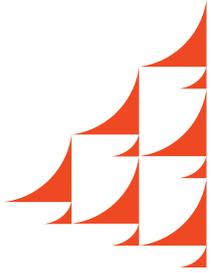


The Arab Gulf States
Institute in Washington
Building bridges of understanding



Gulf Security in a Multipolar World: Power Competition, Diversified Cooperation

Emma Soubrier



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About the Author

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Executive Summary

The Gulf region has long been considered a “Western lake” – formally British with the colonial presence of the United Kingdom until the early 1970s, and less formally American given the continued military footprint of the United States, starting with the Naval Support Activity Bahrain. But lately the international relations of the Gulf countries increasingly have been characterized by a diversification of partnerships, including in a field that has historically been deemed the preserve of the United States and European allies: arms trade, and defense and security cooperation. What is the impetus for these new trends; what currents do they point to inside and outside the region; and are these dynamics likely to lead to a deep reshaping of Gulf security, with its center of gravity shifting away from traditional friends and guardians?

Giving an overview of evolving military cooperation and arms transfers between three Gulf Arab states (Saudi Arabia, the United Arab Emirates, and Qatar) and emerging outside powers, this paper evaluates the relative weight of these new partnerships. Additionally, it argues that the dynamics of these new partnerships point to changing underlying power strategies of the Gulf states. Traditional powers involved in the region should take this multipolarization of Gulf security into account to build new cooperation schemes.

Introduction

In the past decade, there has been a deep reshaping of the international relations of the Gulf states as a result of the evolution of both the way outside powers engage the region and the way regional actors perceive and project their own interests and role in the Middle East and globally. In particular, Gulf Arab states are advancing new defense and security cooperation schemes with emerging or returning global powers, such as the BRICS countries (Brazil, Russia, India, China, and South Africa), as well as countries closer to home, such as Egypt and Turkey. This has been spurred by the specter of U.S. disengagement from the region – a perception that has been bolstered by U.S. officials repeatedly stating their intention to get out of the Middle East¹ even if this has not materialized,² and does not seem likely or desirable³ in the near future – and a new or renewed interest on the part of these outside powers to exert more influence in the region.

This is also part of power or empowerment strategies of Gulf Arab countries themselves. By diversifying partnerships, Gulf leaders have long sought to achieve a degree of strategic autonomy.⁴ More recently, against a favorable regional and international background, they have been able to increasingly use this newfound relative autonomy in arms procurement and arms

1 Simon Tisdall, “Why Instinct and Ideology Tell Trump to Get Out of the Middle East,” *The Guardian*, January 11, 2020.

2 Derek Chollet, “The Myth of American Disengagement,” *Defense One*, May 20, 2016.

3 Hussein Ibish, “Why the U.S. Can’t Disengage From the Middle East,” *The National*, May 28, 2016.

4 Emma Soubrier, “Evolving Foreign and Security Policies: A Comparative Study of Qatar and the UAE,” in *The Small Gulf States: Foreign and Security Policies Before and After the Arab Spring*, eds. Khalid S. Almezaini and Jean-Marc Rickli (London: Routledge, 2017), 123-43.

manufacturing. This allows them to secure their interests and exert power and influence in their relations with traditional partners and in an increasing number of external theaters (in particular, North Africa and the Horn of Africa⁵).

Because of their status as some of the world's biggest arms importers, this paper focuses on Saudi Arabia, the United Arab Emirates, and Qatar. It first paints a picture of their evolving defense cooperation schemes with some major non-Western powers, in some cases initiating relations for the first time while rekindling ties in others. This was the case with the BRICS countries (other than Brazil, which has more limited defense and arms relations with the Gulf countries), as well as Egypt and Turkey. Then, it seeks to explore how these budding or reinvigorated bilateral relations fit into a broader context of evolving strategies of Gulf countries that have helped elevate them on regional and international stages in the past decade.⁶ Finally, it turns to the issue of possible challenges and limits to these strategies of diversifying partnerships, assessing the likely long-term implications of these new realities on regional and global dynamics.

By diversifying partnerships, Gulf leaders have long sought to achieve a degree of strategic autonomy.

Consolidation of Defense Cooperation With Emerging Powers: An Overview

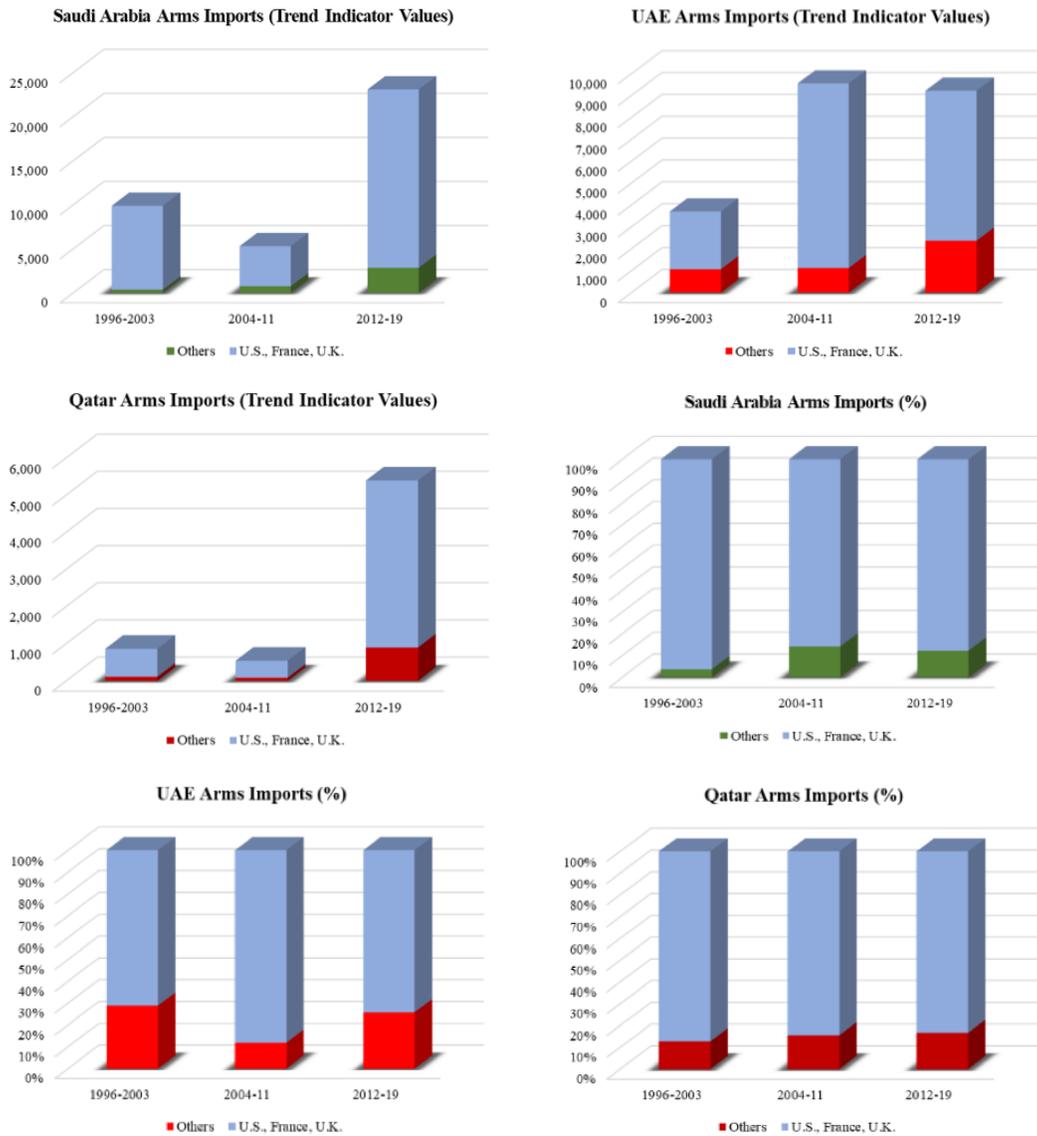
Most works on Gulf defense and security issues focus on the evolving U.S. presence in the region, in terms of military deployments and arms exports, and sometimes the role of European partners and suppliers. This is not surprising as the United States, France, and the United Kingdom have historically been the most important arms exporters to the region. Together, they represent more than two-thirds of total military purchases from Saudi Arabia, the UAE, and Qatar.⁷ Yet, there is an expanding presence of other powers in these markets, boosting defense cooperation in the region. While they still account for less than 20% of total imports from the three Gulf states (see figures), these increasing shares tell a broader story.

⁵ "UAE Security Forum 2019: Reshaping the Future of the Horn of Africa," *Arab Gulf States Institute in Washington*, February 13, 2020.

⁶ See David Held and Kristian Ulrichsen, *Transformation of the Gulf: Politics, Economics and the Global Order* (Florence: Taylor and Francis, 2013); Emma Soubrier (dir.), *Les Pays Du Conseil De Coopération Du Golfe: Nouvelles Puissances Du Monde Arabe?* (Paris: Éditions du Cygne, 2014); Florence Gaub, *The Gulf Moment: Arab Relations Since 2011* (Carlisle: Strategic Studies Institute and U.S. Army War College Press, 2015).

⁷ Their respective shares within this framework have evolved throughout time. For a more comprehensive study, see Emma Soubrier, "La place de la France à l'international au prisme de ses partenariats stratégiques : les cas du Qatar et des Emirats arabes unis," *Champs de Mars* 30 (2018): 181-90.

Gulf Arms Markets From 1996-2019



Note: All figures express arms imports in Trend Indicator Values, a value constructed by the Stockholm Peace Research Institute and explained in the "Sources and Methods" section of the [Arms Transfers Database](#). These graphs show effective deliveries, which means that trends sometimes appear years after the actual signing of a given contract.

Russia and China

Over the past few years, signs of an increasing Russian footprint in the Gulf region, in particular when it comes to arms trade and defense cooperation, have multiplied. In March 2019, Russian Foreign Minister Sergei Lavrov made a four-day trip to the Gulf states, which illustrated a clear ambition to boost ties with the region.⁸ This interest was confirmed with President Vladimir Putin's visit to Saudi Arabia and the UAE in October 2019,⁹ and Moscow has been holding discussions with both Saudi Arabia and Qatar regarding the possible purchase of advanced S-400 anti-aircraft systems. Likewise, the recent Chinese push toward the Gulf region, which has mostly been reflected in enhanced trade ties,¹⁰ is also apparent in growing defense ties.¹¹ These include a more visible presence through Chinese warship patrols in the Gulf¹² and the acquisition by Gulf states of Chinese armed drones (Saudi Arabia and the UAE have bought the Wing Loong-1 and Wing Loong-2).¹³

The presence of Russia and China in Gulf markets should not be overestimated (see figures). However, the discussions between Moscow and both Riyadh and Doha about S-400 systems are noteworthy, especially given that Russia has, so far, exported little to no arms to them. According to the Stockholm International Peace Research Institute, Moscow only signed one contract with Doha in 2017 for portable surface to air missiles (Igla-S/SA-24) and one contract with Riyadh the same year for a self-propelled multiple rocket launcher (TOS-1).¹⁴ Beijing's exports to the three Gulf states are still very limited, but they are remarkable both for their increase (from zero) and their political implications (as the Gulf countries bought armed drones from China when their Western partners refused to sell such drones to them). Additionally, the signing by Russia and China of new security agreements with Qatar (between Beijing and Doha in September 2017 and Moscow and Doha in December 2019) and even the establishment of more binding "strategic partnerships" with the UAE (between Moscow and Abu Dhabi in June 2018¹⁵ and Beijing and Abu Dhabi in July 2018) are notable.

For Moscow and Beijing, this ties into evolving global strategies that are fundamentally reshaping international relations – the rise of a truly "multipolar world."¹⁶ There are differences in the history and level of their respective engagement with the region as well as in the scope of or rationale behind their outreach in the Middle East.¹⁷ China's presence has been increasing gradually over

⁸ Fuad Shahbazov, "Lavrov's Gulf Trip Highlights Russia's Growing Regional Role," *Middle East Institute*, March 22, 2019.

⁹ Li-Chen Sim, "Putin's Visit to the Gulf Puts Growing Russian Influence on Display," *Arab Gulf States Institute in Washington*, October 24, 2019.

¹⁰ Xuming Qian and Jonathan Fulton, "China-Gulf Economic Relationship Under the 'Belt and Road' Initiative," *Asian Journal of Middle Eastern and Islamic Studies* 11, no. 3 (2017).

¹¹ Camille Lons, Jonathan Fulton, Degang Sun, and Naser Al-Tamimi, "China's Great Game in the Middle East," *European Council on Foreign Relations*, October 21, 2019.

¹² "Chinese Warships Tour Gulf Arab States for First Time Since 2010," *Reuters*, January 23, 2017.

¹³ Beth Stevenson, "UAVs Continue to Grow in Strength in the Middle East," *Aviation International News*, November 17, 2019.

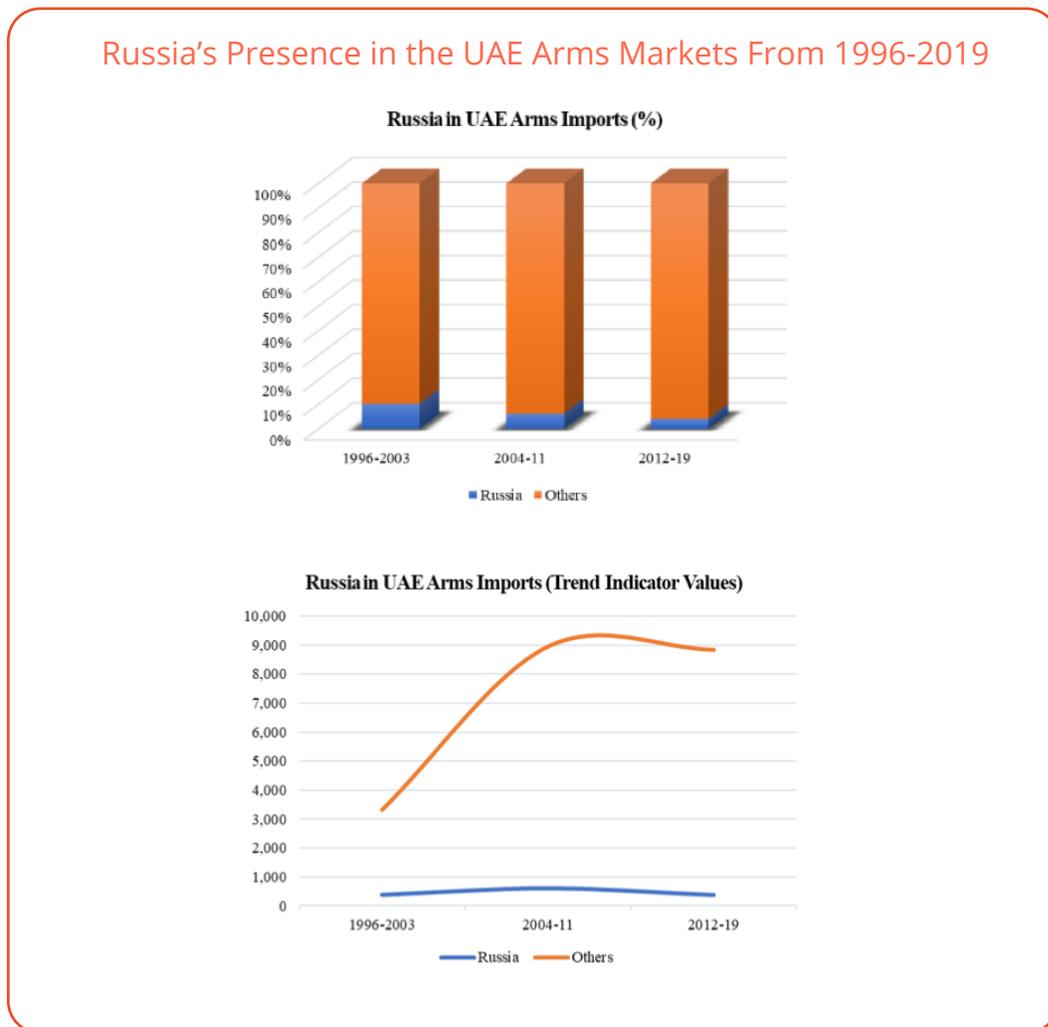
¹⁴ Trade registers generated from the Stockholm International Peace Research Institute's [Arms Transfers Database](#).

¹⁵ Giorgio Cafiero, "Understanding Russia and the UAE's Special Partnership," *LobeLog*, October 16, 2019.

¹⁶ Elizabeth Dickinson, "New Order," *Foreign Policy*, October 5, 2009.

¹⁷ See the testimony of Jon B. Alterman before the House Foreign Affairs Subcommittee on the Middle East, North Africa, and International Terrorism on "Chinese and Russian Influence in the Middle East," May 9, 2019.

the past decade and was originally anchored in trade and energy concerns,¹⁸ before the need to secure these prompted Beijing to also boost military ties. Russia had historically been involved in the region, but its engagement became much more dramatic with its military deployments to Syria in 2015, aiming to bolster the regime of President Bashar al-Assad.¹⁹ Since the 1990s, Moscow has had a sustained arms trade with Abu Dhabi, which saw weapons procurement from Russia – and the Soviet Union prior to that – as a way to avoid too strong a dependence on the West. However, while the numbers of arms imports from Moscow have stayed even over the past three decades, their share of total imports in the UAE has dropped (see figures).



¹⁸ Lee Hudson Teslik, "China-Gulf Economic Relations," *Council on Foreign Relations*, June 2, 2008.

¹⁹ Christine Wormuth, *Russia and China in the Middle East: Implications for the United States in an Era of Strategic Competition* (Santa Monica: RAND Corporation, 2019). On the topic of Russia's evolving presence in the Middle East, see: Eugene Rumer, "Russia in the Middle East: Jack of All Trades, Master of None," *Carnegie Endowment for International Peace*, October 31, 2019.

China's Presence in Gulf Arms Markets From 1996-2019



India and South Africa

India and South Africa are nowhere near Russia and China when it comes to arms trade (quite modest) and military ties to the Gulf states – which is not surprising given their limited weight in these fields on the international stage. However, their strategic relations with Saudi Arabia, the UAE, and Qatar have evolved over the past decade. India's regional interests, like China's, mostly revolve around trade ties and energy security. It recently elevated its commitment to the region by establishing a “comprehensive strategic partnership” with the UAE in 2015²⁰ and setting up a strategic partnership council with Saudi Arabia in late 2019.²¹

The willingness of New Delhi to consolidate security and defense relations with the more militarily capable Gulf countries comes in the context of its tensions with neighboring Pakistan, which has important ties to the Gulf monarchies. It also has a lot to do with common security concerns and naval ambitions. The Gulf Arab states are all members of the Indian Ocean Naval Symposium, conceived by the Indian navy and established in 2008 “as a biennial forum for navy chiefs of the Indian Ocean littoral.”²²

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South Africa has built a strategic relationship with the UAE. They signed a bilateral defense agreement in 1999 and cooperate on defense manufacturing. Tawazun Dynamics, a joint venture between Denel Dynamics, a South African government-owned armaments development and manufacturing company, and Tawazun Holding, an Abu Dhabi-owned investment holding company specialized in the defense industry, was created in September 2012 and has led to the manufacturing of Al Tariq missiles under a South African license.

South Africa also established bilateral military cooperation with Qatar and Saudi Arabia later in the 2000s. More recently, relations between Johannesburg and the Gulf capitals have been somewhat strained, however, with arms trade to Saudi Arabia and the UAE (which represent more than one-third of South Africa's total exports) having been suspended for issues linked to end-user agreements and the refusal by the two Gulf countries to abide by some new inspection clauses. These are recent additions to South African arms exports legislation that might have to do with the alleged violation by the UAE of such agreements in the context of the war in Yemen.²³ South Africa has also markedly refused to pick sides in the diplomatic dispute with Qatar.²⁴

²⁰ Kadira Pethiyagoda, “In a Multipolar Middle East, a Strategic Partnership Between India and the UAE Evolves,” *Brookings Institution*, September 22, 2015.

²¹ Dipanjan Roy Chaudhury, “In Big Push, Delhi & Riyadh Set Up Strategic Partnership Council,” *The Economic Times*, October 30, 2019.

²² Rahul Roy-Chaudhury, “India and the Gulf Region: Building Strategic Partnerships,” *International Institute for Strategic Studies*, August, 29, 2018.

²³ Joe Bavier and Alexander Winning, “South Africa Blocks Arms Sales to Saudi and UAE in Inspection Row,” *Reuters*, November 22, 2019.

²⁴ Will Todman, “The Gulf Scramble for Africa: GCC States' Foreign Policy Laboratory,” *Center for Strategic and International Studies*, November 20, 2018.

Egypt and Turkey

The Gulf Arab states' relations with Egypt and Turkey are much more politicized or polarized. It is relevant to study these two regional powers together for the degree to which their evolving interactions with Saudi Arabia, the UAE, and Qatar inform deeper regional trends, but some of their underlying dynamics are very different. First, Turkey is an arms producer while Egypt is not: "Despite its status as the longest-standing arms manufacturer of the Arab states, [it] maintains low rates of indigenous manufacturing and has plateaued as a 'third-tier' arms producer."²⁵ According to the SIPRI Arms Transfers Database, Turkey was the 14th biggest exporter of major conventional weapons in the world (and the second biggest in the Middle East after Israel) from 2015-19.²⁶ This was an 86% increase over 2010-14. Second, since the beginning of the Arab uprisings in late 2010, Egypt has arguably become a "recipient" of regional power dynamics, a client to outside patrons,²⁷ while Turkey has been an ascending regional power.²⁸ Turkey has consolidated its strategic partnership with Qatar, having signed defense cooperation agreements and establishing a military base in the emirate.²⁹ However, Saudi Arabia and the UAE have both been important consumers of Turkish weapons. From 2012-19, they were respectively its second and fourth (by a margin behind Pakistan as the third) biggest customers.³⁰ Arms actually delivered to these two countries however appear to have dropped slightly in the last three years, which may be because of the Saudi and Emirati diplomatic rift with Qatar that began in June 2017.

²⁵ Florence Gaub and Zoe Stanley-Lockman, *Defence Industries in Arab States: Players and Strategies* (Paris: European Union Institute for Security Studies, 2017), 31.

²⁶ Pieter D. Wezeman, Aude Fleurant, Alexandra Kuimova, Diego Lopes Da Silva, Nan Tian, and Siemon T. Wezeman, "Trends in International Arms Transfers, 2019," *Stockholm International Peace Research Institute*, March 2020.

²⁷ On patron-client dynamics in world politics, see for instance Michael Handel, "Does the Dog Wag the Tail or Vice-Versa? Patron-Client Relations," *Jerusalem Journal of International Relations* 6 (1982): 24-35.

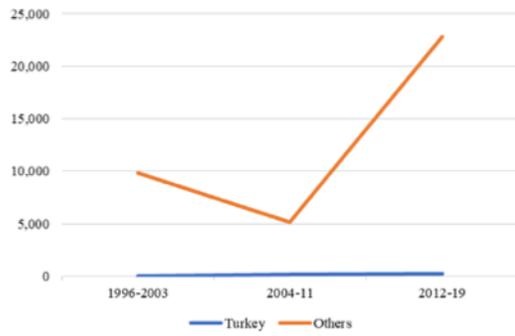
²⁸ Steven A. Cook and Hussein Ibish, "Turkey's Resurgence as a Regional Power Confronts a Fractured GCC," *Arab Gulf States Institute in Washington*, December 18, 2019.

²⁹ See Ali Bakeer, "Turkey's Involvement in Gulf Security," *Gulf International Forum*, March 11, 2019; Antoine Vagneur-Jones and Can Kasapoglu, "Bridging the Gulf: Turkey's Forward Base in Qatar," *Foundation for Strategic Research*, August 11, 2017.

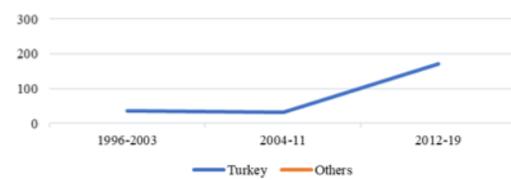
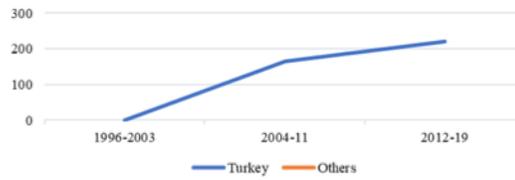
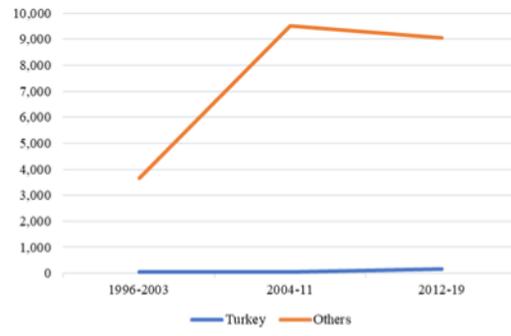
³⁰ Importer/exporter Trend Indicator Value table generated from the Stockholm International Peace Research Institute's *Arms Transfers Database*.

Turkey's Presence in Gulf Arms Markets From 1996-2019

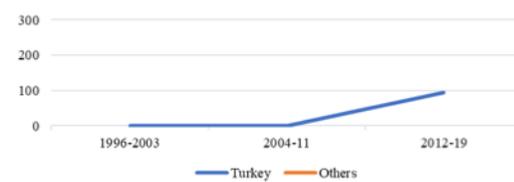
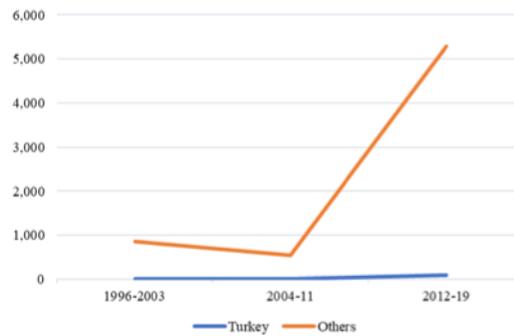
Turkey in Saudi Arms Imports (Trend Indicator Values)



Turkey in UAE Arms Imports (Trend Indicator Values)



Turkey in Qatar Arms Imports (Trend Indicator Values)



While Egypt became a figurative battlefield between Gulf states in their competition for influence for a couple of years as the political scene was being reshaped after the ouster of President Hosni Mubarak in 2011,³¹ it has resolutely anchored itself in the orbit of the UAE and, to a lesser extent, Saudi Arabia. Egypt has negotiated new defense and military cooperation agreements with Abu Dhabi, also strengthening relations with Riyadh, notably signing a maritime border demarcation agreement that settled a long-time dispute.³² Additionally, it has significantly increased arms trade with the UAE, as a client. Egypt is indeed the largest export market of the growing Emirati defense industry. Last, but not least, the increasing regional divide, or “Gulfization”³³ of Middle Eastern politics, is illustrated by a common projection of forces and influence amid a “new matrix of alliances” in North Africa³⁴ (particularly Libya for the UAE and Egypt) and the Horn of Africa³⁵ (particularly Somalia for Qatar and Turkey).

Egypt is indeed the largest export market of the growing Emirati defense industry.

Empowerment of the Gulf Countries

While the increasing diversification of defense partnerships of Saudi Arabia, the UAE, and Qatar has a lot to do with renewed and proactive engagement on the part of emerging economies in a context of growing global competition, it is also largely boosted by the Gulf Arab states themselves as part of their strategies to increase their level of autonomy and self-determination and increasingly project this newfound power – and influence – outside of their borders.

Achieving Relative Strategic Autonomy

The first goal of the multipolarization of Gulf security, in terms of arms trade and military cooperation, is to help the Gulf Arab states achieve relative autonomy, providing them with leeway or added leverage in their strategic and international relations with their traditional partners. The smaller Gulf countries, Qatar and the UAE, have in fact utilized this diversification strategy since the beginning of the 1990s as a way to balance against regional threats (amid a complex security constellation revolving around the triangle of power among Iran, Iraq, and Saudi Arabia) and avoid being too dependent on a unique source of security and stability.³⁶ This diversification of strategic partnerships makes Saudi Arabia, the UAE, and Qatar more immune to pressures to act on the regional and international stage exactly how their traditional Western partners would want them

³¹ Emma Soubrier, “Golfe-Egypte : une riyal politik au service d’une plus grande autonomie stratégique ?,” *Lettre de l’IRSEM* n°2 (Paris: Institut de recherche stratégique de l’Ecole militaire, February 2015).

³² George Sadek, “Egypt/Saudi Arabia: Egyptian Parliament Ratifies Maritime Border Demarcation Agreement,” *Library of Congress*, June 26, 2017.

³³ Marc Owen Jones, Ross Porter, and Marc Valeri, *Gulfization of the Arab World* (Berlin: Gerlach Press, 2018).

³⁴ Hussein Ibish, “Competition for Mediterranean Natural Gas Deepens as Gulf, European States Join the Fray,” *Arab Gulf States Institute in Washington*, February 27, 2020.

³⁵ Tom Wilson and Andrew England, “Middle East’s Power Struggle Moves to the Horn of Africa,” *Financial Times*, June 30, 2019.

³⁶ Emma Soubrier, “Mirages of Power? From Sparkly Appearances to Empowered Apparatus, Evolving Trends and Implications of Arms Trade in Qatar and the UAE,” in DB Des Roches and Dania Thafer, eds., *The Arms Trade, Military Services and the Security Market in the Gulf* (Berlin: Gerlach Press, 2016).

to behave, and it allows them to act more in accordance with their own interests. At the same time, the diversification of their arms suppliers gives them more room to maneuver: It not only allows them to be less dependent on the United States, France, and the United Kingdom, but also – and possibly more important – allows them to “benefit from competition both in terms of prices and conditions.”³⁷

Lately, the increased competition for the Gulf arms markets with Russia and China seems to have led the United States to reconsider some exports that were long considered technologically too sensitive. The U.S. State Department approved the possible sale of a Terminal High Altitude Area Defense, or THAAD, missile-defense system to Riyadh quickly after Saudi Arabia began talks with Russia concerning S-400s.

Additionally, the administration of President Donald J. Trump has recently tried to ease conditions for exporting U.S. military drones – a decision that may be connected to the Chinese successes in exporting armed unmanned aerial vehicles around the world, including the

The Gulf Arab states are also taking advantage of the global export race for their markets to become more demanding in terms of offsets associated with contracts, which play an important role in their developing a nascent indigenous defense industry.

Gulf region.³⁸ The Gulf Arab states are also taking advantage of the global export race for their markets to become more demanding in terms of offsets associated with contracts, which play an important role in their developing a nascent indigenous defense industry.³⁹

Diversifying the Economy

The evolving trends in arms procurement in the Gulf states should be understood against the background of stated objectives from Saudi Arabia, the UAE, and Qatar to diversify their economies away from oil – a goal that Abu Dhabi and Riyadh, specifically, seem eager to fulfill through the development of a national defense technological and industrial base.⁴⁰ Some nontraditional suppliers have contributed to building local capabilities, as they were keener to meet the offset requirements of their Gulf clients. South Africa is an example, illustrated by the creation of Tawazun Dynamics. Russia has also played that card in its arms trade with the UAE.

How the NIMR armored vehicles were first developed also reflects these dynamics: Originally and officially undertaken by the local company Emirates Defense Technology, they are a product of technical engineering from Industrial Computer Technologies, a subsidiary of

³⁷ Alexandra Kuimova, “Russia’s Arms Exports to the Mena Region: Trends and Drivers,” *Euro-Mediterranean Study Commission*, April 1, 2019.

³⁸ Emma Soubrier, “US Arms Trade in the Gulf: An Instrument of Whose Power and Influence?,” *Gulf International Forum*, May 15, 2019.

³⁹ See Bilal Y. Saab, “The Gulf Rising: Defense Industrialization in Saudi Arabia and the UAE,” *Atlantic Council*, May 4, 2014.

⁴⁰ As laid out in Saudi Vision 2030, Abu Dhabi Economic Vision 2030, and Qatar National Vision 2030.

Russia's Gorky Automobile Plant. They were then produced in the Advanced Industries of Arabia plant in Jordan, which was established by the Emirati Bin Jabr Group in partnership with the King Abdullah II Design and Development Bureau.⁴¹

Of course, Western companies have made similar arrangements, bringing about some of the leading defense companies like Abu Dhabi Ship Building and Thales Advanced Solutions, which are now all part of the Edge conglomerate, a new entity announced at the Dubai Air Show 2019, absorbing most of the Emirati defense industrial assets.⁴²

One of the incentives driving the interests of Gulf Arab states to purchase weapons from and establish defense industrial cooperation with nontraditional partners has been their tendency to have fewer restrictions or reservations when it comes to transferring technologies and agreeing to have part or all of the supply chain locally produced. For instance, the 2017 contract between Moscow and Riyadh regarding a self-propelled multiple rocket launcher included the transfer of technology to localize "the manufacturing and sustainment of advance armament systems" in Saudi Arabia.⁴³

Every biannual edition of Abu Dhabi's International Defence Exhibition and Conference, or IDEX, is an opportunity for regional powers to confirm that they "are serious about developing domestic defense industries and enlisting global defense firms as partners in this effort."⁴⁴ Down the road, the UAE and Saudi Arabia might hope to not only achieve economic diversification through local manufacturing of arms but also to become competitors on global markets; the UAE in particular has been explicit about becoming a net arms exporter and seems to have its eyes on African markets.⁴⁵

Pursuing Broader Ambitions of Regional Power and Influence

The diversification of arms suppliers and bilateral military partnerships seems to support the new ambitions of power and influence of Saudi Arabia, the UAE, and Qatar. As the Arab uprisings and regional turmoil unraveled, they looked to fill the vacuum of regional power and advance their interests. In Syria, for instance, Saudi Arabia and Qatar heavily supported opposition groups beginning in 2011. Moreover, Saudi Arabia, the UAE, and Qatar targeted economic relief to countries in accordance with specific interests; this economic diplomacy evolved from an accommodating soft power dynamic to a more assertive policy tailored to definite needs. Today, these trends are also illustrated by increasing arms exports or transfers from the Gulf states, particularly the UAE, to some of these other countries.

⁴¹ See Matthew Hedges, "Made in the UAE," *Defence Procurement International*, January 9, 2017.

⁴² Agnes Helou, "UAE Launches 'Edge' Conglomerate to Address its 'Antiquated Military Industry,'" *DefenseNews*, November 6, 2019.

⁴³ "Saudi Arabia Signs Agreement to Manufacture Russian Weapons Locally," *Al Arabiya*, October 5, 2017.

⁴⁴ DB Des Roches, "IDEX 2019 Highlights Gulf States' Move to Develop Domestic Defense Industries," *Arab Gulf States Institute in Washington*, March 11, 2019.

⁴⁵ Florence Gaub and Zoe Stanley-Lockman, *Defence Industries in Arab States: Players and Strategies* (Paris: European Union Institute for Security Studies, 2017), 59.

From 2012-19, the top five recipients of arms from the UAE were Egypt, Libya, Jordan, Algeria, and Yemen. While all these exports are inherently part of a strategy of power and influence, it is possible to differentiate between two categories of recipients. On the one hand, exports to Egypt, Jordan, and Algeria could be part of a broader strategy to develop an indigenous defense industry. The establishment of military industrial collaboration with these countries allows access to human resources that the UAE (much like Qatar) lacks. The role played by Jordan and Algeria in the development of NIMR military vehicles is an illustration of this. The announcement in early March of “a three-year Egyptian weapons manufacturing plan to achieve self-sufficiency and export Egyptian weapons abroad”⁴⁶ as well as the launch of a biannual Egypt Defence Expo, or EDEX, in December 2018, could be signs that a deeper defense industrial partnership between Cairo and Abu Dhabi is underway.

The establishment of military industrial collaboration with these countries allows access to human resources that the UAE (much like Qatar) lacks.

On the other hand, arms transfers to Libya and Yemen fall under gray areas because they go against U.N.-backed embargos and are sometimes directed to nongovernmental parties – which is true of all transfers of military equipment and weapons by Gulf Arab states, and others, to conflict zones and war-torn countries (Libya, Yemen, and Syria). These issues do not only arise when it comes to exports or reexports of arms produced in the Gulf states or from countries that might have less compulsory end-user agreements. Studies have pointed to the presence of Western-made weapons in Syria and Libya. Challenges related to international laws (breaking arms embargos) or commercial licenses (violating end-user agreements) may however intensify in a truly multipolar world. Tools to enforce them and means to leverage partners may indeed decrease as a result of the proliferation of global arms producers and of regional actors gradually reaching strategic autonomy.

Challenges and Limits of Diversified Partnerships

These new diversification schemes present technical and geopolitical difficulties, bringing into question whether these trends are likely to really lead to a new regional picture.

The Interoperability Conundrum

One of the most important arguments put forward by observers and policymakers concerned about the multipolarization of Gulf security is that of interoperability. The idea is that buying military equipment from nontraditional (non-Western) suppliers hinders the military readiness of the Gulf countries because it will “erode interoperability between allies” and could allow powers that are not allies, such as Russia “to gain access to sensitive military data.”⁴⁷ For instance, Washington made this argument when Riyadh declared in October 2017 that it was ready to invest several billion dollars in Russian arms and military equipment, including the S-400 missile systems. As Russian platforms “are not interoperable with US military hardware, [acquiring these puts] barriers between effective military cooperation with countries in the

⁴⁶ George Mikhail, “Egypt Boosts Local Weapons Production,” *Al-Monitor*, March 4, 2020.

⁴⁷ Henry Storey, “After Khashoggi: A Saudi Pivot to Russia and China?,” *Foreign Brief*, February 7, 2019.

region, proportionate to the amount of Russian technology products they acquire.”⁴⁸ This argument is also one of the most important justifications for uninterrupted sales by traditional arms suppliers, especially the United States. To counter congressional resolutions to suspend weapons sales to Saudi Arabia and the UAE in July 2019, the White House argued that, “apart from negatively affecting [bilateral relationships, this] would hamper [the United States]’ ability to sustain and shape critical security cooperation activities and would significantly hinder the interoperability between [the] nations.”⁴⁹

There are two important points regarding the interoperability argument. First, for a long time this argument was disconnected from reality given that the three Gulf countries were not using the material they were buying. While there is an argument that this does not matter because the crucial element was to make sure that their militaries would be interoperable with those of the United States and European allies if necessary, this also has a lot to do with the political value of arms sales – buying weapons from the United States, France, and the United Kingdom has historically been part of quid-pro-quo dynamics linked to a broader and tacit “oil for security” pact.⁵⁰ The second, related point is that the Gulf countries have proved on numerous occasions that they were ready to duplicate capabilities, or to divide different capabilities across their militaries, if they felt that was what best answered their security needs. The mixed jetfighter fleets of the three countries (F-15s and Eurofighters in Saudi Arabia; F-16s and Mirages in the UAE; F-15s, Eurofighters, Mirages, and Rafales in Qatar) are an example of this. The divide between the Saudi Eastern Fleet and Western Fleet, which have chosen different suppliers, is another one.⁵¹ As long as acquiring capabilities from nontraditional partners does not translate into a drop in acquisitions from traditional partners, the interoperability conundrum might thus not be as central as it appears.

The U.S. Withdrawal in Focus: Who Else to Secure the Gulf?

Some observers have tied this issue to another well-known conundrum: the perception of a U.S. withdrawal from the Gulf. Andrew Exum, a former deputy assistant secretary of defense for Middle East policy, wrote: “Our Gulf partners have been masterful at scaring the wits out of successive U.S. administrations, by suggesting they fear we will abandon them. ... That fear helped spark what has now been a decade-long push to sell more U.S. weapons to our Gulf partners, increasing interoperability and thus deepening the bilateral ties between our respective militaries.”⁵² He suggests that the fear of the United States leaving the region is exaggerated. However, many analysts of the Gulf states continue to bring forward the idea that, in the event of a U.S. withdrawal from the region, no one could replace the United States as the main security guarantor of the region, and that this is why Saudi Arabia, the UAE, and Qatar should not be flirting with other potential protectors – who could not deliver.

⁴⁸ Adam Bensaid, “Russia is Selling More Weapons to Saudi Arabia and the UAE,” *TRT World*, February 22, 2019.

⁴⁹ Joe Gould, “US Senate Allows Arms Sales to Saudi Arabia, Sustaining Trump Vetoes,” *DefenseNews*, July 29, 2019.

⁵⁰ Emma Soubrier, “The Arms Dynamic in Evolving Gulf (Geo)Politics,” *World Peace Foundation*, June 19, 2019.

⁵¹ Anthony Cordesman, *Saudi Arabia: Guarding the Desert Kingdom* (New York: Routledge, 2018).

⁵² Andrew Exum, “U.S. Arms Sales to the Gulf Have Failed,” *The Atlantic*, June 21, 2019.

This specter is commonly proposed but has yet to materialize. Notably, it seems that China and Russia agree that the United States should, in fact, stay in the region. Beijing prefers a more multilateral approach than that favored by Washington, especially under the Trump administration and against the background of the “maximum pressure” policy against Iran. Nonetheless, “China’s preference for a continued US lead in maintaining Gulf security [was made evident by] its willingness to consider participating in the US-led maritime alliance.”⁵³ Secondly, if called upon, neither Russia nor China would be able to deploy the number of military personnel that the United States could, at least in the near term. Finally, there is an argument that Gulf partners would not be able and ready to call other countries to help them in the face of an Iranian threat. However, recent events might have shaken their confidence that they could rely upon the United States in such a situation either. With these considerations, down the road, Saudi Arabia, the UAE, and Qatar might aim for real strategic autonomy.

Persistent Obstacles to Real Strategic Autonomy

The idea that the Gulf countries face serious challenges (especially when it comes to quantity and quality of human resources) that are likely to hinder their strategic autonomy in the long run is another one of the main arguments of critics of the multipolarization of Gulf security. The implication is that, should Gulf partners continue to turn to other suppliers and challenge what used to be a pretty exclusive relationship, the United States might decide that it is no longer in its interest to secure the region by deploying so many of its forces to the region, which would put the Gulf countries in a pickle given that they have a long way to go before they will be able to defend themselves.

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While the United States’ departure from the region does not seem imminent, there

are two important things to note when considering strategic autonomy. In the literal sense, which would imply a capacity to effectively create an indigenous defense industry and build military capabilities credible enough that there is no need for outside support, Saudi Arabia, the UAE, and Qatar might never be truly autonomous. The potential for the UAE and Saudi Arabia to develop a successful and sustainable local defense industry, for instance, is questionable, given that many of the local defense companies are still funded by the government, are not competitive in the international arena, and, for now, represent little more than a new way to distribute government wealth.⁵⁴ Additionally, while the UAE has, over the past few years, demonstrated strong military

⁵³ James M. Dorsey, “Gulf Security: China Envisions Continued US Military Lead,” *Modern Diplomacy*, December 27, 2019.

⁵⁴ See Shana Marshall, “The Arms Trade and Clientelism in the Arab World,” *Brandeis University, Crown Center for Middle East Studies*, October 2012.

capabilities,⁵⁵ the Gulf's "Little Sparta"⁵⁶ and the other Gulf states are nowhere near able to defend themselves on their own. However, it is not clear that true strategic autonomy in that sense is their actual goal. Very few countries around the world are truly self-sufficient in terms of arms procurement and military capabilities. Strategic autonomy also means being able to defend a country's own interests without succumbing to external pressures to adopt behavior more supportive of another's interests. Considering this, these three Gulf countries are not only very autonomous, as illustrated by their conducting independent operations in Libya, but their growing strategic autonomy is contributing to a fundamental shift in international dynamics.⁵⁷

Very few countries around the world are truly self-sufficient in terms of arms procurement and military capabilities.

Conclusion

While Saudi Arabia, the UAE, and Qatar increasingly turn to nontraditional powers for some of their arms procurements, also signing new binding strategic partnerships, it is important not to overestimate the impact this has on their historical relations with Western powers. The United States, France, and the United Kingdom have a continued relevance (presence in military bases, security agreements, military cooperation, training, and equipment) in the Gulf region. Therefore, their replacement doesn't seem to be likely.

However, the implications of this increasing multipolarization of Gulf security should not be underestimated either. Indeed, this gives the Gulf countries additional leverage in their relationships with their traditional partners to get the equipment they want and strengthen their ability to assert their interests on the regional and international stage. One of the most important questions is whether the Gulf states' traditional partners are ready to accept this multipolarization, or opening of an age of further fluidity in international relations, in the Gulf and beyond.

With tensions between the United States and Iran increasing concerns over the security and stability of the Gulf region, the new partnerships of the Gulf Arab states could help bridge the gap with Iran. One common feature of many of these strategic relationships is that they don't come with conditions of "exclusivity." Russia, China,⁵⁸ India, and South Africa⁵⁹ have good

⁵⁵ See Emma Soubrier, "The UAE Armed Forces: Building Military Credibility," in Kristian Alexander and William Guéraiche, eds., *The Different Facets of Security in the United Arab Emirates* (New York: Routledge, 2020); David B. Roberts, "Bucking the Trend: The UAE and the Development of Military Capabilities in the Arab World," *Security Studies* (February 11, 2020).

⁵⁶ Rajiv Chandrasekaran, "In the UAE, the United States Has a Quiet, Potent Ally Nicknamed 'Little Sparta,'" *The Washington Post*, November 9, 2014.

⁵⁷ Emma Soubrier, "Global and Regional Crises, Empowered Gulf Rivals, and the Evolving Paradigm of Regional Security," in March Lynch, eds., *POMEPS Studies 34: Shifting Global Politics and the Middle East* (Washington, DC: Project on Middle East Political Science, March 2019).

⁵⁸ Julia Gurol and Jacopo Scita, "China's Persian Gulf Strategy: Keep Tehran and Riyadh Content," *Atlantic Council*, January 24, 2020.

⁵⁹ Kitaneh Fitzpatrick, "Shedding Light on the Iran-South Africa Relationship," *Council on Foreign Relations*, December 17, 2019.

relations with both shores of the Gulf, and they are important partners for Iran. Building on this, some of these countries see themselves as possible mediators in Gulf conflicts – as do many European countries.⁶⁰

There are increasing calls, from both inside and outside the region, for the opening of a new chapter in Gulf security, one that reflects a truly multipolar world. While the removal of “extraregional” foreign troops from the Gulf states implied in the Russian “Collective Security Concept for the Persian Gulf Area” and the Iranian proposal for a “Hormuz Peace Endeavor,” make them difficult to consider, they both move toward “the addition (rather than removal) of participants in regional security, ... the ‘multilateralization’ of the Gulf security architecture.”⁶¹ Renewed multilateral dynamics could be articulated within “a flexible, issue-orientated core groups framework” – with maritime security initiatives as a place to start.⁶² One thing is certain: As the world is going through unprecedented times that could lead governments worldwide to reevaluate the definition of threats and ways to address security challenges of tomorrow, this might be the perfect time to come up with innovative future cooperation schemes.

⁶⁰ Emma Soubrier, “The European Response to the Saudi Attacks: A Careful Balancing Act,” *Arab Gulf States Institute in Washington*, September 30, 2019.

⁶¹ Kristian Ulrichsen, “Rebalancing Regional Security in the Persian Gulf,” *Rice University’s Baker Institute for Public Policy*, February 2020: 14-15.

⁶² Cinzia Bianco, “A Gulf Apart: How Europe Can Gain Influence With the Gulf Cooperation Council,” *European Council on Foreign Relations*, February 25, 2020.

