

1616 Rhode Island Avenue NW
Washington, DC 20036

Anthony H. Cordesman
Phone: 1.202.775.3270

Email: acordesman@gmail.com

Web version:
www.csis.org/burke/reports



After the “Caliphate” *The Metrics of Daesh and the Ongoing Challenge of Extremism*

Part Three: Factors Shaping Continuing Violent Extremism, and Conflicts in the MENA Region

Anthony H. Cordesman

acordesman@gmail.com

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*Please send comments
and suggested additions to
acordesman@gmail.com*

Burke Chair
In Strategy

SABAH ARAR/AFP/Getty Images

Factors Shaping Continuing Violent Extremism and Conflicts in the MENA Region

This is the third report in a three-part survey of metrics that address the fighting in Iraq and Syria, the ongoing challenge of extremism, and the trends in key causes of that extremism and regional instability. This series is titled ***After the “Caliphate”: The Metrics of Daesh and the Ongoing Challenge of Extremism.***

- Part One - *Daesh, Syria and Iraq* -- contained some 60 different metrics covering the trends in war on Daesh in Syria and Iraq, the outcome of the fighting, and the remaining threats to stability in Syria and Iraq. It is available on the CSIS web site at <https://www.csis.org/analysis/after-caliphate-metrics-daesh-and-ongoing-challenge-extremism>.
- Part Two - *The Changing Threat* -- surveyed the broader trends in Islam, and in Islamic extremism. It then focuses on these trends in the Middle East and North Africa (MENA), and the scale of the continuing threat they pose to the stability of the MENA region. Part Two is now available on the CSIS web site at <https://www.csis.org/analysis/metrics-daesh-and-ongoing-challenge-extremism>.

Part Three: Factors Shaping Continuing Violent Extremism, and Conflicts in the MENA Region

This third part of the survey is entitled ***Factors Shaping Continuing Violent Extremism, and Conflicts in the MENA Region.***

It provides a series of metrics that measure the extent of civil unrest and instability by region and by country. The break outs by country are critical to understanding the forces at work. The MENA region is often described as Arab – in spite of the existence of Israel – and as Muslim in spite of the presence of large Christian and other minorities in many states and the diverse nature of sects within Islam. As the maps in this section show, however, it consists of highly diverse mix of nations with different neighbors, populations, political and economic conditions, and often major ethnic, regional, tribal, and sectarian differences. In practice, this makes national vulnerability to extremism and terrorism highly case specific, and involves intangibles that cannot be easily quantified, if at all.

At the same time, there are many problems and issues in the civil structure of MENA states and other heavily Islamic states that can lead to political upheavals, extremism and terrorism, and civil conflict. The UN’s Arab Development Reports have long warned about these problems, and so have a wide variety of outside intelligence reports, and academic and think tanks studies. As has been noted in Part One of this survey, these problems have been so serious in countries like Syria and Iraq that they qualify as “failed states.” Few analysts would argue that Libya and Yemen do not qualify as further examples – along with other largely Islamic states outside the MENA region like Afghanistan and Somalia.

The USCENTCOM Summary of the Civil Causes of Instability

These issues have led USCENTCOM to describe the MENA region and much of South and Central Asia as follows on its web site:

- *The region is among the least secure and stable places of the world.* Adversarial relationships among neighboring states, widespread ethnic and sectarian struggles, malign influence and destabilizing activities, cyber-based threats, and growing arsenals of sophisticated conventional weapons and weapons of mass destruction all combine to imperil enduring U.S. vital national interests, as well as those of our trusted partners and allies.
- *Multiple ethnic groups, speaking different languages with hundreds of dialects and confessing multiple religions which transect national borders. Demographics that create opportunities for tension and rivalry.*
- *Geography consists of the intersection of three continents and globally vital commercial sea lanes, flight corridors, pipelines and overland routes.* Nations which stretch from North Africa across the Middle East have forms of governance ranging across the political spectrum, including emerging democracies, hereditary monarchies, autocracies, and Islamist theocratic regimes.

The Choice Between Stability and “Failed State”

At the same time, a number of other states have long been relatively stable. It is clear that creating or maintaining a stable structure of governance, security, and economics can defeat extremism. Several factors seem to have been particularly important in determining whether or not a given MENA state declines into “failed state” status:

- Stable states with working social-economic contracts, and a proven or traditional civil order – normally monarchies – are less vulnerable.
- Much of momentum behind Islamic militancy is a reaction to failed secularism – repression, political divisions, , military rule, corruption, and failed economic development are all key factors.
- Relative success in Creating jobs, income, housing and services that can deal with massive population growth and /or demographic shifts in the size and location of ethnic, sectarian, tribal and other factions within a given nation is critical. Failures plays a major role in shaping internal conflicts and state failures.

The Metrics of Stability and Instability

The level of instability in each state, and the extent to which it can be called a failed state is dependent on a wide range of

variables. These include many variables where metrics are lacking or have limited value. Religious and ideological factors can sometimes be highlighted by polling data, but are highly intangible, and polling capabilities are often limited and do not cover extremists. Complex political interactions and issues are difficult to survey, and so are the many internal divisions within given countries—including the major regional and other internal differences that are often a key source of instability and conflict.

There are, however, many causes of instability where some metrics are available, and do seem to accurately reflect broad regional and national trends. These causes include

- *Sectarian, Ethnic, Tribal discrimination, and violence*
- *Charismatic, competent violent opposition leader(s)/groups*
- *Repression and failed authoritarian rule.*
- *Dysfunctional democracy and civil political structures.*
- *Excessive/clumsy/abusive use of force -- state terrorism*
- *Corrupt and ineffective structures of governance and government services.*
- *Failed rule of law, justice system, basic law enforcement and social order.*
- *Gross poverty, economic injustice, failure to develop and modernize, lack of reform. Near economic collapse, inflationary crisis.*
- *Unemployment pressure, lack of stable career options, population pressure.*
- *Alienation of youth, middle class.*
- *Rising violence makes the most violent side the winner.*
- *Urban instability, violence.*

The Organization of Part Three

The metrics that are used in this survey are organized into four different groupings that highlight the key civil patterns involved:

- **Civil Failures, Corruption, Poor Governance, and Repression**

7

• Economic factors	13
• Ethnicity, Sect, Tribalism, Regionalism and the Impact of Hyperurbanization	25
• Demographics and Youth Bulge	36

It should be stressed that the choice of the metrics presented in each grouping metrics sometimes had to be made in ways that bypassed additional metrics that should have been highly useful, such as detailed patterns in poverty and unemployment, medical factors like infant mortality and life expectancy, and functional levels of education and government services.

This was done because the data available on MENA states lacked clear comparability, were too dated, and/or did not seem credible. The recent levels of conflict in some states also presented a major problem. Here, it should be noted that many data bases and metrics – such as the UN country data on human development and much of the poverty data -- are presented in spite of rankings that raise serious conflict as to how a given ranking could be awarded given the present level of conflict in that country.

The seriousness of the broad trends MENA regions' stability problems does seem all too clear from the metrics that are included. However, as is the case in parts of this survey, key data are almost always uncertain, have serious gaps, and raise at least some credibility problems. Taking any one set of figures in any given metric for granted -- or assuming it has statistical levels validity – requires in-depth probing of that particular data point.

Civil Reasons why Secularism Fails and Ideological Extremism Rises in Heavily Islamic States

- **Sectarian, Ethnic, Tribal discrimination, and violence**
- **Charismatic, competent violent opposition leader(s)/groups**
- **Repression and failed authoritarian rule.**
- **Dysfunctional democracy and civil political structures.**
- **Excessive/clumsy/abusive use of force -- state terrorism**
- **Corrupt and ineffective structures of governance and government services.**
- **Failed rule of law, justice system, basic law enforcement and social order.**
- **Gross poverty, economic injustice, failure to develop and modernize, lack of reform. Near economic collapse, inflationary crisis.**
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- **Urban instability, violence**

Civil Failure, Corruption, Poor Governance, and Repression

Civil Failure, Corruption, Poor Governance, and Repression

MENA states differ radically in the quality and nature of their governance, political systems, perceptions of national unity, level of repression, and internal security systems.

Sources differ over the structure of governance and level of repression. The metric adapted from reporting in the Economist seems to be as accurate as any. However, key aspects of governance do not lend themselves to metrics. The best detailed narrative survey of government repression and state terrorism seems to be in the sections of the United State State Department *Country Reports on Human Rights* that deal with the treatment of individuals, role of the police and security apparatus, rule of law, the number and treatment of political prisoners, and free speech. In many cases, the actual practices of a government are more important than its system of government.

The quality of such reporting did experience cuts when a separate report was developed on religious rights, and after cutbacks in coverage in the in 2018 report, but the country sections available on

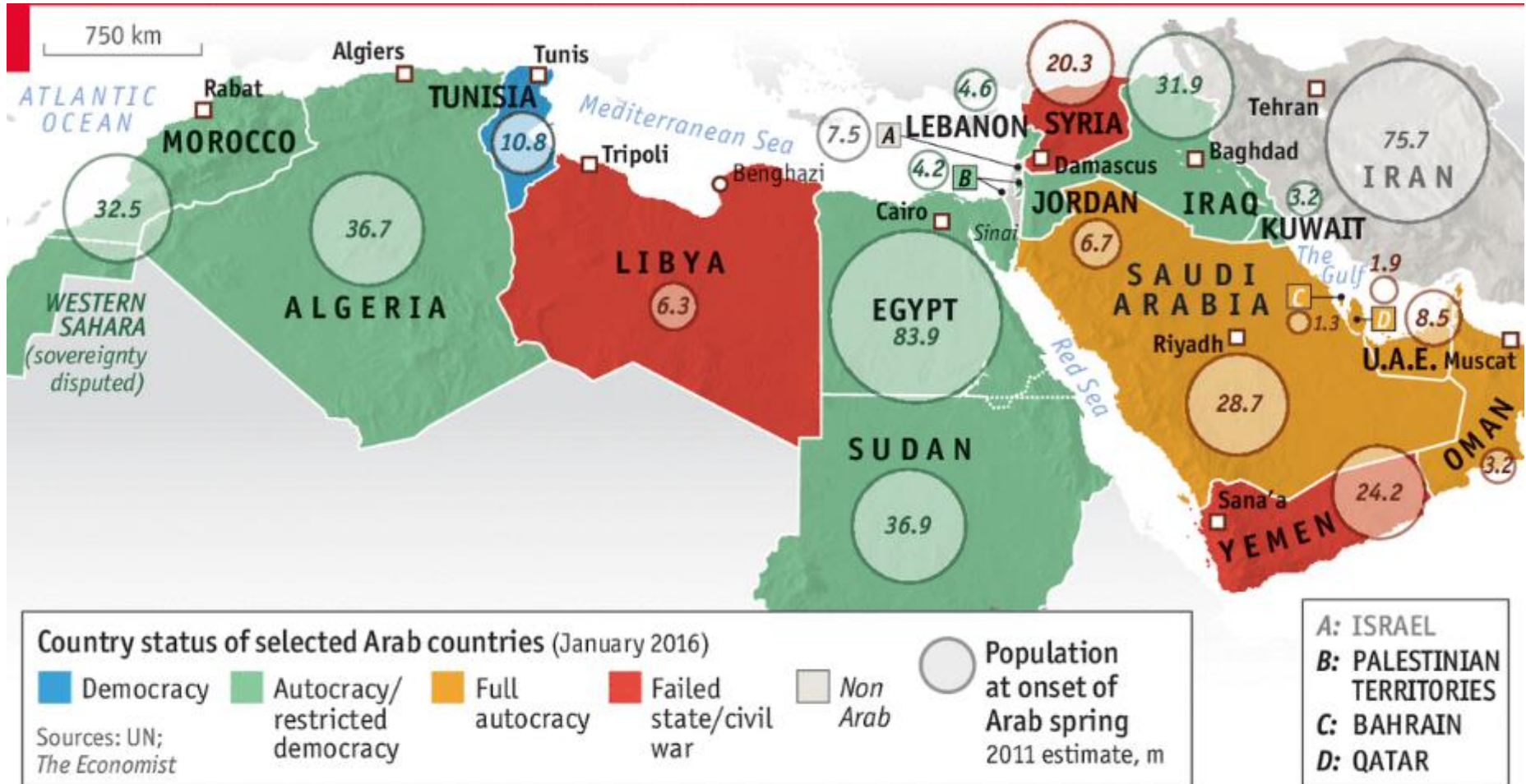
<https://www.state.gov/j/drl/rls/hrrpt/humanrightsreport/#wrapper> still provide a more neutral and comprehensive coverage than various NGOs and the UN. The revisions in 2018 also eliminated significant amounts of reporting by NGOs that needed tighter review of their sources and content.

Coverage of religious tensions, and issues is also now available at the Department of State's *International Religious Freedom Report* at www.state.gov/religiousfreedomreport/. It represents perhaps the best open source survey of religious demographics, and the impact of the rule of law, government practices, and abuses by foreign forces and nonstate actors.

These two sources warn that given states are using levels of repression that do encourage violent opposition, extremism, and terrorism – as well as alienate significant segments of the population. Unfortunately, the country reporting on internal security and counterterrorism often ignores these issues and abuses and only focuses on the scope level of counterterrorism activity. As note earlier, no report in the levels of terrorist activity attempts to define and survey the level of state terrorism and all focus on non-state terrorism.

The reporting on the basic quality of government is better. The World Bank has long provided a survey of ix key aspects of governance which is summarized in the metrics that follow. It provides a serious warning of the extent to which MENA nations have a level of governance that qualifies them as failed states in key areas like corruption, rule, of law, and governance. Similarly, Transparency International provides an excellent annual report on perceptions of corruption by country. The metrics show that one oddity about “corruption” is the extent to which high scores serve as a warning of extremist and terrorist activity and civil upheavals and violence. There is not seem to be any clear relation between correlation and causation, but high corruption scores may reflect a level of popular frustration and anger that people are more willing to show than when they are asked questions that deal directly with the quality and nature of the regime.

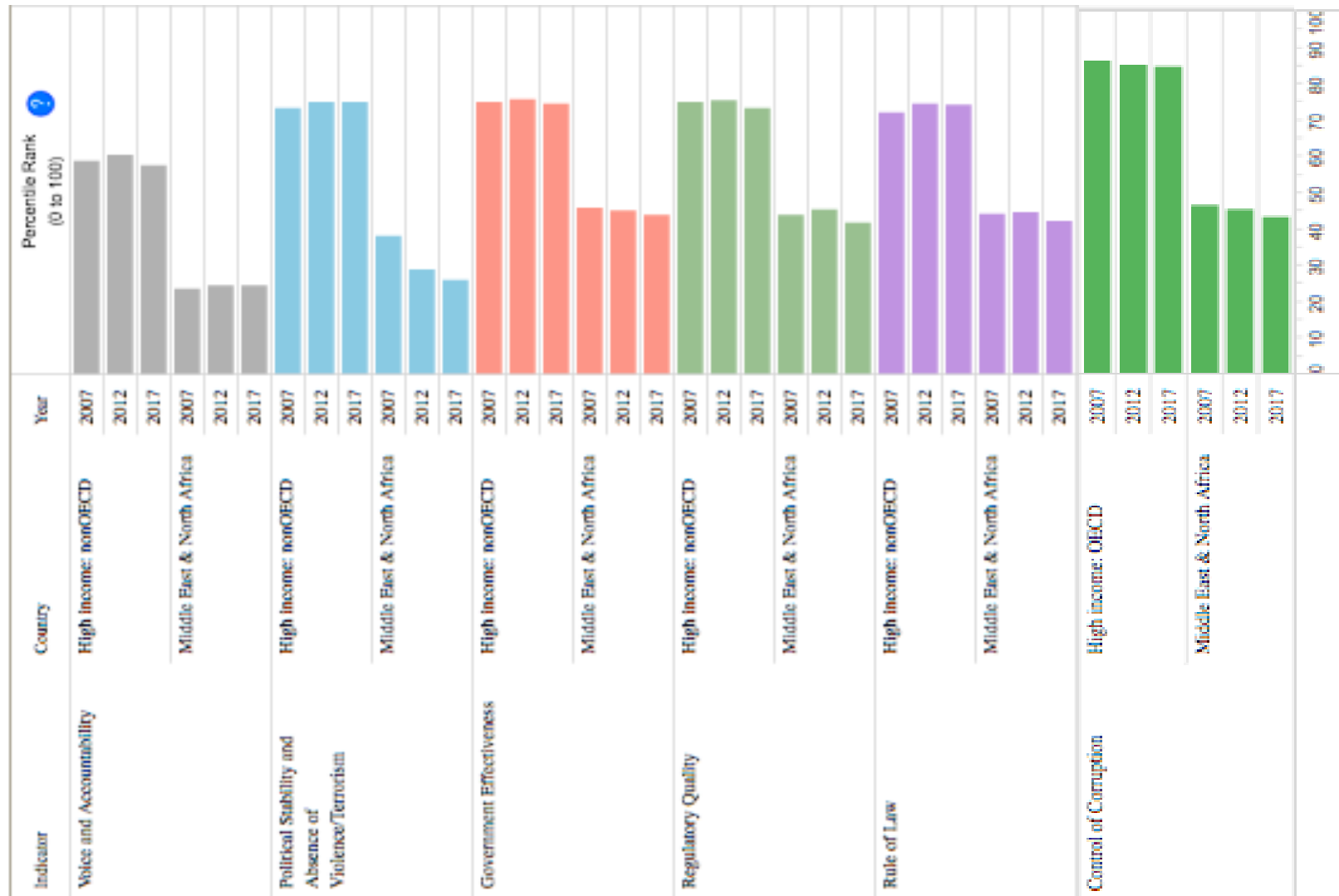
Different Patterns in Governance



Economist.com

Source: adapted from *The Economist*, January 7, 2016

The MENA Region's Low Standards of Governance Compared to High Income Countries



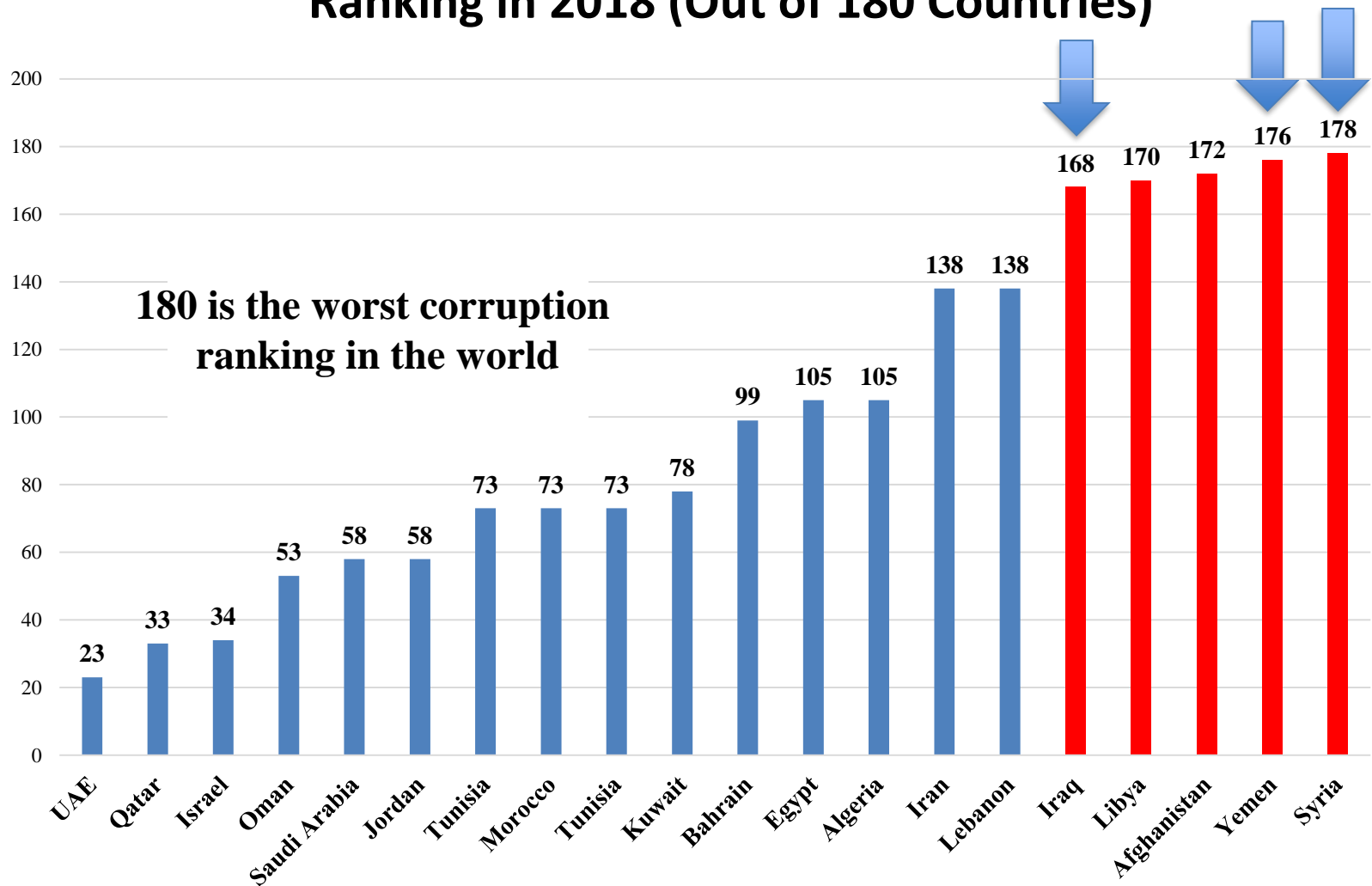
Radically Different Levels of Governance by Country

World Bank's Percentile Rank in World in 2017 -
100.0% is Best, Red Indicates is in the Lowest One-Third

Country	Government Effectiveness	Corruption	Political Stability & Absence of Violence & Terrorism	Regulatory Quality	Rule of Law	Violence and Accountability
1. Algeria	30.3	30.3	14.8	10.6	19.2	23.2
2. Bahrain	51.9	60.1	15.2	66.8	67.3	11.3
3. Egypt	39.4	34.1	9.0	17.3	32.7	13.3
4. Iran	45.2	20.2	15.7	10.1	26.0	12.8
5. Iraq	9.6	6.7	2.4	9.6	4.3	20.7
6. Israel	89.4	79.8	16.7	87.0	82.2	70.4
7. Jordan	57.7	63.9	28.1	57.7	61.1	26.6
8. Kuwait	46.6	44.7	43.8	53.4	57.7	30.5
9. Lebanon	33.2	14.9	8.6	40.9	21.2	31.5
10. Libya	2.4	1.9	3.3	1.0	1.9	9.4
11. Morocco	47.6	44.2	31.0	44.7	48.6	28.6
12. Oman	61.5	56.7	71.4	68.3	65.9	23.6
13. Qatar	74.5	76.4	65.7	67.8	76.4	10.8
14. Saudi Arabia	62.5	65.9	23.8	54.8	57.2	5.9
15. Syria	1.9	2.4	1.0	3.4	1.0	2.0
16. Tunisia	51.0	53.8	13.8	36.1	48.1	53.2
17. UAE	90.4	82.7	67.6	80.8	77.4	18.2
18. Yemen	1.4	1.4	0	5.8	2.4	5.4
19. West Bank/Gaza	37.0	55.8	8.1	56.3	36.5	21.7
CONTROLS						
Afghanistan	9.1	3.8	0.5	6.7	4.8	22.2
Somalia	0.5	0.5	2.9	0.5	0.0	3.9
Switzerland	96.6	99.5	92.9	97.1	98.6	98.0
US	85.1	88.9	59.0	92.8	91.8	82.3

Source: World Bank, Worldwide Governance Indicators, Accessed March 2019, https://databank.worldbank.org/data/reports.aspx?Report_Name=WGI-Table&Id=ceea4d8b.

Transparency International Corruption Perceptions Ranking in 2018 (Out of 180 Countries)



Transparency International Corruption Perceptions Index “The Corruption Perceptions Index ranks countries and territories based on how corrupt their public sector is perceived to be.”

Economic Factors

Economic Factors

MENA states also differ radically in the quality and nature of their economic progress, wealth, and distribution of income. .

Sources like the UN Arab Development Reports warned nearly a decade before the political upheavals began in 2011 that economic problems were reaching a critical level in many MENA countries. With few exceptions, this still remains the case and the situation in most countries has actually grown worse in terms of polls of popular perceptions and many relevant statistics since 2011.

This is disguised in part by heavily politicized or no official national reporting in many key metrics, or defining reporting on key areas like “poverty” and “employment” in ways that sharply understate the problem in given countries. At the same time, MENA countries differ sharply in relative wealth and per capita income, although the impact on their populations is disguised to some extent by what seem, to be far higher estimates of PPP or Purchasing Power Parity values than are really justified.

Employment is clearly a critical problem in much of the MENA region and a source of major dissatisfaction and anger in some countries. These issues are explored in more depth in the following section on demographics, population growth, and the youth bulge.

The World Bank ease of doing business scores also warn that there is a major gap between repeated promises of national economic reform and development and the actual implementation of such efforts, and the both the IMF and World Bank’s tendency to issue estimates based on future reform and progress have become something approaching repetitive myths.

The data on national military spending also warn that many countries are spending at levels that seriously affect their economic growth and ability to fund key civil programs.

Finally, the UN Human Development Index provides a broader alternative in estimating relative economic progress, but is based on official national data, and seems to ignore the impact of the recent level of popular upheavals and violence in some MENA states.

More broadly, credible metrics reflect national averages and estimates, and do not address income distribution; corruption, nepotism, and crony capitalism; and discrimination by ethnicity, sect, region, or tribe. Like all of the data in this section, they ignore what can be gross internal inequities and sources of terrorism extremism, and violence.

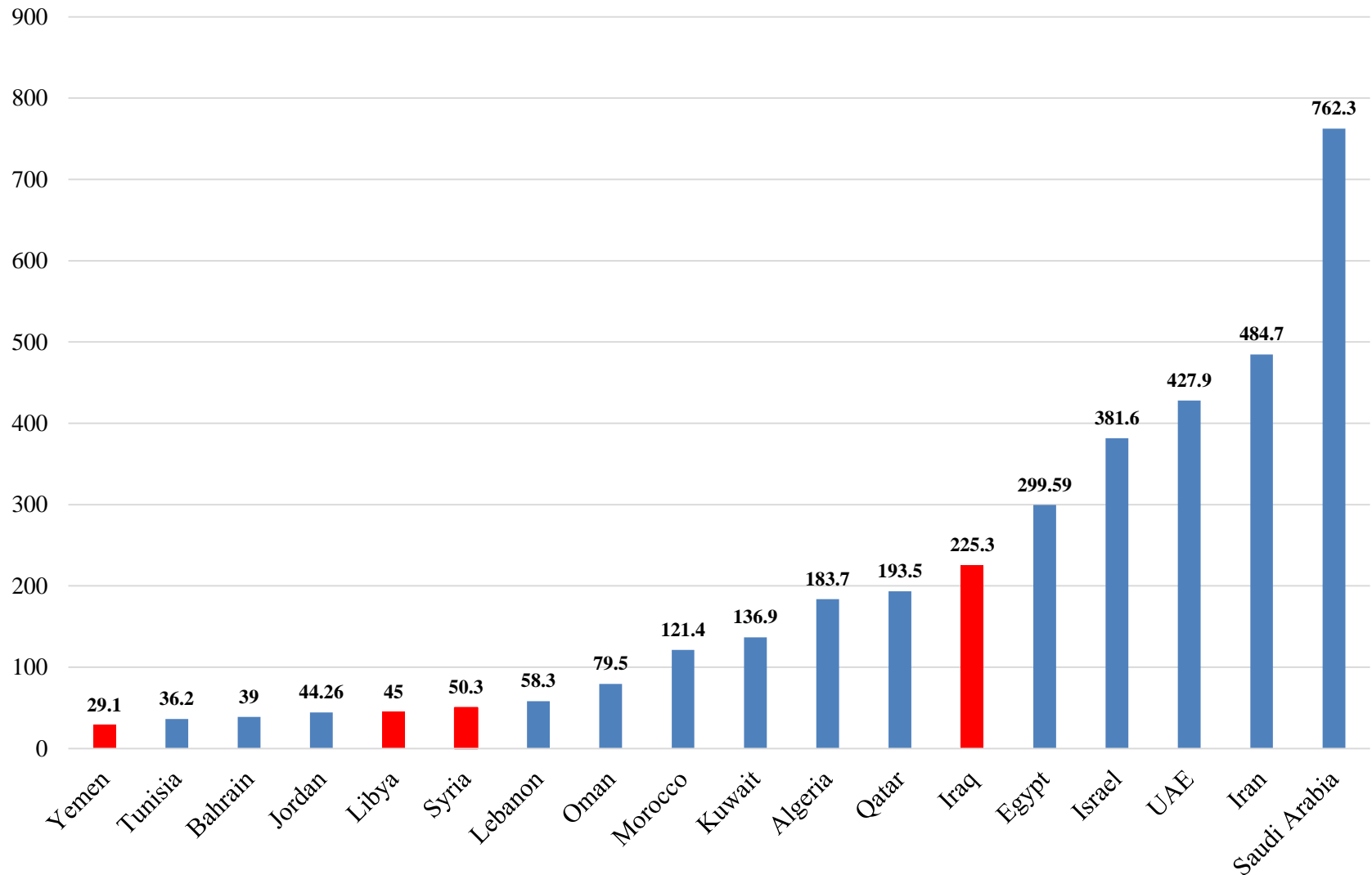
Economic Factors Dominate Perception of Challenges:

What are the most important challenges your country is facing today (%)?

	The economic situation (poverty, unemployment and price increases)	Financial and administrative corruption	Enhancing (strengthening) democracy	Achieving stability and internal security	Other
Algeria	76.9	14.9	2.7	3.3	2.2
Egypt	87.6	6.5	1.4	1.3	3.1
Iraq	52.5	32.5	3.5	9.7	1.7
Jordan	81.0	14.0	1.1	0.7	3.3
Kuwait	56.5	25.3	9.4	0.9	8.0
Lebanon	60.6	24.4	3.5	7.1	4.3
Libya	23.1	32.3	2.3	0.7	41.6
Morocco	83.9	9.6	2.1	0.8	3.6
Palestine	50.3	8.7	1.3	3.0	36.6
Sudan	74.2	17.2	2.3	3.4	2.8
Tunisia	88.4	8.6	0.7	0.9	1.6
Yemen	74.6	17.1	3.9	2.8	1.6

Source: Arab Barometer 2014.

Economic Power: Comparative MENA GDPs in Market Terms in 2019: (IMF Estimate in OER Terms in \$US Billions)

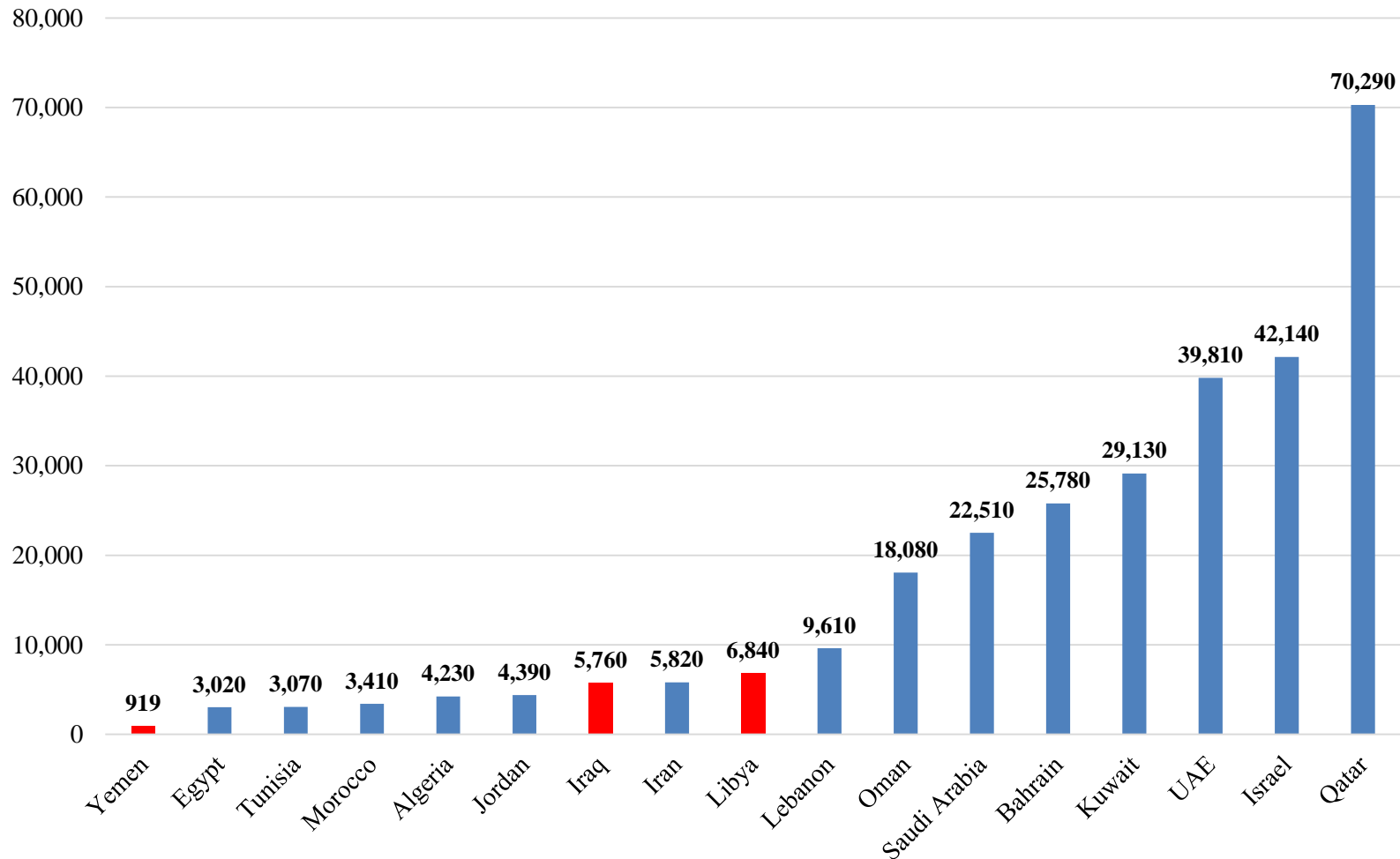


IMF Data Mapper for estimated GDP and GDP per capita at official exchange rate (OER).

https://www.imf.org/external/datamapper/NGDP_RPCH@WEO/OEMDC/ADVEC/WEOWORLD. The OER rate is chosen instead of the PPP rate, because it reflects a better measure of the relative size of a modern economy and ability to generate modern military forces.

Wealth is Relative: Comparative MENA GDPs Per Capita in Market Terms in 2018:

(IMF Estimate in OER Terms in \$US Billions)



IMF Data Mapper for estimated GDP and GDP per capita at official exchange rate (OER).

https://www.imf.org/external/datamapper/NGDP_RPCH@WEO/OEMDC/ADVEC/WEO/WORLD. The OER rate is chosen instead of the PPP rate, because it reflects a better measure of the relative size of a modern economy and ability to generate modern military forces. No data are available for Syria.

IMF MENA Country GDP and GDP/Per Capita Data

(Note that Shaded Estimates Often seem to Assume Best Case Conflict Resolution and Development)

Country	GDP (in \$US Current Billions)			GDP Per Capita in Current \$US		
	2016	2017	2018	2016	2017	2018
Afghanistan	19.454	20.889	21.657	561.347	587.920	601.252
Algeria	159.049	178.287	197.629	3,901.867	4,292.272	4,669.224
Bahrain	32.176	34.895	37.841	22,599.899	24,028.728	25,546.880
Djibouti	1.889	2.029	2.187	1,902.754	1,988.765	2,084.856
Egypt	332.484	237.073	n/a	3,686.070	2,500.772	n/a
Islamic Republic of Iran	404.447	431.920	418.875	5,026.670	5,304.661	5,085.909
Iraq	171.716	197.699	223.258	4,532.736	5,087.767	5,601.469
Jordan	38.709	40.487	42.553	5,549.141	5,677.617	5,837.503
Kuwait	110.873	120.351	135.305	25,868.683	27,318.517	29,879.781
Lebanon	49.611	51.457	53.620	11,105.131	11,408.834	11,775.155
Libya	18.539	31.331	43.636	2,903.741	4,858.672	6,699.897
Mauritania	4.755	5.116	5.435	1,253.378	1,317.938	1,368.990
Morocco	103.607	109.824	120.997	3,004.221	3,151.145	3,435.475
Oman	66.824	74.274	82.620	16,667.485	17,972.922	19,390.534
Pakistan	278.913	303.993	n/a	1,440.967	1,541.080	n/a
Qatar	152.469	166.326	183.807	58,246.753	60,804.259	66,202.094
Saudi Arabia	644.935	683.827	748.003	20,317.660	21,120.481	22,649.613
Somalia	6.887	7.382	7.781			
Sudan	57.649	58.239	41.676	1,455.823	1,428.028	992.652
Syria	n/a	n/a	n/a	n/a	n/a	n/a
Tunisia	42.074	40.275	40.298	3,689.725	3,496.286	3,462.822
United Arab Emirates	348.743	377.435	411.827	35,383.919	37,225.745	39,483.545
Yemen	20.901	16.511	13.840	717.438	550.795	449.115

Shaded portions are IMF Estimates. These are Official Exchange Rate and Not PPP estimates.

Source: IMF, <https://www.imf.org/external/pubs/ft/weo/2018/01/weodata/weoselgr.aspx>.

Uncertain Outdated and Unreported MENA Poverty Levels

Like the data on unemployment, poverty data could be a key indicator of the causes of extremism, terrorism, insurgency, and civil conflict. In practice, the data are so bad, so rarely reported, and often so dated that there is no way to tell. (See World Bank, *Piecing Together the Poverty Puzzle*, 2018)

Many countries simply do not report. Others report meaninglessly low levels for what seem to be political purposes and to avoid negative public reactions.

A few countries in the attached table – Afghanistan and Yemen – do report what seem to be credible figures, but most estimates are far too low, and are often based on long outdate levels of poverty that do not reflect real world income needs, particularly in urbanized areas or ones dependent on market prices.

These data also present the same problems as the other data shown in this survey. They report nation-wide figures and do not display inequities in income distribution, or by ethnicity, sect, tribe, or region.

Country	CIA (%)	World Bank Extreme Poverty (%)	IMF Multi-Dimensional Poverty
1. Algeria	23% (2006)	0.4% (2017)	2.11% (2013)
2. Bahrain	ND	ND	ND
3. Egypt	27.8% (2016)	1.4% (2015)	5.22% (2014)
4. Iran	18.7% (2007)	0.4% (2014)	ND
5. Iraq	23% (2014)	2.2% (2012)	14.6% (2011)
6. Israel	22% (2014)*	0.5% (2012)	ND
7. Jordan	14.2% (2002)	0.2% (2014)	1.30% (2012)
8. Kuwait	ND	ND	ND
9. Lebanon	28.6% (2004)	0.0% (2017?)	ND
10. Libya	33.3%**	ND	1.97% (2014)
11. Morocco	15% (2007)	0.9 (2015)	18.57% (2011)
12. Oman	ND	ND	ND
13. Qatar	ND	ND	ND
14. Saudi Arabia	ND	ND	ND
15. Syria	82.5% (2014)	21.2 (2004)	7.39% (2009)
16. Tunisia	15.5% (2015)	0.9% (2014)	1.32% (2012)
17. UAE	19.5% (2003)	ND	ND
18. Yemen	54% (2014)	40.9% (2014)	47.77% (2013)
19. Palestine	18% (2011)	0.6% (2016)	0.99% (2014)
CONTROLS			
Afghanistan	54.5% (2017)	ND	56.10%
Somalia	ND	ND	82.22% (2006)
Switzerland	6.6% (2014)	ND	ND
US	15.1% (2010)	1.2% (2016)	ND

ND= No data. * Poverty level is a real world \$7.30 per person. **CIA rough estimate.

Source: CIA, National Poverty Levels), <https://www.cia.gov/library/publications/the-world-factbook/fields/221.html>, accessed 17.3.2019. World Bank, *Piecing Together the Poverty Puzzle*, 2018, <http://www.worldbank.org/en/publication/poverty-and-shared-prosperity>. IMF is World Economic and Financial Surveys, World Economic Outlook Database, Table Six: Multidimensional Poverty Index, Developing Countries, <https://www.imf.org/external/pubs/ft/weo/2018/01/weodata/index.aspx>.

No Credible Unemployment Data

After careful examination, it seems clear than that there are credible warnings that youth unemployment is a major stability problems and threat.

However, national reporting to the UN, World Bank, and IMF is so inconsistent, politicized, dated, or missing that it is omitted from this survey.

Even where countries do report, and the levels are high enough to be broadly credible, they do not reflect high levels of disguised unemployment where several people work at low wages and have little productivity, where many people have given up seeking employment, and where women face major barriers in entering the labor force.

Polls consistently show that employment, and merit based employment opportunities are critical areas of concern in virtually every MENA nation. This is not reflected, however, in most country data. Neither is the expectation in many countries that state jobs and state industry jobs are “entitlements” and sometimes are not expected to involve serious actual work.

	Total Unemployment		Total Youth Unemployment Ages 15-24	
	%	World Rank	%	World Rank (Worst is 174)
1. Algeria	11.70	156	25.2	163
2. Bahrain	3.80	45	ND	ND
3. Egypt	11.90	159	30.8	146
4. Iran	12.40	165	29.2	137
5. Iraq	16.00	174	ND	ND
6. Israel	4.30	57	7.3	142
7. Jordan	18.50	180	29.3	138
8. Kuwait	2.10	19	14.6	83
9. Lebanon	ND	ND	ND	ND
10. Libya	30.0	206	ND	ND
11. Morocco	10.0	138	19.9	67
12. Oman	ND	ND	ND	ND
13. Qatar	0.60%	3	0.5	1
14. Saudi Arabia	5.80	85	24.2	125
15. Syria	50.00	216	35.8	154
16. Tunisia	15.90	173	34.7	151
17. UAE	1.60*	13	12.1	66
18. Yemen	27.00	200	24.5	126
19. West Bank/Gaza	26.70	198	40.7	163
CONTROLS				
Afghanistan	23.90	193	ND	ND
Somalia	ND	ND	ND	ND
Switzerland	3.00	37	8.1	36
US	4.40	62	9.2	43

* 2016 **

Source: CIA, <https://www.cia.gov/LIBRARY/publications/the-world-factbook/rankorder/2129rank.html>, and CIA Library, On-line data base, accessed 17.4.2019

Radically Different Levels of Economic Reform and Ease of Doing Business by Country

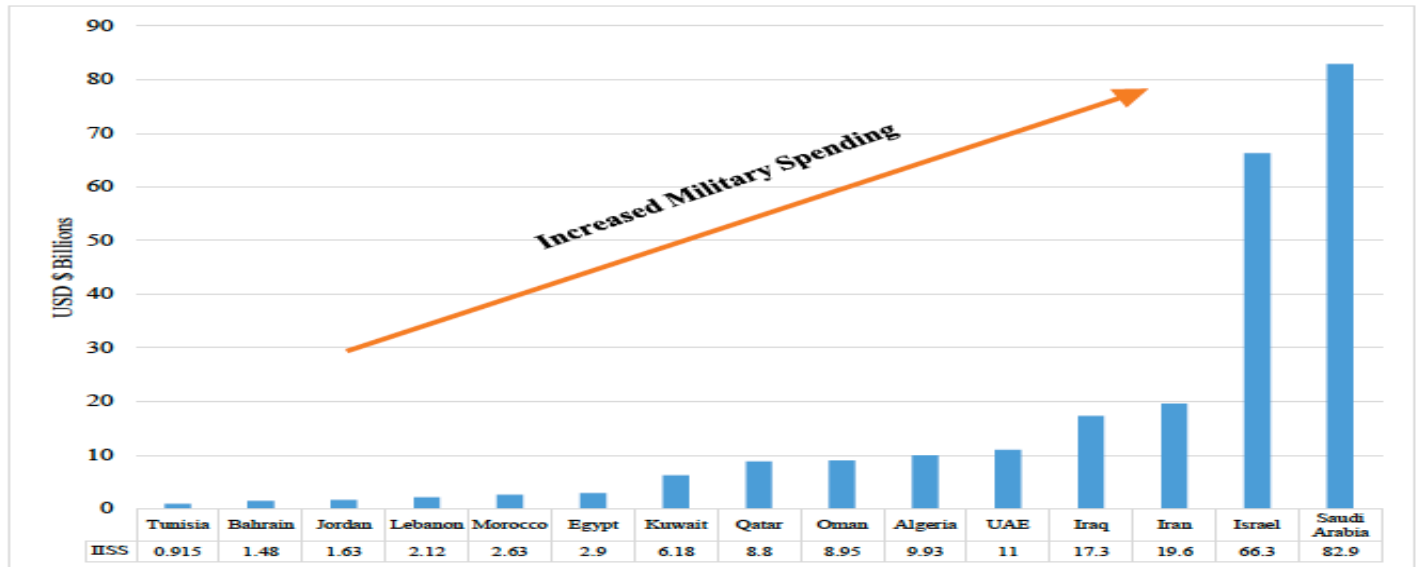
World Bank's Rank and Score in World in 2018 out of 190 Countries Rated. **The lower the ranking, the higher the level of performance**

Note: The World Bank reports that the name of the *Doing Business* distance to frontier score has been changed to "ease of doing business score" to better reflect the main idea of the measure—a score indicating an economy's position to the best regulatory practice. Nevertheless, the process for calculating the score remains the same. The score combines measures with different units such as time to start a company or procedures to transfer a property. The score captures the gap between an economy's current performance and a measure of best regulatory practice set in *Doing Business 2015* across the entire sample of the same 41 indicators for 10 *Doing Business* indicator sets used in previous years. For example, according to the *Doing Business* database, across all economies and over time, the least time needed to start a business is 0.5 days, while in the worst 5% of cases it takes more than 100 days. Half a day is, therefore, considered the best performance, while 100 days is the worst. Higher scores show absolute better ease of doing business (the best score is set at 100), while lower scores show absolute poorer ease of doing business (the worst performance is set at 0). The percentage point scores of an economy on different indicators can be averaged together to obtain an aggregate score. For more details, see the chapter on the ease of doing business score and ease of doing business ranking available at <http://www.doingbusiness.org>.
Source: World Bank Flagship Group Report, *Doing Business 2019, Training for Reform*, World Bank 2019, p. 5. Based on the World Bank Doing Business database

	World Ranking	Ease of Doing Business Score
1. Algeria	157	49.65
2. Bahrain	62	69.85
3. Egypt	120	58.56
4. Iran	128	56.98
5. Iraq	171	44.72
6. Israel	49	73.23
7. Jordan	104	60.98
8. Kuwait	97	62.20
9. Lebanon	142	54.04
10. Libya	186	33.44
11. Morocco	60	71.02
12. Oman	78	67.19
13. Qatar	83	65.89
14. Saudi Arabia	92	63.50
15. Syria	179	41.57
16. Tunisia	80	66.11
17. UAE	11	81.28
18. Yemen	187	32.41
19. West Bank/Gaza	116	59.11
CONTROLS		
Afghanistan	167	47.77
Somalia	190	20.04
Switzerland	38	75.69
US	8	82.75

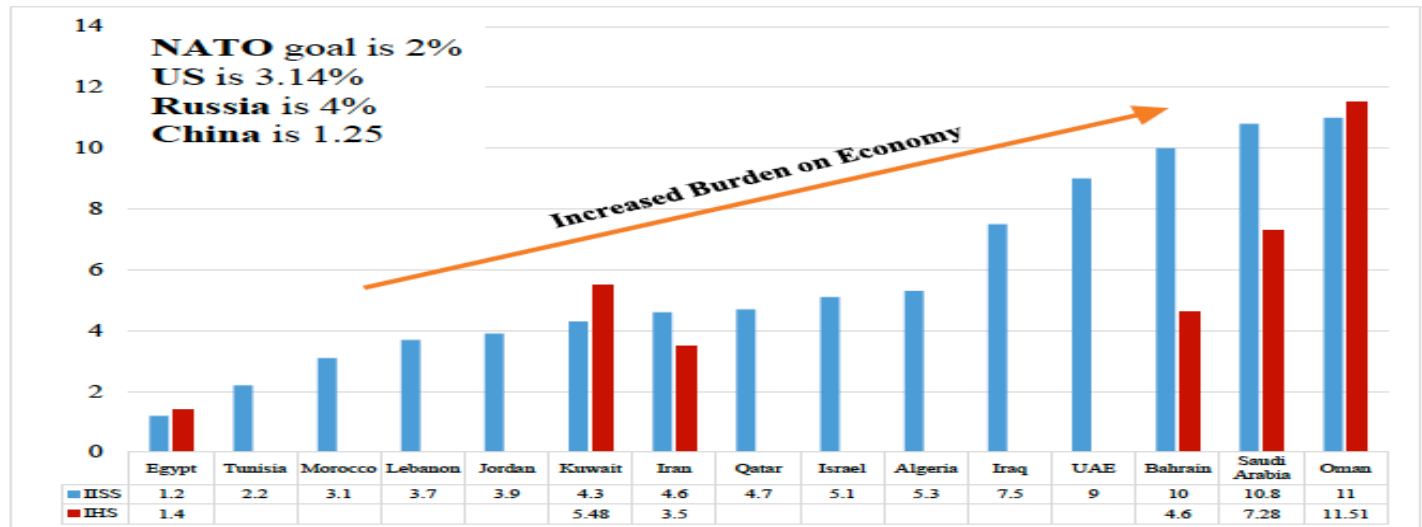
Excessive National Security Spending?

Comparative Estimates of Military Spending, Total Defense Budget, (USD\$ Billions) 2018



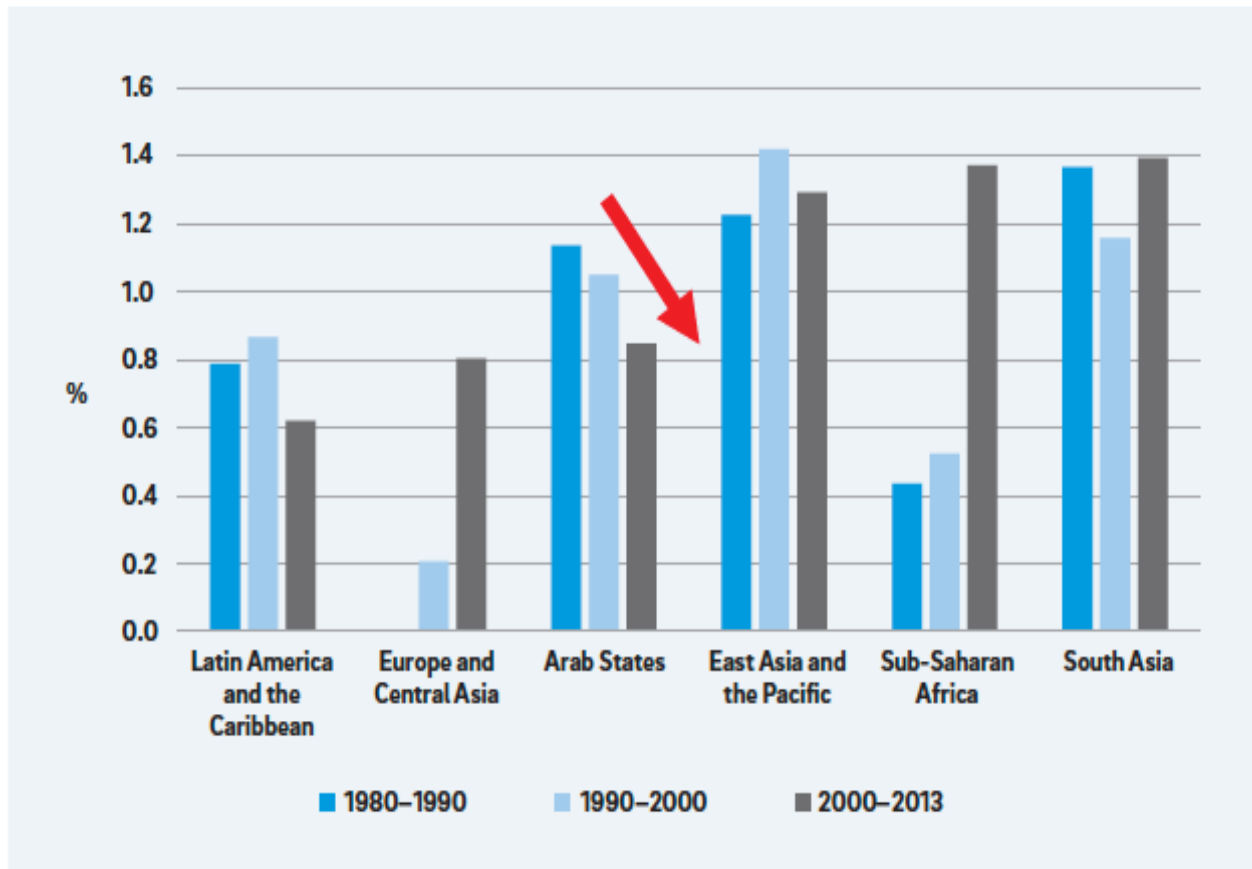
Adapted from the IISS Military Balance 2019. Author's estimates for Qatar and UAE.

Comparative Estimates of Military Spending as Percentage of GDP, 2018*



Adapted from the IISS Military Balance 2019 and Jane's Sentinel Security Assessment. Author's estimates for Qatar and UAE.

Regional Decline in UN Human Development Index: 1980-2013



UNDP states that over its 35-year history, the human development index (HDI) has remained the most salient tool in the human development approach to measuring human well-being. The HDI tracks improvements in key aspects of people's lives, capturing progress in three basic human capabilities: to live a long and healthy life, to be educated and knowledgeable, and to enjoy a decent standard of living. It stands as an alternative to the purely economic gross domestic product (GDP) indicator and is helpful in monitoring and understanding change in societies because it allows progress to be assessed more broadly.

The Arab Development Report states that, "all Arab countries increased their level of achievement between 1980 and 2010, driven mostly by gains in education and health, while income fell behind in comparison. Although it is difficult to place the Arab countries into one Arab basket, the region still scores lower than the world average on the HDI and already lags three of the world's six regions, namely, East Asia and the Pacific, Europe and Central Asia and Latin America and the Caribbean. By the year 2050, the region is projected to rank fifth, only a little ahead of sub-Saharan Africa.

The progress achieved in some areas of human development over the years has tended to elevate the expectations of people in Arab countries, and this has taken on even more importance because many people have become more well educated, are living longer lives and are more connected to the outside world. Yet, enhancing human development is only meaningful if people have the opportunity to make choices and if they are free to exercise these choices. In this sense, any improvement in the HDI is incomplete unless it also measures positively the ability of people to act."

MENA Country Ranking in UN Human Development Index: 1980-2013

The HDI was created to emphasize that people and their capabilities should be the ultimate criteria for assessing the development of a country, not economic growth alone.

The Human Development Index (HDI) is a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living. The HDI is the geometric mean of normalized indices for each of the three dimensions.

The health dimension is assessed by life expectancy at birth, the education dimension is measured by mean of years of schooling for adults aged 25 years and more and expected years of schooling for children of school entering age.

The standard of living dimension is measured by gross national income per capita. The HDI uses the logarithm of income, to reflect the diminishing importance of income with increasing GNI. The scores for the three HDI dimension indices are then aggregated into a composite index using geometric mean.

The HDI simplifies and captures only part of what human development entails. It does not reflect on inequalities, poverty, human security, empowerment, etc.

Country	World Rank In 2017 (189th is Worst)	Human Development Score 2017	Change in Ranking 2012- 2015	Average Annual HDI Growth 1990-2017 (%)
1. Algeria	85	0.754	-3	0.99%
2. Bahrain	43	0.846	7	0.47%
3. Egypt	115	0.696	0	0.90%
4. Iran	60	0.798	-2	1.21%
5. Iraq	120	0.685	1	0.67%
6. Israel	22	0.903	-1	0.49%
7. Jordan	95	0.735	-5	0.65%
8. Kuwait	56	0.803	-3	0.44%
9. Lebanon	80	0.757	-4	ND
10. Libya	108	0.706	0	0.15%
11. Morocco	123	0.672	0	1.40%
12. Oman	48	0.821	7	0.47%
13. Qatar	37	0.856	-1	0.47%
14. Saudi Arabia	39	0.853	0	0.75%
15. Syria	155	0.536	-0.21	0.87%
16. Tunisia	95	0.735	2	0.95%
17. UAE	34	0.863	1	0.64%
18. Yemen	178	0.452	-20	0.46%
19. Palestine	119	0.686	-12	ND
CONTROLS				
Afghanistan	168	0.498	-1	ND
Somalia	ND	ND	ND	ND
Switzerland	2	0.944	0	0.47%
US	13	0.924	-5	0.27+

Source: UN *Human Development Report*,
accessed 16.4.19,
<http://hdr.undp.org/en/composite/trends>.

Ethnicity, Sect, Tribalism, Regionalism and the Impact of Hyperurbanization

Ethnicity, Sect, Tribalism, Regionalism and the Impact of Hyperurbanization

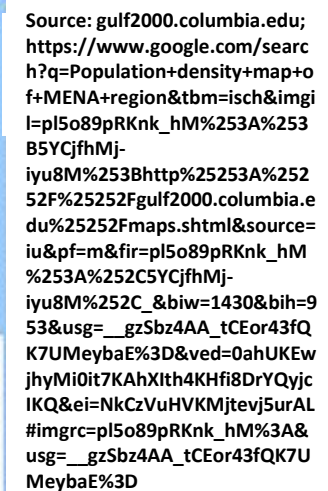
The internal and broader differences in sect, ethnicity, tribe, religion, and class within the MENA region has long been a sporadic source of violence. They have reached a new peak since the Iran Revolution, however, and the beginning of the Iran-Iraq War in 1980. The deployment of US and other Western forces into the region in 1990-1991 for the liberation of Kuwait led some extremists to link any foreign military presence to an attack on Islam, and the invasion of Iraq in 2003 led to a major reversal between sectarian politics that had been a major source of tension and conflict between Sunni and Shi'ite. At the same time, religious extremists and terrorists have attacked other Muslim sects, Christians, and small religious minorities in a range of countries.

Tensions and conflicts have also risen between Arabs and Kurds, Over the Berber issue, and at tribal levels – particularly in Libya and Yemen. Sectarian tension and violence is often linked to ethnicity and tribalism as well as to inequities in national politics, governance, and economic development.

These patterns are hard so complex that they are hard to trace and almost impossible to map or reduce to metrics except at a national level. The maps in this section that show the difference in ethnicity and sect – and the scale of the Kurdish problem -- do illustrate the sheer complexity of the problem, and so does the summary survey of current divisions by country adapted from the CIA *World Factbook*.

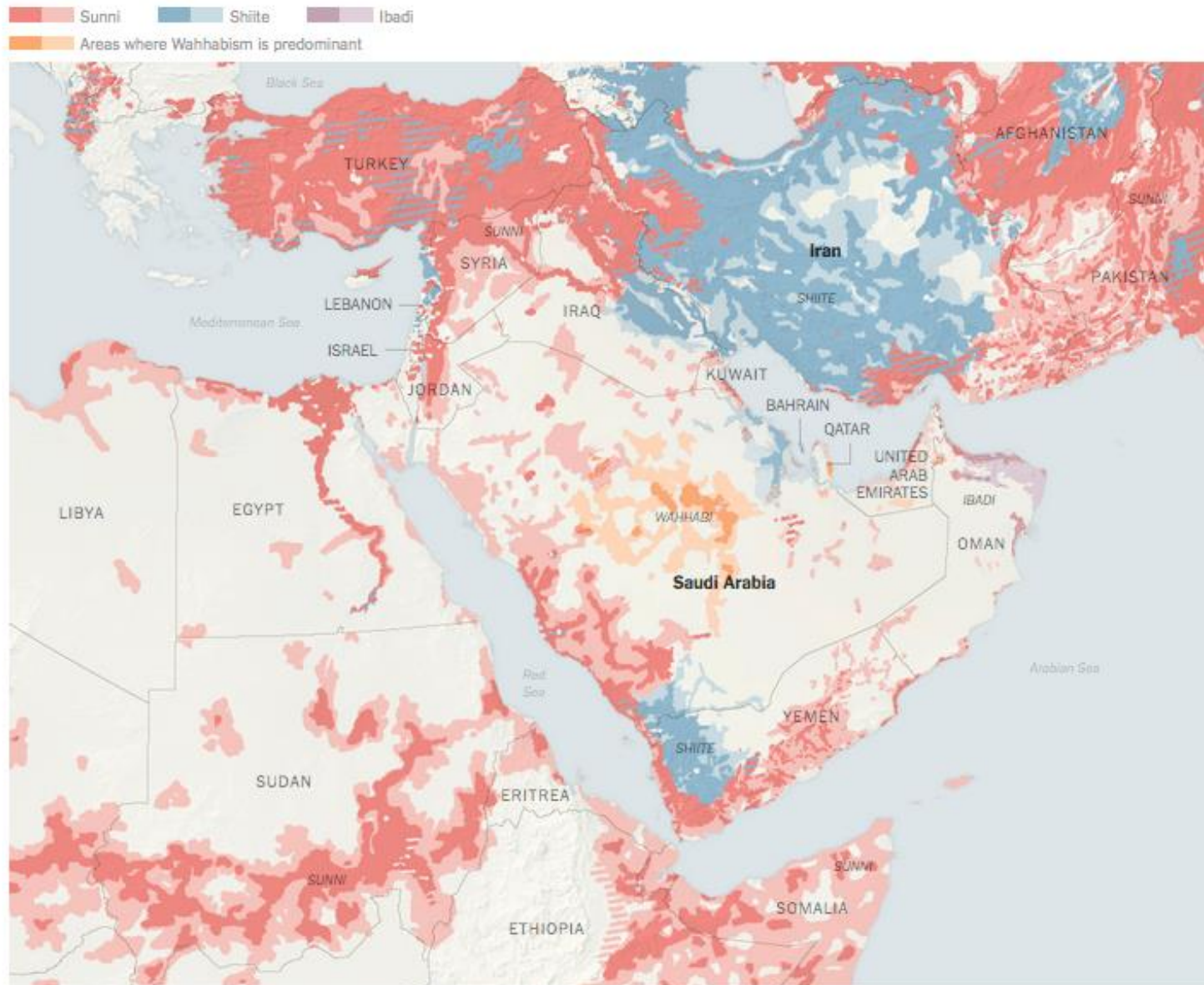
The data involved are often little more than guesstimates, however, and are often based on estimates made years earlier in nations that have never had a real census and where polling efforts are suspect at best. Narrative reporting on religious demographics and violence in the Department of State's *International Religious Freedom Report* at www.state.gov/religiousfreedomreport/ warns that these issues have received far too little attention in addressing many aspect of extremism, terrorism, and civil violence. These problems are compounded by the fact that terrorism databases make no attempt to categorize and analyze incidents by sect, ethnicity, or tribe, or even distinguish whether an act has religious motivation.

Population mobility is another key issue. Large populations of refugees and independently displaced persons (IDPs) are creating new sources of tension, and de facto segregation and violence. Massive increases in total and urban populations – changes which metrics show have reached the level of hyperurbanization in many MENA countries -- have also push various groups together much more tightly and sometimes in ways that encourage tension and conflict. So have the patterns of sectarian violence that reach across the MENA region from Iran to Lebanon.



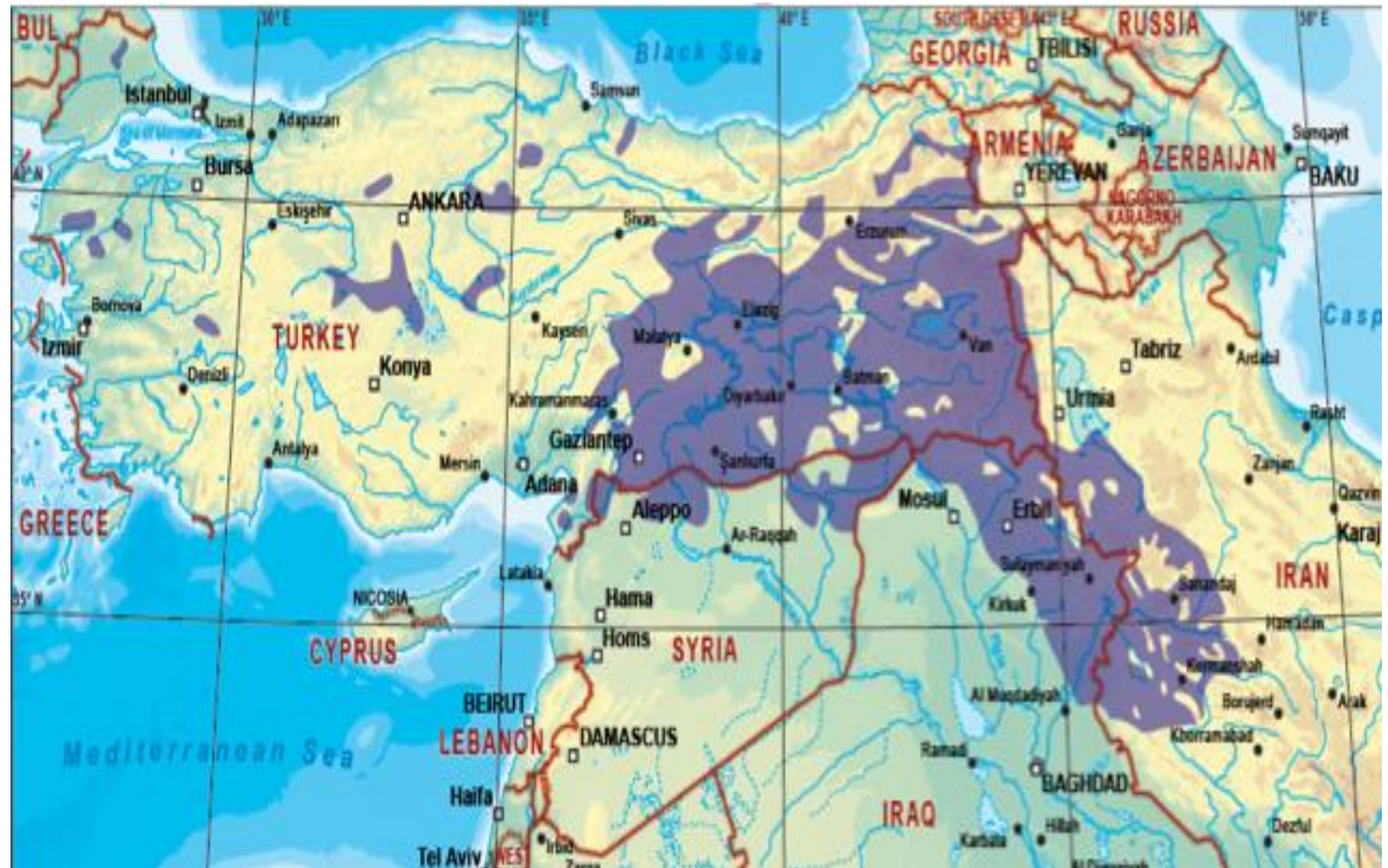
27

Sectarian Divisions in MENA



The New York Times | Source: M. Izady, Columbia University's Gulf 2000 project | Note: Non-Muslims and other Islamic sects are not shown.

The Broader “Kurdish Problem”



Source: Source: Atlas-Syria: Federal Ministry of the interior, Republic of Austria, 2015, http://www.ecoi.net/atlas_syria.pdf, p. 16

Ethnicity and Sect by Subregion and Country - I (CIA World Factbook Estimate, Accessed 20.4.2019)

North Africa

Morocco

- **Ethnic Groups:** Arab-Berber 99%, other 1%
- **Religions:** Muslim 99% (official; virtually all Sunni, <0.1% Shia), other 1% (includes Christian, Jewish, and Baha'i); note - Jewish about 6,000 (2010 est.)
- **Languages:** Arabic (official), Berber languages (Tamazight (official), Tachelhit, Tarifit), French (often the language of business, government, and diplomacy) note: the proportion of Berber speakers is disputed

Algeria

- **Ethnic Groups:** Arab-Berber 99%, European less than 1% **note:** although almost all Algerians are Berber in origin (not Arab), only a minority identify themselves as Berber, about 15% of the total population; these people live mostly in the mountainous region of Kabylie east of Algiers; the Berbers are also Muslim but identify with their Berber rather than Arab cultural heritage; Berbers have long agitated, sometimes violently, for autonomy; the government is unlikely to grant autonomy but has officially recognized Berber languages and introduced them into public schools
- **Religions:** Muslim (official; predominantly Sunni) 99%, other (includes Christian and Jewish) <1% (2012 est.)
- **Languages:** Arabic (official), French (lingua franca), Berber or Tamazight (official); dialects include Kabyle Berber (Taqbaylit), Shawiya Berber (Tacawit), Mzab Berber, Tuareg Berber (Tamahaq)

Libya

- **Ethnic Groups:** Berber and Arab 97%, other 3% (includes Greeks, Maltese, Italians, Egyptians, Pakistanis, Turks, Indians, and Tunisians)
- **Religions:** Muslim (official; virtually all Sunni) 96.6%, Christian 2.7%, Buddhist 0.3%, Hindu <0.1, Jewish <0.1, folk religion <0.1, unaffiliated 0.2%, other <0.1 (2010 est.) **note:** non-Sunni Muslims include native Ibadhi Muslims (<1% of the population) and foreign Muslims
- **Languages:** Arabic (official), Italian, English (all widely understood in the major cities); Berber (Nafusi, Ghadamis, Suknah, Awjilah, Tamasheq)

Tunisia

- **Ethnic Groups:** Arab 98%, European 1%, Jewish and other 1%
- **Religions:** Muslim (official; Sunni) 99.1%, other (includes Christian, Jewish, Shia Muslim, and Baha'i) 1%
- **Languages:** Arabic (official, one of the languages of commerce), French (commerce), Berber (Tamazight) **note:** despite having no official status, French plays a major role in the country and is spoken by about two-thirds of the population

Egypt

- **Ethnic Groups:** Egyptian 99.7%, other 0.3% (2006 est.) **note:** data represent respondents by nationality
- **Religions:** Arabic (official), Arabic, English, and French widely understood by educated classes
- **Languages:** Muslim (predominantly Sunni) 90%, Christian (majority Coptic Orthodox, other Christians include Armenian Apostolic, Catholic, Maronite, Orthodox, and Anglican) 10% (2015 est.)

Ethnicity and Sect by Subregion and Country - II (CIA World Factbook Estimate, Accessed 20.4.2019)

Levant

Israel

- **Ethnic Groups:** Jewish 74.4% (of which Israel-born 76.9%, Europe/America/Oceania-born 15.9%, Africa-born 4.6%, Asia-born 2.6%), Arab 20.9%, other 4.7% (2018 est.)
- **Religions:** Jewish 74.7%, Muslim 17.7%, Christian 2%, Druze 1.6%, other 4% (2016 est.)
- **Languages:** Hebrew (official), Arabic (used officially for Arab minority), English (most commonly used foreign language)

West Bank/Gaza

- **Ethnic Groups:** **Gaza:** Palestinian Arab; **West Bank:** Palestinian Arab, Jewish, other
- **Religions:** **Gaza:** Muslim 98.0 - 99.0% (predominantly Sunni), Christian <1.0%, other, unaffiliated, unspecified <1.0% (2012 est.) **note:** dismantlement of Israeli settlements was completed in September 2005; Gaza has had no Jewish population since then; **West Bank:** Muslim 80-85% (predominantly Sunni), Jewish 12-14%, Christian 1-2.5% (mainly Greek Orthodox), other, unaffiliated, unspecified <1% (2012 est.)
- **Languages:** Arabic, Hebrew (spoken by many Palestinians), English (widely understood)

Jordan

- **Ethnic Groups:** Jordanian 69.3%, Syrian 13.3%, Palestinian 6.7%, Egyptian 6.7%, Iraqi 1.4%, other 2.6% (includes Armenian, Circassian) (2015 est.) **note:** data represent population by self-identified nationality
- **Religions:** Muslim 97.2% (official; predominantly Sunni), Christian 2.2% (majority Greek Orthodox, but some Greek and Roman Catholics, Syrian Orthodox, Coptic Orthodox, Armenian Orthodox, and Protestant denominations), Buddhist 0.4%, Hindu 0.1%, Jewish <0.1, folk <0.1, unaffiliated <0.1, other <0.1 (2010 est.)
- **Languages:** Arabic (official), English (widely understood among upper and middle classes) .

Lebanon

- **Ethnic Groups:** Arab 95%, Armenian 4%, other 1% **note:** many Christian Lebanese do not identify themselves as Arab but rather as descendants of the ancient Canaanites and prefer to be called Phoenicians
- **Religions:** Muslim 57.7% (28.7% Sunni, 28.4% Shia, smaller percentages of Alawites and Ismailis), Christian 36.2% (Maronite Catholics are the largest Christian group), Druze 5.2%, very small numbers of Jews, Baha'is, Buddhists, and Hindus (2017 est.) **note:** data represent the religious affiliation of the citizen population (data do not include Lebanon's sizable Syrian and Palestinian refugee populations) ; 18 religious sects recognized
- **Languages:** Arabic (official), French, English, Armenian

Syria

- **Ethnic Groups:** Arab ~50%, Alawite ~15%, Kurd ~10%, Levantine ~10%, other ~15% (includes Druze, Ismaili, Imami, Nusairi, Assyrian, Turkoman, Armenian)
- **Religions:** Muslim 87% (official; includes Sunni 74% and Alawi, Ismaili, and Shia 13%), Christian 10% (includes Orthodox, Uniate, and Nestorian), Druze 3%, Jewish (few remaining in Damascus and Aleppo) **note:** the Christian population may be considerably smaller as a result of Christians fleeing the country during the ongoing civil war
- **Languages:** Arabic (official), Kurdish, Armenian, Aramaic, Circassian, French, English

Ethnicity and Sect by Subregion and Country - III (CIA World Factbook Estimate, Accessed 20.4.2019)

Gulf

Bahrain

- **Ethnic Groups:** Bahraini 46%, Asian 45.5%, other Arab 4.7%, African 1.6%, European 1%, other 1.2% (includes Gulf Co-operative country nationals, North and South Americans, and Oceanians) (2010 est.)
- **Religions:** Muslim 73.7%, Christian 9.3%, Jewish 0.1%, other 16.9% (2017 est.)
- **Languages:** Arabic (official), English, Farsi, Urdu

Kuwait

- **Ethnic Groups:** Kuwaiti 30.4%, other Arab 27.4%, Asian 40.3%, African 1%, other .9% (includes European, North American, South American, and Australian) (2018 est.)
- **Religions:** Muslim (official) 74.6%, Christian 18.2%, other and unspecified 7.2% (2013 est.) **note:** represents the total population; about 69% of the population consists of immigrants
- **Languages:** Arabic (official), English widely spoken

Iran

- **Ethnic Groups:** Persian, Azeri, Kurd, Lur, Baloch, Arab, Turkmen and Turkic tribes
- **Religions:** Muslim (official) 99.4% (Shia 90-95%, Sunni 5-10%), other (includes Zoroastrian, Jewish, and Christian) 0.3%, unspecified 0.4% (2011 est.)
- **Languages:** Persian (official), Azeri Turkic and Turkic dialects, Kurdish, Gilaki and Mazandarani, Luri, Balochi, Arabic

Iraq

- **Ethnic Groups:** Arab 75-80%, Kurdish 15-20%, other 5% (includes Turkmen, Yezidi, Shabak, Kaka'i, bedouin, Romani, Assyrian, Circassian, Sabaeen-Mandaeen, Persian) **note:** data is a 1987 government estimate; no more recent reliable numbers are available
- **Religions:** Muslim (official) 95-98% (Shia 64-69%, Sunni 29-34%), Christian 1% (includes Catholic, Orthodox, Protestant, Assyrian Church of the East), other 1-4% (2015 est.) **note:** while there has been voluntary relocation of many Christian families to northern Iraq, recent reporting indicates that the overall Christian population may have dropped by as much as 50% since the fall of the SADDAM Husayn regime in 2003, with many fleeing to Syria, Jordan, and Lebanon
- **Languages:** Arabic (official), Kurdish (official), Turkmen (a Turkish dialect), Syriac (Neo-Aramaic), and Armenian are official in areas where native speakers of these languages constitute a majority of the population

Oman

- **Ethnic Groups:** Arab, Baluchi, South Asian (Indian, Pakistani, Sri Lankan, Bangladeshi), African
- **Religions:** Muslim 85.9%, Christian 6.5%, Hindu 5.5%, Buddhist 0.8%, Jewish <0.1%, other 1%, unaffiliated 0.2% (2010 est.) **note:** Omani citizens represent approximately 60% of the population and are overwhelmingly Muslim (Ibadi and Sunni sects each constitute about 45% and Shia about 5%); Christians, Hindus, and Buddhists accounting for roughly 5% of Omani citizens
- **Languages:** Arabic (official), English, Baluchi, Urdu, Indian dialects

Ethnicity and Sect by Subregion and Country - IV (CIA World Factbook Estimate, Accessed 20.4.2019)

Gulf - Continued

Qatar

- **Ethnic Groups:** non-Qatari 88.4%, Qatari 11.6% (2015 est.)
- **Religions:** Muslim 67.7%, Christian 13.8%, Hindu 13.8%, Buddhist 3.1%, folk religion (2010 est.)
- **Languages:** Arabic (official), English commonly used as a second language

Saudi Arabia

- **Ethnic Groups:** Arab 90%, Afro-Asian 10%
- **Religions:** Muslim (official; citizens are 85-90% Sunni and 10-15% Shia), other (includes Eastern Orthodox, Protestant, Roman Catholic, Jewish, Hindu, Buddhist, and Sikh) (2012 est.) **note:** despite having a large expatriate community of various faiths (more than 30% of the population), most forms of public religious expression inconsistent with the government-sanctioned interpretation of Sunni Islam are restricted; non-Muslims are not allowed to have Saudi citizenship and non-Muslim places of worship are not permitted (2013)
- **Languages:** Arabic (official)
-

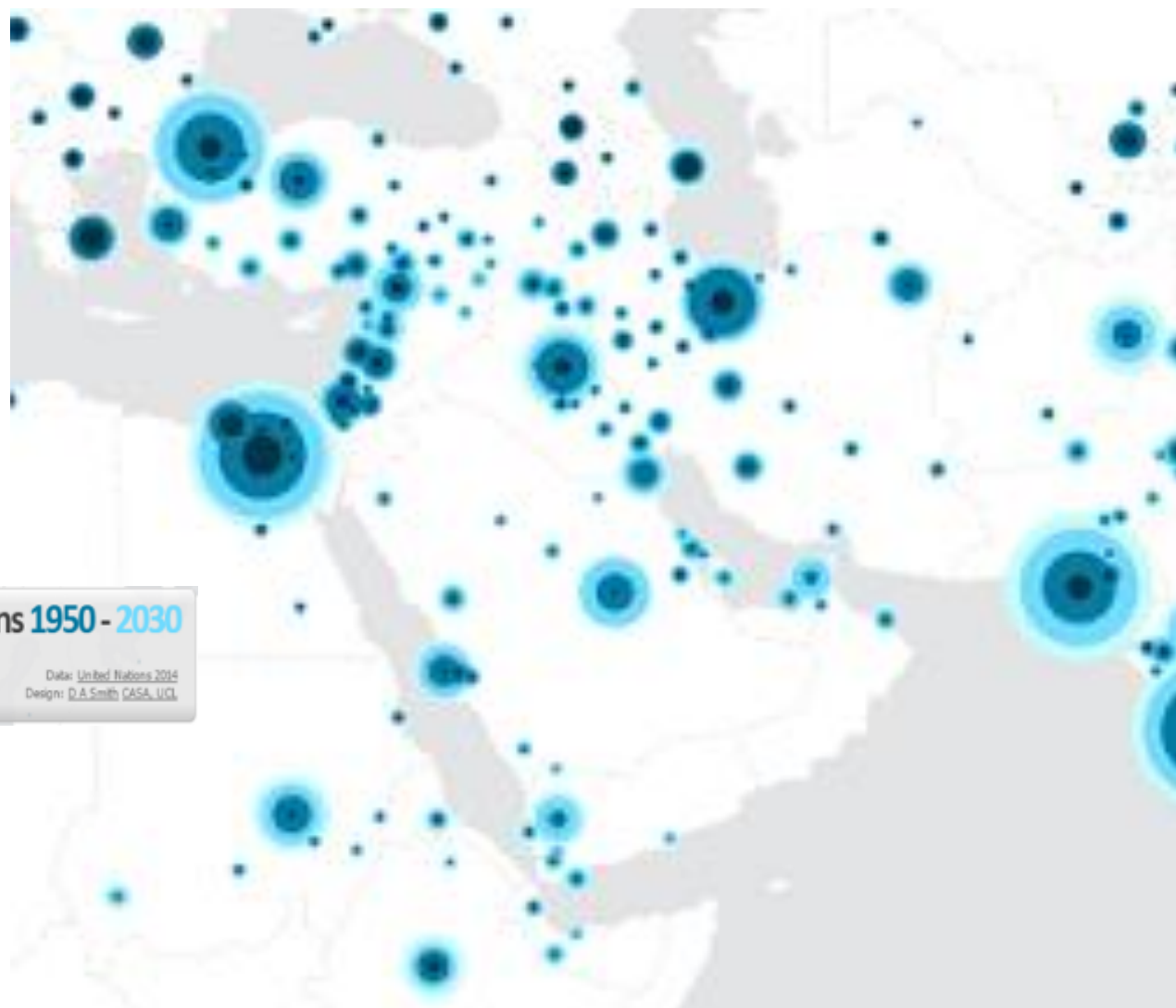
UAE

- **Ethnic Groups:** Emirati 11.6%, South Asian 59.4% (includes Indian 38.2%, Bangladeshi 9.5%, Pakistani 9.4%, other 2.3%), Egyptian 10.2%, Philippine 6.1%, other 12.8% (2015 est.)
- **Religions:** Muslim (official) 76%, Christian 9%, other (primarily Hindu and Buddhist, less than 5% of the population consists of Parsi, Baha'i, Druze, Sikh, Ahmadi, Ismaili, Dawoodi Bohra Muslim, and Jewish) 15% (2005 est.) **note:** represents the total population; about 85% of the population consists of noncitizens
- **Languages:** Arabic (official), Persian, English, Hindi, Urdu

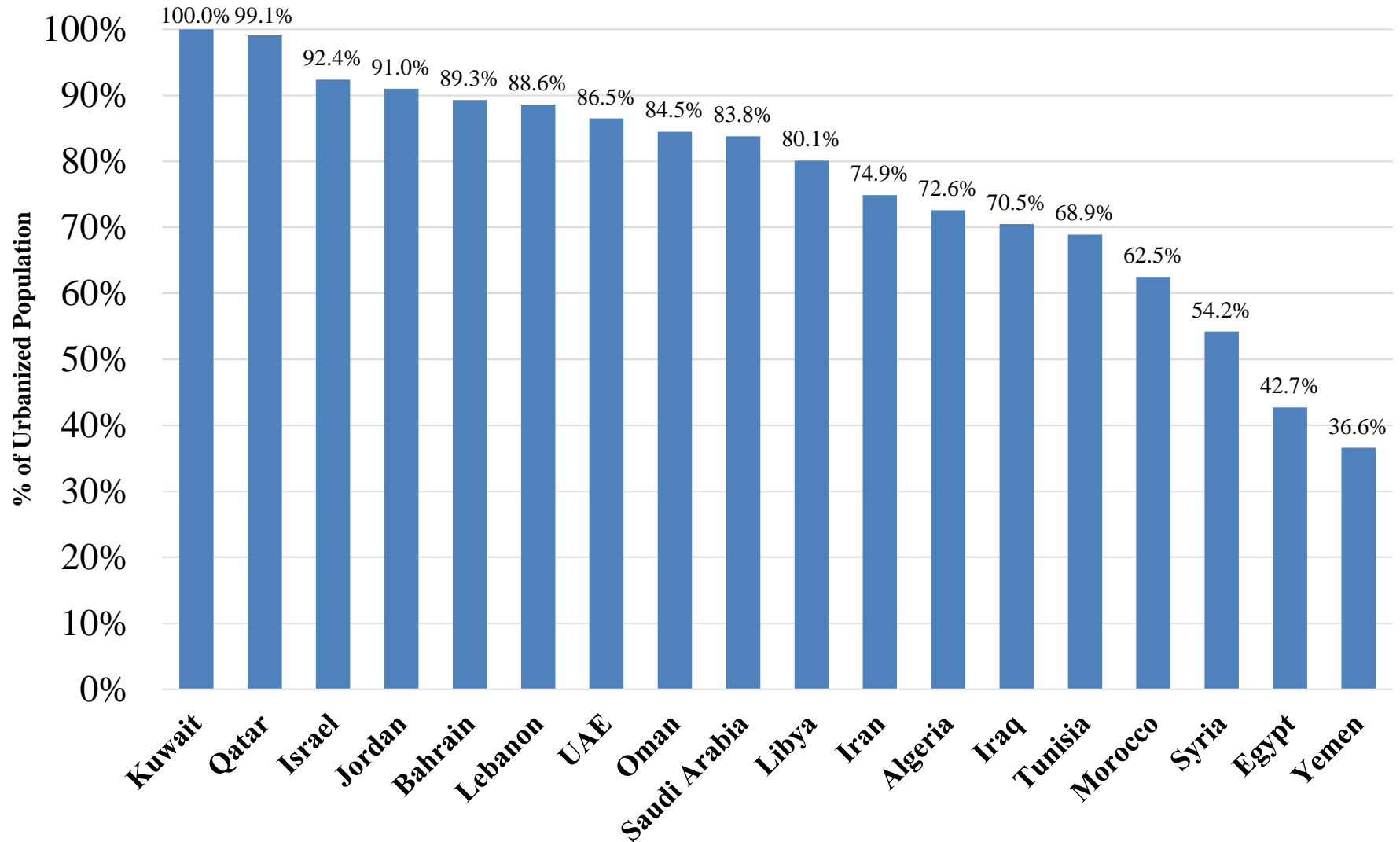
Yemen

- **Ethnic Groups:** predominantly Arab; but also Afro-Arab, South Asians, European
- **Religions:** Muslim 99.1% (official; virtually all are citizens, an estimated 65% are Sunni and 35% are Shia), other 0.9% (includes Jewish, Baha'i, Hindu, and Christian; many are refugees or temporary foreign residents) (2010 est.)
- **Languages:** Arabic (official) **note:** a distinct Socotri language is widely used on Socotra Island and Archipelago; Mahri is still fairly widely spoken in eastern Yemen

Hyper Urbanization: 1950-2030



Percentages of Urbanization in 2018



Demographics and Youth Bulge

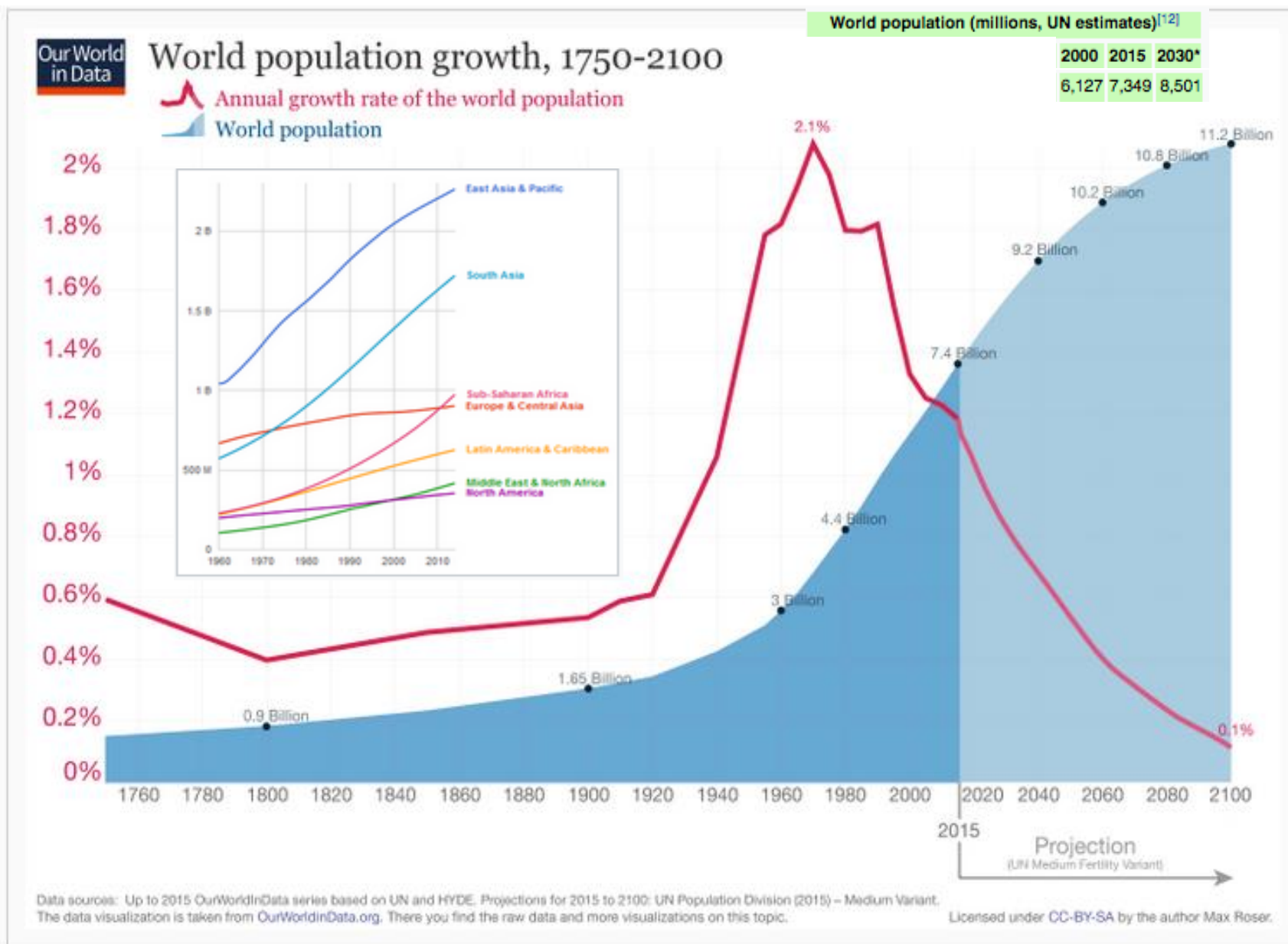
Demographics and the Youth Bulge

Most MENA states now virtually ignore the reality of their own demographics. Efforts to reduce population growth receive far less attention – although economic pressures have helped to reduce the birth rate. The metrics in this section show, however, that the MENA region has experienced massive population growth since 1950, and will experience serious population pressure for at least the next two decades. The U.S. Census Bureau estimates that it grew 5.5 times between 1950 (77.1 million) and 2019 (424.0 million). It is estimated to grow another 43% by 2050.

The country-by-country estimates that follow warn that most MENA countries face population challenges their government's have so far failed to meet for at least several decades – problems made much worse by warfighting and the upheaval that began in 2011. These problems will compound every other challenge presented in this series of surveys, and will often be a path to sustained civil upheavals – as well as terrorism and extremism.

This is particularly true when the sheer youth of the population is considered, along with the massive need for *productive* job creation – a problem that has been put off for years by offering government jobs that have little or no productive output. As the Arab Development Reports warned in 2016, the metrics that show the “youth bulge” are a critical potential recipe for regional instability, and are far worse for a MENA region that has vast expanses of desert than in other parts of the world.

It is also all too clear the Arab youth deeply distrusts most governments ability to offer fair employment opportunities – generally with good reason.



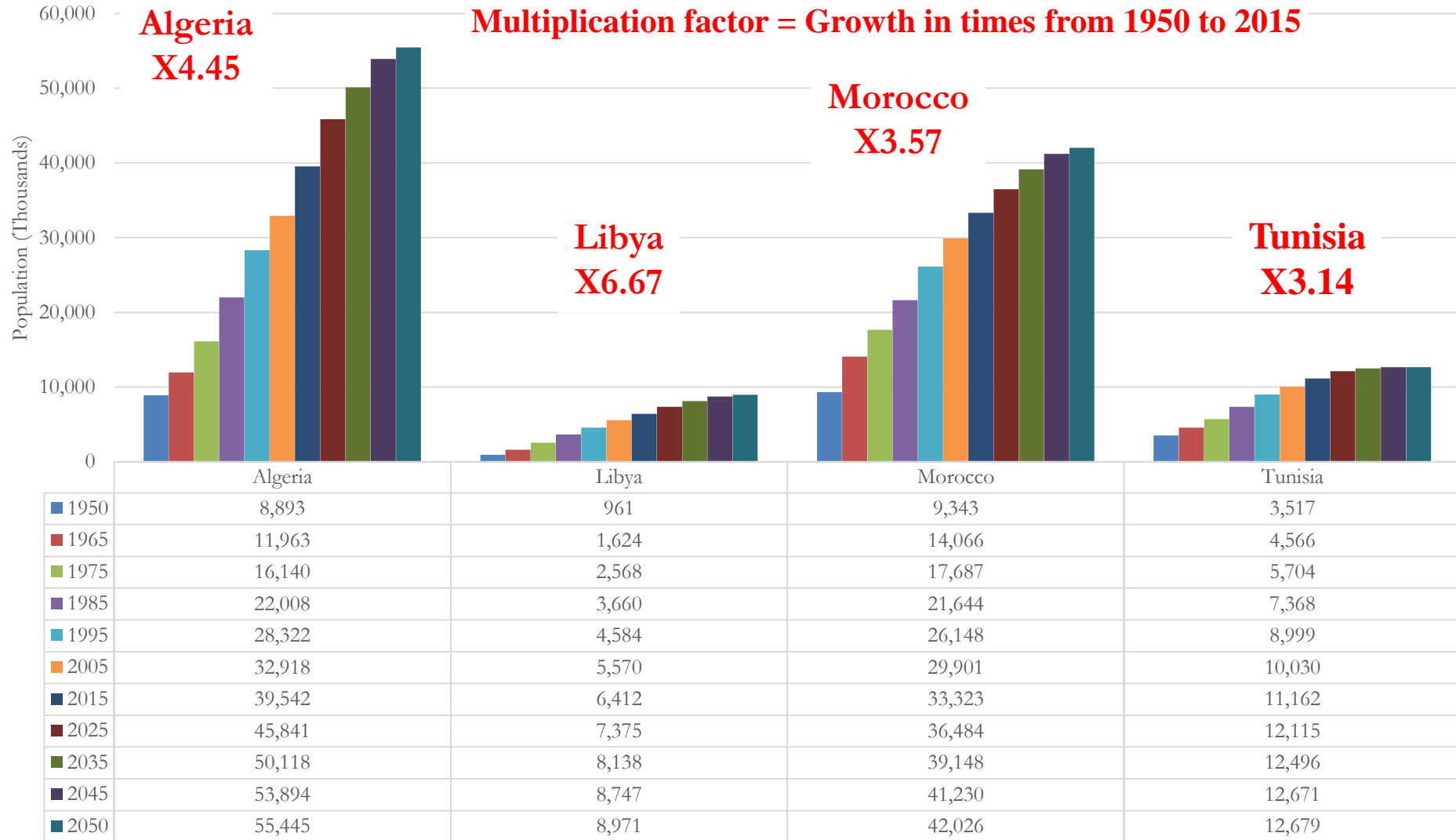
MENA Population Explosion: 1950-2050

Demographic Indicators	1950	1960	1970	1980	1990	1995	2000	2005	2010	2015	2019	2025	2030	2040	2050
Population															
Midyear population (in thousands)	77,085	98,823	128,481	172,205	234,965	259,563	285,712	314,361	351,771	394,355	423,963	464,681	496,715	555,384	607,411
Growth rate (percent)	(NA)	(NA)	(NA)	(NA)	1.1	1.5	1.9	1.9	2.1	2.0	1.6	1.4	1.2	1.0	0.8
Fertility															
Total fertility rate (births per woman)	(NA)	(NA)	(NA)	(NA)	4.9	3.8	3.2	2.9	2.9	2.8	2.7	2.5	2.4	2.2	2.1
Crude birth rate (per 1,000 population)	(NA)	(NA)	1	0	20	21	25	24	24	24	22	19	17	16	15
Births (in thousands)	(NA)	(NA)	83	85	4,610	5,421	7,113	7,619	8,611	9,399	9,215	8,731	8,541	8,892	8,815
Mortality															
Life expectancy at birth (years)	(NA)	(NA)	(NA)	(NA)	66	67	69	71	72	74	74	76	77	78	80
Infant mortality rate (per 1,000 births)	(NA)	(NA)	(NA)	(NA)	63	51	42	35	27	23	21	18	15	11	8
Under 5 mortality rate (per 1,000 births)	(NA)	(NA)	(NA)	(NA)	89	69	54	43	33	28	25	21	18	13	10
Crude death rate (per 1,000 population)	(NA)	(NA)	0	0	4	5	5	5	5	5	4	5	5	6	7
Deaths (in thousands)	(NA)	(NA)	18	18	973	1,214	1,545	1,620	1,676	1,802	1,906	2,121	2,388	3,149	4,102
Migration															
Net migration rate (per 1,000 population)	(NA)	(NA)	0	-0	-5	-1	-1	-0	1	1	-1	0	-0	-0	-0
Net number of migrants (in thousands)	(NA)	(NA)	0	-14	-1,067	-287	-173	-127	493	469	-400	98	-14	-99	-132

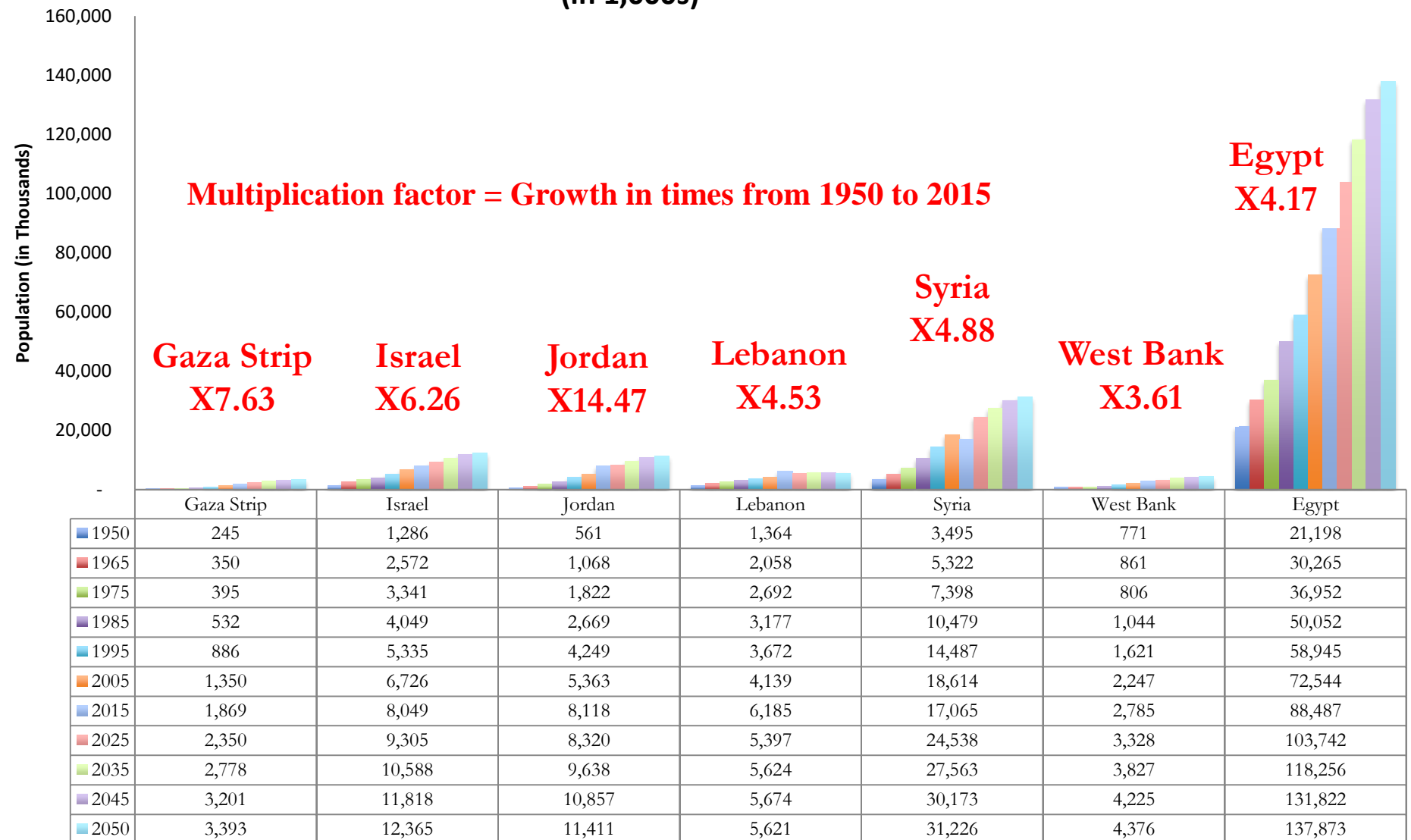
- Grew 5.5 times Between 1950 and 2019
- 43% additional growth by 2050
- Will grow 7.9 times between 1950 and 2050

US Census Bureau IDB , <https://www.census.gov/data-tools/demo/idb/region.php?N=%20Results%20&T=13&A=both&RT=0&Y=1950,1960,1970,1980,1990,2000,2010,2019,2030,2041,2050&R=-1&C=AF,BA,EG,IR,IZ,JO,KZ,KU,KG,LE,MU,PK,QA,SA,SY,TL,TX,AE,YM/>,

Demographic Pressure in North African Countries 1950-2015 (in 1,000s)

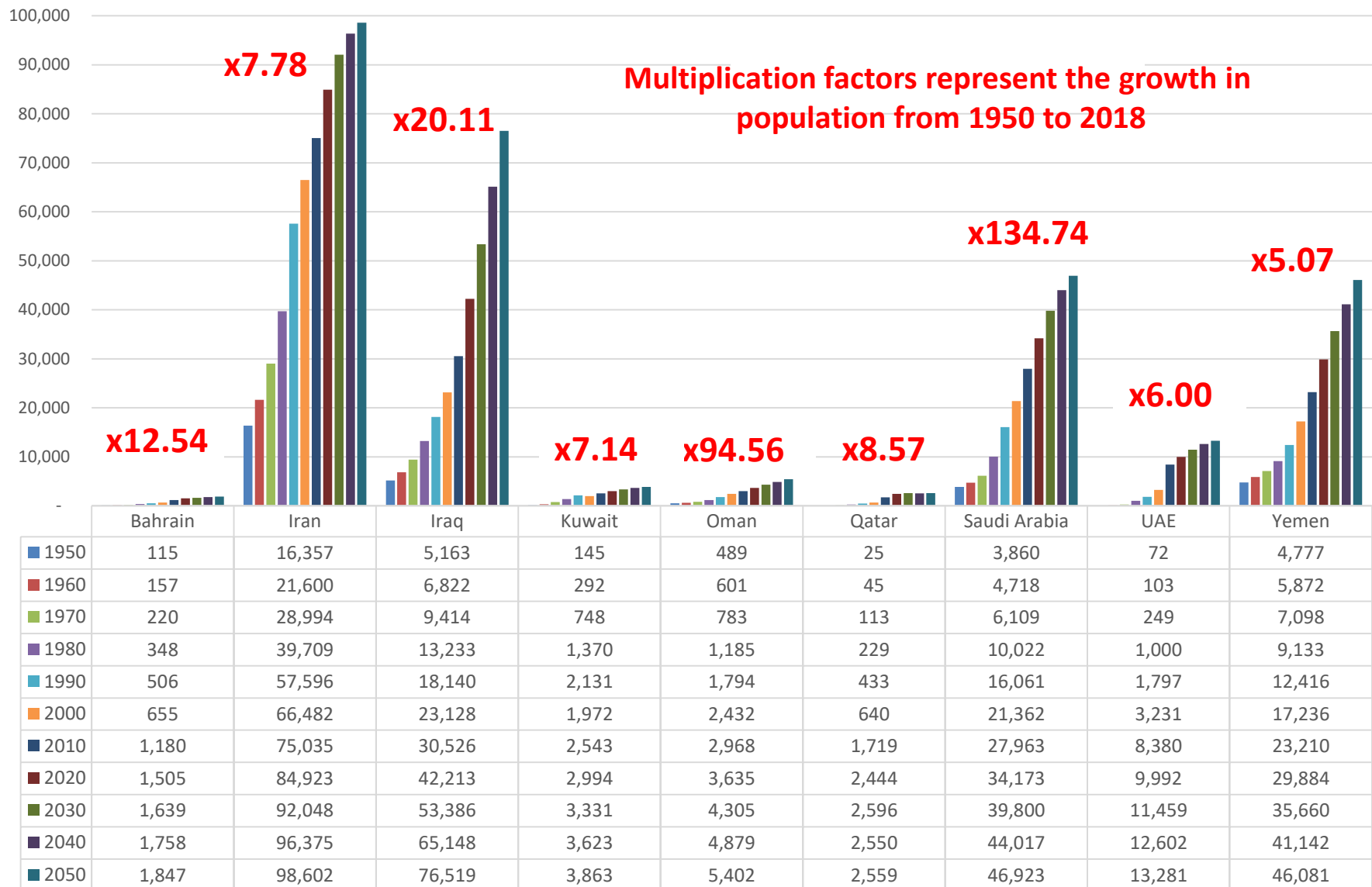


Demographic Pressure in Arab-Israeli Countries: 1950-2050 (in 1,000s)

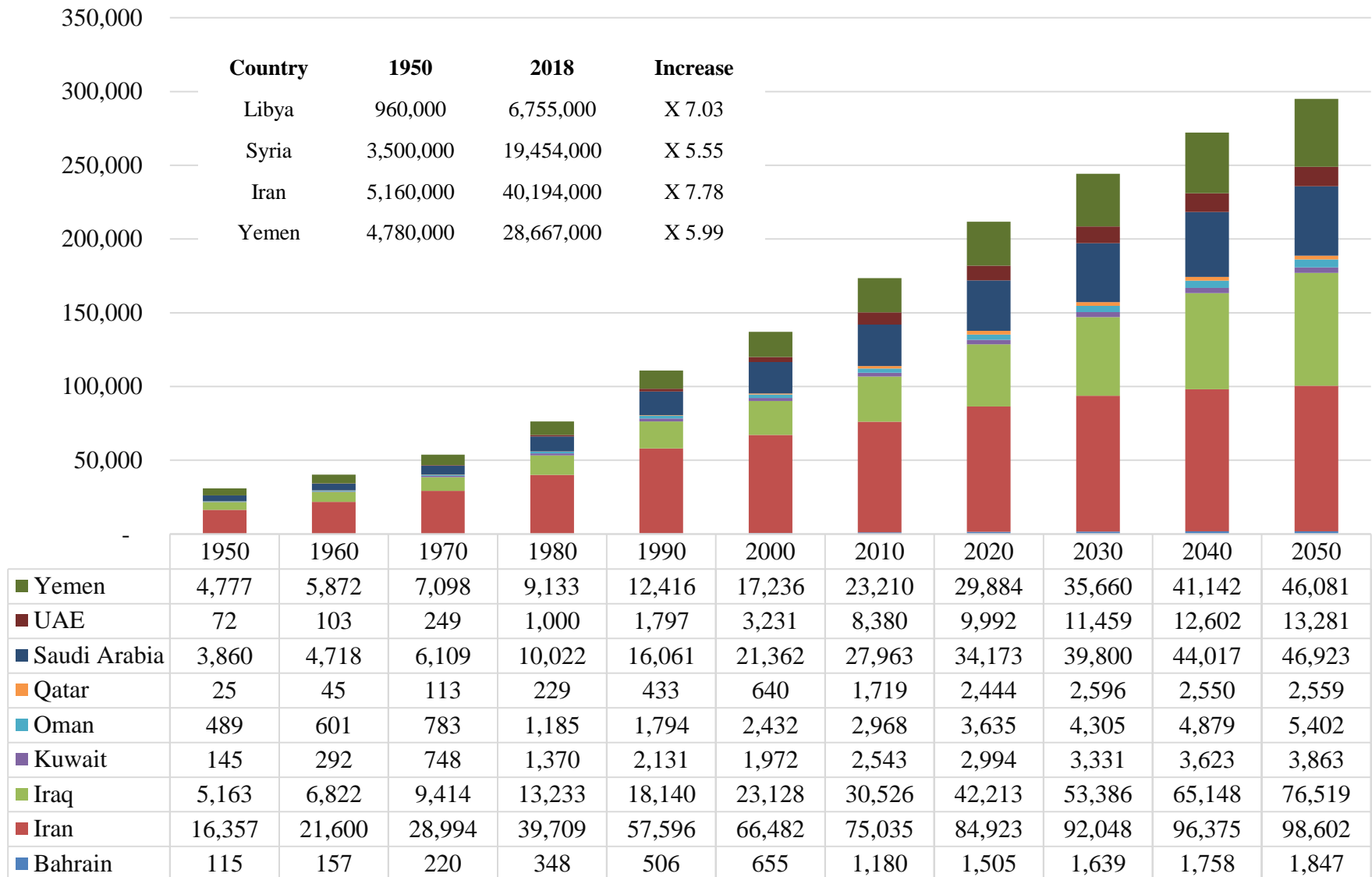


Demographic Pressure in Gulf Countries: 1950-2050

(in 1,000s)

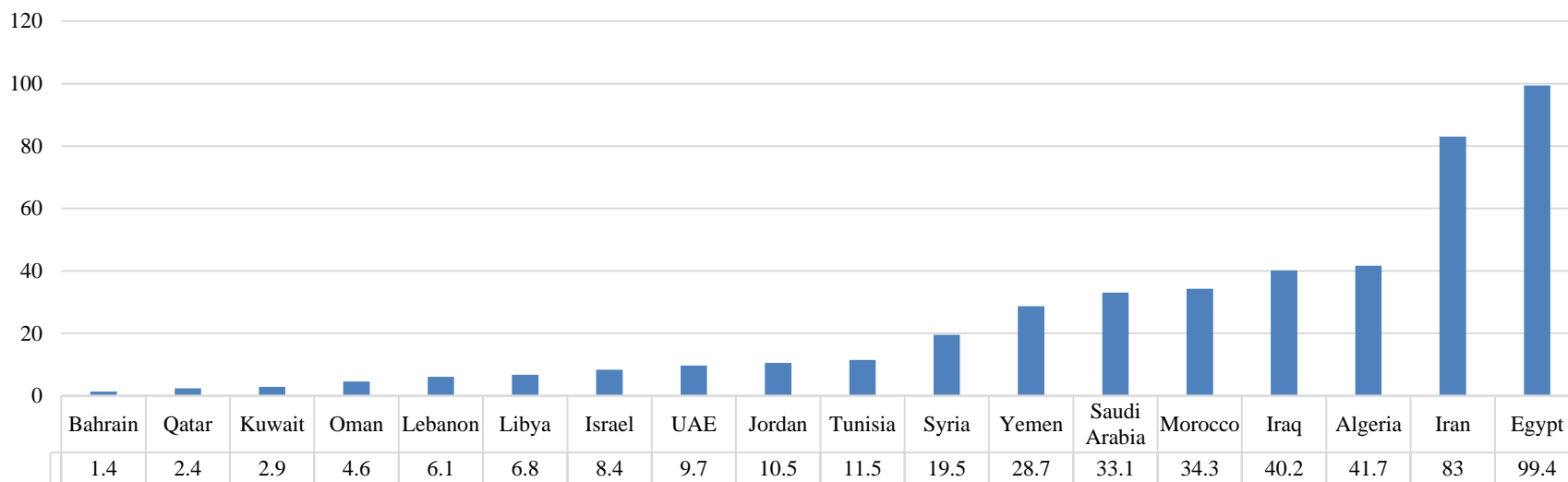


Cumulative Demographic Pressure in the Gulf: 1950-2050 (In Thousands)

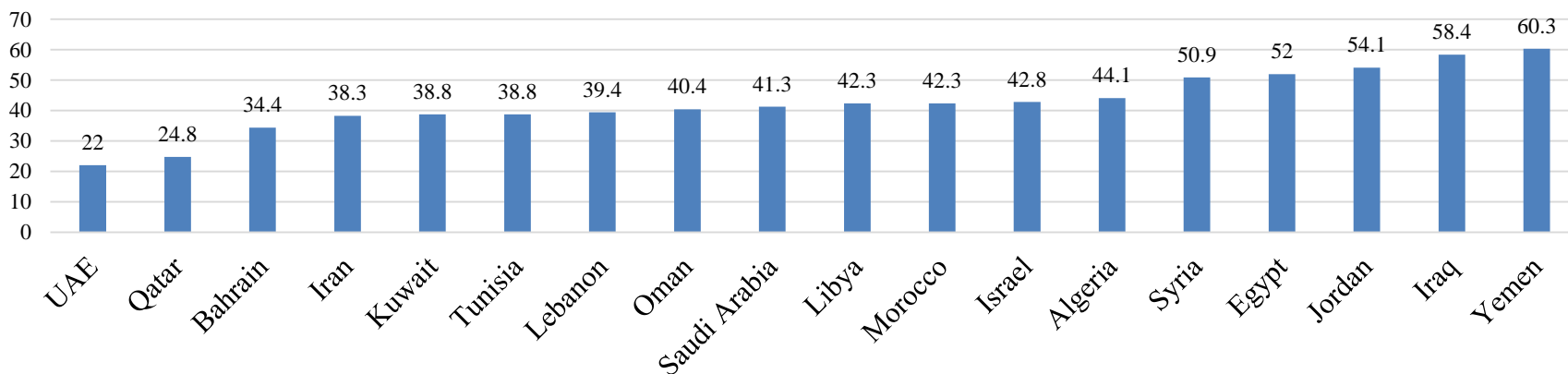


How Total Population Compares with the Impact of the Youth Bulge

Total Population in Millions – Mid 2018



% of Total that Is 24 Years of Age or Younger



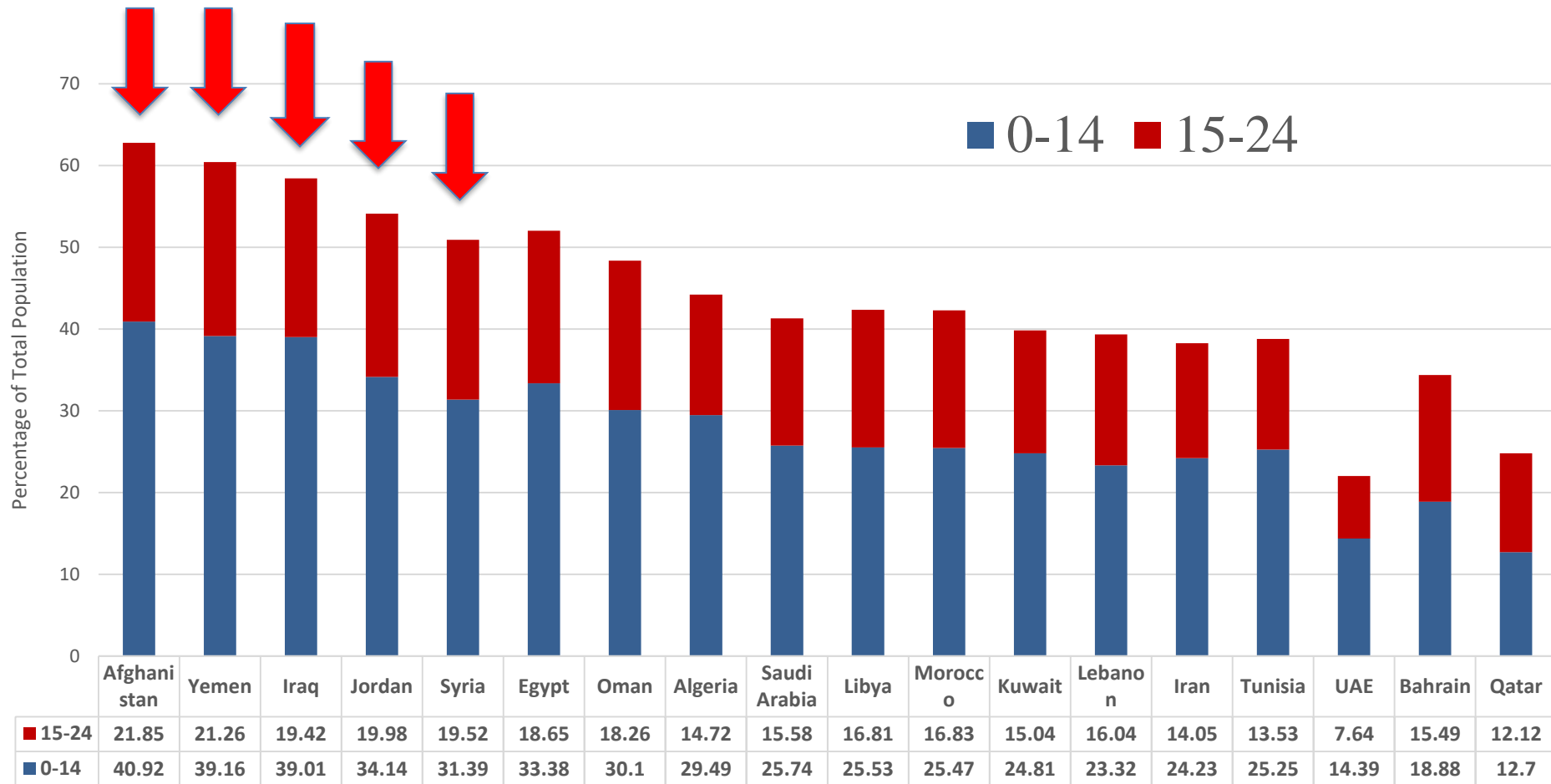
Population, Wealth, and Per Capita Income by MENA Country

Country	Total Population In Millions in Mid 2018*	% 24 years of Age or Younger	GDP (OER) in \$US Billions in 2019	GDP (OER) per Capita in \$US in 2019
1. Algeria	41.7	44.1	183.7	4,230
2. Bahrain	1.4	34.4	39.0	25,780
3. Egypt	99.4	52.0	299.59	3,020
4. Iran	83.0	38.3	484.7	5,820
5. Iraq	40.2	58.4	225.3	5,760
6. Israel	8.4 (2017)	42.8	381.6	42,140
7. Jordan	10.5	54.1	44.26	4,390
8. Kuwait	2.9	38.8	136.9	29,130
9. Lebanon	6.1	39.4	58.3	9,610
10. Libya	6.8	42.3	45.0	6,840
11. Morocco	34.3	42.3	121.4	3,410
12. Oman	4.6 (2017)	40.4 (2017)	79.5	18,080
13. Qatar	2.4	24.8	193.5	70,290
14. Saudi Arabia	33.1	41.3	762.3	22,510
15. Syria	19.5	50.9	50.3*	no data
16. Tunisia	11.5	38.8	36.2	3,070
17. UAE	9.7	22.0	427.9	39,810
18. Yemen	28.7	60.3	29.1	919

*CIA 2015.

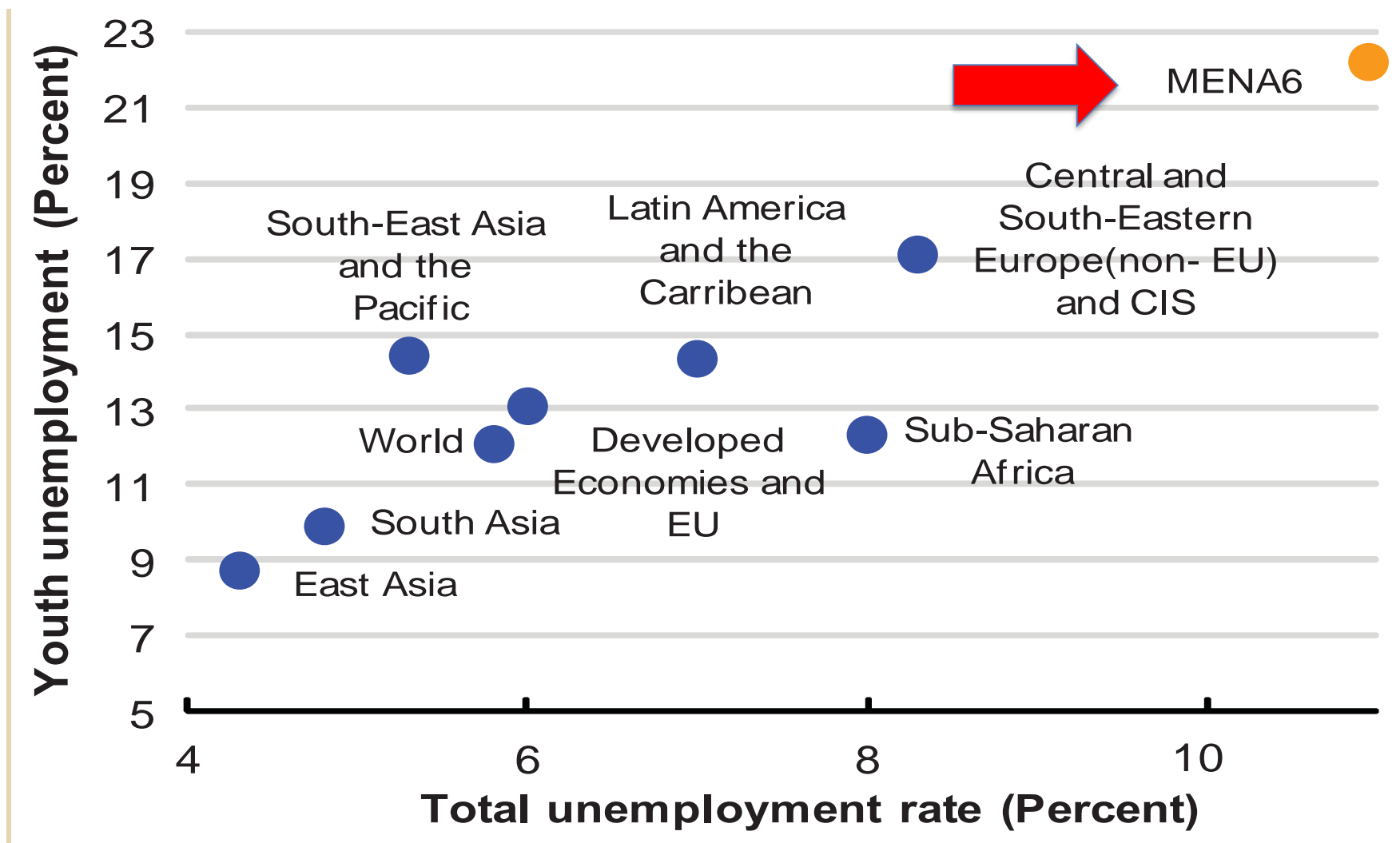
CIA, *World Factbook*, for population data, accessed on 15 April 2019. IMF Data Mapper for estimated GDP and GDP per capita at official exchange rate (OER). https://www.imf.org/external/datamapper/NGDP_RPCH@WEO/OEMDC/ADVEC/WEOWORLD. The OER rate is chosen instead of the PPP rate, because it reflects a better measure of the relative size of a modern economy and ability to generate modern military forces.

How Young is the Youth Bulge? (Percentage of Population Below 24)



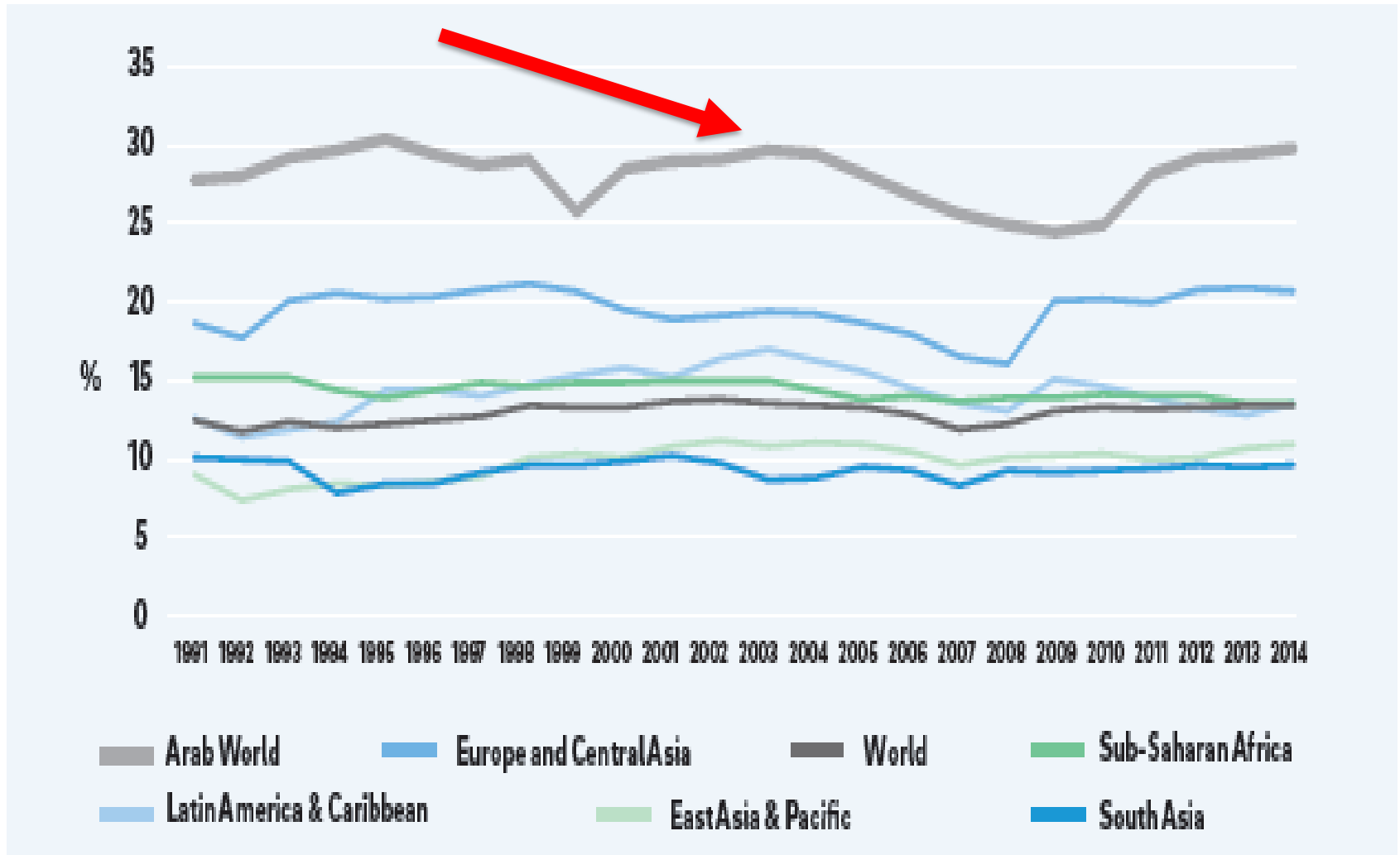
Source: Central Intelligence Agency, World Factbook 2019, Accessed January 2019,
<https://www.cia.gov/library/publications/the-world-factbook/>

Total and Youth Unemployment Rates by Region (2008): The Threat From POAYMs

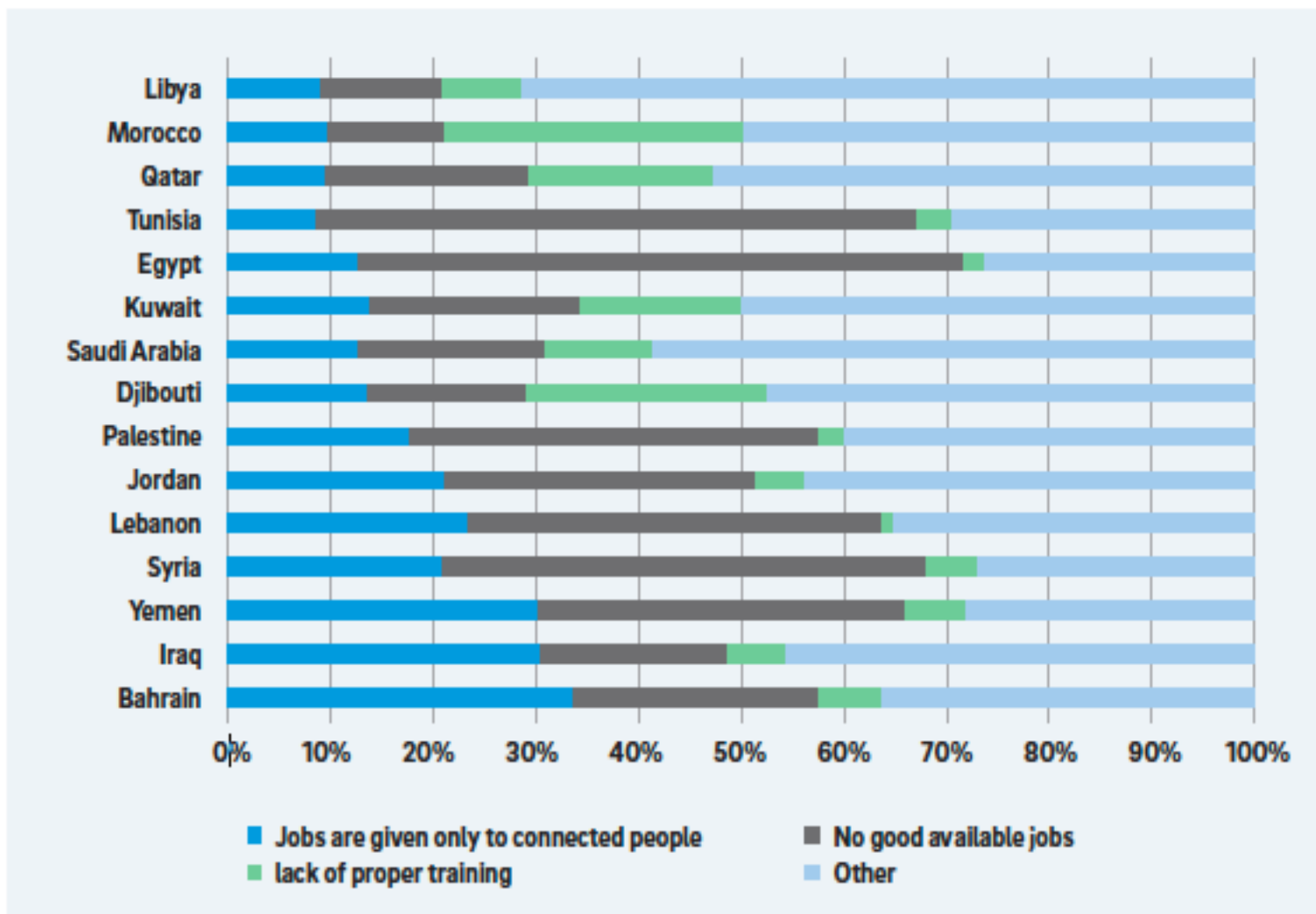


Comparative Youth Unemployment Rate

Youth unemployment rate (% of total labor force ages 15–24, modelled ILO estimate), 1991– 2013 ')



The Dependency Challenge by MENA Country: 2014



Source: World Bank 2014b.

Dependency and Support Ratios in 2015 by MENA Country

Dependency ratios are a measure of the age structure of a population. They relate the number of individuals that are likely to be economically "dependent" on the support of others. Dependency ratios contrast the ratio of youths (ages 0-14) and the elderly (ages 65+) to the number of those in the working-age group (ages 15-64). Changes in the dependency ratio provide an indication of potential social support requirements resulting from changes in population age structures. As fertility levels decline, the dependency ratio initially falls because the proportion of youths decreases while the proportion of the population of working age increases. As fertility levels continue to decline, dependency ratios eventually increase because the proportion of the population of working age starts to decline and the proportion of elderly persons continues to increase.

total dependency ratio - The total dependency ratio is the ratio of combined youth population (ages 0-14) and elderly population (ages 65+) per 100 people of working age (ages 15-64). A high total dependency ratio indicates that the working-age population and the overall economy face a greater burden to support and provide social services for youth and elderly persons, who are often economically dependent.

youth dependency ratio - The youth dependency ratio is the ratio of the youth population (ages 0-14) per 100 people of working age (ages 15-64). A high youth dependency ratio indicates that a greater investment needs to be made in schooling and other services for children.

elderly dependency ratio - The elderly dependency ratio is the ratio of the elderly population (ages 65+) per 100 people of working age (ages 15-64). Increases in the elderly dependency ratio put added pressure on governments to fund pensions and healthcare.

potential support ratio - The potential support ratio is the number of working-age people (ages 15-64) per one elderly person (ages 65+). As a population ages, the potential support ratio tends to fall, meaning there are fewer potential workers to support the elderly.

Country	Dependency Ratio (%)			Potential Support Ratio (%)
	Total	Youth	Elderly	
1. Algeria	52.7	43.8	9	11.2
2. Bahrain	30.2	27.1	3	33.1
3. Egypt	61.8	53.6	8.2	12.2
4. Iran	40.2	33.1	7.1	14.2
5. Iraq	77.7	72.3	5.5	18.3
6. Israel	64.4	45.7	18.4	5.4
7. Jordan	66.1	59.8	6.2	16
8. Kuwait	29.8	27.1	2.7	37.3
9. Lebanon	47.4	35.3	12	8.3
10. Libya	49.1	21.9	28	3.6
11. Morocco	51.6	41.9	9.7	10.3
12. Oman	32.4	29.4	3.1	32.6
13. Qatar	17.5	16.3	1.3	78.1
14. Saudi Arabia	40.9	36.6	4.3	23.2
15. Syria	72.8	65.8	7	14.3
16. Tunisia	45.6	34.5	11.1	9
17. UAE	17.4	16.2	1.2	84.4
18. West Bank/Gaza	75.8	70.5	5.2	19.9
19. Yemen	76.8	71.7	5.1	19.8
CONTROLS				
Afghanistan	88.8	84.1	4.7	21.2
Somalia	97.4	92.1	5.3	12.9
Switzerland	48.8	22	26.8	3.7
US	51.2	29	22.1	4.5
World				

Source: CIA, *Filed Listing Dependency Ratios, 2015*; CIA Library web site, accessed 22.4.19.

A Note on Data and Methodology

There are major limits to the quality of much of the data available on the recent fighting, possible future threats, and key aspects of regional stability. In some cases, key data is only available in the form of “guesstimates” and heavily politicized reporting, or is not available at all. No suitably credible data are available to create such metrics -- although such data may appear to exist until their sources, definition, and timeliness is examined in detail. In other cases, metrics are presented that seem useful, but are informed “guesstimates.” They present numbers, graphics, and maps that are also uncertain, but represent estimates that seem broadly correct and to accurately portray broad trends in the absence of more reliable data.

The Need to Face Complexity

At the same time, metrics have the advantage that they help the analyst and decision maker to examine key trends in more detail. They help show the overall patterns in complex events, and help illustrate interactions in civil-military developments, in ways that looks beyond a given aspect of a conflict.

If there is any key lesson that emerges out of the rise of instability, extremism, terrorism, civil wars, and insurgencies over the last three decades, it is that there is no simple way of focusing on a few key variables that can lead to meaningful solutions or either national or regional stability. One key reason that so many attempted solutions have become part of the problem is that policymakers and warfighters have been unwilling to address complexity, and have tried to substitute ideology for an examination of the facts.

Drawing on a Wide Range of Sources

The maps, graphics, and summary data in this survey deliberately draw on a wide range of sources, although they emphasize reporting by the U.S. government, UN agencies, leading NGOs, and the World Bank. The sources of each metric are listed on each page, and also show the role of a wide range of media, think tanks, and other research centers. It should be obvious that this means that the bulk of the work presented reflects the skills of the original analysts producing such material – although many cases, the original source comes from a government or international agency which cannot be fully attributed.

Key Contents

There are many different ways in which these metrics could have been organized. In practice, Part One of this survey begins with the patterns in warfighting against the Daesh “caliphate” and attempt to create a state. It then

covers the final battles against the Daesh pseudostate,” looks at the uncertain state of victory as of April 2019, and examines the scale of the U.S. military effort. It goes on to examine the patterns in violence, and casualties in both civil conflicts and the fighting against extremist and terrorism movements. It highlights the fact that defeating Daesh’s attempts to create a state has not defeated Daesh even in Syria and Iraq. The survey then moves on to key indicators of the scale of the post-Daesh challenges in bringing stability to Syria and Iraq.

Part Two of the survey broadens its coverage to show key trends in Islam. It and makes it clear that Muslims generally associate their faith more closely with the governance and the rule of law than the practitioners of other faiths.

At the same time, the data show that the overwhelming majority of Muslims reject violent extremism and terrorism. It is also Muslims who suffer most from any form of religious extremism and sectarian warfare, and it is brutally clear that such fighting has become a “clash within a civilization.” If one looks at the casualty data shown earlier – and in almost all estimates of the overall numbers of those killed and injured by extremist and terrorism acts by movements claiming to be “Islamic” – the vast majority of such casualties are the result of Muslims killing or wounding fellow Muslims.

It should be stressed that the metrics shown in Part One and Part Two share the same problems as virtually all other reporting on extremism and terrorism. They ignore state terrorism, and the casualties from violent state terrorism and repression. This is not a casual issue. The casualty data on Syria presented in this survey indicate that that the Assad regime alone may have killed, wounded, and displaced more civilians since 2011 than all of the world’s non-state actors and extremist and terrorism groups combined.

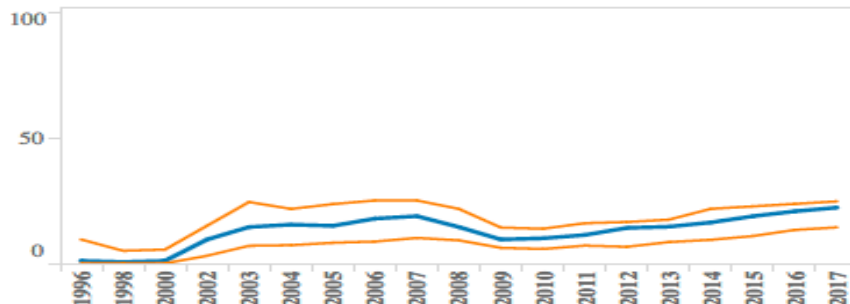
Part Three provides a range of data on broader causes of instability in the MENA region. There are many areas where adequate data are lacking. Yet, there are still enough data to warn that that the causes of instability in the MENA region – like those in other largely Islamic regions and states – are so broad and so serious that extremism, terrorism, and civil conflict are likely to be endemic well beyond the coming decade.

These metrics show convincingly that a number of governments, political structures, and economies are as much of a threat as terrorism and extremism. As studies like the UN’s Arab Development Reports have warned since 2002, “failed states” – regimes that do not make effective efforts at development, at creating jobs and income for their peoples, that let corruption substitute for effective governance, and tolerate or exploit internal discrimination by sect, ethnicity, tribe or other group – are as much of a threat as any extremist or terrorist non-state actors. Ironically such states not only are the worst enemy of their peoples, but ultimately of their own survival as a regime.

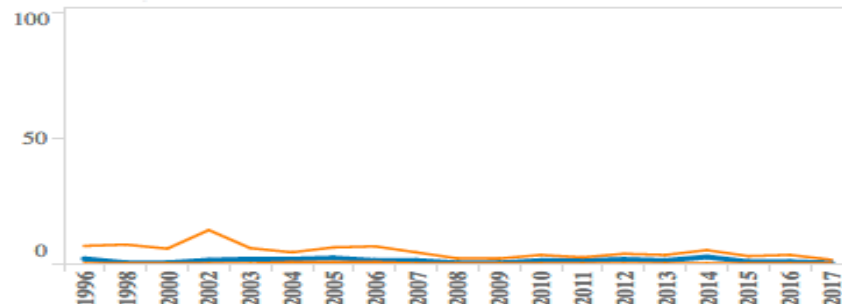
Back-Up: Other Wars

Afghanistan: Failed Governance

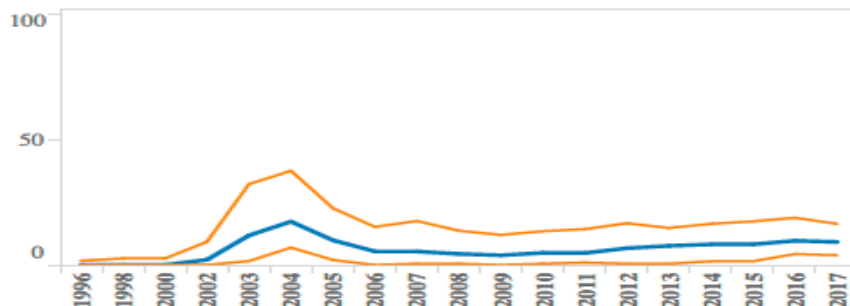
Voice and Accountability



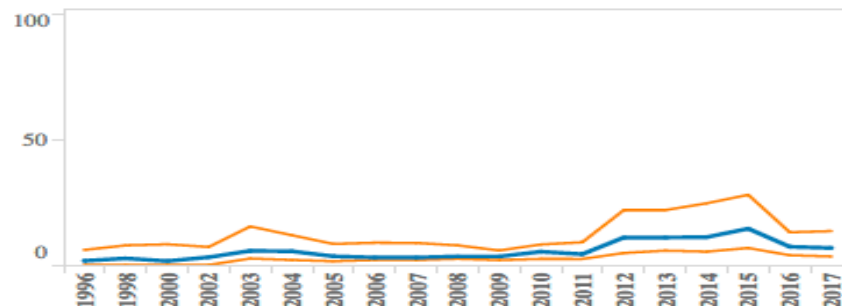
Political Stability and Absence of Violence



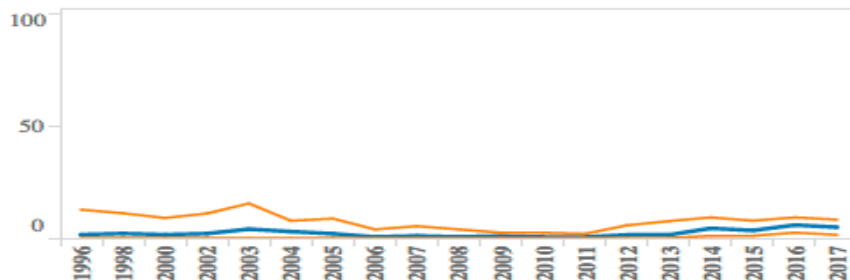
Government Effectiveness



Regulatory Quality



Rule of Law



Control of Corruption

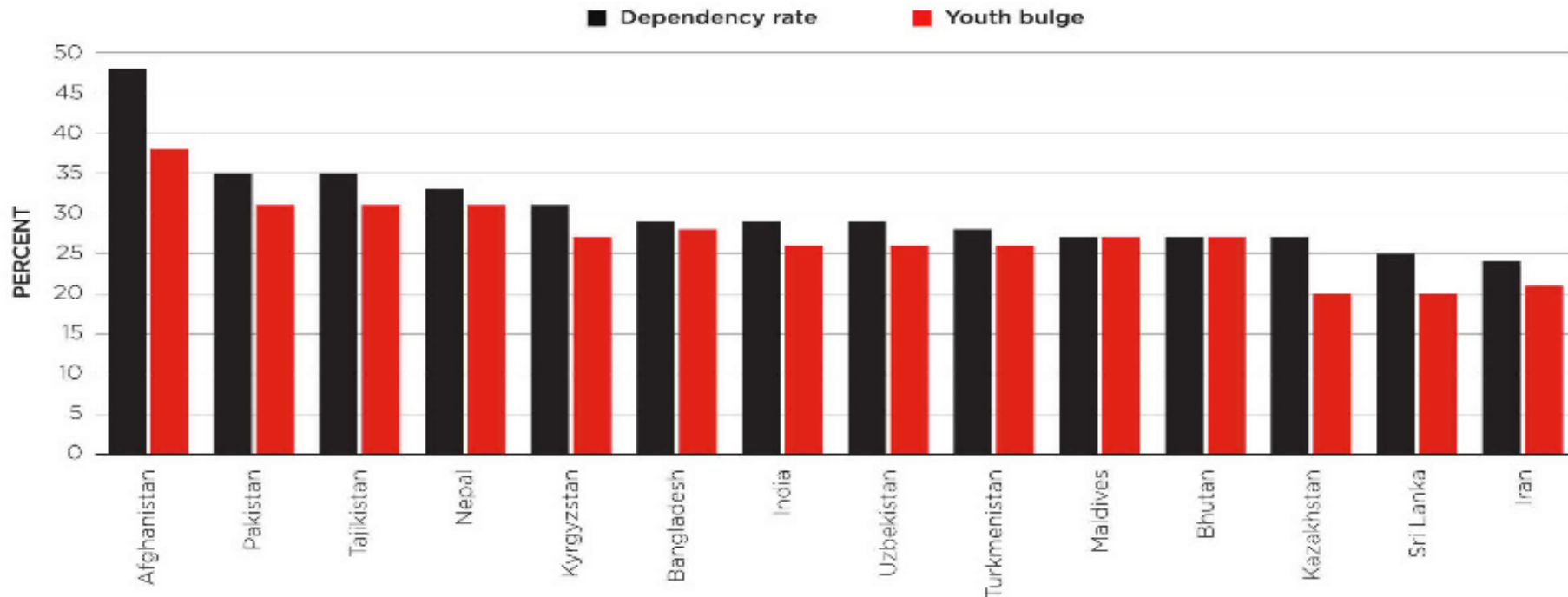


Transparency International ranks as near worst case: 177th out of 180 Countries in 2017. Fourth Worst in World

The inner, thicker blue line shows the selected country's percentile rank on each of the six aggregate governance indicators. The outer, thinner red lines show the indicate margins of error.

Source: Kaufmann D., A. Kraay, and M. Mastruzzi (2010), *The Worldwide Governance Indicators: Methodology and Analytical Issues*. The Worldwide Governance Indicators are available at: www.govindicators.org

Afghanistan: Youth Bulge (15-24 years of age) and Employment

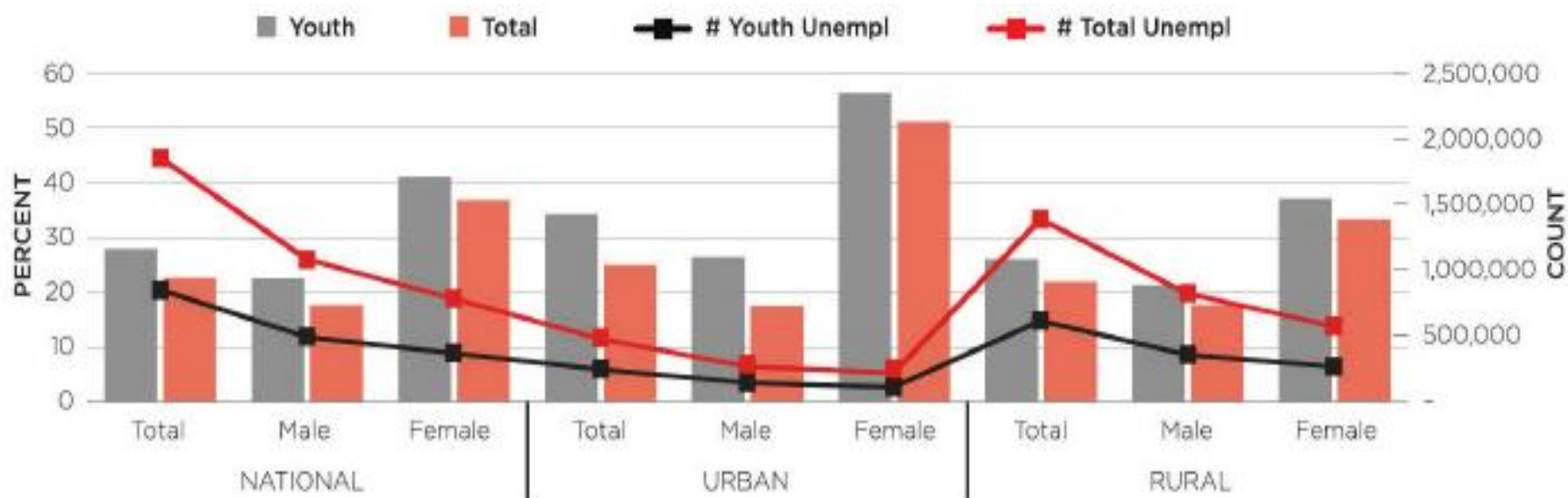


Notes: Dependency rate defined as $(0-15)/(Total\ Population)$; Youth bulge defined as $(15/24)/(15+)$.
Source: ALCS 2013-14 (Afghanistan); UNDESA (2015)

The Afghanistan economy struggles to create enough jobs to accommodate its fast growing labor force. Slowdown in economic growth has focused attention on Afghanistan's chronic excess of labor. With a fertility rate steadily above five children per woman, Afghanistan has the fastest growing population, the highest dependency rate, and the biggest "youth bulge" in South Asia. Afghanistan's demographic profile poses tremendous challenges to public finances and the labor market. In particular, high dependency rates squeeze private savings, which hampers investment and growth while straining spending on social services, notably health and education. In the labor market, an estimated 400,000 jobs need to be created every year to accommodate new workers; this is a daunting challenge in the absence of economic growth and with constrained budgets for public investment.

the Total Fertility Rate in Afghanistan is 5.3 children per woman (DHS, 2015). Together with Timor-Leste, Afghanistan remains the only country outside Africa where the TFR is above 5 children per woman (UNDESA 2015). According to UNDESA (2015), Afghanistan is endowed with the third largest youth bulge in the world, after Uganda and Chad, as more than one fifth of the population is aged between 15 and 24. The Afghan population is expected to double in size from 28.4 million in 2010 to 56.5 million in 2050. It is estimated that, even under optimistic growth and labor-intensity of growth scenarios, the Afghan labor market will not be able to match labor supply growth until 2027.

Afghanistan: The Urban Rural Youth Employment Gap



"Unemployment" and "poor economy" are the biggest problems cited by Afghans in the most recent opinion polls. Evidence supports these perceptions of a bleak labor market. According to ALCS data, in 2013-14, 22.6 percent of the Afghan labor force was unemployed. Almost one in every four people participating in the labor market, or 1.9 million individuals, are either working less than eight hours per week or do not have a job and are actively looking for one.

Unemployment was particularly severe among youth (27.9 percent) and women (36.8 percent). Nationwide, almost half of the unemployed are below the age of 25 (45.6 percent), reflecting Afghanistan's struggle to create jobs for its growing labor force amidst the economic recession that accompanied the transition phase.

As of 2013-14, approximately 877 thousand youth were unemployed; two-thirds were young men, about 500 thousand, and four in five of these unemployed young men lived in rural areas (Figure 14).

There are stark differences in the education profiles of unemployed youth; while unemployed male youth in urban areas are more likely to be educated-54 percent have secondary education or above-the opposite holds in rural areas, where 54 percent of unemployed male youth have no formal education and 37.1 percent are illiterate

Afghan Economy - 2017

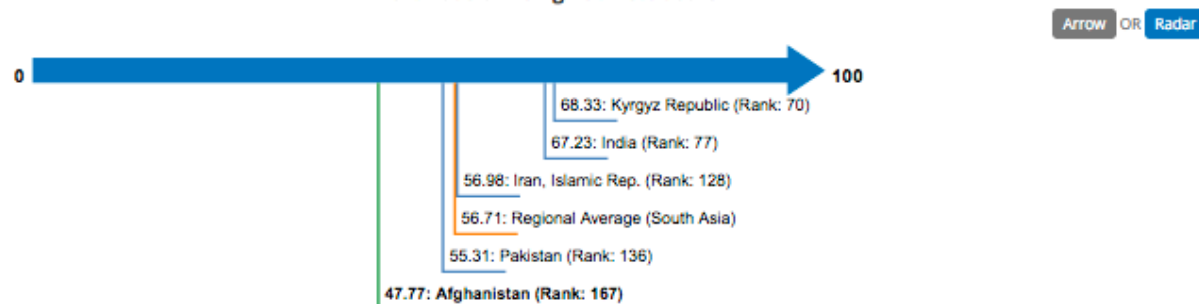
- **Business sentiment remains suppressed**
- **Agriculture sector's performance has also been mixed in 2016; cereals production recorded a decline of nearly 5 percent while fruit production has been higher.**
- **Real gross domestic product (GDP) growth is projected to have only marginally increased from 0.8 percent in 2015 to 1.2 percent in 2016. With a population growth of nearly 3 percent, such a level of economic growth implies a decline in per capita income.**
- **Inflation increased from -1.5 percent in 2015 to 4.4 percent in 2016, driven by lagged effects of currency depreciation and a recovery in global food prices.**
- **Revenue collection has significantly improved in the past two years after the abrupt decline in revenues in 2014. But, revenues: \$1.7 billion and expenditures: \$6.639 billion (2015 est.) –Budget deficit was 26.8% of GDP (2015 est.)**
- **Domestic revenues increased by nearly 15 percent in 2016, which exceeded the revenue target by around 5 percent.**
- **Both tax and non-tax revenues increased, while customs duties remained flat given weak imports. In proportion to GDP, however, revenue collection still remains relatively low at 10.7 percent.**
- **With an increase in exports and slower growth for imports (due to weaker domestic demand), the trade deficit is estimated to have improved from -36.7 percent of GDP in 2015 to -35.0 percent in 2016. The large trade deficit continues to be financed by foreign aid, with the current account balance expected in a small surplus estimated at around 4 percent of GDP in 2016. (Exports were \$658 million (2014 est.) \$2.679 billion (2013 est.) not including illicit exports or reexports. Imports were \$7.004 billion (2014 est.) \$12.19 billion (2013 est.)**

Afghanistan: World Bank Ease of Doing Business Rankings:

Better, But
Only 167th in
the World in
2019

World Bank,
<http://www.doingbusiness.org/en/data/explore/economies/afghanistan#>.

DB 2019 Ease of Doing Business Score



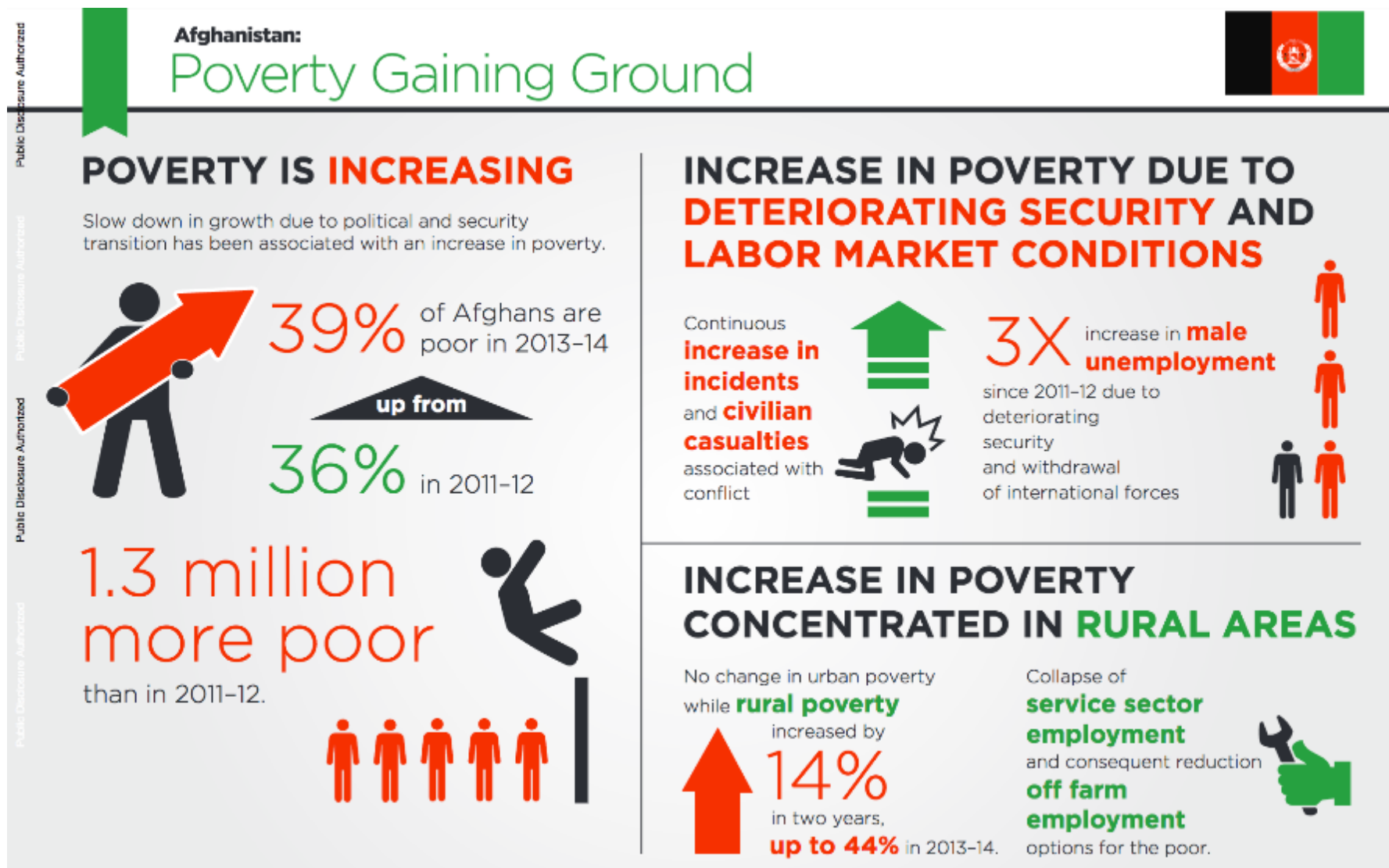
Note: The ease of doing business score captures the gap of each economy from the best regulatory performance observed on each of the indicators across all economies in the *Doing Business* sample since 2005. An economy's ease of doing business score is reflected on a scale from 0 to 100, where 0 represents the lowest and 100 represents the best performance. The ease of doing business ranking ranges from 1 to 190.

Topics	DB 2019 Rank	DB 2019 Score	DB 2018 Score ¹	Change in Score (% points)
Overall	167	47.77	37.13	↑ 10.64
Starting a Business✓	49	92.04	82.55	↑ 9.49
Dealing with Construction Permits	184	34.54	33.70	↑ 0.84
Getting Electricity	168	44.51	44.58	↓ 0.07
Registering Property	186	27.50	27.50	..
Getting Credit✓	99	50.00	45.00	↑ 5.00
Protecting Minority Investors✓	26	71.67	10.00	↑ 61.67
Paying Taxes✓	177	43.27	41.97	↑ 1.30
Trading across Borders	177	30.63	30.63	..
Enforcing Contracts	181	31.76	31.76	..
Resolving Insolvency✓	74	51.78	23.62	↑ 28.16

✓ = Doing Business reform making it easier to do business. ✗ = Change making it more difficult to do business.

[Click here to see all reforms made by Afghanistan](#)

Afghanistan: World Bank Poverty Warning I



Afghanistan: World Bank Poverty Warning II

Afghanistan:

A Labor Market Crisis



JOBS WERE LOST DURING THE TRANSITION PHASE

Slow down in growth has been accompanied by deteriorating labor market conditions:

1.92 million unemployed in 2013-14

Between 2011-12 and 2013-14 unemployment registered a

3X increase in rural areas
2X increase in urban areas



JOBS CRISIS ESPECIALLY CHALLENGING FOR YOUTH



1 in 2 unemployed Afghans is 14 to 24 years old.



500,000 male youth are unemployed,

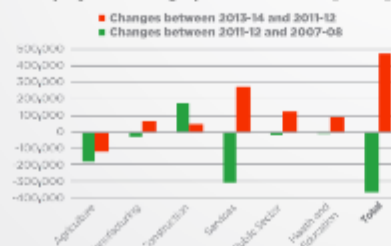
2/3 live in rural areas



COLLAPSE OF SERVICE SECTOR IN RURAL AREAS

76% of jobs destroyed were in the rural service sector
4 out of 5 of the jobs that were created between 2007-08 and 2011-12 were lost by 2013-14.

Employment changes, male workforce [25-50]



Source: Afghanistan Living Conditions Survey (ALCS) 2007-08, 2011-12, and 2013-14

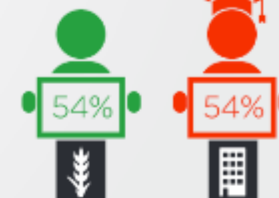
URBAN/RURAL DISPARITIES IN EDUCATION



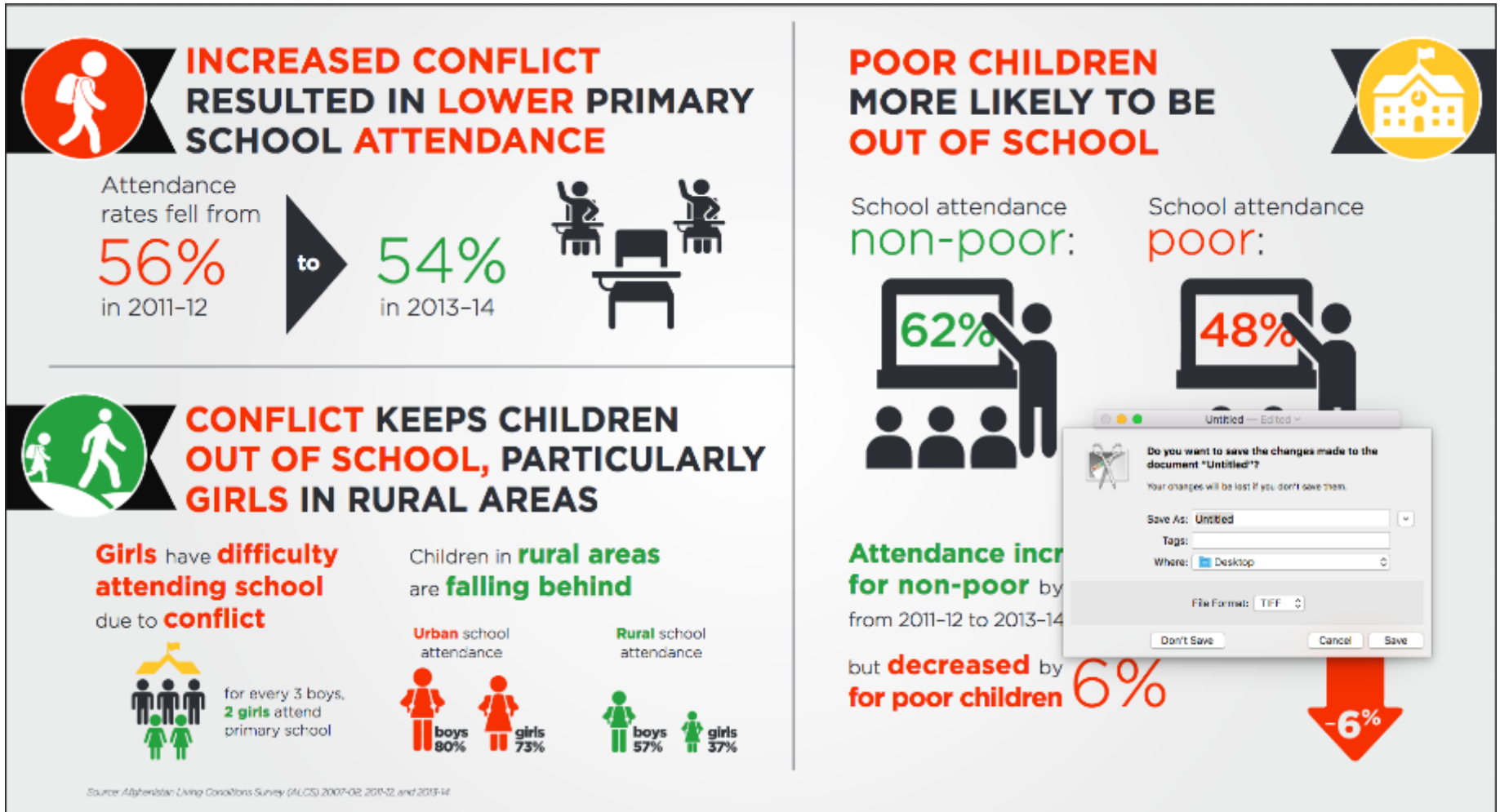
Male youth who are unemployed have different education profile depending on where they live:

Majority in rural areas has no education

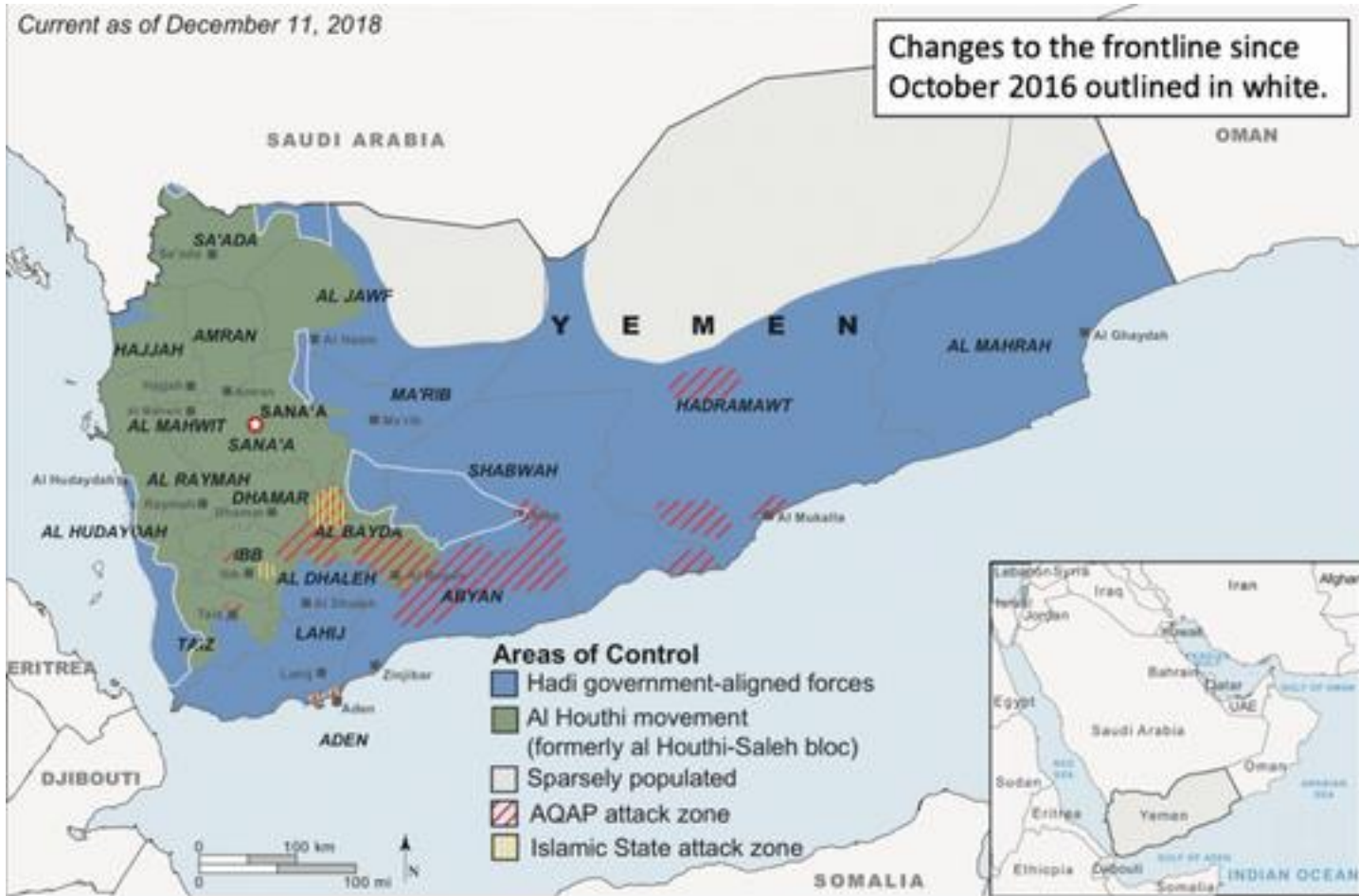
Majority in urban areas has higher education



Afghanistan: World Bank Poverty Warning III



Yemen: December 2018

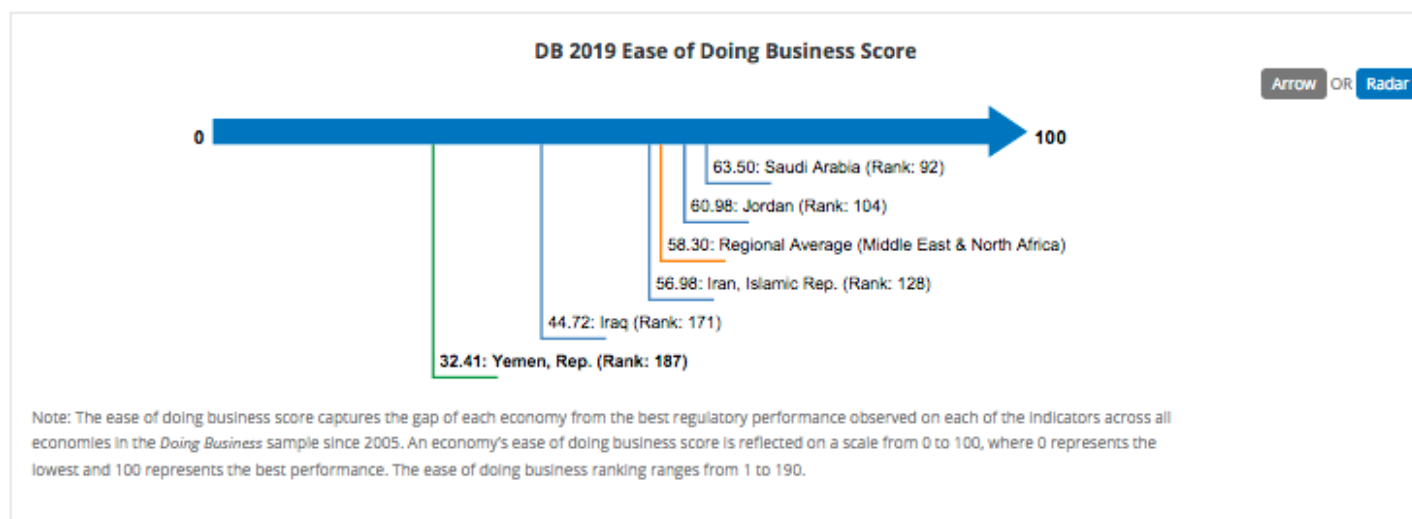


Katherine Zimmerman, AEI,
<https://mail.google.com/mail/u/0/#search/Syria/FMfcgxwBVzsMStcjVVcTcWggXcXbXSnF>

Yemen: World Bank Ease of Doing Business Rankings:

**Worse, and
Only 187th in
the World in
2019**

World Bank,
<http://www.doingbusiness.org/en/data/explore/economies/yemen#>.

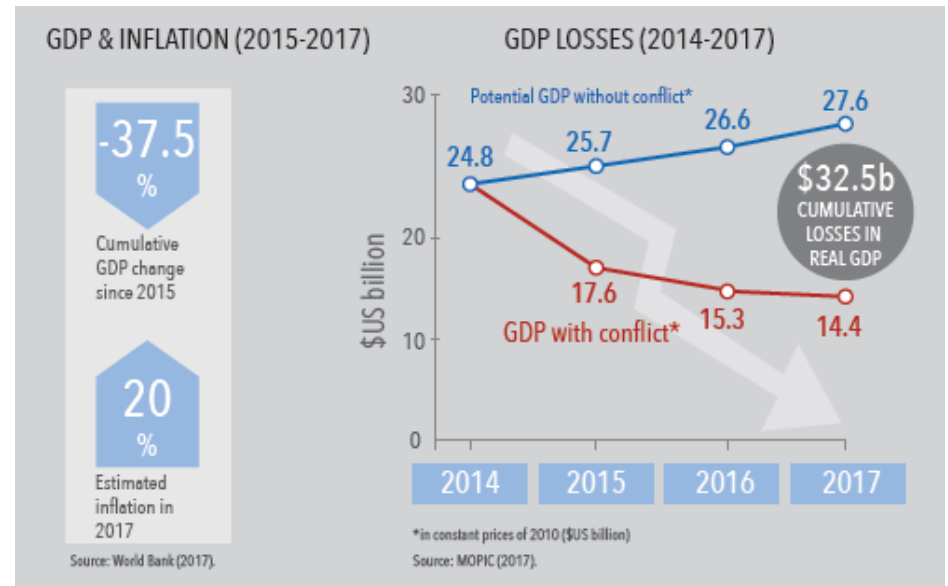
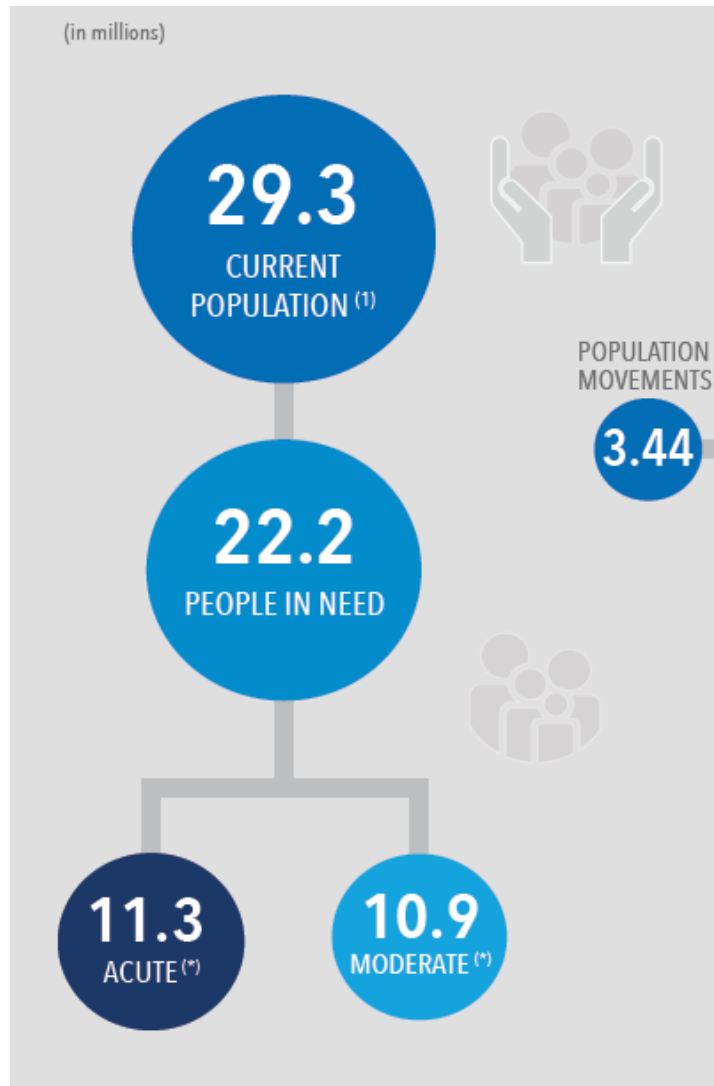


Grid OR Chart

Topics	DB 2019 Rank	DB 2019 Score	DB 2018 Score ¹	Change in Score (% points)
Overall	187	32.41	33.00	↓ 0.59
Starting a Business	175	67.01	72.68	↓ 5.67
Dealing with Construction Permits	186	0.00	0.00	..
Getting Electricity	187	0.00	0.00	..
Registering Property	81	65.18	65.21	↓ 0.03
Getting Credit	186	0.00	0.00	..
Protecting Minority Investors	132	43.33	43.33	..
Paying Taxes	83	74.13	74.13	..
Trading across Borders	189	0.00	0.00	..
Enforcing Contracts	139	48.52	48.52	..
Resolving Insolvency	157	25.89	26.14	↓ 0.25

✓ = Doing Business reform making it easier to do business. ✗ = Change making it more difficult to do business.

Yemen: Human and Economic Costs



NUMBER OF PEOPLE IN NEED (TOTAL)

16.37M

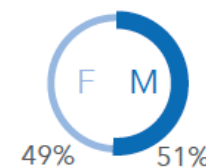
NUMBER OF PEOPLE IN NEED (ACUTE)

9.3M

HEALTH

BY SEX

BY AGE



51%
Children

49%
Adults