

## IISS Military Balance 2012

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The publication of this year's Military Balance comes at a poignant time, as we mourn the loss of 6 members of Britain's armed forces in Afghanistan, whose eulogies we will publish later today: A reminder of the human cost of conflict. The International Institute for Strategic Studies (IISS), publishers of the Military Balance do not claim that it predicts the outcome of conflict, or its likelihood; all they can do is record developments.

The dominant development over the last 12 months was the Arab Spring, with its differing manifestations from Tunisia to the bloody events in Libya. More recent developments in Syria and tensions in the Gulf and Iran remind us that this region is still in ferment. It would be a very brave analyst who would predict the way things will play out here. And then there is Afghanistan; this too is symptomatic of a wider regional dynamic which involves other powers and is still not yet quite fixed. NATO's exit strategy, driven by US political calculations, is beginning to look questionable. Policy makers believe that all will be well by the end of 2014 for ISAF to leave. Or at least good enough.

The main story of the previous 12 months has been the relative shifts in the level of defence spending between the USA, Europe and Asia. Following the 2008 financial crisis, levels of expenditure in the west have declined. This has resulted in a convergence of spending between Asia and the West. IISS notes that while per capita spending levels in Asia remain significantly lower than those in Europe, on the current trend Asian defence spending is likely to exceed that of Europe, in nominal terms, in 2012. An eclipse or an occlusion?

Asia seems to be the key to many possible developments in the next 12 months. With Afghanistan continuing to be a cockpit of turmoil in North West Asia, the South China Sea is another sphere of uncertainty. A change of regime in China coming just after a change of regime in North Korea could well alter the dynamic in this region. Rivalries might evolve into tension. The US has begun to pivot its main strategic effort towards the Pacific and Asia. India is also beginning to develop its armed forces and its defence industries to demonstrate its intention of being a player on the world stage.

While the US undertakes a strategic re-alignment and also cuts its level of defence expenditure, the efforts of Europe begin to look increasingly weak. As IISS notes; between 2008 and 2010 there have been reductions in defence spending in 16 European member states. In a significant proportion of these, real terms declines have exceeded 10%. Every member of NATO has been reducing defence expenditure, on the premise that their membership of the Alliance will guarantee their safety. This may be true but the cumulative effect of these cuts was very evident in the Libyan campaign. European gaps in capability included tanker aircraft, targeting and surveillance assets which were furnished by the US. There was also a noted shortage of

precision guided munitions; something which would have become a real problem had the campaign persisted much longer.

Given the propensity of events to surprise policy makers the publication of this assessment is useful. It reminds us of the areas of tension that have been forgotten by the media and it serves as a useful guide to those whose job is to try to predict the future outcome of the events which are playing out today. For the first time the IISS notes cyber capability in the order of battle of each country's armoury. Perhaps a portent of things to come. Our study of history tells us that events don't just happen, they unfold. A good understanding of where we are and how we got here helps us to see where we are going a bit better.