalions, special forces; 1 ground-air defence regiment (S-400 & Pantsir-S2); electronic warfare and cyber offensive detachment; Kornet anti-tank missiles ★★★★★; Igla-S man-portable surface-to-air missiles ★★★★★).

Air assets:

- **Syria: 26 combat aircraft** (10 Su-35 ★★★★★, 6 Su-34, 8 Su-24, 2 Tu-22MZ) and 1 Il-30 electromagnetic listening device at the Hmeimim air base.
- **Libya: 10 MiG-29s** ★★★★★ and **4 Su-24s** based in Joufra, Al Ghardabiya and Al Khadim.

Naval assets:

- **Eskadra in the eastern Mediterranean:** 2 upgraded Kilo attack submarines ★★★★★ capable of firing Kalibr cruise missiles ★★★★★, 1 Grigorovich frigate ★★★★★ armed with Kalibr cruise missiles, 1 Bykov light frigate, 2 corvettes, 1 electromagnetic listening ship, 3 amphibious transport ships («Tartous Express»).
- **Black Sea Fleet** (capable of rapid deployment in the Mediterranean): 4 upgraded Kilo attack submarines, 3 frigates (1 Krivak and 2 Grigorovich armed with Kalibr missiles), 2 Bykov light frigates, 4 corvettes, 12 missile patrol boats, 4 amphibious assault ships + Naval Aviation: 40 combat aircraft (18 Su-30SM and 22 Su-24), 8 maritime patrol aircraft (Il-38N, Be-12) and 30 ASW combat helicopters (Ka-27, Ka-52, Mi-14).

Anti-Access/Area Denial (A2/AD):

- S-400 anti-missile batteries ★★★★★, Kalibr & Bastion long-range anti-ship missiles ★★★★★, electronic warfare and GPS jamming; Zircon hypersonic anti-ship missiles ★★★★★; Cephalopod underwater combat UAVs; MDM-1/2/3/4/5 underwater mines.

Long range strike capability

- **Tu-160 Blackjack bombers** ★★★★★ Tu-22MZ Backfire and Tu-95 Bear armed with Kh-555 cruise missiles ★★★★★ (range of 2,800 km), air-to-air refueling Il-78M aircraft.
- **Su-34 fighter bombers** ★★★★★
- **Iskander tactical ballistic missiles** ★★★★★ (range of 500 km)

Airborne, airmobile and amphibious force projection:

- 110 strategic transport aircraft (10 An-24 Condor, 4 An-22, 96 Il-76)
- 30 Mi-26 heavy lift helicopters
- 20 amphibious assault ships (LST)

Short notice reinforcement capabilities:

Ground forces:

3 divisions (2 airborne, 1 mechanized) & **6 brigades** (3 special forces [Spetsnaz], 2 marine infantry, 1 armored).

Air assets:

7 air regiments with **120 combat aircraft** (15 Su-35 ★★★★★, 15 Su-30, 15 Su-34 and 45 Su-27SM, [all ★★★★★], 30 Su-25 ★★★★★, 3 A-50 Mainstay early warning aircraft, several Il-78M air-to-air refueling tankers).

Naval assets:

Northern, Baltic and Pacific Fleet detachments including 1 Kirov cruiser ★★★★★, 3 Udaloy and Admiral Gorshkov destroyers ★★★★★, 4 frigates, 6 amphibious assault ships (LST), 4 oil tankers and several nuclear attack submarines on interdiction missions (including 1 SSN Yassen ★★★★★).

»» Briefing note

Russia made its grand return to the region in 2015 to save the regime of Bashar al-Assad, threatened by the rapid advance of IS in Syria. In doing so, the Kremlin erased 25 years of absence from the Mediterranean Rim. Taking advantage of the impression of relative disengagement of the United States and a favourable international context, Vladimir Putin is moving his pieces on the regional chessboard and gaining positions that give him hope of regaining the status that was Russia's on the eve of the collapse of the Soviet Union. By coming to an agreement with Turkey, Israel, and Bashar al-Assad, it probably intends to expel the Iranians from Syria in order to re-establish its own influence on the Levant. Its only constraints are in fact material (budget, effective equipment and a sufficiently trained military) as well as linked to the impacts of the war in Ukraine.

Despite structural difficulties, Russia is capable of deploying its Eskadra (2 submarines, 4 warships and 4 support ships), 13,000 troops and advisers (40% mercenaries from the Wagner group), 50 tanks, 100 armoured vehicles, 38 fighters and about 20 attack helicopters in the region. It remains ready to send large reinforcements if necessary (40,000 troops, 120 fighter planes and about 20 warships), even if a part of these forces could be stuck in Ukraine for a while. As in the Cold War, the main assets of the Russian armed forces remain their numbers, their hardiness, their firepower and their psychological advantage over their Western adversaries.

» Overview

Political system: Republic with a semi-presidential regime

Population: 67 million inhabitants / 21st in the world

GDP: \$2,750 billion / 6th in the world

Defence spending: \$55 billion (2% of GDP) / 8th in the world

Total strength of armed forces: 205,000 / 22nd in the world

Breakdown of armed forces: Ground (115,000 / 9 brigades & 9 independent regiments / 220 main battle tanks), Air & Space (41,000 / 220 combat aircraft including 40 from the Naval Aviation), Navy (35,000 / 6 nuclear attack submarines, 1 aircraft carrier, 15 frigates, 13 corvettes), Joint Services (14,000) + 38,000 trained reservists.

Nuclear arsenal: about 300 nuclear warheads: 48 M-51.2 intercontinental ballistic missiles armed with several warheads each embarked on 4 Le Triomphant class SSBN nuclear submarines, and more than fifty ASMPA airborne delivery missiles.

Relevant international/regional security organisations: NATO, European union

States in which the French armed forces have bases: Jordan (300 airmen), United Arab Emirates (750-1000 troops), Djibouti (1500 troops).

States in which the French armed forces are deployed: Lebanon (650 troops in the framework of UNIFIL II mission), Iraq-Syria (600 troops in the framework of *Operation Chamal / Inherent Resolve*).

International missions in which the French Navy is involved: 1 frigate as part of the EU *Irini* mission to monitor the embargo on arms transfers to Libya, 1 frigate as part of the EU *Atalanta* mission to combat piracy in the Gulf of Aden, 1 frigate and 1 Atlantique-2 for maritime patrol as part of the EU *Agenor* mission to monitor the Strait of Hormuz (on an ad hoc basis), 1 frigate or the Jeanne d'Arc mission (1 helicopter carrier and 1 FLF frigate) within *Task Force 150* in the Arabian Sea.

Armed forces characteristics and capabilities

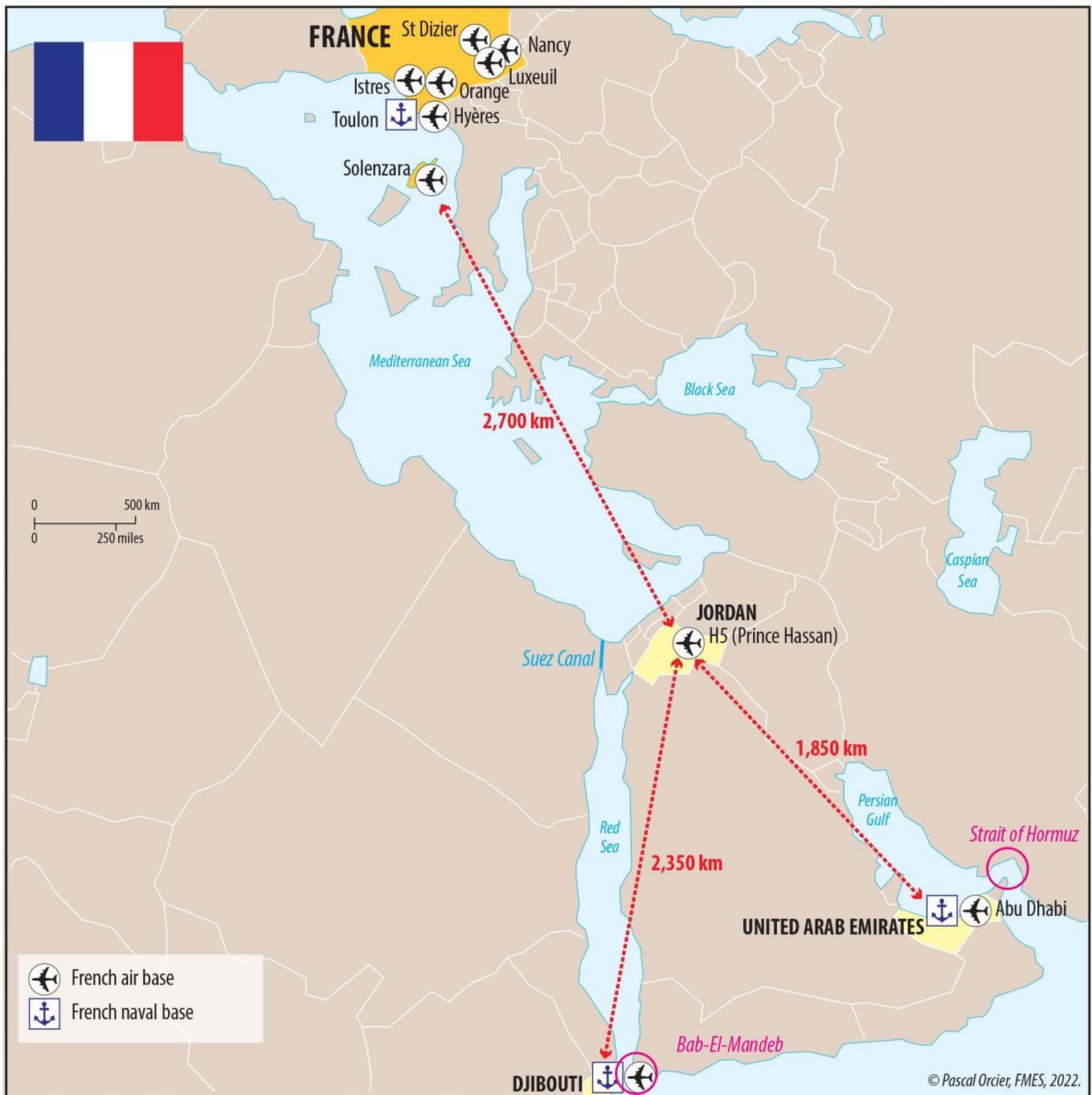
Motivation ★★★★★☆

Equipment ★★★★★☆

Resilience ★★★★★☆

Combat effectiveness ★★★★★☆

Doctrine/Planning ★★★★★☆



»» Strategic objectives for the Mediterranean & Middle East region:

- Defend the freedom of the seas; keep open the sea lanes linking the Mediterranean to the Indian Ocean (international trade) and the island of Reunion (sovereignty) via the Suez Canal, the Red Sea and the Bab el-Mandeb Strait.
- Stabilise, with EU assistance if possible, the southern shore, including by combating IS, armed Jihadi groups, and radicalised political Islam to prevent them from increasing their influence in the region and in Europe.
- Stabilise Lebanon, which is a prime entry point for France in the Levant; avoid its collapse, as well as an open conflict between this country and Israel through Hezbollah or Iranian intervention.
- Keep both Turkey in the Mediterranean Rim, and Iran in the Persian Gulf, at arm's length, both perceived as possible regional troublemakers with destabilising ambitions.
- Manage a complex relationship with Algeria while at the same time maintaining close relations with Morocco and Tunisia.
- Present itself as a counterbalancing power capable of developing an independent regional strategy aimed at stabilising the region; rely on Egypt, the United Arab Emirates and Iraq for this; win contracts to supply French industry.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS OF THE FORCES DEPLOYED IN THE REGION

Fully sovereign nuclear deterrence.

Excellent capabilities in the sphere of Invisible assets (strategic intelligence, covert or clandestine action, satellites, and cyber).

Extensive operational experience.

Well located bases offering a certain strategic depth; Corsica represents a valuable support point in the Mediterranean in terms of surveillance and power projection (air strikes).

Excellent knowledge and understanding of the region.

VULNERABILITIES OF THE FORCES DEPLOYED IN THE REGION

Maintaining operational readiness is a concern, especially for helicopters and armoured vehicles.

Insufficient resilience.

Insufficient number of force multipliers, especially strategic transport and armed MALE UAVs, in relation to the areas of operation.

Extended logistics: impossibility of simultaneously getting involved with Turkey, Israel and Egypt and still maintain military air links with bases in Djibouti and the Middle East.

Latent hostility of certain states (Algeria, Turkey, Syria, and Iran) to the French presence in the region, reinforced by the impact of the diasporas in France.

Difficult extraction and therefore vulnerability of the contingent deployed in Lebanon (UNIFIL II) in the event of a regional conflagration.

Forces deployed in the region on a permanent basis:

Eastern Mediterranean:

1 FREMM or FDA air surveillance frigate ★★★★★☆ in the Syrian channel and 1 nuclear attack submarine on patrol (Suffren ★★★★★☆ or Rubis ★★★★★☆); occasional detachment of 4 Rafale fighters ★★★★★☆ in Greece; naval facilities in Limassol (Cyprus).

Jordan:

• **4 Rafale fighters** and a Mamba surface-to-air missile system on the H5 air base.

United Arab Emirates:

Joint Battle Group (15 Leclerc main battle tanks ★★★★★☆, infantry, 8 Caesar 105 mm artillery guns, engineers); **6 Rafale fighters** and 1 KC-135F air-to-air refueling aircraft; ALINDIEN Headquarter of the French Navy.

Djibouti:

1 joint regiment (15 AMX-10RC main battle tanks ★★★★★☆, infantry, 4 helicopters, artillery, engineers); **4 Mirage 2000 fighters** (2 x 2000-D and 2 x 2000-C), logistic air base serving as a relay for transport aircraft.

Long range strike capability

- **Rafale fighters bombers** ★★★★★☆ armed with Scalp-EG cruise missiles ★★★★★☆ (range of more than 500 km) and air-to-air refueling aircraft by Rafale «nannies» or Airbus A-330 MRTT.
- **MQ-9A Reaper armed MALE UAVs.**
- **Sea-launched cruise missiles: MDCN** (range of more than 1,000 km) ★★★★★☆

Airborne, airmobile and amphibious force projection:

- 21 strategic transport aircraft (15 A-400M, 6 Airbus A-330 MRTT + 6 others currently being delivered)
- 30 NH-90 / Caracal medium transport helicopters
- 3 assault helicopter carriers (Mistral class)

Short notice reinforcement capabilities

Ground forces:

4 brigades (4th Airmobile, 6th Armoured, 9th Marine infantry, 11th Airborne) + special forces (COS); VBCI, Jaguar & Griffon light armoured vehicles ★★☆☆☆; Tiger combat helicopters; Milan and Javelin anti-tank missiles ★★★★★☆ Mistral portable surface-to-air missiles ★★☆☆☆

Air assets:

1 mixed air wing comprising **24 Rafale F3 fighters** ★★★★★☆, 2 E-3D AWACS, 1 C-160G Gabriel electromagnetic surveillance aircraft, 3 Atlantic-2 ASM fighters, 4 A-330 MRTT air-to-air refueling aircraft, MQ-9A Reaper armed UAVs.

Naval assets:

1 naval air group (*Charles de Gaulle* aircraft carrier carrying **24 Rafale F3** fighters and 2 E-2D Hawkeye fighters, 3 FREMM frigates, 1 FDA frigate, 1 oil tanker, 1 Suffren or Rubis nuclear attack submarine); **1 amphibious group** (2 assault helicopter carriers, 1 FREMM or FDA frigate, 2 FLF frigates, 1 supply tanker); Exocet MM-40 Block-3B anti-ship missiles ★★★★★; **1 nuclear attack submarine on interdiction missions.**

Theater anti-aircraft capabilities: Aster-30 / SAMP missiles ★★★★★☆

»» Briefing note

France is as much oriented towards Europe as towards the Mediterranean and the Middle East (and Africa beyond that). As a global player with territories on the three maritime fronts (Atlantic, Indian and Pacific) and a permanent member of the UN Security Council, it seeks to establish itself as an independent counterbalancing power, capable of making a different voice heard in the concert of nations. Unlike the United States and the United Kingdom, France refuses to adopt a posture of systemic hostility towards Russia, China and Iran; it seeks a form of active third way, between a neo-conservative ideological approach which has proved ineffective, and a Gaullist-Mitterrand approach which has reached its limits. It is trying to draw its European partners into this strategy, with mixed success so far.

Very concerned by the stability of the Mediterranean Rim and the Middle East, France maintains a permanent force of 4,500 troops in this vast region, including 30 main battle tanks, 18 fighters and 5 frigates. It is ready to commit reinforcements and send its naval air group there if necessary, as it has done on several occasions in recent decades. Its professional armed forces are credible and recognised as unequalled in Europe, even if they suffer from logistical and budgetary constraints.

»» Overview

Political system: **Parliamentary Monarchy** (Queen Elizabeth II)

Population: 67 million inhabitants / 21st in the world

GDP: \$2,800 billion / 5th in the world

Defence spending: \$61 billion (2.2% of GDP) / 5th in the world

Total strength of armed forces: 150,000 / 34th in the world

Breakdown of armed forces: Ground (84,000 / **11 brigades** / **220 main battle tanks**), Air & Space (33,000 / **160 combat aircraft**), Navy (33,000 / 7 nuclear attack submarines, 2 aircraft carriers, 6 destroyers, 13 frigates) + 80,000 trained reservists.

Nuclear arsenal: 180 nuclear warheads (to be increased to 260 by 2030) aboard 4 Vanguard SSBN nuclear submarines, each carrying 16 Trident II D-5LE intercontinental ballistic missiles armed with several warheads.

Relevant international/regional security organisations: «Five Eyes», NATO, AUKUS

States in which the British armed forces have bases: **Cyprus** (3,500 troops including 260 observers in the UNFICYP mission), **Bahrain** (200 troops), **Oman** (500 troops).

States in which the British armed forces are deployed: **Iraq** (400 troops as part of operation *Inherent Resolve*), **Jordan** (detachment of the 16th Airmobile Brigade), **Kuwait** (80 troops), **Qatar** (detachment to the Al-Udeid air base), **Turkey** (officers detached to the NATO Ground HQ in Izmir).

International missions in which the Royal Navy is involved: **1 frigate** within *Sea Guardian* in the **Mediterranean** (NATO), **1 frigate** and **1 amphibious assault ship LSD** within the mission to secure the **Strait of Hormuz** (United States), **1 frigate** within *Task Force 150* in the **Arabian Sea**.

Armed forces characteristics and capabilities

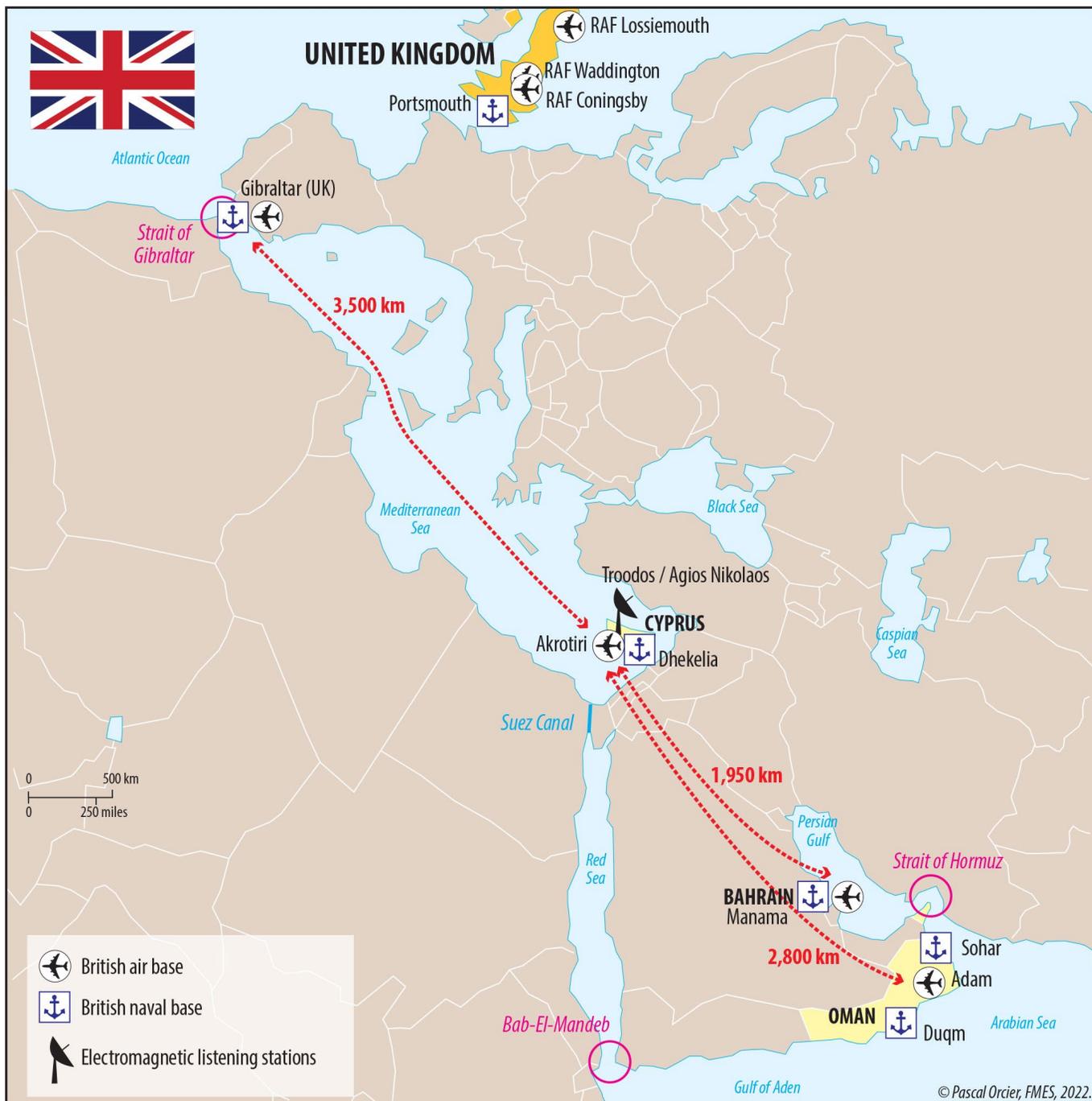
Motivation ★★★★★☆

Equipment ★★★★★☆

Resilience ★★★★★☆

Combat effectiveness ★★★★★☆

Doctrine/Planning ★★★★★☆



»» Strategic objectives for the Mediterranean & Middle East region:

- Maintain British presence in the region (Cyprus, Bahrain, Oman) and conquer others if possible, in order to win new markets in a post-Brexit «Global Britain» context.
- Align with the US posture in the region even if it means engaging in new confrontations, in order to maintain the special relationship with the US at all costs.
- Promote freedom of movement at sea wherever possible by increasing the number of FONOPS (*Freedom of Navigation Operations*) missions.
- Keep Russia and China at bay as the two ideological adversaries of the UK, which is a strong advocate of liberalism in all its aspects (political, economic, philosophical and religious).
- Reach an agreement with Turkey to perpetuate the British presence in Cyprus, weaken the European Union and better control Islamic finance in London's financial centre.

CHARACTERISTICS AND CAPABILITIES OF THE ARMED FORCES

STRENGTHS OF THE FORCES DEPLOYED IN THE REGION

Very close to the United States.

Nuclear deterrence.

Extensive operational experience; good knowledge and understanding of the region.

Good capabilities in sphere of invisible assets (satellites, strategic intelligence, and clandestine operations).

Cyprus provides an excellent base in the Eastern Mediterranean.

Overall good quality of armament, although ground forces equipment is aging.

VULNERABILITIES OF THE FORCES DEPLOYED IN THE REGION

Recruitment problems; very tight operational cycles that do not leave enough room for training.

Inadequate maintenance, especially in the naval sector.

Vulnerability of the logistical axis linking Gibraltar to Oman, easily interdicted in case of regional confrontation.

Relatively negative perception of the UK in the region.

Forces deployed in the region on a permanent basis:

Gibraltar: 1 regiment (570 soldiers); 1 Type-45 destroyer, 1 nuclear attack submarine (Astute ★★★★★☆ or Trafalgar) ; air logistics base serving as a relay to Cyprus.

Cyprus: 2 infantry battalions; Troodos and Ayios Nikolaos listening stations; 8 Typhoon fighters ★★★★★☆ and support detachment (1 A-330 MRTT, 2 transport aircraft, MQ-9A Reaper UAV) at Akrotiri air base

Bahrain: Naval (Mina Salman) and air (Muharraq) bases; British maritime component command for the Middle East.

Oman: Naval bases in Sohar and Duqm; 6th and 8th joint fighter squadrons (UK-Oman) equipped with Hawk Mk-203 (Masirah air base) and Typhoon (Adam air base) respectively; plan to transfer a British armoured detachment from Canada to the Duqm hub to contribute to its security.

Long range strike capability:

- 20 F-35B stealth fighter bombers ★★★★★☆
- Typhoon fighters bombers ★★★★★☆ armed with Storm Shadow cruise missiles with a range of more than 500 km ★★★★★☆ and refuelled by Airbus A-330 MRTTs
- Sea-launched cruise missiles: Tomahawk (range of 1,600 km) ★★★★★☆
- 10 armed MQ-9A Reaper UAVs

Airborne, airmobile and amphibious force projection:

- 28 strategic transport aircraft (20 Airbus A-400M, 8 C-17)
- 60 CH-47 Chinook heavy lift helicopters
- 5 amphibious assault ships (2 LPD, 3 LSD)

Short notice reinforcement capabilities:

Ground forces:

3 brigades (3rd Commando, 7th Mechanized, 16th Airmobile) + special forces (SAS & SBS); **Challenger 2 main battle tanks** ★★☆☆☆; AH-64D Apache combat helicopters; Javelin anti-tank missiles ★★☆☆☆; Stormer man-portable surface-to-air missiles ★★☆☆☆

Air assets:

1 mixed air wing with **24 Typhoon fighters** ★★☆☆☆, 2 E-3D AWACS, 2 R1 Sentinel electronic surveillance aircraft, 2 P-8A Poseidon ASW fighters, 4 A-330 MRTT air-to-air refueling aircraft, MQ-9A Reaper UAVs.

Naval assets:

1 Carrier group (aircraft carrier Queen Elizabeth II carrying 24 F-35B fighters (including 14 from the US Marine Corps), 2 Type-45 destroyers ★★☆☆☆, 3 Type-23 frigates, 2 oil tankers, 1 nuclear attack submarine); **1 amphibious group** (3 LPD/LSD assault ships, 1 Type-45 destroyer, 3 Type-23 frigates, 2 supply tankers); Harpoon Block-1C anti-ship missiles ★★☆☆☆; **1 or 2 nuclear attack submarines on interdiction missions.**

»» Briefing note

The United Kingdom sees the Mediterranean Rim and Middle East region in three ways: as a maritime and trade route to be protected, as an area of opportunity to capture new markets, and as an area of crisis that allows it to exercise the responsibilities associated with its status as a permanent member of the UN Security Council and a close ally of the US. This is why London permanently deploys around 6,000 troops. In the «Global Britain» logic, the contribution to securing the Middle East allows the British crown to indirectly secure its overseas interests in the Indian Ocean (Diego Garcia and Mauritius), in Oceania (Australia and New Zealand) and in the South China Sea (Singapore and Brunei), while at the same time showing itself to be a credible protector of the Commonwealth. However, this posture puts the United Kingdom in the front line against China and Russia, which explains its recent decision to increase its nuclear arsenal, that had been threatened with decommissioning.

On the conventional military front, the British armed forces are not at the level they were at the beginning of the 21st century. Despite their undoubted motivation and a high level of resilience, they suffer from structural and logistical difficulties that must be resolved if they are to regain their prestige and credibility. For the time being, they are still largely perceived as a quality force, but as a backup to the United States.

»» The Balance of Power in
North Africa and the Middle East

3

THE BALANCE OF POWER IN NORTH AFRICA AND THE MIDDLE EAST

This third section, illustrated with original graphs and tables, summarises the assessments and power relations drawn from the 20 North Africa and Middle East (MENA) country profiles.

Demography remains an important marker for assessing the importance of a state and its ability to influence the future of this region which has a total of just over 530 million inhabitants, or only 6.8% of the world's population. The three most populous countries are Egypt, Turkey and Iran, which together account for more than half the population of this vast area. Egypt alone is more populous than all the other North African countries combined. Similarly, Yemen has more inhabitants than the six petro-monarchies of the Arabian Peninsula combined. For the latter, the data presented here deliberately count only the citizens of these six countries and not the very large number of foreigners and expatriates who can represent up to 90% of the population, as in Qatar.

Two-thirds of the region's population is Arab, but these Arab populations, 95% Muslim, now represent only 20% of the world's Muslim population; in the eyes of many Muslims, Arab countries are therefore no longer necessarily the natural representatives of their religion. This is probably why some Arab monarchs attach so much importance to their religious status, such as the King of Saudi Arabia, who remains the Custodian of the two Holy Mosques (Medina and Mecca), the King of Jordan, who avails himself of his status as Custodian of the Al-Aqsa Mosque in Jerusalem, and the King of Morocco, who remains constitutionally Commander of the Faithful.

The six countries with the highest birth rates are all Arab: Egypt, Iraq, Yemen, Jordan, Libya and Mauritania; these countries, in which poverty is tangible, are therefore particularly fragile on the socio-economic level, especially after the soaring of wheat prices following the war in Ukraine, with the exception of Libya which has a small population and significant oil revenues. All the other countries in the region have begun their demographic downturn, including the highly populated Turkey and Iran, but also the Maghreb and Gulf countries; these were all countries that were characterised by strong population growth in the decades following their independence. Iran, in particular, is beginning to worry about the relative ageing of its population and the non-renewal of generations. Today, it is mainly non-state actors (e.g., the Palestinians, Hezbollah, Houthis, Kurds, IS, ultra-orthodox minorities, and the Muslim brothers) that continue to encourage a very high birth rate because they openly rely on the demographic weapon to swing the balance of power to their advantage.

The wealth of the various states is also crucial in assessing their influence on the region. There are enormous disparities. The six monarchies of the Gulf Cooperation Council account for 38% of the wealth of the countries in the MENA zone, even though they represent only 6% of the region's population. Conversely, Egypt and the North African countries, which account for 40% of the population of the region, account for only 15% of its wealth. The five richest states (Saudi Arabia, Turkey, Iran, the United Arab Emirates and Israel) - only two of which are Arab - account for two-thirds of the wealth of the MENA region, which itself represents only 5% of the world's wealth.

These disparities are even more pronounced when one thinks in terms of per capita income. We have chosen by convention to calculate it in the same way for all countries by dividing the overall GDP by the number of inhabitants, without making adjustments that are always subject to question. For the Gulf monarchies, however, we have adapted the GDP/population ratio by reducing the 'weight' of expatriates by 60%, given their large number. The gap between the richest (Qatar) and poorest (Yemen) populations is in the order of 1 to 100. The populations of the richest countries are not necessarily the best off, as in the case of the top three countries (Saudi Arabia, Turkey, and Iran) whose per capita incomes rank 5th, 8th and 10th respectively. The four countries with the richest inhabitants (\$65,000 average income per capita) are Qatar, the United Arab Emirates, Kuwait and Israel. In this respect, it is interesting to note that Israel and the United Arab Emirates are becoming increasingly similar: same number of inhabitants (a little more than 9 million counting foreigners and expatriates for the UAE), comparable gross domestic product, high wealth per capita, companies that concentrate on very high technology and are attuned to globalisation; this is undoubtedly one of the reasons to explain the rapidity of the close cooperation set up between these two countries in the framework of the Abraham Accords, in addition to their common fears concerning Iran. Far behind are the countries of the Levant (\$5,500 average income per capita), followed by North Africa (\$3,300 average income per capita).

A state's defence effort depends on its wealth. Unsurprisingly, those that spend the most on defence are the richest, even if the effort as a percentage of GDP shows significant variations: 5% on average for Saudi Arabia, the United Arab Emirates and Israel; but 2.5% for Iran and 1.5% for Turkey, which both retain significant leeway for greater expenditure in the event of war, while Israel and the petro-monarchies could be close to their ceiling. In relative terms, the three countries in the MENA region that devote the most effort to their defence are Syria (10% of GDP), Oman (9.8%) and Algeria (6.5%).

In absolute terms, Israel, Saudi Arabia, the United Arab Emirates and Bahrain, all of which are resolutely hostile to Tehran, together spend six times more on defence than Iran, illustrating these countries' sense of vulnerability vis-à-vis their powerful neighbour.

In terms of military tools, if we integrate all the qualitative, quantitative and technological data presented in the preceding sheets and the graphs and tables that follow, five countries stand out and can boast of maintaining the most powerful armies in the region: 1) Israel; 2) Turkey; 3) Iran, even if most of its armaments are obsolete; 4) Egypt; 5) Algeria. The armies of the petro-monarchies of the Arabian Peninsula may well be abundantly equipped, but their effectiveness remains highly questionable, with the exception of the United Arab Emirates which has patiently forged a powerful and credible tool. The Syrian and Iraqi armies remain theoretically imposing, but they are exhausted and fragmented by very long years of civil war and by the presence of competing militias that contest their monopoly of state power. In Yemen and Libya, the regular armed forces have become a minority compared to the many militias and foreign contingents that occupy the terrain.

The armies of other states in the MENA region (Algeria, Morocco, Mauritania, Tunisia, Lebanon, Jordan, Oman, Qatar, Kuwait and Iraq) remain mainly defensive and oriented towards internal security; their main mission is to repel external aggression and to dissuade armed militias present on their territory (if any) from strengthening their hold on power, especially in Lebanon. These armies are therefore not structured to initiate hostilities or to conduct offensive operations. However, they do have the means to deploy forces to contribute to international operations that could bring them prestige and experience.

In terms of internal security, six states (Iran, Egypt, Iraq, the United Arab Emirates, Oman and Bahrain) maintain a proportion of law enforcement forces that is substantially equivalent to or greater than that of the regular armed forces, illustrating the fear of the rulers towards their own

population and a form of mistrust of the armed forces. This is particularly true in Iran, Egypt and Iraq, where the regimes in place fear popular protests fuelled by very strong socio-economic dissatisfaction.

Finally, this third part closes with a series of scenarios that explore possible armed confrontations between several states in the MENA region, made plausible by the increase in regional tensions and the aggressive postures of certain protagonists. Each scenario synthesises the balance of power of the main belligerents in the different domains of the visible and the invisible, compares their assets and vulnerabilities and examines their respective strategies to try to win.

»» Summary:

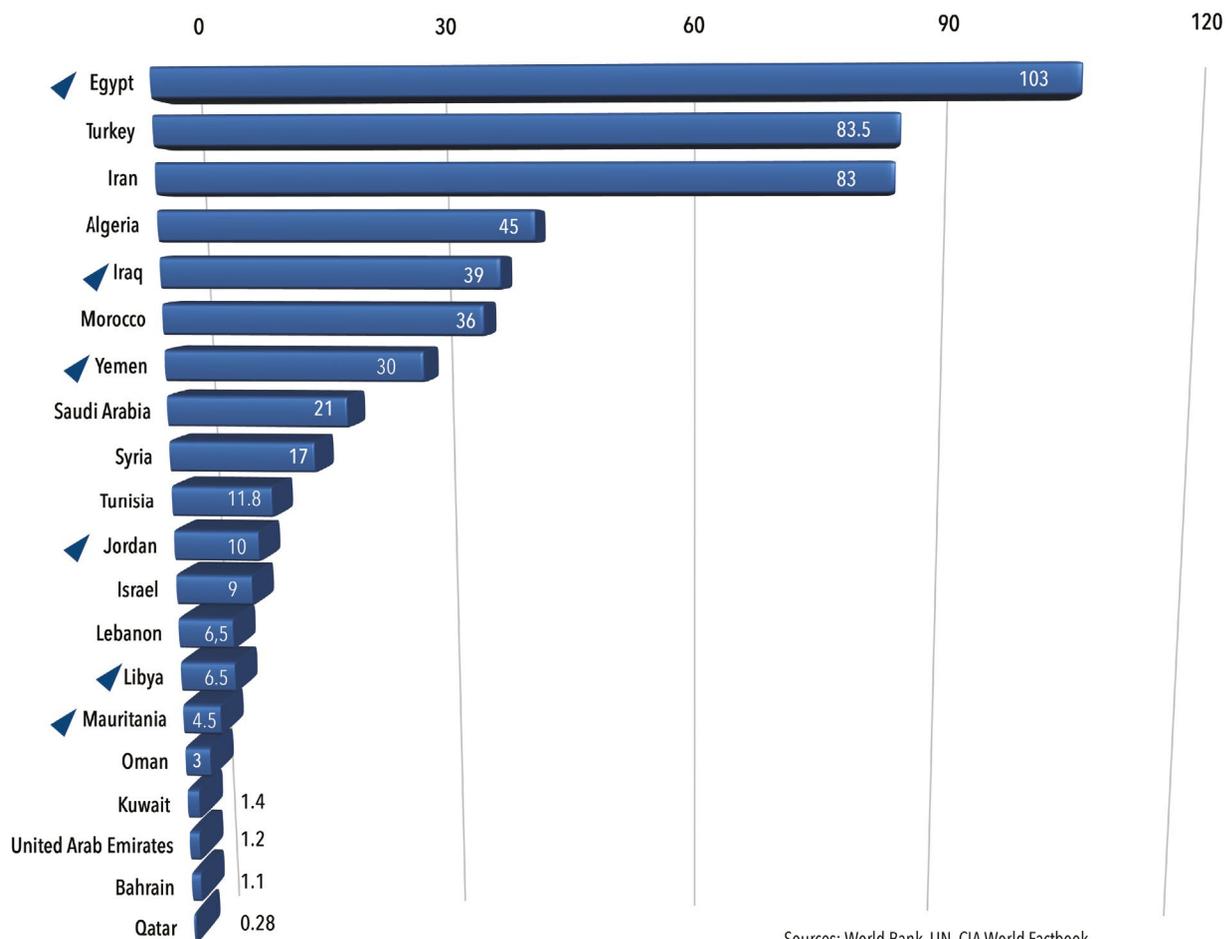
The region of North Africa and the Middle East remains fundamentally fragmented and divided in every respect: demographic, ethnic, religious, political, economic, military, and natural resources. Most of the peoples of this region, in search of an identity and a new post-western model, are resurrecting an exacerbated form of nationalism which they combine with a strong Islamist background. Contrary to the second half of the twentieth century when nationalism and pan-Islamism did not generally mix, many leaders in the MENA region are now tempted to synthesise the two, while reviving old rivalries and neighbourhood quarrels to distract from domestic difficulties and consolidate their contested legitimacy.

This development is taking place in a context of heightened rivalries between global actors who may be tempted to use these growing regional tensions to their advantage. The risks of armed confrontation or at least border clashes are therefore very real. Faced with these risks, the region's armies are not all at the same level. Only the most powerful or the most resilient (Israel, Turkey, Iran, Egypt, Algeria; Morocco and Syria to a lesser extent) seem capable of sustaining a high-intensity conflict over a longer period of time.

Demography in the Middle East and North Africa

Demography of the MENA countries in 2022

Arrows indicate countries with a birth rate above 3 in 2021

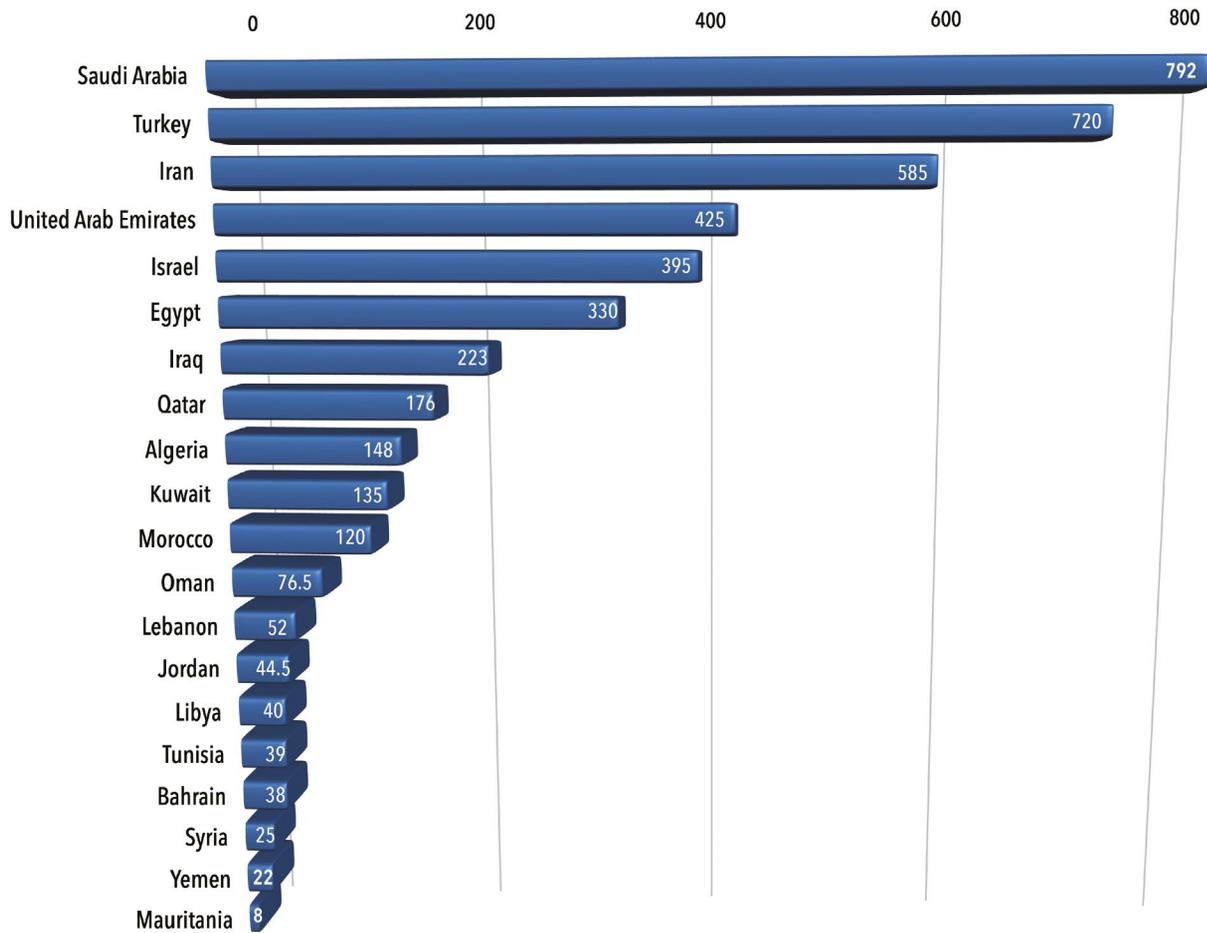


Sources: World Bank, UN, CIA World Factbook

Demography is expressed in millions of inhabitants. The populations of the Gulf Cooperation Council monarchies include only those citizens who hold the relevant nationality.

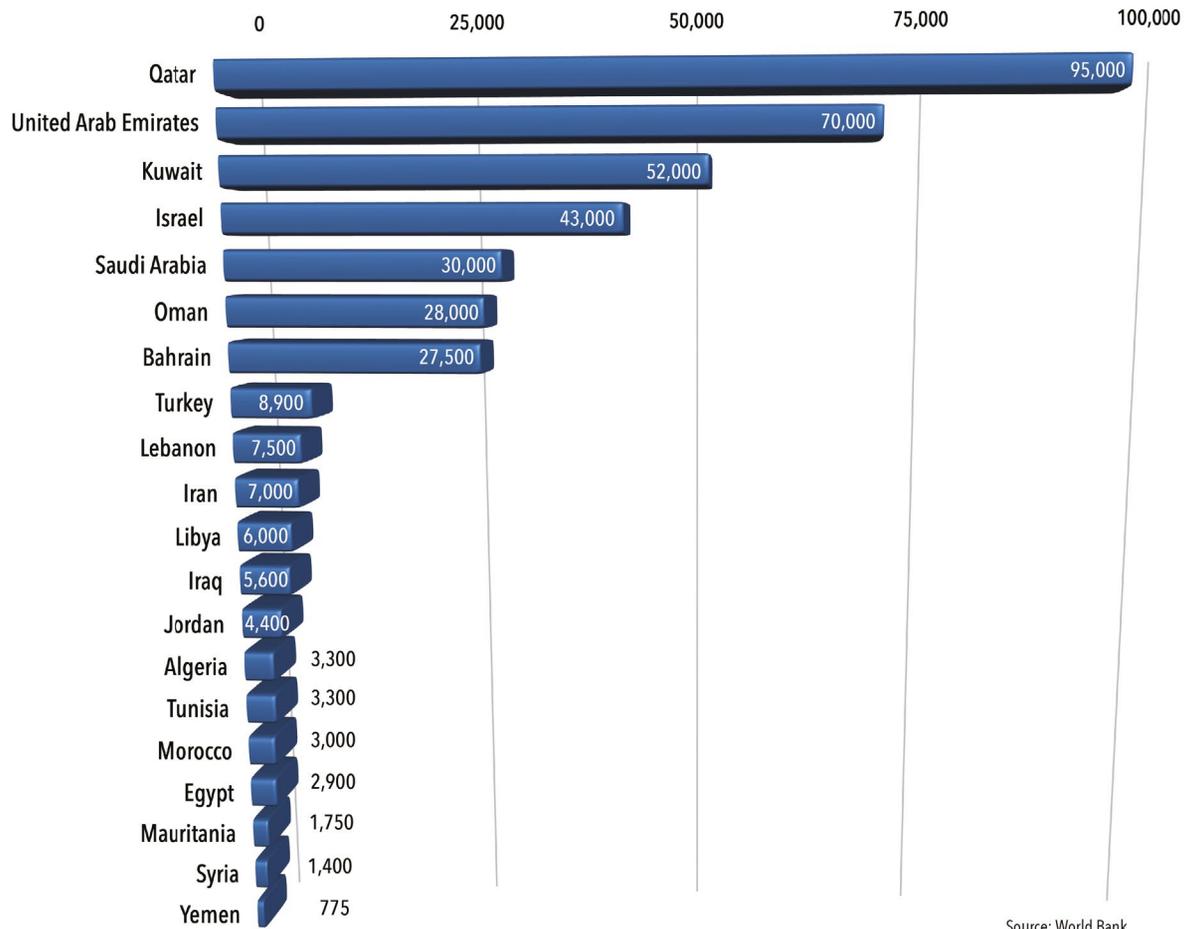
»» Wealth in the Middle East and North Africa

Wealth of MENA countries in 2021 (GDP in billion dollars)



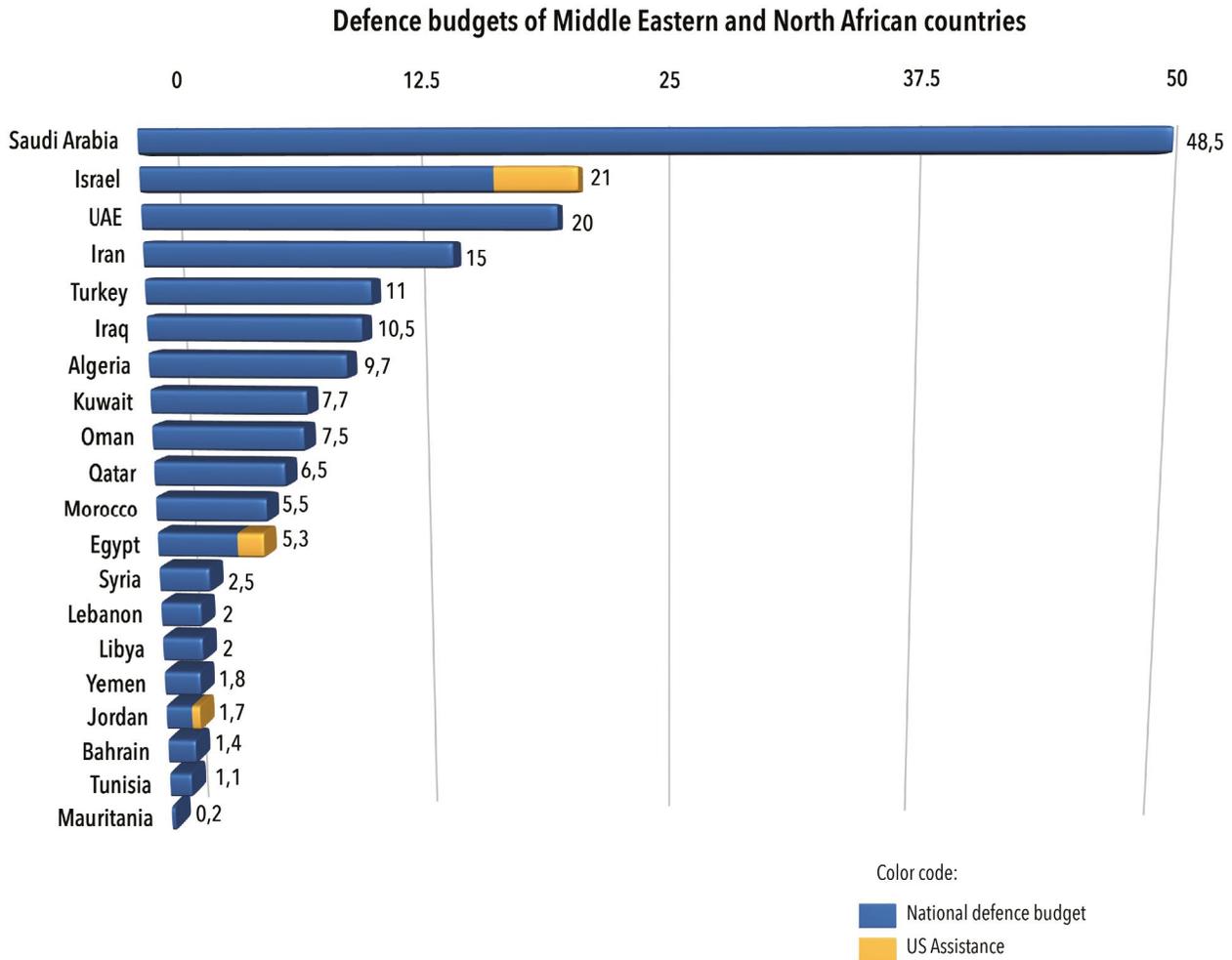
Source: World Bank

Per capita wealth of MENA countries (in dollars)



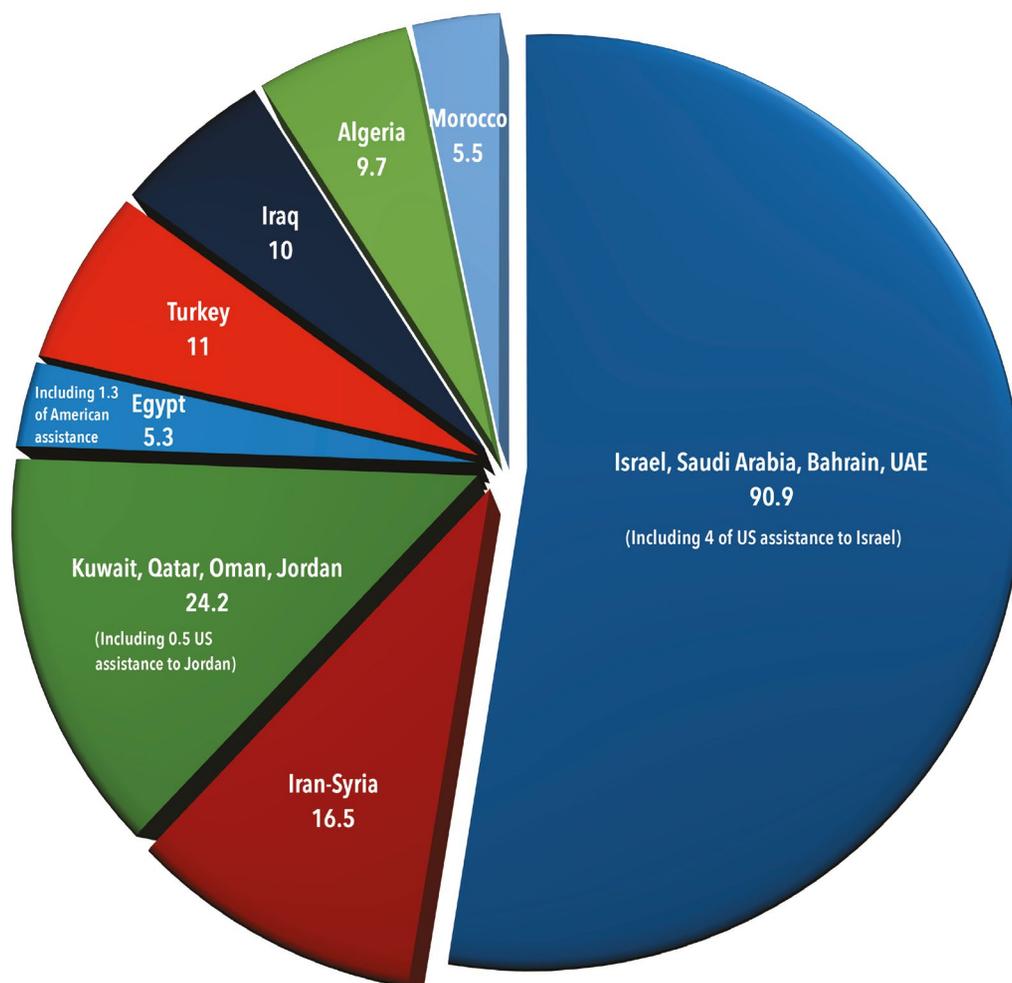
Source: World Bank

»» Military spending in the Middle East and North Africa



»» The distribution of military expenditure by blocks

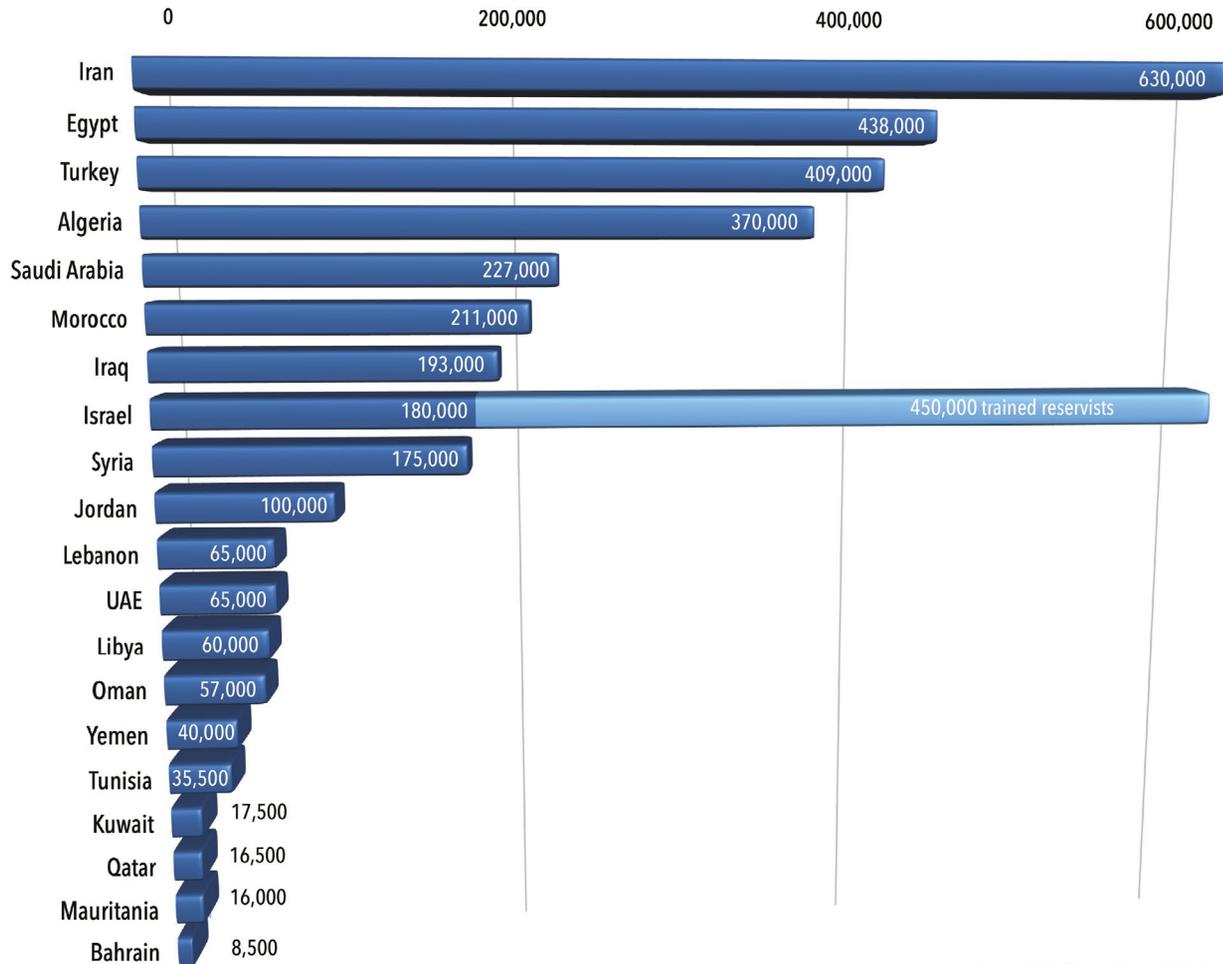
Military budgets of the main MENA countries in 2021 (in billions of dollars)



Sources: ISS Military Balance 2021, CIA World Facebook, FMES

»» Armed forces in the Middle East and North Africa

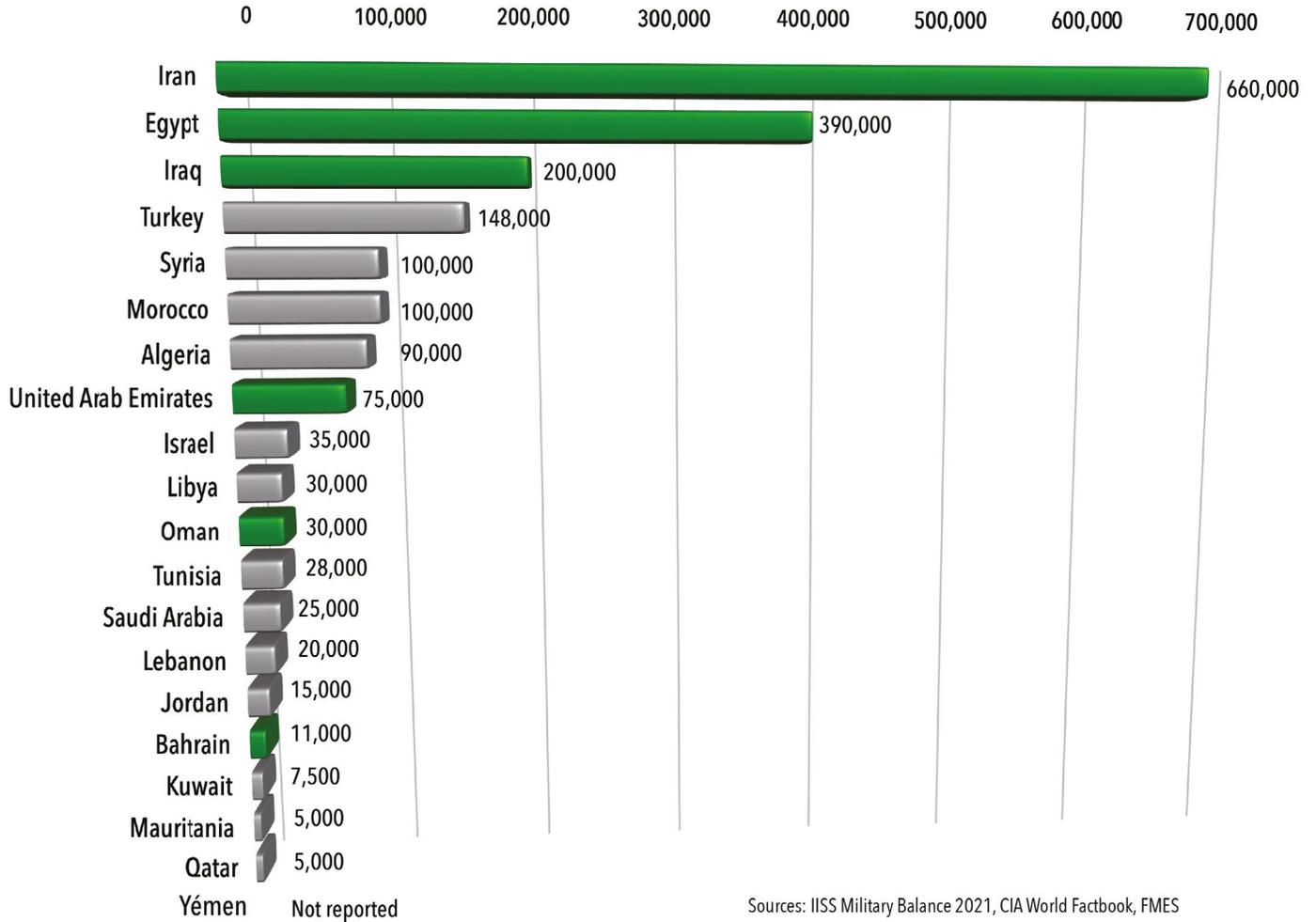
Number of armed forces in MENA countries in 2021



Sources: IISS Military Balance 2021, FMES

Number of internal security forces in MENA countries in 2021 (in number of agents)

Countries shown in green have a similar or greater number of internal security forces than military personnel

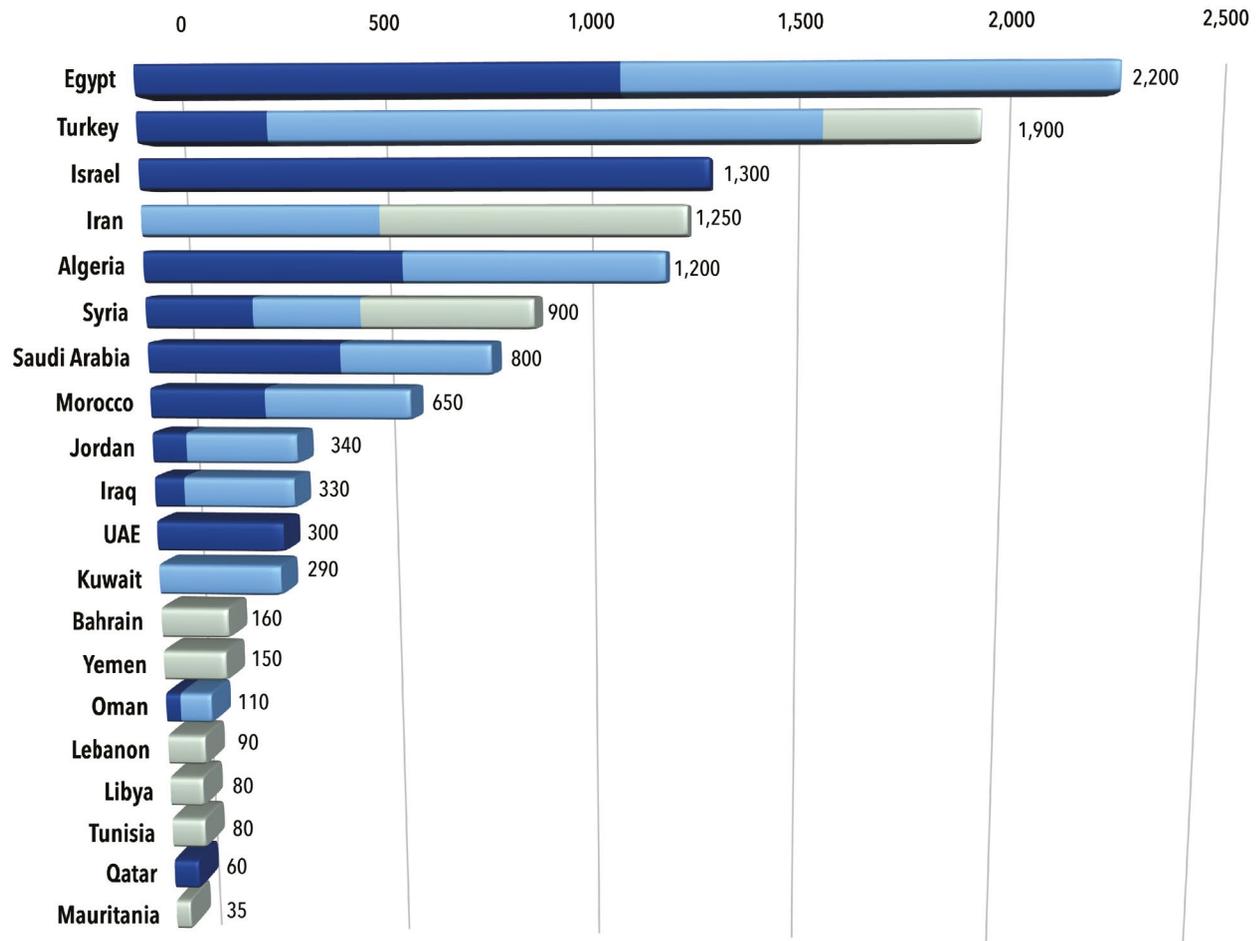


Sources: IISS Military Balance 2021, CIA World Factbook, FMES

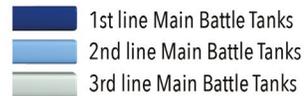


Comparison of land forces in the Middle East and North Africa

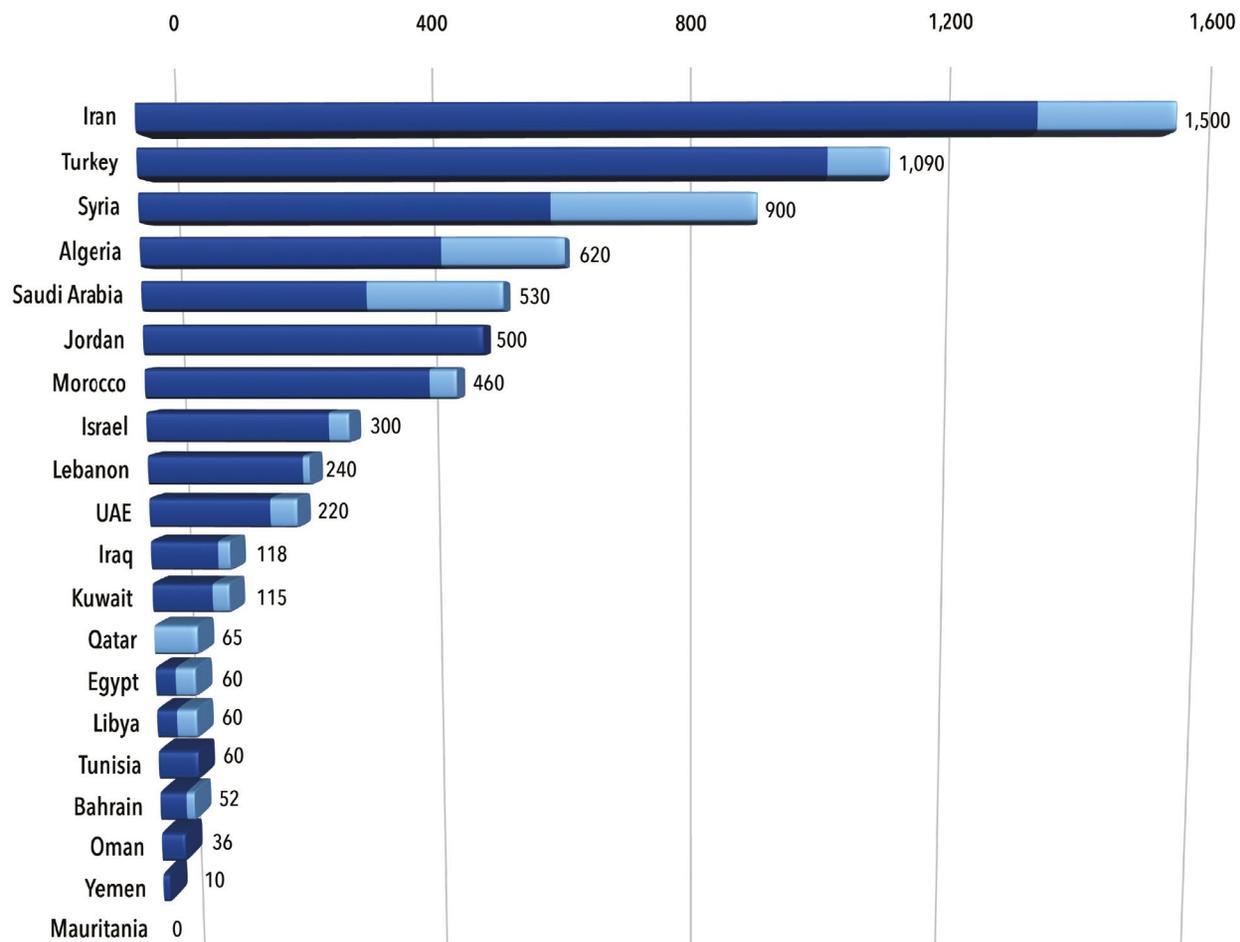
Comparison of main battle tanks in the Middle East and North Africa



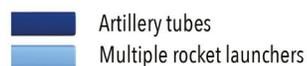
Color code:



Artillery capabilities of the armies of the Middle East and North Africa

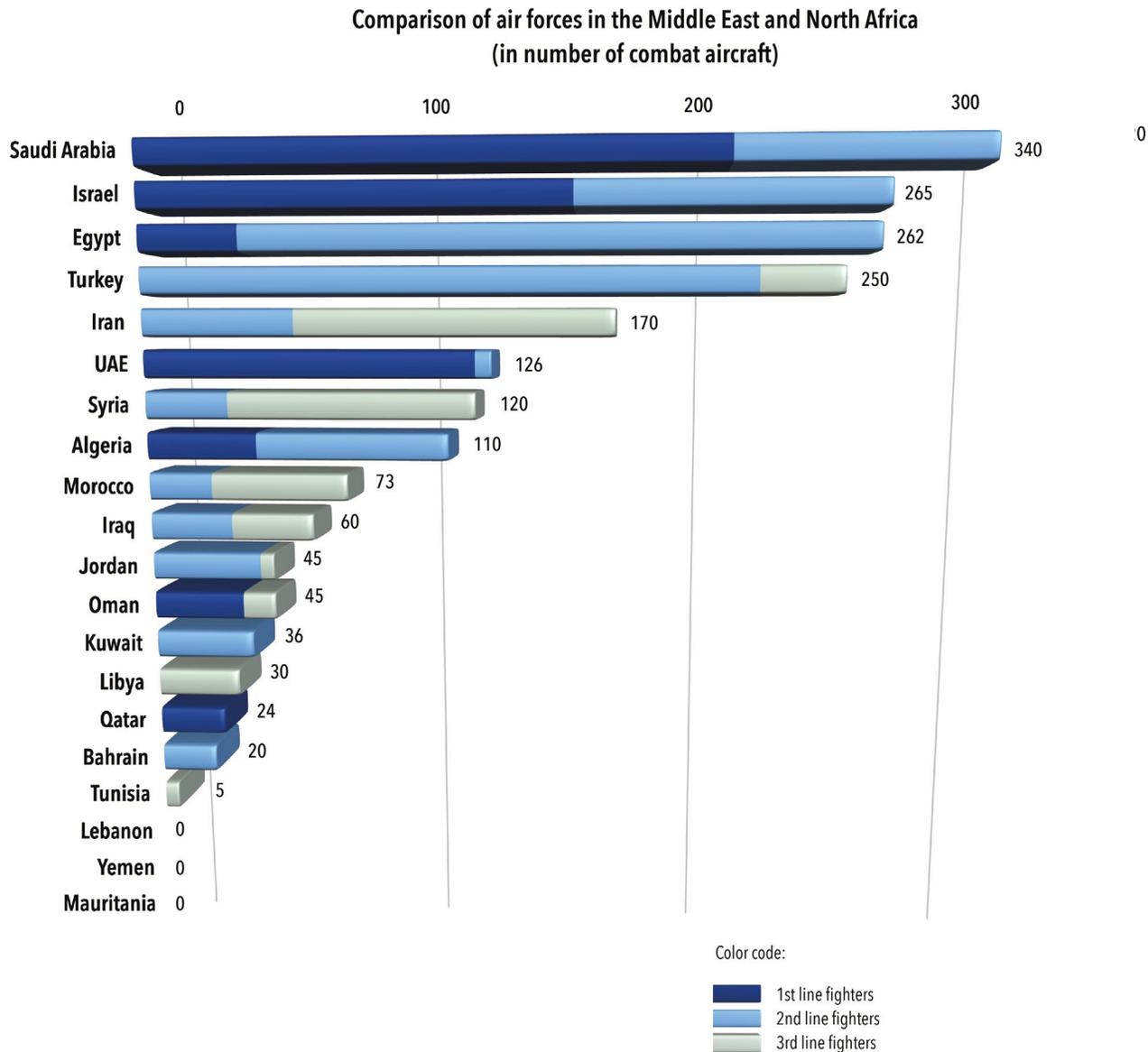


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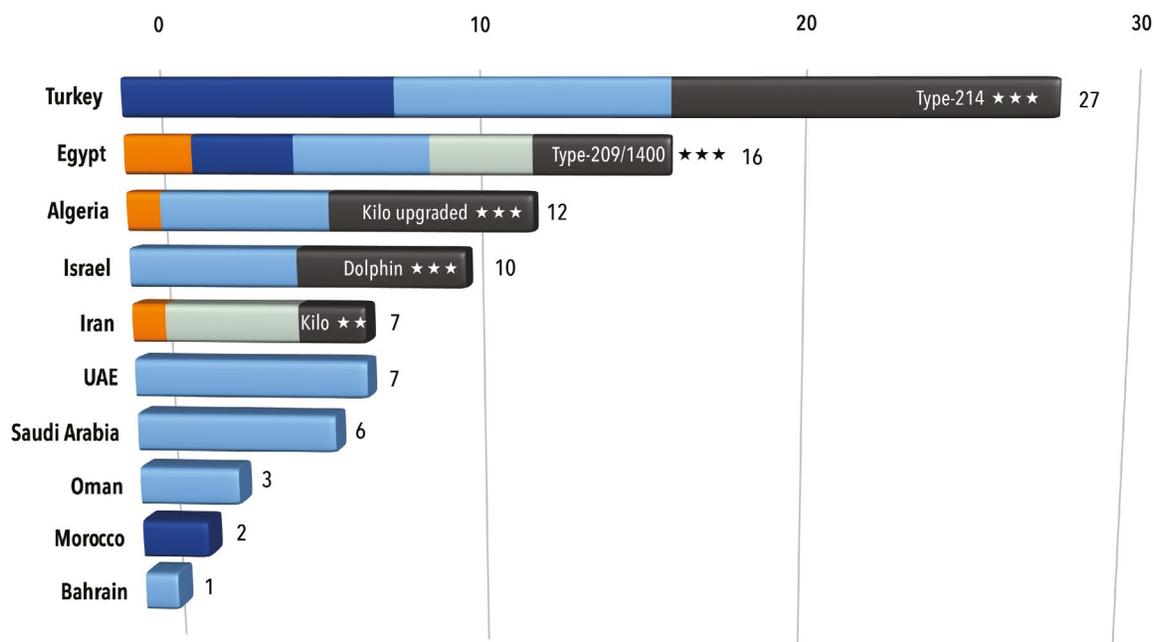


Comparison of the air forces in the Middle East and North Africa



Comparison of naval forces in the Middle East and North Africa

Comparison of the main navies in the Middle East and North Africa



Color code:

- Helicopter carriers
- 1st line frigates
- 2nd line frigates and light frigates
- 3rd line frigates and light frigates
- Attack submarines

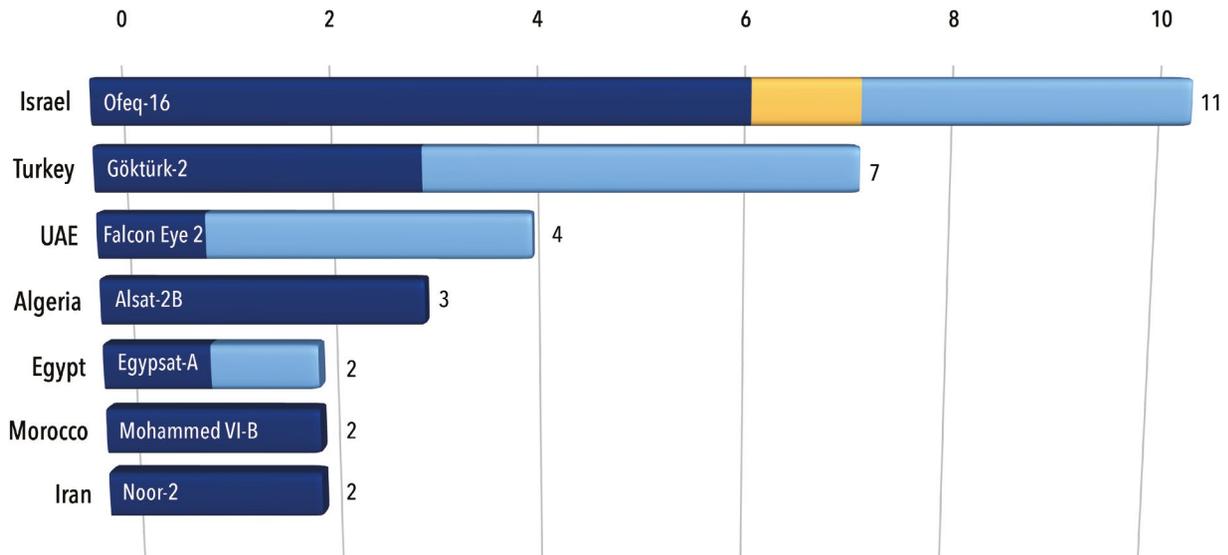
Dolphin

Best performing attack submarine



States with military satellites in the Middle East and North Africa

States with military satellites in the Middle East and North Africa



Color code:

- Reconnaissance satellites
- Radar imaging satellites
- Communication satellites

Ofeq-16 Best performing reconnaissance satellite

Note: The Iranian satellite Noor-1 is probably out of control and should be replaced by a Russian satellite type Kanopus-V

SCENARIO: ALGERIA vs MOROCCO

There are several reasons that could provoke an armed confrontation between Algeria and Morocco: the historical rivalry between the two countries; the Western Sahara conflict which has poisoned relations between Algiers and Rabat for nearly four decades; and a possible desperate action by Algerian generals in the event of the collapse of the regime of which they are the pillar.

Indications of growing tensions have multiplied in 2021: Algeria's decision to break off diplomatic relations with Morocco; closure of the Maghreb-Europe gas pipeline through which Algeria supplied Spain with gas via Morocco; Algeria's closure of its airspace in September; the death of three Algerian lorry drivers killed on November 1st on the road linking Mauritania to Algeria; the appointment of Moroccan General Belkhir el-Farouk, former commander of the southern zone, to the strategic position of Inspector General of the Royal Armed Forces, and of Algerian General Saïd Chengriha, who has a deep understanding of the Moroccan border, to the position of Chief of Staff of the Algerian army.

In the event of an armed confrontation, Israel, perhaps associated with the United Arab Emirates, could support Morocco militarily in a discreet way so as not to leave its only ally in the Maghreb in a difficult position. However, this support could not be too visible so as not to weaken Israel's own position, which is otherwise under pressure in the Levant and the Middle East. Limited American support could also be envisaged (notably in the field of intelligence or drone strikes), especially if Russia or Iran were to take Algeria's side.

For its part, Algeria could benefit from support, also discreet, from Russia and perhaps Iran, without direct involvement however, as Russia does not wish to get bogged down and Iran does not wish to disperse its forces.

Armed forces budget:

Morocco: 5,5 milliards de dollars, en forte augmentation (+30%).

Algeria: 9,7 milliards de dollars

In the event of an armed confrontation, the strengths and weaknesses of both sides are listed below:

»» Invisible assets

Morocco could benefit from US and Israeli intelligence and cyber capabilities that are far superior to Algeria's, as well as from the support of Israeli Harop suicide UAVs. Algeria's intelligence and ground surveillance capabilities are greater in quantity but cannot be diverted from the Sahel border for too long. Algeria could instrumentalise the Polisario Front. Since Algeria has underwater superiority thanks to its modernised Kilo submarines, it could easily impose a maritime embargo against Morocco.

In terms of conventional deterrence, the advantage lies with Algeria, which has superior capabilities in terms of long-range land strikes (Iskander and Kalibr missiles).

» Visible assets

Ground forces:

	MOROCCO	ALGERIA
Troop numbers (ground and associated forces)	228,000	310,000
Combat units	7 brigades, 9 régiments	5 divisions, 8 independent brigades
Airmobile forces	2 bataillons	5 régiments
1 st line main battle tanks	220	600
2 nd line main battle tanks	340	600
Total:	560	1,200
Best main battle tank in service	M-1A1 Abrams ★★☆☆☆	T-90S ★★☆☆☆
Other armoured vehicles	1,850	2,000
Artillery (artillery tubes + MRL)	460	620

- **Areas in which Morocco is superior:** Clandestine operations; sustained resistance..
- **Areas in which Algeria is superior:** Long-range strikes; mechanised combat in open ground.
- **Actions that would allow Morocco to take the lead:** Purchase of long-range strike assets.
- **Actions that would allow Algeria to take the lead:** Improvements in intelligence and cyber warfare; also in training, motivation and development of initiative in the troops.

Morocco has no military interest in a land confrontation in the south and in the Western Sahara where Algerian superiority could easily be asserted. In the north, the mountainous terrain is very favourable to Morocco and would offer a strategic depth that would allow it to easily hold the rare axes of penetration and exchange time for some parcels of territory.

Air forces:

	MOROCCO	ALGERIA
1 st line fighter aircraft	25 F-16V (awaiting delivery)	110
2 nd line fighter aircraft	70	65
Total:	95 (by 2024)	175
Best fighter in service	F-16C/D ★★★★★☆☆	Su-30 ★★★★★☆☆
Attack helicopters	19 Apache + 36 others awaiting delivery	45 Mi-24/28
UAVs	32	20
Air transport capacity	13 transport aircraft 3 Heavy-lift helicopters	25 transport aircraft 14 Heavy-lift helicopters

- **Areas in which Morocco is superior:** UAVs (thanks to Israel).
- **Areas in which Algeria is superior:** Air superiority and ground support.
- **Actions that would allow Morocco to take the lead:** Purchase of an A2AD system; accelerating the delivery of American Patriot systems.
- **Actions that would allow Algeria to take the lead:** Improvements in training, motivation, and pilot training.

Algeria's air superiority, currently beyond doubt, may diminish over time due to planned deliveries of F-16Vs to Morocco. If the US and Israel become involved, the balance could be redressed in Morocco's favour through the rapid acquisition of more capable A2AD systems.

Naval forces:

	MOROCCO	ALGERIA
Submarines	0	6 ★★★★★☆☆
1 st line frigates	2	0
2 nd line frigates	5	5
Best frigate in service	FREMM ★★★★★☆☆	Meko-200 ★★★★★☆☆
Corvettes/missile boats	4	22
Amphibious assault ships	3 LSM	4 (1 LHD, 3 LSM)

- **Areas in which Morocco is superior:** Anti-submarine warfare (thanks to its FREMM).
- **Areas in which Algeria is superior:** Maritime interdiction.
- **Actions that would enable Morocco to improve:** Acquisition of non-attributable maritime interdiction assets: mines, underwater drones. Acquisition of new FREMMs to reduce the Algerian submarine threat.
- **Actions that would allow Algeria to improve:** Training.

Algeria is in a strong position to deny the Moroccan navy access to the sea. This advantage could be negated by the involvement of the United States and Israel and the delivery to Morocco of mines, submarine drones and ASW capabilities.

»» Summary

The balance of power is very unfavourable to Morocco in the event of an extension of the conflict to Western Sahara, which could prompt Algeria to act. Morocco could possibly hide behind a deterrence of the weak to the strong through long-range strikes, but mutual vulnerability would probably imply disproportionate losses.

The planned strengthening of the Moroccan armed forces (intelligence, drones, denial of access capabilities, cyber) will partially rebalance the forces. But only an increased deep strike capability or a more explicit alliance with the USA could truly deter Algerian aggression.

In the event of a large-scale confrontation, Morocco's strategy would undoubtedly be to seek stalemate through a classic defence of the weak against the strong, through asymmetric operations in Algerian territory and a communications war to discredit the aggressor and win Western support.

In the end, the most likely scenario remains that of recurrent border clashes between Algeria and Morocco.

SCENARIO: TURKEY vs GREECE AND CYPRUS

The hypothesis of an armed confrontation between Turkey and Greece associated with Cyprus (the two countries are intimately linked), remains a credible conflict hypothesis in view of the historical rivalry between the populations, the recent tensions linked to Cyprus and the competition for control of maritime and air space in the Aegean Sea, in addition to the rivalries linked to gas exploration in the eastern Mediterranean. The historical dispute between these countries would have escalated into armed conflict several times in recent history had the USA not intervened. The perceived diminishment of US involvement in the region could encourage Turkey to act in a context of polarised public opinion and the whipping up of Turkish nationalism for electoral purposes.

The Turkish elections of 2023 represent an important marker: the declining popularity of the president, linked to the deterioration of the Turkish economy and the hardening of his domestic policy, could provoke hasty moves on the part of the government which could seek to distract and rally its population around a spectacular action that would pander to national sentiment.

Hostilities could be triggered by Turkey (e.g., seizure of islets in the Aegean Sea, or strong-arm action against gas exploration vessels) or by Greece in response to a Turkish provocation, such as the annexation of Northern Cyprus, military provocation or gas exploration in Greek or Cypriot waters, or the mass transfer of migrants for destabilisation purposes.

In such a case, the United States, NATO and the European Union will probably not have the time to impose a de-escalation and will prefer not to engage militarily in the conflict, each for different reasons. France, probably alone, could support Greece and Cyprus militarily out of European solidarity and in the name of international law, should Turkish aggression manifest itself as such.

Israel, perhaps in association with the United Arab Emirates and Egypt, could support Greece and Cyprus in a discreet manner, so as not to let Turkey gain the upper hand in the Eastern Mediterranean and thereby promote political Islam (in line with Egypt and the UAE's positions consisting of fighting political Islam). It should be noted, however, that Ankara is attempting a rapprochement with Egypt and the Emirates, no doubt to strengthen its regional posture, but also perhaps to de-mine the reactions of others in anticipation of such a scenario. The American posture will obviously be crucial. The United States does not seem inclined to commit itself militarily against Turkey, which it relies on to contain Russia (especially in the context of the war in Ukraine), Iran and China. Instead, it could impose strong economic sanctions on the Turkish government and quietly support Greece to maintain the balance.

Turkey could receive discreet support from Qatar because of the strong ties built up over the past decade, but also from Russia if it believes that a Turkish success would weaken NATO and the EU.

Armed forces budgets:

Turkey: 11 billion \$ [far more in terms of Turkish money devalued to the dollar] (15 % of GDP)

Greece associated with Cyprus: 5.4 billion (2.5% of GDP and 1.8% of GDP respectively)

In the event of an armed confrontation, Turkey would immediately have a dissuasive military ascendancy. This is based on the political and operational demonstration of the uninhibited use of armed force; Turkey has demonstrated for several years that it does not hesitate to use force to defend its interests in Iraq, Syria, the Mediterranean, Libya, and the South Caucasus (Nagorno-Karabakh).

The simplest scenario, on the Turkish side, remains the annexation of the Turkish Republic of Northern Cyprus (TRNC) followed by a validation referendum, similar to the Russian operation in Crimea in 2014. Turkey now has an army corps in the territory. President Erdogan's announcements about taking over the seaside resort of Varusha, which has remained empty since the Turkish invasion of 1974, is a worrying sign. Greece and Cyprus would then be faced with a dilemma: accepting the *fait accompli* or retaliating militarily by militarising islands in the Aegean Sea or attempting to organise a blockade of Cyprus to counter the annexation of the TRNC: options that could lead to a conflictual escalation.

The seizure of Greek islands near the Turkish coast and/or the attack on a gas exploration vessel is another scenario, possibly complementary to the first one, which would signal Turkey's willingness to change the status quo of current maritime delimitation. Here again, the Greek government would be in the difficult position of suffering without being proactive, especially if faced with the option of the armed recapture of an island, which is always difficult and costly.

»» Invisible assets

This Turkish superiority is reinforced by excellent intelligence and clandestine action capabilities, combined with very good amphibious and deep strike assets that would allow it to take a surprise bargaining chip near its coast. Such an operation would certainly rely on a hybrid strategy combining a disinformation campaign, NGO actions (of the «Freedom Flotilla» type in support of Gaza in 2010), massive movements of migrants towards the Greek coast and the activation of diaspora networks to neutralise possible reactions from EU member states.

» Visible assets

Ground forces:

	TURKEY	GREECE, ASSOCIATED WITH CYPRUS
Troop numbers	270,000 (+ 157,000 internal security forces)	106,000
Combat units	4 divisions, 38 brigades	6 divisions, 13 brigades
1 st line main battle tanks	300	350
2 nd line main battle tanks	1,250	580
3 rd line main battle tanks	350	200
Total	1,900	1,130
Best tank in service	Leopard-2A4 ★★★★★☆	Leopard-2 ★★★★★☆
Other armoured vehicles	5,300	2,680
Artillery (artillery tubes + MRLs)	1,090	838

• **Areas where Turkey is superior:** Overall numbers of infantry and commando forces; air-land combat (main battle tanks, armour, helicopters, drones); air mobility/deep-strike capability; strike coordination.

• **Areas in which Greece and Cyprus are superior:** Determination, hardiness and resilience in the face of loss given the symbolic importance of the terrain they are defending. Knowledge of the ground, especially the Aegean islands.

• **Actions that would allow Turkey to gain an advantage:** Improve naval infantry training and joint coordination for operations to capture and hold Greek islands or survey ships.

• **Actions that would enable Greece associated with Cyprus to gain an advantage:** Pre-positioning of troops and reinforcement of training for the defence of the islands and the Cyprus Line. Strengthen coordination between the army and air & sea support for defensive, evacuation or counterattack operations.

The Turkish army has a quantitative but also qualitative superiority, given its combat experience in Iraq, Syria, Libya and Nagorno-Karabakh. Turkish troops have developed a recognised know-how in the use of special forces, fire coordination and the use of UAVs. They will also have the advantage of having the initiative in scenarios involving the invasion of islands in the Aegean Sea close to their territory.

While Turkish forces cannot envisage invading the southern part of Cyprus without opposing the international forces in place (notably the British), they can take some of the Greek islands close to their coast, most of which are undefended, by force. The Greek-Cypriot forces

on the other hand, will have no chance of retaking Northern Cyprus, which is de facto territory controlled by the Turkish army, which is firmly entrenched there. The recapture of the islands would be very difficult for Greece but could be envisaged by special forces operations supported by substantial air and sea assets, provided that they were carried out very quickly before the installation of Turkish reinforcements and defence systems. The easiest thing for the Greek armed forces to do would therefore be to organise the defence of the islands now.

Air forces:

	TURKEY	GREECE, ASSOCIATED WITH CYPRUS
1 st line fighter aircraft		88
2 nd line fighter aircraft	220	100
3 rd line fighter aircraft	30	22
Total	250	210
Best fighter in service	F16 Block 50 ★★★★★☆☆	F-16 Block-52+ ★★★★★☆☆ (24 Rafale ★★★★★☆☆ awaiting delivery)
Air-to-air refuelling aircraft	7	-
Combat helicopters	80	100
Armed UAVs	175	4
Transport aircraft and helicopters	10 aircraft, 80 helicopters	15 aircraft, 51 helicopters
Ballistic missiles	60	-

Greece has the advantage in the air. The Greek air force, with the quality of its aircraft and pilots, is able to provide the air superiority that could disrupt a Turkish amphibious or naval operation. It could also provide support to an operation to recapture an island, if one were to be conducted. Greece also has the capacity for retaliatory strikes deep inside Turkish territory, but this option which would move the conflict to the mainland is unlikely given its political impact and the risk of military escalation.

Naval forces:

	TURKEY	GREECE, ASSOCIATED WITH CYPRUS
Submarines	11 (★★★★☆)	8 (★★★★☆)
1 st line frigates	8 Meko 200TN ★★★★★	4 Meko-200 ★★★★★
2 nd line frigates	8	9
Corvettes & missile boats	19	14
Amphibious assault ships	5 LST	5 LST

Greece has the advantage in naval matters. Although both countries have a medium sized fleet and a small submarine capability, these fleets are effective because of their proximity to each other's naval bases. Each can therefore envisage disrupting the other's navigation (exploration, demonstration, exercises). This has been demonstrated by the Turkish Navy for several years. However, once hostilities were declared Greece would have a considerable advantage with the numerous islands in the Aegean Sea, as well as Crete and Cyprus, which represent unsinkable ships likely to pose a threat to any Turkish vessel in the area, once they were equipped with radar and anti-ship and anti-aircraft missiles. This capability, which would only be effective if the islands were equipped with A2AD (denial of access) capabilities, is however not usable in times of crisis, as it does not allow for posturing and harassment. It is in this situation that French, European, Egyptian or Israeli support, if it exists, could be most useful in deterring the Turkish navy.

One point seems certain, however: the channel separating the northern part of Cyprus from Turkey will remain more difficult to interdict for the Greek navy, given its narrow width and the proximity of Turkish air bases. An air-sea blockade of Cyprus would therefore be difficult to implement and would entail a very high risk of escalation.

»» Summary

A conflict sequence between Turkey on the one hand and Greece and Cyprus on the other hand would probably result from a Turkish initiative. This capacity for initiative on the part of the Turkish government, combined with armed forces hardened by numerous engagements, backed by a very nationalistic public opinion, and effective levers vis-à-vis European countries, gives Turkey an undeniable ascendancy. Its armed forces could generate a *fait accompli* that would be difficult to reverse, unless the United States and/or Russia intervene directly, which would be a game changer in view of the dissuasive forces that these two global players could quickly commit to the area.

To help them resist such a threat, Greece and Cyprus are seeking to obtain new US guarantees and to forge a network of alliances that would increase the political cost of such an initiative for Turkey. For his part, President Erdogan is working to dissuade the Emiratis, Egyptians and Israelis from intervening.

In the end, the best defence for the Greeks and Cypriots is to preventively dissuade any Turkish aggression by reinforcing their defensive system on their territory and controlled islands, while demonstrating through visible training, exercises, equipment, and communication their will to firmly defend their territory and their sovereignty. Prevention, and the display of credible allies, remain in their case the best way to «win the war before the war».

SCENARIO: ISRAEL vs IRAN AND ITS ALLIES

The scenario of a major armed confrontation between Israel and Iran is plausible, even if the Israeli and Iranian leaders are aware of each other's vulnerabilities and have more interest in exploiting the threat from the other for domestic political purposes (diversionary effect), rather than allowing themselves to be drawn into an escalation that could quickly get out of hand.

Such a confrontation would probably be initiated by Israeli pre-emptive strikes against Iran's nuclear programme in the event of a failure of the ongoing negotiations; in reaction to an Iranian nuclear test; or a deliberate Iranian provocation. It could also result from an escalation of tensions between Israel and Hezbollah, particularly in the context of the collapse of the Lebanese state.

If such a confrontation were to occur, it is likely that the Syrian regime and the Lebanese army would try to stay out of the way so as not to risk losing everything, as with the Arab monarchies, which are aware of the weakness of their military tools and are reluctant to interfere in a conflict in which they would only stand to suffer losses, unless the United States intervenes militarily alongside Israel. Iran would carry out massive retaliatory missile and rocket strikes from its territory, Lebanon and Syria would launch strikes against the Israeli population and activate the Lebanese Hezbollah, the Palestinian Hamas and some Shiite militias in Syria and Iraq to launch commando and harassment operations against Israel. Unless the United States intervenes directly, it is likely that Russia will not intervene and will play it safe, seeking to take advantage of the confrontation to strengthen its position in the region, particularly in Syria and Lebanon, taking advantage of the probable weakening of the Iranian presence there.

Armed forces budgets:

Israel: \$21 billion with US aid (4.3% of GDP)

Iran: \$15 billion (2.5% of GDP)

In the event of an armed confrontation, here are the strengths and vulnerabilities of each side.

»» Invisible assets

Israel is a true deterrent nuclear power, even if its capability remains undeclared. It is therefore highly unlikely that Iran would initiate massive pre-emptive strikes against Israel; in Iran's declared, and assumed, strategy such strikes would only come as retaliation for prior Israeli attacks against Iran, targeting in particular the Iranian nuclear programme. Given the current balance of power, Israel does not seem to be in a position to destroy the entire infrastructure of Iran's nuclear programme on its own, which is underground and heavily hardened. Israeli strikes would therefore only aim to send a clear deterrent message and delay the programme, without being able to put an end to it.

For its part, Iran exercises some form of conventional and asymmetric deterrence, via its ballistic arsenal and local allies, by raising the spectre of massive retaliatory strikes against Israeli cities and sensitive sites, as well as continuous harassment of Israel. Such massive and repeated strikes would aim to saturate and exhaust Israel's missile defence.

Apart from this mutually destructive scenario which could easily lead to the downfall of the current leadership on both sides, the most likely scenario is that Israel and Iran continue to confront each other clandestinely through a range of covert actions: targeted assassinations, bombings, sabotage, cyber-attacks, destabilising actions, information manipulation, economic warfare, ship attacks, and undeclared strikes. Escalation could occur in space (anti-satellite), at sea (destruction of gas and oil infrastructures), in the nuclear domain (sabotage of the civilian power plant at Bushehr in Iran, controlled by the IAEA, or the Dimona power plant in Israel) or underwater (mines, drones, torpedoing of ships). For the time being, it is clear that Israel has a certain advantage in this clandestine struggle. To restore the balance, Iran should further harden its communications and command networks and strengthen its cyber capabilities.

»» Visible assets

The numbers in brackets indicate the reinforcements that can be mobilised or brought into the theatre during a period of rising tension.

Ground forces:

	ISRAEL	US CENTCOM	IRAN	HEZBOLLAH & HAMAS
Troop numbers	180,000 (+ 450,000)	50,000 (+ 150,000)	630,000 (+ 870,000)	45,000 (+ 65,000)
No. of combat units	12 divisions (3 active)	8 brigades (+ 5 divisions)	Quds Force ; 24 divisions (+ 14 reserve divisions)	Guerrilla forces
1 st line main battle tanks	1,300	300 (+ 300)	-	-
2 nd line main battle tanks	-	-	550	-
3 rd line main battle tanks	-	-	700	75
Total	1,900		1,325	
Best tank in service	Merkava IV+ ★★★★☆	M-1A2+ Abrams ★★★★☆	T-72S upgraded ★★★★☆☆	T-62/72 ★★☆☆☆
Other armoured vehicles	5,400	1,200 (+ 1,200)	1,500	100
Artillery (artillery tubes + MRLs)	300 (+ 300)	100 (+ 360)	1,500	Tens of thousands of rockets

· **Areas in which Israel is superior:** Air-to-ground combat in clear terrain (main battle tanks, armour, helicopters and UAVs); air mobility/action in depth; coordination of fire and effects.

· **Areas in which Iran and its allies are superior:** Overall numbers of infantry and commando forces; defensive urban combat; guerrilla warfare; artillery and ballistic missiles; determination, hardiness and resilience to losses.

- **Actions that would enable Israel to gain an advantage:** Strengthen its urban combat capabilities; urban and underground infantry combat training; and long-range force projection capabilities. Increase the number of loitering munitions. Acquisition of very high penetration conventional bombs (of the GBU-43/B MOAB type).
- **Actions that would allow Iran and its allies to gain an advantage:** Acquire new main battle tanks, armoured vehicles, combat helicopters, anti-tank and anti-aircraft missiles; strengthen its fleet of loitering munitions.

In its immediate vicinity (the Palestinian territories, Lebanon, and Syria), Israel has a force ratio that is far superior to anything that Iran can field or mobilise, including its Quds Force. But the Israeli army is not in a position to project its forces far from home, with the exception of highly targeted airborne and airmobile actions; however, its commandos and special forces would not be able to hold out for long. Israeli ground or airmobile actions in Iran are therefore only conceivable on a small scale and over a very short period of time, to destroy sensitive targets or ensure the evacuation of airmen whose aircraft have been shot down.

For its part, Iran remains very strong and resilient on its own territory. It has a considerable numerical advantage on the ground, a very nationalistic population determined to repel any aggressor, real strategic depth, very mountainous terrain conducive to defence and delaying actions, and a decentralised defensive strategy organised around very autonomous forces entrenched in resistance hubs near the major cities. In other words, Iranian ground forces - both regular army and pasdaran - are structured to fix the adversary, then bog him down before wearing him down in deadly harassment battles. American and Israeli units attempting an amphibious landing or air-mobile assault in Iran would be condemned to a battle of attrition with no end in sight. It is therefore unlikely that Israel will deploy military land forces outside Lebanon and southern Syria.

Air forces:

	ISRAEL	US CENTCOM	IRAN	HEZBOLLAH & HAMAS
1 st line fighter aircraft	155	160 (+ 330)	-	-
2 nd line fighter aircraft	110	-	55	-
3 rd line fighter aircraft	-	-	155	-
Total	755		170	
Best fighter in service	F-35I ★★★★★★	F-22 ★★★★★★	MiG-29 ★★★★★☆☆	-
Air-to-air refuelling aircraft	12	32	5	-
Combat helicopters	40	100 (+ 240)	40	-
Armed UAVs	Several dozen	60 (+ 36)	100	Several dozen
Transport aircraft and helicopters	88	765	50	-
Ballistic missiles	Several dozen	-	Several thousand	Several thousand

Israel has total air superiority over Lebanon and Syria, unless it were to enter into a head-on collision with Russia, which could then activate its A2AD bubble against it. In any event, Israel retains the ability to massively hammer Hezbollah and Hamas positions. The balance of power is more complex with respect to Iran. Israel certainly has an undeniable air superiority against the Iranians, especially in the perspective of massive (night-time) but limited raids. Its superiority, accentuated by cyber-attacks and diversionary actions, could nevertheless be countered locally by limited but effective means of denial of access (anti-missile and anti-aircraft systems) assigned to the defence of strategic sites linked to the nuclear programme, the ballistic arsenal, and the decision-making centres (around Tehran). If Israel were to be equipped with conventional weapons with very high penetration or lethality, it could inflict a symbolic blow strong enough to discredit the Iranian authorities, but it is not conceivable that the United States would grant them this capability for the moment.

The long-term support of an air campaign aimed at disrupting the entire Iranian defence apparatus seems to be beyond Israel's reach, unless directly supported by the United States, i.e. unless it has a blank cheque to act. The US has the means to acquire global air superiority over Iran. This air superiority appears to be all the stronger because the United States could quickly commit large air reinforcements and because Iranian territory is only imperfectly covered by radar and air defence networks. Moreover, the US and Israeli air forces have at their disposal both a large number of air-to-air refuelling aircraft to ensure that they are always over the theatre of operations, and the strategic depth offered by the airspace of the Gulf monarchies. The Iranian air force would therefore probably be quickly destroyed on the ground and in the air. However, it is conceivable that Iran could receive Russian (Su-30, Su-35 and S-400) and Chinese (J-10, J-15 and HQ-9B) fighters and missiles before such a confrontation as part of the bargaining over the nuclear issue. Such deliveries could make Israeli targeted strikes more difficult, although they would probably not be a game-changer against US air power.

To regain some form of advantage, Iran would do well to accelerate the negotiation and early delivery of capable Russian and Chinese anti-missile and anti-aircraft fighters and systems. Tehran could also accept the pre-emptive deployment of Russian and/or Chinese denial of access assets on its territory to protect certain sensitive sites: e.g., Russian assets around the Russian-run Bushehr nuclear power plant, thus establishing an A2AD bubble over the western half of the Persian Gulf; Chinese assets around Bandar Abbas (in the eastern part of the Gulf) to protect oil traffic in the Strait of Hormuz and the Gulf of Oman.

While the destruction of Iran's air power seems relatively easy to achieve in the event of joint American-Israeli action, as Iran has only about thirty MiG-29s (best fighters) that are more than thirty years old, the complete neutralisation of armed UAVs, cruise missiles and above all of Iran's ballistic arsenal, would be much more complicated to achieve. These ballistic missiles are scattered around the country in underground and hardened sites. Many of them are mobile and can be moved. Seeking their destruction would involve a long and dangerous air campaign that Israel does not seem able to conduct alone.

Naval forces:

	ISRAEL	US CENTCOM	IRAN
Submarines	5 ★★☆☆☆	2 [+ 3] ★★★★★	2 ★★☆☆☆ (+ 15 midget submarines)
Aircraft carriers	-	1 [+ 2]	-
Cruisers	-	2 [+ 3] ★★★★★	-
1 st line destroyers	-	7 [+ 12] ★★★★★	-
2 nd line light frigates	2 ★★☆☆☆	-	-
3 rd line frigates	-	-	4 ★★☆☆☆
Corvettes & missile boats	11	16	17
Amphibious assault ships	3 LCVP	3 LHD-LPD [+ 4]	4 LST

Israel alone is not in a position to challenge Iran's naval superiority in the Persian Gulf or the more accessible maritime area of the Gulf of Oman. It can at best conduct harassment or intimidation actions with its Submarines, drones and combat swimmers. On the other hand, the Israeli navy has an indisputable superiority over Iran and its allies in the eastern Mediterranean and the Red Sea, even if its offshore gas installations located off Israel remain vulnerable. It could therefore prohibit Iranian ships from entering the Mediterranean and blockading Lebanon and Syria, by coordinating with the USA or even with Russia.

Only a massive US engagement from the Gulf of Oman would allow for the rapid destruction of key Iranian naval units and coastal defence infrastructure in the Persian Gulf (including the Farsi, Tunb and Abu Musa islets). Iran would nevertheless retain a very strong naval and submarine harassment capability in the area thanks to its thousands of heavily armed speedboats (some of them suicide boats) and anti-ship missiles scattered along the coast, along with its midget submarines, drones and mines. Iran also appears to have underground ballistic missiles capable of targeting a naval air group operating, as might be predicted, near the Strait of Hormuz. In the event of a major confrontation, Iranian sailors, whether they belong to the regular navy or to the pasdaran, seem to be in a position to deny access to the waters of the Persian Gulf to a naval or amphibious group. However, they would find it very difficult to cross this narrow maritime space and even more difficult to leave it. Their hybrid flotilla structured around the former modified supertanker Makran, often deployed outside the Gulf, would not survive an Israeli or American attack.

To regain some form of advantage, Iran would do well to acquire long-range (Kalibr & Bastion type) or hypersonic (Zircon) anti-ship missiles, underwater drones, and more of the latest generation of «smart» underwater mines. Tehran could also concede naval facilities to China to perpetuate the dissuasive presence of a Chinese naval group around the Strait of Hormuz.

For its part, Israel could strengthen its deep strike capability (towards the Persian Gulf) by acquiring more cruise missiles fired from naval platforms (including its submarines), and by developing its force projection capability by increasing the number of its combat swimmers and acquiring true amphibious assault ships useful both in the Mediterranean, the Red Sea, or wherever Israeli interests are threatened by Iran or its allies.

»» Briefing note

Unless there is an outrageous provocation by one or the other, the scenario of a major open confrontation between Israel and Iran remains unlikely today unless it were part of a more global confrontation involving the United States. Massive raids or a pre-emptive nuclear strike by Israel are still possible especially in the case of an Iranian nuclear test, but their effects would most likely backfire and ultimately prove disastrous. Without US backing and support Israeli strikes in Iran would have limited impact in any case, especially since it seems unlikely that Saudi Arabia and the United Arab Emirates would join in without the guarantee of strong US participation. Similarly, an American ground assault in Iran supported by Israel and some of the Gulf monarchies would certainly turn into a nightmare for the perpetrators.

The most likely scenario remains that of a continuation of the discreet confrontation between Israel and Iran via the range of actions available in their invisible assets, especially if Washington and Tehran manage to reach a minimal agreement on the Iranian nuclear dossier. This clandestine confrontation could spike in intensity without however escalating to a regional level.

At the end of the day the most likely hypothesis if Iran were to reach the threshold of military nuclear capability, would be that Israel would take advantage of the disintegration of the Lebanese state to eradicate Hezbollah for good, even if it meant entering Lebanon once again, in order to eliminate this player from the regional game for good and thus stabilise a certain form of dissuasion with Tehran: Israel would not provoke Iran in the Persian Gulf; in return, Iran would not provoke Israel on its northern border. In this perspective, Israel could agree with Russia to expel Iranian forces from Syria and let the Bashar al-Assad regime and the Kremlin exert decisive influence in Lebanon.

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