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

Part Two: The Changing Threat

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ARIS MESSINIS/AFP/Getty Images
Introduction

This is the second 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 Two** - *The Changing Threat* -- surveys 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](https://www.csis.org/analysis/metrics-daesh-and-ongoing-challenge-extremism).

- **Part Three** -- *Key Factors that Seem Likely to Lead to Continuing Violent Extremism, and Conflicts in the MENA Region* -- will explore metrics that portray the broader causes of instability and possible future conflict in the region.

**Part Two: A Survey of the Changing Threat**

Part Two draws upon work by the PEW Trust, and polls on Muslims and citizens in a range of largely Islamic states to show both the growing strategic importance of Islam and that the vast majority of Muslims oppose violent extremism and share the same goals and values as other cultures and regions.

It then focuses on the small minority that does actively support extremism and terrorism, and on global and regional estimates of the patterns in terrorism and extremism. It shows how the levels of violence in heavily Islam and MENA countries compare to those in other parts of the world.

*Human Costs are in the Millions and Rising*

The costs to the Islamic world have already been immense. As Part One has shown, the death toll in Syria alone has been a civil war where a mixture of Islamic extremist violence and state repression has probably cost well have over 500,000 lives -- the vast majority of which have been Muslims killing Muslims, and Sunnis killing fellow Sunnis.

The number of civilian dead in Iraq and other states where violent extremists have been active are
harder to estimate, but almost certainly exceed 100,000, and may well exceed 200,000. Tragic as terrorist attacks on other religions -- like the attacks on Christian in Sri Lanka -- violent extremists that claim to be "Islamic" have done immense damage to Islam and fellow Muslims.

And, deaths are only part of the cost. Studies by the World Bank and IMF indicate that extremist violence -- ranging from terrorist activities to civil war, may cost Iraq, Libya, Syria, and Yemen the equivalent of a decade of economic development at a time when all have to deal with massive population growth and youth employment problems.

The UNHCR has noted that the fighting in Syria has displaced 6.6 million people and drive 5.6 million out of the country, while 13.1 million people are in need. In Iraq, a nation of some 36 million, the UNHCR estimates that some 11 million people have had to live in conflict areas, and 6.7 million have needs humanitarian assistance.

The levels of violence do vary in other countries. In Libya, the impact on the civilian population was more limited, but the UNHCR still estimated in early 2019, that 813,000 people needed humanitarian assistance, and 673,000 were of concern. Still important in a country with only 6.4 million people, but smaller by comparison.

Yemen, however, is a different case. It has a population of some 29.6 million. The UNHCR estimate of the impact of the Yemeni civil war in January 2019 -- a war driven by a mixture of factional, sectarian, and extremist violence -- was 24.1 million people in need, 14.4 million in need of protection and assistance, 3.3 million Internally Displaced Persons (IDPs), and 1 million returnees. Some 81 per cent of the IDPs had been displaced for more than one year.

A "Clash Within a Civilization: "Muslim Extremists Seeking Power and Killing Fellow Muslims"

The metrics in Part Two show that the MENA region has enduring levels of violence that go far beyond Daesh's effort to establish what it called a "caliphate." They make it clear that violent groups and individuals that claim to be Islamic have been a key source of its conflicts, and are the main source of extremist and terrorist activity in the world today.

At the same time, the maps in Part Two show that this violence is part of a global pattern dominated by Muslims killing fellow Muslims in struggles for power in largely Muslim states. Such extremists may claim to be attacking non-Muslims, non-Believers, apostates, and heretics for religious reasons, but the metrics make it clear that virtually all such groups actually focus their efforts on seizing power within the largely Muslim countries where they operate.

The maps and metrics show that the primary casualties in a number of the countries shown in Part Two have been Sunni Muslims who have been attacked by violent extremists that claim to be Sunnis as well. In short, Daesh has been part of pattern of violence whose primary impact has been to sustain a "clash within a civilization," rather than threaten other faiths and outside states.
Underlying Causes that Will Shape at Least the Next Generation

These metrics, along with the metrics and analyses in Part One and Part Three, -- show this "clash" is likely to endure for at least the coming decade. Extremists have already done critical damage to economic and social development, and to governance and the rule of law. They also so far lack any credible ideological goals that could lead them to deal effectively with economic development if they succeeded in controlling a state.

At the same time, the metrics that will be include in Part Three make it clear that the broader causes of instability in the MENA region – like those in other largely Islamic regions and states – are so broad and so serious deep that extremism, terrorism, and civil conflict are likely to be endemic well beyond the coming decade. Even if one ignores religion, extremism will driven by failures in politics, governance, economics, and adapting to population dynamics that make "failed states" as much of threat to their own survival -- and their people's welfare -- as the extremist threat they fight.

Finally, the Metrics in Part Two warn that focusing on today's main non-state actors may ignore a large majority of the terrorist acts taking place in the world, largely Islamic states, and the region. Some data warn that focusing on organized extremist and terrorism groups like Daesh and Al Qaida ignores large areas of extremist violence.

The Strengths and Limits of Terrorism Metrics

The terrorism metrics in Part Two have been chosen because they do seem to be accurate enough to reflect broad trends, but this is more of a judgment call than the result of any evidence that the data bases and methodologies involved have anything approaching a statistically valid level of precision. The user should also be aware of several key limits to the data used in any analysis of terrorism and extremism:

Experts do not agree on the definition of "terrorism" or "extremism," and such designations are sometimes highly political or biased. Moreover, key data are often missing or so uncertain as to be useful. One example is the lack of any credible estimates of the number of total Daesh fighters overtime. This sometimes results in sharply contradictory estimates, and there current is no single active database that appears to be reliable.

The Department of Homeland Security in the U.S. government once attempted to provide a national database on terrorism. It abandoned this effort because of what it claimed were "resource limitations" but the real reason seems to have been it political controversy.

The START database on global terrorism used in this report was developed operated by the University of Maryland under contract to the State Department, accepted, and has been used by the U.S. State Department in its annual country reports on terrorism, but it is not official or based on U.S. intelligence sources. It is a media-driven data base rather than one that could take advantage of declassified intelligence efforts and direct government or or official inputs.
The START database, however, will not be updated. The START web site (https://www.start.umd.edu/gtd/) now states that, "For more than a decade, START has compiled and published the Global Terrorism Database (GTD) for use by scholars, analysts, journalists, security professionals, and policy makers. It has been our privilege to work closely with these user communities to continually improve the data and inform stakeholders.

"...Since 2012, the majority of the costs of collecting the GTD have been funded by the U.S. State Department, for the past year almost exclusively...Our contract with the State Department ended in May 2018 and, although we received only positive feedback from the Bureau of Counterterrorism and our 2018 data collection was well underway, we recently learned that we were not awarded a follow-on contract for base data collection...At the moment, the loss of the State Department funding means two things: First, we do not currently have funding to complete collection of 2018 data, nor are we able to publish data beyond 2017."

This means that there now will be no open source estimate of the patterns in global terrorism with even semi-official status, and it is unclear that the U.S. even has such a database at a classified level. Background discussion with U.S. and other experts in various countries also indicate that there is no consensus between allied governments or between major international groups over such data. There also is no clear pattern of support for the databases developed by given think tanks, contractors, or commercial vendors, and such data bases often sharply disagree.

**The Strengths and Limits of Terrorism Metrics**

The introduction to Part One made it clear that metrics can only provide useful insights into such an effort. They can only provide limited insights into the key trends into issues as complex as the probable aftermath of the breakup of the Daesh “caliphate” or pseudo-state, and the level of stability in the MENA region in the coming years. Metrics must be combined with explanatory narratives for their full meaning to be clear, and the sources and uncertainties in each metric need to be examined in detail the moment that analysis goes beyond using them as broad indicators and treats them as if they had any clear degree of precision.

The terrorism metrics that are shown in Part Two have been chosen because they still seem to be accurate enough to reflect broad trends, but this is more of a judgment call than the result of evidence that the data bases and methodologies in each metric have anything approaching a statistically valid level of precision. The user should also be aware of several key limits to the data used in any analysis of terrorism and extremism:

- Experts do not agree on the definition of "terrorism" or "extremism," and such designations are highly political and often biased.
• The Department of Homeland Security in the U.S. government once attempted to provide a national database on terrorism but abandoned the effort for what it claims were "resource limitation" but seem to have been political controversy. The START database on global terrorism used in this report was developed operated by the University of Maryland under contract to the State Department, accepted, and used by the U.S. State Department in its annual country reports on terrorism, but it is not official or based on U.S. intelligence sources. It is a media-driven data base.

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• There is no open source official estimate of the patterns in global terrorism, and it is unclear that the U.S. has any such database at a classified level. Background discussion with U.S. and other experts in various countries indicate that there is no consensus between allied governments or between major international groups over such data. There also is no clear pattern of support for the databases developed by given think tanks, contractors, or commercial vendors, and such data bases often sharply disagree.

• Major problems occur in official U.S. and virtually all other estimates of terrorism activity and lethality because of the difficulty in distinguishing between terrorism, insurgency, and civil war. The rise of the intensity in the fighting in countries like Libya, Syria, Iraq, Yemen, Somalia, Afghanistan, and many other cases in Africa and South Asia makes this a critical issue, and it has led to key anomalies like data for 2016 onwards that show a decline in global terrorism at times when fighting with extremists has produce major new peaks in total casualties.

• Open source databases generally claim to be based on media reports, and governmental reports when available. Several key Asian and Central Asian states -- such as China, Pakistan, and Myanmar -- do not provide credible reporting and severely limit the ability of their media to report. A careful examination of several open source databases will show the given countries are entirely omitted.
• No current database on terrorism attempts to include state terrorism. Some human rights reporting -- and the U.S. State Department annual human rights report -- provide erratic and unverified coverage of broad patterns of abuse, but no reliable data. It is clear from a wide range of casualty estimates and media coverage, however, that the Assad regime in Syria has the source of massive number of deliberate civilian killings and injured, and that the government of Myanmar has it similar history in dealing with its Muslims.

• Similarly, reporting on state efforts to counter terrorism and extremism reports in detail on many aspects of counterterrorism, but does not address the degree to which given governments, and internal security systems, repress and/or provoke terrorism and popular resistance.

Accordingly, the trends and data presented in each section of this report must be kept in careful perspective. There has been a vast new effort to fight terrorism since 9/11, but it has not been matched by developing and sustaining the totals necessary to analyze and assess it. The question of how to use the data is critical to any analysis. In the case of terrorism and extremism, the question as to whether the data are accurate enough to be usable is always at least as important.

The Contents of the Report

That said, there are many areas where there are data seem reliable enough to present a range of important indicators. The Table of Contents provides such metrics in the following areas:

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- DNI Summary of Other Threats of Instability and Violence in the MENA Region 54
Putting Islam’s Growing Strategic Importance in Perspective

The Number of Practicing Muslims -- and Islam’s Global Strategic Impact – is Growing Sharply.

But, Islam’s core values are forces for stability and development, and polls indicate that the vast majority of Muslims oppose extremism, terrorism, and violence.
The Number of Practicing Muslims -- and Islam’s Global Strategic Impact – is Growing Sharply

It is already clear from the rise of terrorism and extremism in the Middle East and North Africa, in Sub-Saharan Africa, Africa, in South Asia, in Central Asia, and East Asia that even the most successful efforts in Syria and Iraq can only deal with a limited part of the threat. It is also important to understand, however, that the growth of this threat does not reflect the values of the vast majority of Muslims and that Islam is emerging as steadily growing force in world affairs.

The Number of Practicing Muslims -- and Islam’s Global Strategic Impact – is Growing Sharply

The metrics in this section help put Islam in perspective. They draw upon work by the Pew Trust to show how rapidly the global population of Islam is growing – from 1.6 billon in 2010 to 2.76 billion in 2050 – a growth of 73%. This is a growth from 23.2% of the world’s population to an estimated 29.7%.

These trends illustrate the critical importance of working with Muslims and largely Islamic states to both meet the challenges of terrorism and extremism, and help create the patterns of unity, development, and security that will limit the future growth of extremism/terrorism, insurgency, and civil war.

But, Islam’s core values are forces for stability and development, and polls indicate that the vast majority of Muslims oppose extremism, terrorism, and violence

Metrics on other polls and studies show that Muslims generally see Sharia—or religious law and custom as key part of their values and daily life. They put less emphasis on the separation of church and state, and many see civil governance and the justice systems or driven by self-interest and corruption. This means that any effective effort at counterterrorism, and to build solid strategic partnerships, must recognize the fact that the mainstream of Islam has the same core values as Christianity, Judaism, and the world’s other great religions.

This core identify of values with the vast majority of Muslims is illustrated in remaining metrics in this section. There are significant uncertainties in such polling data, but it still seems clear that the vast majority of Muslims oppose any form of violent extremism and terrorism, and have the same day-to-day goals as their counterparts in the West, Asia, and the rest of the world.

Moreover, many of the metrics that follow warn that failed governance, authoritarianism, corruption, failure to deal fairly with all of a nation’s population, and barriers to economic development and job creation create a
“failed state” set of causes of instability and violence that both generate extremism and terrorism and will be a continuing cause of instability and civil war. In many cases, the regimes in the region as a much of a threat to their own peoples, and outside states, as the terrorists and extremists they fight.
The Rising Global Impact of Islam: 2010-2050

Number of people, 2010-2050, in billions

- Christians and Hindus rise by 35%
- Muslims rise by 73% or 1.6 billion

During the next four decades, Islam will grow faster than any other major world religion.

% of global population, 2010-2050

- Muslims will grow by 6.5% as a share of the global population.

Recent surveys show that most people in several countries with significant Muslim populations have an unfavorable view of ISIS, including virtually all respondents in Lebanon and 94% in Jordan.

Relatively small shares say they see ISIS favorably. In some countries, considerable portions of the population do not offer an opinion about ISIS, including a majority (62%) of Pakistanis.

Favorable views of ISIS are somewhat higher in Nigeria (14%) than most other nations. Among Nigerian Muslims, 20% say they see ISIS favorably (compared with 7% of Nigerian Christians). The Nigerian militant group Boko Haram, which has been conducting a terrorist campaign in the country for years, has sworn allegiance to ISIS.

More generally, Muslims mostly say that suicide bombings and other forms of violence against civilians in the name of Islam are rarely or never justified, including 92% in Indonesia and 91% in Iraq. In the United States, a 2011 survey found that 86% of Muslims say that such tactics are rarely or never justified. An additional 7% say suicide bombings are sometimes justified and 1% say they are often justified in these circumstances.

In a few countries, a quarter or more of Muslims say that these acts of violence are at least sometimes justified, including 40% in the Palestinian territories, 39% in Afghanistan, 29% in Egypt and 26% in Bangladesh.

In many cases, people in countries with large Muslim populations are as concerned as Western nations about the threat of Islamic extremism, and have become increasingly concerned in recent years. About two-thirds of people in Nigeria (68%) and Lebanon (67%) said earlier this year they are very concerned about Islamic extremism in their country, both up significantly since 2013.
“Is religion is an important part of your daily life?” – by Country (% responding ‘yes’)

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Source: Gallup 2015.
Note: “...” not available.

UNDP, Arab Human Development Report, 2016, UN, 2016, p. 35
MENA Views of Religion and Governance: 2017-2018

National Positive vs. Negative Arab Views of Daesh: 2015

Source: Doha Institute, 2015, Arab Human Development Report, 2016, UN, 2016, p. 38
Almost all respondents (98%) indicated that they were aware of the Islamic State of Iraq and the Levant (ISIL, also known as the “Islamic State of Iraq and Syria” and “the Islamic State”). An overwhelming majority (92%) of the Arab public has a negative view of ISIL, with 2% expressing a “positive” view, and 3% “positive to some extent.”

Crucially, in the minuscule group of favorable views of ISIL, answers were not correlated with religion: respondents who identified themselves as “Not religious” were just as likely to have favorable views of ISIL as those who identified as “Very religious.”

Similarly, no relationship could be shown between respondents’ opinions of ISIL and their views on the role of religion in the public sphere. In other words, public attitudes toward ISIL are defined by present-day political considerations and not motivated by religion.

To explore Arab public opinion about factors contributing to the emergence of ISIL, the Arab Opinion Index 2017/2018 included several new questions. When asked to explain the reasons for ISIL’s popularity among its support base, 13% of respondents stated that this was due to its “military accomplishments;” 16% attributed ISIL’s popularity to its claimed adherence to Islamic principles; 11% to the group’s willingness to confront the West; and 10% to the group’s ability to defend the Sunni Muslim community.

When asked to conjecture which factors might drive citizens of Arab countries to join ISIL, 42% said political instability in their home countries, 24% economic conditions, and 6% social circumstances such as inequality, marginalization, and social exclusion. A further 18% credited “brainwashing” and “propaganda,” while a final 6% described the chance to fight foreign powers and/or sectarian militias in Syria and Iraq as the motive for young Arabs to fight with ISIL.

When asked if the existence of ISIL was the result of internal factors endemic to the region or the result of foreign activity, 29% of respondents believed that the group’s existence resulted from the internal conflicts extant in the Middle East, compared to 59% who attributed it to the policies of foreign powers.

When presented with another two statements regarding the origins of ISIL, 42% of respondents were prepared to attribute the rise of ISIL to the religious extremism inherent in Middle Eastern societies while 38% attributed the rise of ISIL to the policies of Arab regimes. The Arab public offers a diverse set of remedies when asked to suggest the best means by which to combat ISIL. The five most common preferences for tackling ISIL and terrorist groups more broadly were military means (18%), ending foreign intervention in Arab countries (17%), resolving the Palestinian conflict (13%), supporting democratic transitions (12%), and solving economic issues (9%).

MENA Positive vs. Negative Arab Views of the U.S. and Key Foreign Threats: 2017-2018

Arab Youth perceptions in 2015: “What do you believe is the biggest obstacle facing the Middle East?”

A regional source of information is the Asda’a Burson-Marsteller Arab Youth Survey, which covered 3,500 youth aged 18–24 in 16 Arab countries (figure 8.7b).

UNDP, Arab Human Development Report, 2016, UN, 2016, p. 81; Asda’a 2015
MENA Youth perceptions in 2018: What do you believe have been the key challenges, and are now the key future challenges, facing the Middle East?

MENA Youth perceptions in 2018: Declining Support of the U.S.

“The Clash With A Civilization”
Extremism and Terrorism in Heavily Islamic States

Even a Small Minority is Highly Dangerous and Fellow Muslims Have Been the Vast Majority of Extremist Targets
Muslims Killing Fellow Muslims: “Clashes Within a Civilization”

While vast majority of Muslims reject extremism and terrorism as violating the core values of Islam, the fact remains that most violent extremism takes place in heavily Islamic states, or involves extremist groups that try to identify themselves as Islamic.” rise of Daesh in Syria and Iraq – and of similar extremism in other largely Islamic states. The share of extremist violence in largely Islamic countries, caused by movements that claim to be Islamic, and within South Asia and the MENA region has also steadily increased over the last two decades. There has been a particularly sharp rise since the U.S.-led invasion of Iraq 2003 and after political upheavals began in 2011.

The charts and maps that follow show that MENA region and South Asia still dominated the rise of terrorism through 2017 – the most recent year for which data are available. They also show why the dealing with the MENA region as a whole is critical to dealing with the global challenges of terrorism and extremism. But, it is critical to note that the vast majority of attacks, targets, and deaths occurred in Islamic states or regions, and that the data do not reflect a clash between civilizations, but rather a clash within one.

Most terrorism – and much of the related insurgencies and civil conflicts – are driven by Muslim extremists attacking fellow Muslims. To put these trends in further context:

- Religious extremism is a key factor motivating a small number of extremists, but the vast majority of terrorism in Islamic states occurs in the poorest and least developed, worst governed, most corrupt, and most ethnically/tribally/sectarian divided “failed states.”

- While such extremist movements claim religious motivation, most are clearly seeking political power.

- Extremist rhetoric from terrorist and violent groups that attack non-Muslims within Muslim and heavily Muslim states usually involves limited levels of activity. A far larger portion of effort by such extremist goes into actual attacks on other Muslims for having different practices, belonging to different sects, or being for being what extremists call heretics or those who are not real Muslims.

- Most actual terrorism in heavily Islamic Sunni states consists of Sunni attacks on fellow Sunnis, although Sunni vs. Shi’ite and other sectarian violence is sometimes a serious problem.

- Regional violence has many other causes. Tribalism and ethnic struggles have also been key sources of extremism and violence – especially between Arab and Kurd.

- Muslims are also victims in areas not shown in the following metrics -- particularly in China, India, and Myanmar, and to a lesser degree in the Philippines, and Thailand.

- The alienation of Muslims – and indoctrination of “lone wolves” in the West – is another source of terrorism. However, the numbers involved are generally negligible compared to those for terrorism in the Islamic world and are not major causes of violence and death in the West in comparison to the levels in the Islamic world.
Setting the Stage: The Global Patterns in Terrorism by Month: 2012-2017

## Setting the Stage: Nine of Ten Countries with the Most Terrorist Attacks/Deaths in 2016-2017 Were Islamic or Had Substantial Attacks and Deaths from Extremists Claiming to Be Islamic

<table>
<thead>
<tr>
<th>Country</th>
<th>Total Attacks 2017</th>
<th>Total Deaths* 2017</th>
<th>Deaths per Attack* 2017</th>
<th>Total Injured* 2017</th>
<th>Injured per Attack* 2017</th>
<th>Total Kidnapped/Hostages 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iraq</td>
<td>1951</td>
<td>4269</td>
<td>2.31</td>
<td>4077</td>
<td>2.21</td>
<td>1960</td>
</tr>
<tr>
<td>Afghanistan</td>
<td>1171</td>
<td>4578</td>
<td>4.22</td>
<td>5023</td>
<td>4.61</td>
<td>835</td>
</tr>
<tr>
<td>India</td>
<td>860</td>
<td>344</td>
<td>0.45</td>
<td>601</td>
<td>0.73</td>
<td>224</td>
</tr>
<tr>
<td>Pakistan</td>
<td>574</td>
<td>957</td>
<td>1.51</td>
<td>1827</td>
<td>3.28</td>
<td>106</td>
</tr>
<tr>
<td>Philippines</td>
<td>483</td>
<td>272</td>
<td>0.70</td>
<td>298</td>
<td>0.65</td>
<td>408</td>
</tr>
<tr>
<td>Nigeria</td>
<td>411</td>
<td>1832</td>
<td>4.04</td>
<td>852</td>
<td>2.64</td>
<td>245</td>
</tr>
<tr>
<td>Somalia</td>
<td>370</td>
<td>735</td>
<td>4.20</td>
<td>1093</td>
<td>3.25</td>
<td>286</td>
</tr>
<tr>
<td>Nepal</td>
<td>247</td>
<td>5</td>
<td>0.02</td>
<td>94</td>
<td>0.39</td>
<td>10</td>
</tr>
<tr>
<td>Egypt</td>
<td>169</td>
<td>293</td>
<td>4.04</td>
<td>481</td>
<td>3.03</td>
<td>37</td>
</tr>
<tr>
<td>Syria</td>
<td>141</td>
<td>2119</td>
<td>8.70</td>
<td>1055</td>
<td>9.42</td>
<td>267</td>
</tr>
<tr>
<td>Worldwide</td>
<td>8584</td>
<td>25722</td>
<td>2.30</td>
<td>19461</td>
<td>2.46</td>
<td>8937</td>
</tr>
</tbody>
</table>

* Includes perpetrators

Note: Some of the apparent reductions in terrorism in Iraq and Syria between 2016 and 2017 – like previous reductions after 2014, come from a shift to major counterinsurgency combat, and higher levels of state terrorism and attacks on civil populations. The break up of the Dash "state" may well lead to a more lasting reduction of all types of casualties, but the full patterns will not be clear until at least the end of 2019.

Worldwide Terrorist-Extremist Incidents by Region: 1970-2017 (Less State-Terrorism and Insurgencies)

Maximum Number of Terrorist Incidents by Region (Less Insurgencies and State Terrorism): 1970 - 2017

In 2013-2017 – the Peak Years of Daesh Terrorism –
There were 68,391 acts of terrorism in the world.
There were 27,430 acts of Terrorism in the MENA region
  • The MENA total was 40.1% of the world total.
  • 5,624 –or 20.5% – of the acts in the MENA region were attributed to Daesh/ISIL.

Source: Adapted from START Global Terrorism Data Base, https://www.start.umd.edu/gtd/search/Results.aspx?chart=regions&casualties_type=b&casualties_max=&start_yearonly=1970&end_yearonly=2017&dtp2=all&region=12,2,7,4,10,1,3,6,5,11,8; March 31, 2018

START – Shifts in Terrorist Incidents by Region:
(Less State Terrorism and Civil War/Counterinsurgency)

1970-2017
181,691 Incidents

2000-2017
111,855 Incidents

Adapted from START Global Terrorism Data Base,
https://www.start.umd.edu/gtd/search/Results.aspx?chart=regions&casualties_type=b&casualties_max=&dtp2=all; 3.8.18

4/29/2019
The MENA and South Asia Dominated Regional Levels of Terrorism in 2017

Source: Dr. Abdullah Toucan, “Terrorism Analysis,” SIRA-Strategic and International Risk Assessment, April 5, 2019, using the START database for 2017.

MENA Violent Incidents

South Asia Violent Incidents

MENA Casualties: Killed & Injured

South Asia Casualties: Killed & Injured

Adapted from START Global Terrorism Data Base, https://www.start.umd.edu/gtd/search/Results.aspx?chart=casualties&casualties_type=b&casualties_max=&start_yearonly=2000&end_yearonly=2017&dtp2=all&region=10; 3.8.18
Map of START Estimate of Terrorist Incidents in Heavily Islamic and Nearby Areas in 1970-2015
(Does not include State Terrorism or incidents relate to insurgencies)

Source: Excerpted from https://www.start.umd.edu/gtd/images/START_GlobalTerrorismDatabase_TerroristAttacksConcentrationIntensityMap_45Years.png
Terrorist Incidents in Muslim Countries or Highly Islamic Areas in ODNI Map of Violent Extremist Operating Areas Since 911

(Less State Terrorism and Civil War/Counterinsurgency)

74,882 – 67% of World Total of 111,041
The Clash within a Civilization: Rise of Terrorism in Heavily Islamic Regions 2010-2017

- 84,878 worldwide
- 71,664 Incidents in heavily Islamic regions
- Grew 3-4 times in 5 years (2010-2014)
  - if do not include insurgency
  - Only 6,875 or ~8% of worldwide were attributed to ISIL/ISIS/Daesh

Years: (between 2010 and 2017), All incidents regardless of doubt. Region: (South Asia; Central Asia; Middle East & North Africa; Sub-Saharan Africa) Source: START Data Base, http://www.start.umd.edu/gtd/.
Focusing on the Major Extremist/Terrorist Groups that Exist At Any Given time Mischaracterizes the Threat Dangerous as movements Al Qaida, Daesh, and the Taliban Have Been, They Have Only Been Responsible for a Limited Portion of the Attacks and Killings
Focusing on the Major Extremist/Terrorist Groups in Given Countries, or That Exist At Any Given time, Mischaracterizes the Threat

The U.S. intelligence community still considers ISIS/Daesh and Al Qa’ida to be serious terrorist threats. Danial Coats, the Director of National Intelligence, described them as follows in the written statement on the Worldwide Threat Assessment that he provided to Congress on January 29, 2019,

**ISIS**

*ISIS still commands thousands of fighters in Iraq and Syria, and it maintains eight branches, more than a dozen networks, and thousands of dispersed supporters around the world, despite significant leadership and territorial losses. The group will exploit any reduction in CT pressure to strengthen its clandestine presence and accelerate rebuilding key capabilities, such as media production and external operations. ISIS very likely will continue to pursue external attacks from Iraq and Syria against regional and Western adversaries, including the United States.*

- ISIS is perpetrating attacks in Iraq and Syria to undermine stabilization efforts and retaliate against its enemies, exploiting sectarian tensions in both countries. ISIS probably realizes that controlling new territory is not sustainable in the near term. We assess that ISIS will seek to exploit Sunni grievances, societal instability, and stretched security forces to regain territory in Iraq and Syria in the long term.

**Al-Qa’ida**

*Al-Qa’ida senior leaders are strengthening the network’s global command structure and continuing to encourage attacks against the West, including the United States, although most al-Qa’ida affiliates’ attacks to date have been small scale and limited to their regional areas. We expect that al-Qa’ida’s global network will remain a CT challenge for the United States and its allies during the next year.*

- Al-Qa’ida media continues to call for attacks against the United States, including in statements from regional al-Qa’ida leaders, reflecting the network’s enduring efforts to pursue or inspire attacks in the West.
- All al-Qa’ida affiliates are involved in insurgencies and maintain safe havens, resources, and the intent to strike local and regional US interests in Africa, the Middle East, and South Asia.
- Al-Qa’ida affiliates in East and North Africa, the Sahel, and Yemen remain the largest and most capable terrorist groups in their regions. All have maintained a high pace of operations during the past year, despite setbacks in Yemen, and some have expanded their areas of influence. Al-Qa’ida elements in Syria, meanwhile, continue to undermine efforts to resolve that conflict, while the network’s affiliate in South Asia provides support to the Taliban.

Director Coats also, however, flagged a wide range of other terrorist groups. They included the Lebanese Hezbollah, “Shia actors,” and “home grown” or local terrorist and terrorist groups – as well as violent ethno-supremacist and ultranationalist groups in Europe. He made it all too clear that the threat of terrorism was a global one and one that extended well beyond ISIS and Al Qa’ida.
The metrics in this section strongly reinforce this point. They show all too clearly that many of the patterns that emerged in Part One of this survey that compared the number of Daesh and Al Qaeda attacks to the total number of attacks in Syria and Iraq reemerge when the impact of key organized extremist movements is compared relative to the total level of terrorism on a regional and global bases.

If anything, there are problems in open source data on terrorism that severely restrict the ability to show the sheer scale of other terrorist and extremist activities. It is impossible to get a realistic picture of the relative side of the threat posed by major terrorist groups like ISIS, Al Qaida, the Taliban, Boko Harum, and Al Shabaab using the START or other data bases that total exclude wartime violence and terrorism related to combat operations.

This reporting on terrorist incidents, casualties, and attack patterns does ignore state terrorism. Current “terrorism” data bases exclude acts of state terrorism by countries like the Assad regime and Iran. As noted earlier, the Assad regime alone has probably killed more civilians in Syria since 2011 than all non-state terrorist groups in the world combined.

At the same time, the broad trends in the START data still make it clear that leading non-state terrorist groups accounted for a less than a third of terrorist incidents – although they did account for half the deaths – 2016-2017. Accordingly, even the total defeat of such movements would still leave a massive mix of terrorist and extremist threats. Major movements like Daesh, Al Qaida, and the Taliban did not dominated the global patterns of terrorism – an more than they did in Syria and Iraq.

Eliminating movements like Daesh (ISIL/ISIS), Al Qaida, and the Taliban would have a major impact on several key movements but would not begin to defeat terrorism in any general sense. Major movements like Daesh, Al Qaida, and the Taliban did not dominated the global patterns of terrorism – an more than they did in Syria and Iraq.

START estimates that:

- ISIS and its affiliates accounted for only 5.3% of the total global terrorist incidents between 2000 and 2017, and 12.1% of the attacks and 26.9% of the deaths in 2017.

- Al Qaida and its direct affiliates accounted for 2,120 of the 111,855 incidents in 2000-2017 (1.9%), and 55 of the 10,900 incidents in 2017 (0.5%).

- The Taliban accounted for 7,557 of the 111,855 incidents in 2000-2017 (6.8%), and 8.3% of the attacks and 18.6 of the deaths in 2017.

Defeating key movements like ISIS, Al Qaida, and the Taliban is a critical part of any strategy to defeat extremism and terrorism, but it will scarcely put an end to terrorism. This requires efforts to address the broader threat, and the causes of extremism, terrorism, and civil conflict.
ODNI Map of Violent Extremist Operating Areas in 2017
ODNI Map of Violent Extremist Operating Areas in 2018

Al-Qa‘ida and ISIS as of 2018

Director of National Intelligence Director Daniel R. Coats, STATEMENT FOR THE RECORD, WORLDWIDE THREAT ASSESSMENT of the US INTELLIGENCE COMMUNITY, January 29, 2019, ODNI, p. 11
Setting the Stage: Four of Five Leading Non-State Terrorist Groups with the Most Terrorist Attacks/Death in 2016-2017 Were Extremist Groups Claiming to be Islamic

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Islamic State of Iraq and Syria (ISIS)**</td>
<td>857</td>
<td>1153</td>
<td>4350</td>
<td>9180</td>
<td>3262</td>
<td>7786</td>
<td>2180</td>
<td>8391</td>
</tr>
<tr>
<td>Taliban</td>
<td>703</td>
<td>851</td>
<td>3654</td>
<td>3620</td>
<td>3205</td>
<td>3572</td>
<td>705</td>
<td>1501</td>
</tr>
<tr>
<td>Al-Shabaab</td>
<td>353</td>
<td>342</td>
<td>1464</td>
<td>736</td>
<td>1049</td>
<td>927</td>
<td>316</td>
<td>393</td>
</tr>
<tr>
<td>Maoists/Communist Party of India - Maoist (CPI-Maoist)</td>
<td>295</td>
<td>338</td>
<td>206</td>
<td>177</td>
<td>212</td>
<td>141</td>
<td>125</td>
<td>171</td>
</tr>
<tr>
<td>Boko Haram/ISIS-West Africa</td>
<td>276</td>
<td>200</td>
<td>1287</td>
<td>1090</td>
<td>949</td>
<td>1121</td>
<td>235</td>
<td>232</td>
</tr>
</tbody>
</table>

* Includes perpetrators
** Excludes attacks attributed to branches of ISIS or ISIS-inspired individuals

- All five leading perpetrator groups accounted for 2,484 attacks in 2017, or 29% of total.
- “Islamic” extremist groups accounted for 2,184, or 25%.
- The five groups accounted for 10,961 deaths, or 58% of the total.
- “Islamic” extremist groups accounted for 10,755, or 57%.

Worldwide Terrorism: ISIL, Al Qaida
Shares of Total Incidents: 2000-2017

Total: 111,855 Incidents

ISIL: 5,894 Incidents = 5.3%

Al Qaida: 2,120 Incidents = 1.9%

Taliban: 7,557 Incidents = 6.8%

Note: (Islamic State in Bangladesh; Islamic State in Egypt; Islamic State in the Greater Sahara (ISGS); Islamic State of Iraq (ISI); Islamic State of Iraq and the Levant (ISIL)). Al Qaida includes: (Al-Qaida; Al-Qaida Kurdish Battalions (AQ-K); Al-Qaida Kurdish Battalions (AQKB); Al-Qaida Network for Southwestern Khulna Division; Al-Qaida Organization for Jihad in Sweden; Al-Qaida in Iraq; Al-Qaida in Lebanon; Al-Qaida in Saudi Arabia; Al-Qaida in Yemen; Al-Qaida in the Arabian Peninsula (AQAP); Al-Qaida in the Indian Subcontinent; Al-Qaida in the Islamic Maghreb (AQIM)

## Worldwide Terrorism: Taliban, ISIL, and Al Qaida as % of Total Attacks and Deaths in 2017

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>ISIL</th>
<th>Al Qaida</th>
<th>Taliban</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deaths</td>
<td>26,445</td>
<td>7,120</td>
<td>Not in Top 15</td>
<td>4,925</td>
</tr>
<tr>
<td>% of Total</td>
<td>-</td>
<td>26.9%</td>
<td>N/A</td>
<td>18.6%</td>
</tr>
<tr>
<td>Attacks</td>
<td>10,900</td>
<td>1,321</td>
<td>Not in Top 15</td>
<td>907</td>
</tr>
<tr>
<td>% of Total</td>
<td>-</td>
<td>12.1%</td>
<td>N/A</td>
<td>8.3%</td>
</tr>
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</table>

Extremist Cadres Can be Small and Still Succeed:
Foreign Fighters are Negligible Part of Population Base: 5/2015

Foreign fighters in Syria and Iraq

<table>
<thead>
<tr>
<th>Country</th>
<th>Per million population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tunisia</td>
<td>272</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>86</td>
</tr>
<tr>
<td>Russia</td>
<td>10</td>
</tr>
<tr>
<td>Jordan</td>
<td>189</td>
</tr>
<tr>
<td>Morocco</td>
<td>45</td>
</tr>
<tr>
<td>France</td>
<td>18</td>
</tr>
<tr>
<td>Lebanon</td>
<td>155</td>
</tr>
<tr>
<td>Germany</td>
<td>8</td>
</tr>
<tr>
<td>UK</td>
<td>10</td>
</tr>
<tr>
<td>Libya</td>
<td>97</td>
</tr>
<tr>
<td>Turkey</td>
<td>7</td>
</tr>
<tr>
<td>Pakistan</td>
<td>2</td>
</tr>
<tr>
<td>Uzbekistan</td>
<td>17</td>
</tr>
</tbody>
</table>

Note: Upper estimates used. Countries with fewer than 500 fighters not included
Source: ICSR, CIA World Factbook

Scoping the Broader Trends in Extremism and Terrorism in the MENA Region
Scoping the Trends in Extremism and Terrorism in the MENA Region

Once again, there are limits in the data that limit the value of such comparisons. It is impossible to get a realistic picture of the threat posed by ISIS, Al Qaida, and the Taliban using the START or other data bases that total exclude wartime violence and terrorism related to combat operations. Current reporting on terrorist incidents, casualties, and attack patterns also ignores state terrorism. Current “terrorism” data bases exclude acts of state terrorism by countries like the Assad regime and Iran. As noted earlier, the Assad regime alone has probably killed more civilians in Syria since 2011 than all non-state terrorist groups in the world combined.

At the same time, the metrics in this section both put the level of extremist and terrorist violence in further perspective, and illustrate several additional points.

• One is that the MENA region has a long history of civil instability and violence. The current wave of terrorism and civil conflict has many historical precedents. The Arab Development Report for 2016 also highlights the fact that the MENA has a broad range of violence that goes beyond terrorism and extremism.

• The maps and data on this violence show that the patterns are more national than regional or cultural, Such violence has long been heavily concentrated in the Levant and Iraq and Yemen.

• The histograms that show a post 2014 leveling or reduction in the levels of terrorism must be approached with caution. The number of related casualties and violence from insurgencies and civil conflicts rose sharply, but is not counted as terrorism.

• There does not seem to be a major includes in the lethality of terrorist attacks, and there does not seem to be a consistent recent set of shifts in targets, methods of attacks, or weapons used.

• The number of “volunteers” may seem high, but is a tiny percentage of national populations.

Once key caution about these data is that a close examination of the patterns of in national terrorism warns that successful repression can sometimes achieve apparent stability, but often does so at the cost of more serious terrorism arising over time, and that the eventual implosion or collapse of authoritarian or repression regimes often leads to more intense civil conflicts, and the rise of violent or extremist movements instead of more peaceful political factions.

In most cases, the eventual successful transformation of a terrorist movement to a counterinsurgency and then to actual political rule leads to one of three cases: the success turns into failure because the movement adopts policies too unrealistic to allow it to survive, it transforms into an authoritarian and repressive rule regardless of its original ideology, or it gradually (and often covertly) transforms to adopt at least the economic policies that allow it to succeed in providing at least minimally acceptable living standards and conditions. These are important issues given the lack of realistic economic and governance policies advocated by some extremist groups.
MENA Before Islamic Extremism:
Dysfunctional & Divided, Authoritarianism and Civil War

- **Turkish Caliphate:** 1362-1875, 1876-1914 Jihad, 1918-1923
- **Oman:** Dhofar rebellion 1962-1975
- **Libya:** Italy 1911-1947, King 1951-1969, Qaddafi 1969-2011, civil war 2011-present
Conflict and Extremism: Arabs are 5.2% of Global Population, But...

Map of START Estimate of Attacks in or Near the MENA Area in 1975-2015

Source: Excerpted from https://www.start.umd.edu/gtd/images/START_GlobalTerrorismDatabase_TerroristAttacksConcentrationIntensityMap_45Years.png
Map of START Estimate of Attacks in or Near the MENA Area in 2017

Map of START Estimate of Attacks in or Near the Levant and Gulf Areas in 2017

IHS Jane’s Global Attack Index Assessment of Terrorism in the MENA Region

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>18</td>
<td>14</td>
<td>9</td>
<td>14</td>
<td>nd</td>
</tr>
<tr>
<td>Bahrain</td>
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<tr>
<td>Egypt</td>
<td>166</td>
<td>26</td>
<td>700</td>
<td>28</td>
<td>nd</td>
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<tr>
<td>Iran</td>
<td>21</td>
<td>22</td>
<td>47</td>
<td>68</td>
<td>nd</td>
</tr>
<tr>
<td>Iraq</td>
<td>2,164</td>
<td>1,480</td>
<td>3,378</td>
<td>1,118</td>
<td>Daesh/ISIS</td>
</tr>
<tr>
<td>Israel</td>
<td>55</td>
<td>136</td>
<td>10</td>
<td>3</td>
<td>nd</td>
</tr>
<tr>
<td>Jordan</td>
<td>6</td>
<td>4</td>
<td>0</td>
<td>3</td>
<td>nd</td>
</tr>
<tr>
<td>Kuwait</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
</tr>
<tr>
<td>Lebanon</td>
<td>63</td>
<td>4</td>
<td>28</td>
<td>0</td>
<td>nd</td>
</tr>
<tr>
<td>Morocco</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
</tr>
<tr>
<td>Libya</td>
<td>414</td>
<td>150</td>
<td>606</td>
<td>217</td>
<td>Daesh/ISIS</td>
</tr>
<tr>
<td>Oman</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
</tr>
<tr>
<td>Qatar</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
<td>nd</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>93</td>
<td>92</td>
<td>51</td>
<td>33</td>
<td>Ansar Allah</td>
</tr>
<tr>
<td>Syria</td>
<td>8,440</td>
<td>3,073</td>
<td>3,641</td>
<td>2,012</td>
<td>Daesh, Qiwaat Suriyya al-Dimogratiiyya (QSD), Hayat Tahir al-Sham</td>
</tr>
<tr>
<td>Yemen</td>
<td>1,326</td>
<td>1,192</td>
<td>1,092</td>
<td>8,083</td>
<td>Ansar Allah</td>
</tr>
<tr>
<td>West Bank/Gaza</td>
<td>119</td>
<td>115</td>
<td>14</td>
<td>12</td>
<td>nd</td>
</tr>
</tbody>
</table>

nd = No Data provided
The Rise of Terrorism in the MENA Region Since the “Arab Spring”: Number of Incidents in 2010-2017

- 32,965 Incidents
- 38% of Global Total of 86,720
- 52% of largely Islamic nations total of 62,864*
- Only 25% attributed to Daesh and Al Qaida
- 20% to ISIS/Daesh

**Years:** (between 2010 and 2017), All incidents regardless of doubt. Does not include acts of state terrorism. **Region:** START definition of Middle East & North Africa plus author’s estimate for Oman. Largely Islamic countries include Afghanistan; Algeria; Azerbaijan; Bahrain; Djibouti; Egypt; Eritrea; Indonesia; Iran; Iraq; Israel; Jordan; Kazakhstan; Kuwait; Kyrgyzstan; Lebanon; Libya; Malawi; Malaysia; Mali; Mauritania; Morocco; Niger; Nigeria; Pakistan; West Bank and Gaza Strip; Qatar; Saudi Arabia; Somalia; Sudan; Syria; Tajikistan; Tunisia; Turkey; Turkmenistan; United Arab Emirates; Uzbekistan; Yemen; North Yemen; South Yemen)

Source: START Data Base, [http://www.start.umd.edu/gtd/](http://www.start.umd.edu/gtd/)
Lethality of Terrorism in the MENA Region Since the Rise of Daesh: 2013-2017

Range of Killed and Wounded in 27,423 Incidents in MENA During 2013-2017

Range of Killed in 15,636 Incidents With Fatalities, out of total of 27,423

Note: No clear historical patterns of change in levels of lethality emerged over the 2013-2017 period because cannot separate clearly between terrorism and insurgency. Does not include state terrorism

Years: (between 2010 and 2017), All incidents regardless of doubt. Region: (Middle East & North Africa)
Character of Terrorism in the MENA Region

Weapons Type Used in Total of 27,423 Incidents

Attacker Type Used in Total of 27,423 Incidents

Target Type in Total of 27,423 Incidents

Note: No clear historical patterns of change in mix of weapons, targets, and attacks emerged over the 2013-2017 period, partly because cannot clearly separate terrorism from insurgency battles. Does not include state terrorism.

Years: (between 2010 and 2017), All incidents regardless of doubt. Region: (Middle East & North Africa)
US Director of National Intelligence (DNI) Assessment of Other Threats in the MENA Region in the MENA Region in 2019
Other Threats in the MENA Region

It is important to stress that extremism is only one source of violence and terrorism in the MENA region, and that terrorism is only a relatively small part of even extremist violence. Civil war and insurgency dominate the patterns of violence and the human cost of war, and a massive arms race is taking place in the Gulf region that could leave to a devastating conflict. Ongoing civil wars are occurring in Libya, Syria, and Yemen, and it is unclear that Iraq will not see another cycle of sectarian and ethnic conflict.

State – as distinguished from non-state – violence, terrorism, and warfighting remain major threats in Syria, Libya, Yemen, and other regional states. The Assad regime in Syria represents a particularly serious case of state terrorism where the state has moved from repression to forms of war fighting involving deliberate chemical warfare, barrel bombing, artillery attacks, and other military attacks on civilians, medical facilities, and food supplies. While all regional casualty estimates are uncertain, the actions of the Assad regime may well have killed more civilians since 2001 than all non-state terrorism in the MENA region combined.

The U.S. Director of National Intelligence provided a broad assessment of the overall mix of non-terrorist threats in his annual Worldwide Threat Assessment for Congress in early 2019 that warns of the sheer scale of instability in the region. Part Three of this survey goes further, and provides a detailed survey of the far broader range of key structural trends that may led to regional instability and violence for at least the next decade.
DNI Summary of Other Threats in the MENA Region

Political turmoil, economic fragility, and civil and proxy wars are likely to characterize the Middle East and North Africa in the coming year, as the region undergoes a realignment of the balance of regional power, wealth and resource management, and the relationships among governments, nonstate political groups, and wider populations.

Iran

Iran’s regional ambitions and improved military capabilities almost certainly will threaten US interests in the coming year, driven by Tehran’s perception of increasing US, Saudi, and Israeli hostility, as well as continuing border insecurity, and the influence of hardliners.

Iran’s Objectives in Iraq, Syria, and Yemen

We assess that Iran will attempt to translate battlefield gains in Iraq and Syria into long-term political, security, social, and economic influence while continuing to press Saudi Arabia and the UAE by supporting the Houthis in Yemen.

In Iraq, Iran-supported Popular Mobilization Committee-affiliated Shia militias remain the primary threat to US personnel, and we expect that threat to increase as the threat ISIS poses to the militias recedes, Iraqi Government formation concludes, some Iran-backed groups call for the United States to withdraw, and tension between Iran and the United States grows. We continue to watch for signs that the regime might direct its proxies and partners in Iraq to attack US interests.

Iran’s efforts to consolidate its influence in Syria and arm Hizballah have prompted Israeli airstrikes as recently as January 2019 against Iranian positions within Syria and underscore our growing concern about the long-term trajectory of Iranian influence in the region and the risk that conflict will escalate.

- Iran’s retaliatory missile and UAV strikes on ISIS targets in Syria following the attack on an Iranian military parade in Ahvaz in September were most likely intended to send a message to potential adversaries, showing Tehran’s resolve to retaliate when attacked and demonstrating Iran’s improving military capabilities and ability to project force.

In Yemen, Iran’s support to the Houthis, including supplying ballistic missiles, risks escalating the conflict and poses a serious threat to US partners and interests in the region. Iran continues to provide support that enables Houthi attacks against shipping near the Bab el Mandeb Strait and land-based targets deep inside Saudi Arabia and the UAE, using ballistic missiles and UAVs.

Domestic Politics

Regime hardliners will be more emboldened to challenge rival centrists by undermining their domestic reform efforts and pushing a more confrontational posture toward the United States and its allies. Centrist President Hasan Ruhani has garnered praise from hardliners with his more hostile posture toward Washington but will still struggle to address ongoing popular discontent.
Nationwide protests, mostly focused on economic grievances, have continued to draw attention to the need for major economic reforms and unmet expectations for most Iranians. We expect more unrest in the months ahead, although the protests are likely to remain uncoordinated and lacking central leadership or broad support from major ethnic and political groups. We assess that Tehran is prepared to take more aggressive security measures in response to renewed unrest while preferring to use nonlethal force.

• Ruhani’s ability to reform the economy remains limited, given pervasive corruption, a weak banking sector, and a business climate that discourages foreign investment and trade.

**Military Modernization and Behavior**

*Iran will continue to develop military capabilities that threaten US forces and US allies in the region. It also may increase harassment of US and allied warships and merchant vessels in the Persian Gulf, Strait of Hormuz, and Gulf of Oman.*

• Iran continues to develop, improve, and field a range of military capabilities that enable it to target US and allied military assets in the region and disrupt traffic through the Strait of Hormuz. These systems include ballistic missiles, unmanned explosive boats, naval mines, submarines and advanced torpedoes, armed and attack UAVs, antiship and land-attack cruise missiles, antiship ballistic missiles, and air defenses. Iran has the largest ballistic missile force in the Middle East and can strike targets as far as 2,000 kilometers from Iran’s borders. Russia’s delivery of the SA-20c SAM system in 2016 provided Iran with its most advanced long-range air defense system. Iran is also domestically producing medium-range SAM systems and developing a long-range SAM.

• In September 2018, Iran struck Kurdish groups in Iraq and ISIS in Syria with ballistic missiles in response to attacks inside Iran, demonstrating the increasing precision of Iran’s missiles, as well as Iran’s ability to use UAVs in conjunction with ballistic missiles.

We assess that unprofessional interactions conducted by the Iranian Islamic Revolutionary Guards Corps (IRGC) Navy against US ships in the Persian Gulf, which have been less frequent during the past year, could resume should Iran seek to project an image of strength in response to US pressure. Most IRGC interactions with US ships are professional, but in recent years the IRGC Navy has challenged US ships in the Persian Gulf and flown UAVs close to US aircraft carriers during flight operations. Moreover, Iranian leaders since July have threatened to close the Strait of Hormuz in response to US sanctions targeting Iranian oil exports.

**Saudi Arabia**

Saudi Crown Prince Muhammad bin Salman continues to control the key levers of power in Saudi Arabia, but his simultaneous push for economic and social reform creates potential flashpoints for internal opposition. Saudi public support for the royal family appears to remain high, even in the wake of the murder of journalist Jamal Khashoggi. Moreover, we assess that the Saudi Government remains well positioned to stifle small-scale protests and discontent; it has preemptively arrested or forcibly detained clerics, business leaders, and civil society activists who could be nodes for discontent.

The Kingdom will seek to make progress on its Vision 2030 plan of structural reforms, spearheaded by Crown Prince Muhammad bin Salman and aimed at reducing dependence on oil revenues. The plan’s initiatives include reducing subsidies, building a robust private sector, and instituting taxes, all of which upend the longstanding social contract. Some of these reforms have aggravated segments of the Saudi public, including government workers religious conservatives.
Iraq

Iraq is facing an increasingly disenchanted public. The underlying political and economic factors that facilitated the rise of ISIS persist, and Iraqi Shia militias’ attempts to further entrench their role in the state increase the threat to US personnel.

- The Iraqi Government will confront a high level of societal discontent, institutional weakness, and deep-seated divisions, as well as protests over a lack of services, high unemployment, and political corruption. Baghdad lacks the resources or institutional capacity to address longstanding economic development and basic services challenges, and it faces reconstruction costs in the aftermath of the counter-ISIS campaign, estimated by the World Bank at $88 billion. Iraq’s Kurdistan region is still dealing with political discontent over economic and territorial losses to Baghdad last year.

- ISIS remains a terrorist and insurgent threat and will seek to exploit Sunni grievances with Baghdad and societal instability to eventually regain Iraqi territory against Iraqi security forces that are stretched thin.

Iraqi Shia militants conducted several attacks against US diplomatic facilities in Iraq in September and December 2018. Militias—some of which are also part of the Iraqi Government Popular Mobilization Committee—plan to use newfound political power gained through positions in the new government to reduce or remove the US military presence while competing with the Iraqi security forces for state resources.

Syria

As the Syrian regime consolidates control, the country is likely to experience continued violence. We expect the regime to focus on taking control of the remaining rebel-held territory and reestablishing control of eastern Syria, consolidating gains, rebuilding regime-loyal areas, and increasing its diplomatic ties through 2019 while seeking to avoid conflicts with Israel and Turkey. Russia and Iran probably will attempt to further entrench themselves in Syria.

The regime’s momentum, combined with continued support from Russia and Iran, almost certainly has given Syrian President Bashar al-Asad little incentive to make anything more than token concessions to the opposition or to adhere to UN resolutions on constitutional changes that Asad perceives would hurt his regime.

Opposition groups, which rely on Turkey for continued support, probably are not capable of repelling a regime military operation to retake Idlib Province but may retain enough resources to foment a low-level insurgency in areas the regime recaptures in the coming year.

The regime probably will focus increasingly on reasserting control over Kurdish-held areas. Damascus probably will seek to exploit any security vacuum and Turkish pressure on the Kurds in order to strike a favorable deal with the Kurds while also seeking to limit Turkey’s presence and influence in Syria and reclaim territory in northwestern Syria held by Turkey.

The regime is unlikely to immediately focus on clearing ISIS from remote areas that do not threaten key military, economic, and transportation infrastructure, judging from previous regime counter-ISIS efforts.

Damage to the Syrian economy and its infrastructure has reached almost $400 billion, according to UN estimates, and reconstruction could take at least a decade to complete. The effects of the Syrian civil war will continue to be felt by its neighbors, with approximately 5.6 million Syrian refugees registered in neighboring countries as of October 2018. Russia and Iran will try to secure rights to postwar contracts to rebuild Syria’s battered infrastructure and industry in exchange for sustained military and economic support.
Yemen

The Houthi movement in Yemen and the Saudi-led coalition, which supports the Yemeni Government, remain far apart in negotiating an end to the conflict, and neither side seems prepared for the kind of compromise needed to end the fighting, suggesting the humanitarian crisis will continue. The coalition, buoyed by military gains in the past year, seems fixed on a Houthi withdrawal from Sanaa and significant Houthi disarmament. These terms remain unacceptable to the Houthis, who believe they can use external attacks to threaten Saudi Arabia and the UAE, undercut Saudi and UAE public support for the conflict, and draw international condemnation of the coalition’s intervention in Yemen.

The humanitarian impacts of the conflict in Yemen—including, famine, disease, and internal displacement—will be acute in 2019 and could easily worsen if the coalition cuts key supply lines to Sanaa. The fighting has left more than 22 million people, or approximately 75 percent of the population, in need of assistance, with millions of people at severe risk of famine by the UN definition—numbers that are likely to rise quickly if disruptions to aid access continue.

Libya

Libya is poised to remain unstable into 2019, with poor prospects for reconciliation between competing factions and ongoing threats from ISIS-Libya. Militias aligned with Libya’s key political factions fight intermittently for influence and control of resources, resulting in a high-risk security environment that threatens both rival governments and Western interests. The UN-backed, Tripoli-based Government of National Accord (GNA) and eastern-based House of Representatives (House) remain unable to agree on key posts and government structure. ISIS-Libya’s capabilities have been degraded, but it is still capable of conducting attacks on local and Western targets in Libya and possibly elsewhere in the region.
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.