

Natalia Kalinina

MILITARIZATION OF THE MIDDLE EAST: DYNAMICS AND RISKS (Article I)

The Middle East has long been one of the most neurotic parts of our planet, with an explosive combination of general tension and a deadly civil war in Syria, which could well spiral into a full-scale regional war. There is also the simmering Arab–Israeli conflict, domestic political tensions in some of the region’s countries, and constant meddling by foreign powers.

Meanwhile, Israel is pressing ahead with missile defense testing and deployment; every now and then the country also launches air raids against targets in neighboring Lebanon and Syria. Such behavior predictably creates a political incentive for other players in the region to equip their armed forces with advanced new weaponry.

All these factors combine to create an intricate and constantly changing political kaleidoscope, keeping the world’s attention fixed on the Middle East.

THE CONFLICT POTENTIAL

Since 2011, political regimes have been toppled in Tunisia, Egypt (twice), Libya, and Yemen. There have been civilian uprisings of varying intensity—some of which are still ongoing—in Bahrain, Iraq, Jordan, Kuwait, and Saudi Arabia. Syria has been plunged into a bloody civil war.¹ The Arab Spring has yet to run its course; indeed, it is gradually degenerating into an Islamist Winter. In countries where the revolutions have won, initial euphoria is giving way to squabbles between the various actors that had united to topple the previous governments.

Measures to reduce the risk of conflict that have been undertaken by the UN—including arms embargos on the warring factions—are failing.² As of mid-2013, there were full or partial UN embargos in place against arms deliveries to Al-Qaeda and the Taliban, as well as the governments of Iraq, Iran, Lebanon, and Libya.³ That, however, has failed to reduce the military-political tensions; in some parts of the region those tensions not only persist but actually continue to grow.

Analysis of reports by the UN sanctions committees indicates that arms embargoes are ineffective as an instrument for ending military conflicts. These conflicts usually continue either through weapons being seized by one of the warring factions from the other, or through illegal arms supplies via third countries, as well as other smuggling routes. According to the Stockholm International Peace Research Institute (SIPRI),⁴ arms embargoes yield some tangible results in only about 25 percent of cases.

Middle Eastern leaders, meanwhile, conduct their defense policies in such a way as to ensure the preservation of the political regime if things take a turn for the worse. These policies usually include channeling a large proportion of defense spending towards buying new military hardware or upgrading existing weaponry. These trends were especially obvious ahead of the latest bout of tensions in the region.



Table 1. Breakdown of Total Defense Spending in the Middle East (by country)

Country	Share of total regional spending, %
Saudi Arabia	8.13
Oman	7.93
Iraq	7.65
Israel	7.49
Jordan	5.48
Yemen	4.35
Syria	4.25
Kuwait	4.08
Qatar	3.63
UAE	3.28
Bahrain	3.09
Iran	2.83
Lebanon	2.62
Egypt	2.6
Turkey	2.04

Witness, for example, the statistics for military spending in the Middle East, which reached an accumulated 796.53 billion dollars in the period 2004–2011, and continues to rise⁵ (see [Table 1](#)).

[Table 1](#) demonstrates that Saudi Arabia is the regional leader in terms of defense spending.⁶ According to SIPRI,⁷ in 2012 the Middle Eastern countries once again showed a large growth in defense spending (by 8.3 percent). The fastest growth has been recorded in Oman (51 percent), Saudi Arabia (12 percent), and Kuwait (10 percent).

Escalation of violence in the Middle East and North Africa is usually viewed from two angles:

- ❑ prolongation of the protest movement (i.e. repeat bouts of popular uprisings seen in Egypt, Tunisia, and Libya);
- ❑ rapid stockpiling of weapons in the region via legal supplies (including arms deliveries to the Syrian government and opposition) and illicit transfers (such as arms deliveries to HAMAS from the Libyan arsenals).

Be that as it may, the Middle East remains the most militarized region in the world.⁸ The risks that will remain for the foreseeable future include an escalation of instability in the Middle East (Syria, Iraq, Yemen, Bahrain, Saudi Arabia, Iran, and Turkey) and North Africa (Egypt, Libya); as well as possible unrest in Pakistan following the pullout of U.S. troops from neighboring Afghanistan.

The conflict potential of the Middle East has turned the region into the world's largest defense market, with obvious consequences for global security.

MAIN ARMS IMPORTERS IN THE MIDDLE EAST

In terms of the combined value of the arms contracts signed over the past decade, the Middle East is second only to Asia Pacific, and the gap is gradually closing. In 2004–2011 the figure for Asia Pacific was 155.488 billion dollars, and for the Middle East 142.592 billion (which constitutes 30.9 percent of the global arms market).⁹ In 2011 various Middle Eastern countries placed a total of 33.275 billion dollars' worth of orders for weaponry.

In fact, for the past three years the Middle East has been the global leader in terms of newly signed contracts for military hardware imports. Asia Pacific and the Middle East are the two undisputed leaders in that regard; the rest of the pack are far behind. In terms of spending on weaponry they outstrip Western Europe by a factor of almost 3; North America by a factor of

almost 5; Eastern Europe by a factor of more than 25; and Central America and the Caribbean by a factor of more than 150.¹⁰

Actual deliveries of conventional weapons to the Middle Eastern states in 2005–2012 are estimated at 96.414 billion dollars. The annual figure has risen by more than 50 percent from 11.103 billion in 2005 to 16.848 billion dollars in 2012.¹¹

The Middle East also accounts for some of the biggest deals on the global arms market. On the global scale, the biggest deals in 2012 included:

- ❑ *Algeria*: An Algerian order for two MEKO A-200 frigates placed with Germany's ThyssenKrupp Marine Systems. The deal, which includes an option for another two ships, is estimated at 2.176 billion euros (2.886 billion dollars). The relatively high price includes a full complement of weapons systems for the four ships, six Super Lynx helicopters (AgustaWestland), maintenance of the ships, and the training of their crews.
- ❑ *Egypt*: Germany has agreed to supply two Type 209 non-nuclear submarines to Egypt, despite sharp criticism of the decision by Israel. The contract is worth an estimated 700 million euros (913 dollars).
- ❑ *Israel*: Italy's Alenia Aermacchi has signed a contract with Israel to supply 30 M-346 Master trainer aircraft and a set of related training equipment. The deal is worth an estimated 1 billion dollars. The contract was signed as part of a bilateral agreement between the Israeli and Italian governments, which includes aircraft, engines and simulators, maintenance services, various supplies, and the training of personnel. Deliveries of the trainers are expected to commence by mid-2014.
- ❑ *Iraq*: The United States has signed a contract with Iraq for a second batch of F-16 fighters (18 aircraft worth 3 billion dollars) by 2018. Final deliveries from the first batch of 18 aircraft under a 2011 contract are scheduled for September 2014.
- ❑ *Qatar*: Switzerland's Pilatus Aircraft has signed a contract with Qatar to supply 24 PC-21 trainers, along with a set of training equipment and maintenance services. The first aircraft is to be delivered by mid-2014.
- ❑ *Oman*: Oman has signed a package of contracts with Britain's BAE Systems to supply 12 EF-2000 Typhoon multirole fighters and eight Hawk Mk.128 combat trainers. The first fighters are to be delivered in 2017. The value of the contract for the fighter jets, which includes various auxiliary hardware and weapons systems, is 2.5 billion pounds (over 4 billion dollars). The value of the contract for the Hawk combat trainers and the delivery deadlines have not been disclosed.
- ❑ *Saudi Arabia*:
 - Britain's BAE Systems has signed a contract with Saudi Arabia for the manufacture of 48 EF-2000 Typhoon fighter jets (Tranche 3 modification) at UK facilities. Under an earlier framework contract the 48 aircraft were to be assembled in Saudi Arabia. The two parties are still in talks about setting up an aircraft maintenance facility in Saudi Arabia and increasing the price agreed in the framework contract owing to the new terms. The price Saudi Arabia will pay for the second batch of 48 EF-2000 Typhoon fighters to be delivered under a previously agreed deal for a total of 72 aircraft will become clear later this year once the talks have reached a conclusion.
 - Britain has also signed a contract with Saudi Arabia for 22 Hawk combat trainer jets and 55 PC-21 turboprop trainers (made by Switzerland's Pilatus), worth a total of 1.6 billion pounds (2.5 billion dollars). The aircraft have been bought to train pilots



for the previously ordered EF-2000 Typhoon and F-15SA Eagle jets. Deliveries of the PC-21 trainers are due to commence in 2014, and of the Hawk jets in 2016. The deal also includes various attendant hardware, including training simulators, as well as personnel training.

- The United States has signed a contract with Riyadh for 36 Boeing AH-6i Little Bird light attack helicopters. Deliveries of the AH-6i will be made as part of an earlier Saudi Arabian order (placed in late 2010) for about 60 billion dollars' worth of U.S. weaponry, including 84 new F-15SA fighters; 70 AH-64D Block III Apache attack helicopters; 72 UH-60M Black Hawk multirole helicopters; 12 MD-530F light helicopters; ammunition; communication systems; and other hardware. Some of these contracts were signed in 2011, including the 30 billion-dollar deal with Boeing for 84 new F-15SA fighters, and for the upgrade of 70 F-15 fighters already in service with the Saudi air force.¹²

More than half of the largest international weapons deals signed in the reported period were contracts with various Middle Eastern states, and the trend looks set to continue.

STRUCTURE OF THE MIDDLE EASTERN ARMS IMPORTS

Table 2 contains a breakdown of the Middle Eastern arms imports in 2005–2012 by weapons category¹³ and dollar value.¹⁴

Table 2. Middle Eastern Arms Imports in 2005–2012: Weapons Categories³⁵

Arms category, ranged by dollar value	Contracts signed	2012 deliveries	Trends
Combat aircraft and unmanned aerial vehicles (UAVs) ³⁶	71.84 billion dollars (45.3%)	5.321 billion dollars (31.6%)	Maximum: 2011—6.021 billion dollars Minimum: 2008—1.795 billion dollars ³⁷
Armored vehicles ³⁸	16.039 billion dollars (16.64%)	2.28 billion dollars (13.53%)	Maximum: 2008—2.676 billion dollars Average: 2.3–2.5 billion dollars
Other weaponry ³⁹	12.044 billion dollars (12.5%)	1.462 billion dollars (8.68%)	Maximum: 2010—3.242 billion dollars Minimum: 2006—637 million dollars ⁴⁰
Helicopters ⁴¹	11.219 billion dollars (11.64%)		Maximum: 2007—2.265 billion dollars Minimum: 2006—657 million dollars Average (2011–2012): 1.8–1.95 billion dollars ⁴²
Air defense systems ⁴³	11.138 billion dollars (11.55%)	2.158 billion dollars (12.8%)	Maximum: 2011—2.385 billion dollars Minimum: 2005—197 million dollars Average (2010–2012): over 2 billion dollars ⁴⁴
Naval weaponry ⁴⁵	7.06 billion dollars (7.32%)	2.135 billion dollars (12.67%)	Maximum: 2012—2.135 billion dollars ⁴⁶
Missiles and artillery ⁴⁷	6.92 billion dollars (7.18%)	1.657 billion dollars (9.84%)	Maximum: 2011—1.739 billion dollars Minimum: 2006—145 million dollars

Combat Aircraft and Unmanned Aerial Vehicles (UAVs)

Exporters: The Top 10 exporters in the combat aircraft and UAVs category, in terms of the contracts signed, comprise the United States, Britain, France, Russia, Switzerland, Italy, South Korea, Spain, Israel, and Canada.¹⁵

A total of 24 countries signed arms contracts with the Middle Eastern states in this category in the reported period, including six countries in 2012. In 2012 the biggest exporter to the Middle East was Britain (5.9 billion dollars), followed by the United States (2.725 billion dollars) and Switzerland (1.5 billion).

In terms of actual deliveries in the aircraft and UAVs category to the Middle East, the Top 10 includes: the United States, Britain, France, Switzerland, South Korea, Russia, China, Israel, Canada, and Italy. A total of 25 countries made deliveries to the region in the reported period. In 2012 the largest deliveries were made by the United States (2.682 billion dollars), followed by France (1.68 billion) and Britain (264 million dollars).

Importers: In terms of the contracts signed, the biggest Middle Eastern importer in this category in 2012 was Oman (5.025 billion dollars), followed by Saudi Arabia (2.757 billion dollars), and Iraq (2.3 billion dollars).

In terms of actual deliveries in 2012, the leaders were the UAE (1.628 billion dollars), followed by Turkey (1.595bn), and Saudi Arabia (1.21 billion). These three countries accounted for 83.3 percent of the Middle Eastern conventional arms imports in this category in 2012. They were followed by Qatar (425 million dollars), Iraq (286 million), Oman (80 million), Yemen (38 million), Egypt (36 million), and Jordan (22.5 million).

Armored Vehicles

Exporters: The Top 10 of the countries that signed contracts for armored vehicles with Middle Eastern states in 2005–2012 includes: the United States (11.01 billion dollars),¹⁶ Canada (1,008 billion dollars), Turkey (741 million dollars), Germany (735 million dollars), Russia (654 million dollars), Ukraine (620 million dollars), South Korea (404 million dollars), South Africa (394 million dollars), the Netherlands (260 million dollars), and Bulgaria (188 million dollars). They are followed by: France (168.5 million dollars), Britain (163 million dollars), Belarus (120 million dollars), Serbia (112 million dollars), Belgium (93.8 million dollars), Poland (30.5 million dollars), Italy (20 million dollars), Greece (10 million dollars), the Czech Republic (5 million dollars), and Oman (1 million dollars).

In terms of contracts signed in this weapons category in 2012 the leader was the United States (632 million dollars), followed by Bulgaria with 188 million and France with 125 million.¹⁷

In terms of actual deliveries in 2012, the leader, predictably, was the United States (1.605 billion dollars), followed by Ukraine (216 million) and Canada (138 million).

The figures above illustrate that Russia's positions in the Middle Eastern market in this category leave something to be desired. Incidentally, Ukraine is increasingly becoming a strong competitor to Russian armor suppliers not only in the Middle East but in other parts of the world as well.

Importers: The biggest Middle Eastern importers of armored vehicles in 2005–2012 were Iraq (5.631 billion dollars), Saudi Arabia (4.953 billion dollars), and Egypt (2.386 billion dollars).

In 2012 the leader was Oman (400 million dollars), followed by Iraq (220 million dollars) and Israel (200 million dollars).¹⁸ These three countries accounted for just under 73 percent of the Middle Eastern imports in this weapons category.

Other Weapons Systems

For a number of reasons, there are no sufficiently accurate global figures for the SALW (small arms and light weapons) category.



To begin with, only a few exporters report these figures. Second, it is next to impossible to account for SALW weaponry leaking from legitimate to illicit circulation. Neither are there any figures for SALW deliveries via the black or grey channels, including exports via third countries or transfers from legitimate end users to rebels, gangsters, or terrorists.

A 2008 UN report put global circulation of weapons in the SALW category at 870 million units.¹⁹ The UN estimates that SALW weapons kill 740,000 people every year.²⁰ In one of his 2011 reports, the UN secretary-general estimated the value of the legal SALW market on a global scale at 7 billion dollars.²¹ According to the Small Arms Survey report,²² a total of at least 875 million units of small arms and light weapons had been accumulated on the planet as of 2012, and the figure continues to rise by 8 million every year.

Approximately 14 billion rounds of small arms ammunition are made every year. About 1 million small arms are lost or stolen every year.²³ The Middle Eastern and North African states are the largest importers of SALW weapons and ammunition, which undoubtedly increases the risk of armed conflicts in the region.

A total of about 1,200 private-sector companies in more than 90 countries currently offer products in the SALW category. The leading SALW exporters, with at least 100 million dollars' worth of annual exports, include, in descending order, the United States, Italy, Germany, Austria, Japan, Switzerland, Russia, China, France, South Korea, Belgium, and Spain.

The United States and Russia do not release their SALW exports statistics. It is believed, however, that the United States accounts for about 40 percent of the global figure, and Russia 7 percent. The European Union as a block is the world's largest SALW exporter.

The SALW transfers data contained in the UN Register of Conventional Arms are incomplete—but provide enough information to make some conclusions about SALW exports to various Middle Eastern and North African states in the past three years (see [Table 3](#)).

A closer analysis of SALW exports over the reported period reveals a significant rise in the deliveries of man-portable SAM systems and anti-tank guided missiles. Man-portable SAM

Table 3. Exports of Small Arms and Light Weapons to the Middle East

Country	2009 ⁴⁸	2010 ⁴⁹	2011 ⁵⁰
Austria		Algeria, Jordan, Iraq, Egypt, Qatar, Kuwait, Oman, UAE, Saudi Arabia	
Bulgaria	Yemen, Ethiopia, Iraq	Algeria, Yemen, Ethiopia	Egypt, Algeria, Iraq, Ethiopia, UAE
Bosnia Herzegovina	Yemen		
Britain	Bahrain, Qatar, Lebanon	Jordan, Iraq, Kuwait, Oman, UAE, Saudi Arabia	Bahrain, Djibouti, Oman, UAE, Iraq, Kuwait, Lebanon, Saudi Arabia
Hungary		Saudi Arabia	
Germany	Bahrain, Chad, Qatar	Bahrain, Qatar, Kuwait, Oman, UAE, Saudi Arabia	
Denmark	Ethiopia		
Canada		Saudi Arabia	
Poland			Saudi Arabia, Iraq
Romania	Lebanon		
Serbia	Bahrain		
Slovakia			Egypt
Turkey		Iran, Egypt, Syria	
Ukraine	Lebanon, Chad		
France			Qatar
Switzerland	Qatar, Lebanon, Kuwait		

systems are increasingly being used in armed conflicts; their legal transfers as well as illegal proliferation are becoming a major problem for the international community.²⁴

Based on incomplete information from various sources, it can be assumed that Russia exports about 150–300 million dollars' worth of small arms and light weapons every year. Man-portable SAM systems and anti-tank guided weapons, which are the two most expensive weapons types in this category, account for the bulk of that figure. The main buyers of these Russian-made systems are the Middle Eastern countries (Algeria, Libya, Ethiopia, Jordan, Eritrea, Oman, and others); Asia; Latin America; and some CIS states.

A total of about 200 U.S. companies are involved in the manufacture of small arms. Annual U.S. exports in the SALW category are estimated at about 1.2 billion dollars, on average (i.e. four or five times the Russian figure). Exports of American anti-tank missiles are worth about 775 million dollars, man-portable SAM systems 102 million dollars, and all other SALW types 275 million dollars. Annual U.S. production of all weapons in the SALW category is estimated at 4 million units, which is about half of the global figure. The main buyers of U.S.-made SALW are Western Europe, Japan, Israel, Taiwan, Saudi Arabia, and Egypt.

The global black market for small arms and light weapons is estimated at 3–4 billion dollars at the very least. Only about 50–60 percent of international SALW transfers are actually legal; the rest are made via various illegal or semi-legal mechanisms,²⁵ making the proliferation of SALW very difficult to keep track of. That proliferation is increasingly becoming a major threat to international security.

Helicopters

Exporters: The leaders in this category over the reported period were the United States with 15.108 billion dollars' worth of exports to the Middle East (72.8 percent), Russia with 2.646 billion dollars (12.75 percent, if a large contract with Iraq is confirmed), Italy with 2.22 billion dollars (10.7 percent), France (611 million dollars), UAE (101 million dollars), Jordan (32 million dollars), Poland (6 million dollars), and Ukraine (6 million dollars).

Importers: The biggest Middle Eastern importers in this category in 2005–2012 were Saudi Arabia (10.885 billion dollars, 52.45 percent), followed by Iraq (3.049 billion dollars, 14.65 percent), Turkey (2.524 billion dollars, 12.16 percent), the UAE (1.965 billion dollars), Egypt (1.159 billion dollars), Qatar (548 million dollars), Bahrain (302 million dollars), Jordan (84.6 million dollars), Lebanon (81.1 million dollars), Israel (80 million dollars), Iran (45 million dollars), Yemen (27 million dollars), and Oman (10 million dollars). Iraq led the league table in 2012 with about 2 billion dollars, followed by the UAE with 400 million dollars, and Lebanon with 69 million dollars.

In terms of actual deliveries, the leader in the 2005–2012 period was the UAE with 3.013 billion dollars (26.86 percent of the total), followed by Kuwait with 1.25 billion dollars (11.14 percent), Saudi Arabia with 1.215 billion dollars (10.83 percent), Egypt (1.075 billion dollars), Iraq (1.048 billion dollars), Turkey (785 million dollars), Israel (720 million dollars), Oman (665 million dollars), Qatar (578 million dollars), Bahrain (352 million dollars), Jordan (305 million dollars), Yemen (77 million dollars), Lebanon (71 million dollars), and Iran (65 million dollars).

Air Defense Systems

Exporters: The biggest exporter of air defense systems to the Middle East in the 2005–2012 period was the United States with 5.504 billion dollars (49.4 percent of the total), followed by Russia with 4.776 billion dollars (42.9 percent) and Switzerland with 307 million dollars (2.76 percent). The Top 10 also includes France (166 million dollars), Britain (165.3 million dollars), Egypt (130 million dollars), Italy (85 million dollars), and the Czech Republic (4 million dollars).²⁶ Only three countries exported air defense systems to the Middle East in 2012: the United States (1.644 billion dollars), Russia (413 million dollars), and France (100 million dollars).



Importers: The biggest Middle Eastern importer in this category in 2005–2012 was the UAE with 4.247 billion dollars' worth of imports (38.1 percent of the total). Over the past five years the country has ramped up its spending on air defense systems by a factor of more than 100.

Other major buyers were Egypt with 1.994 billion dollars (17.9 percent), Iran (1.4 billion dollars, 12.57 percent), Kuwait (1.193 billion dollars), Syria (776 million dollars), Turkey (510 million dollars), Saudi Arabia (373 million dollars), Israel (340 million dollars), Jordan (200 million dollars), and Oman (100 million dollars).

The 2012 ranking is led by the UAE with 1.121 billion dollars (51.95 percent), followed by Kuwait with 524 million dollars (24.3 percent), and Egypt with 300 million dollars (13.9 percent). The three countries accounted for 90.1 percent of Middle Eastern imports in this category in 2012. Other buyers included Syria (113 million dollars) and Oman (100 million dollars).²⁷

Naval Weaponry

Exporters: The biggest exporters of naval weaponry to the Middle East in 2005–2012 were Germany (2.2 billion dollars, 31.15 percent of the total), followed by France (1.629 billion, 23.1 percent), the United States (1.369 billion dollars, 19.4 percent), Italy (645 million dollars), Britain (437 million dollars), Sweden (171 million dollars), Turkey (160 million dollars), the UAE (156 million dollars), Russia (120 million dollars), and Australia (71 million dollars).

Nine countries exported naval weaponry to the Middle East in 2012, led by Germany with 635 million dollars, the United States (494 million dollars), and Britain (327 million dollars). Russia did not report any exports to the Middle East in this category in 2012.²⁸

Importers: The biggest Middle Eastern importer of naval weaponry in 2012 was Turkey (2.179 billion dollars, 30.87 percent of the total), although its annual imports figure fluctuated widely from 105 million to 656 million dollars. Turkey was followed by Saudi Arabia with 1.3 billion dollars' worth of imports (18.4 percent), Kuwait (713 million dollars, 10.1 percent), Israel (635 million dollars), Iraq (622 million dollars), the UAE (616 million dollars), Egypt (344 million dollars), Oman (322.5 million dollars), Bahrain (84.5 million dollars), Yemen (71 million dollars), Qatar (43.6 million dollars), Iran (40 million dollars), Lebanon (39 million dollars), Syria (30 million dollars), and Jordan (20 million dollars).

The 2012 ranking in this category is led by Israel with 635 million dollars' worth of imports (29.74 percent), followed by the UAE (256 million dollars, 12 percent) and Oman (252 million dollars, 11.8 percent). The three countries accounted for 53.3 percent of the total figure. Other importers included Iraq (246.2 million dollars), Turkey (240 million dollars), Egypt (215 million dollars), Kuwait (138.5 million dollars), Saudi Arabia (75 million dollars), Lebanon (29 million dollars), Qatar (28.3 million dollars), and Iran (20 million dollars).²⁹

Missiles and Artillery

Exporters: The largest exporter of missiles and artillery systems to the Middle East was the United States with 4.424 billion dollars' worth of sales (63.9 percent), followed by South Korea with 700 million dollars (10.1 percent) and France (500 million dollars 7.23 percent). The ranking also includes China (485 million dollars), Serbia (195 million dollars), Russia (145 million dollars), Turkey (140 million dollars), Finland (86.7 million dollars), Singapore (80 million dollars), Italy (53.6 million dollars), the Netherlands (45 million dollars), Sweden (12.5 million dollars), Belgium (11 million dollars), Bulgaria (10.5 million dollars), Austria (10 million dollars), Slovenia (6.4 million dollars), Bosnia (5 million dollars), the Czech Republic (5 million dollars), Ukraine (3 million dollars), and Romania (2 million dollars).

In 2012 the leader, by a very large margin, was the United States with 1.267 billion dollars' worth of exports in this category, followed by France with 150 million dollars, and South Korea with 140 million.³⁰

Importers: The biggest Middle Eastern importer in this category was the UAE with 1.975 billion dollars' worth of imports (28.54 percent of the total), followed by Jordan (1.048 billion dollars, 15.15 percent), Saudi Arabia (922 million dollars, 13.32 percent). Egypt (829 million

dollars), Turkey (764 million dollars), Iraq (454 million dollars), Israel (354.5 million dollars), Kuwait (347 million dollars), Bahrain (138 million dollars), Oman (48 million dollars), Iran (25.1 million dollars), and Yemen (16 million dollars).

In 2012 the leaders in this ranking were the UAE with 859 million dollars (51.84 percent), Jordan (379 million dollars, 22.87 percent), and Saudi Arabia (233 million dollars, 14.06 percent). The three countries accounted for 88.8 percent of Middle Eastern imports in this category in 2012. They were followed by Turkey (97.9 million dollars) and Egypt (87.8 million dollars).³¹

FORECAST FOR 2013–2016

The military-political situation in the Middle East remains extremely volatile, so projections for the regional arms market can be made only for the short term. Based on the early 2013 figures and information about the contracts that have already been signed, as well as reports about new contract announcements and intentions by various buyers, some projections can be made for the 2013–2016 period (see [Table 4](#)).

The forecast includes two key projections: the ranking of the Middle Eastern countries in terms of expected arms imports, and the ranking of global arms exporters to the Middle East.

In the near time frame (i.e. for the rest of 2013) Saudi Arabia is expected to remain the largest arms importer in the Middle East with 5.183 billion dollars' worth of imports, followed by the UAE (3.441 billion) and Egypt (2.597 billion)³²—see [Table 5](#).

The Middle Eastern states are expected to continue to increase their weapons stockpiles, and almost double their defense procurement spending over the next four years. This is a fairly safe assumption because the figures given above reflect only known weapons contracts; the overall imports figure will be pushed up by new orders placed for weapons systems that do not take long to manufacture (such as SALW, missile and artillery systems, etc.). As a result, the military potential of the Middle East will continue to increase at a rapid pace, which could well lead to an increase in the region's conflict potential as well.

The ranking of the top weapons exporters is fairly predictable; it is based on figures for the eight years to 2012, existing information about new contracts, and extrapolation of the current trends.³³

The United States is expected to retain its position as the top arms exporter to the Middle East over the coming three or four years. It will account for more than 70 percent (72–75 percent) of exports to the region across all weapons categories, up from about 55 percent in 2003–2010. In other words, the United States will strengthen its dominant role in the Middle Eastern defense market.

Speaking of the geography of U.S. arms exports, the Middle East has been one of the top destinations for many decades. In 2004–2011 the United States sold about 50 billion dollars' worth of various items of weaponry to the region, which is about 37 percent of U.S. defense exports. Starting from 2012 the share of the Middle East in these exports is expected to rise sharply. By 2016 the absolute figure will reach about 72 billion dollars, out of the projected total of 120.3 billion. That growth will largely be driven by new orders for American weapons placed by Saudi Arabia and the UAE.

Most of the large contracts were signed after the outbreak of the Arab Spring in the Middle East and North Africa. The ongoing civil war in Syria has also spurred the placement of new orders for American weapons. Meanwhile, Russia and the leading Western European defense suppliers are losing their share of the Middle Eastern market.

Britain is expected to come second in the ranking of the leading arms suppliers to the Middle East, with at least 9 percent (9.2–9.5 percent) of the total. It will be followed by France, with 5.7–5.9 percent of the Middle Eastern market.

In terms of geographic destinations, Britain and France have the most evenly balanced structure of arms exports among the leading global suppliers. The Middle East, Asia Pacific, and North America account for roughly equal proportions of these two countries' exports. For example, in 2004–2011 the Middle East was the third-largest destination of French defense



Table 4. **Projection for Middle Eastern Imports of Conventional Weapons (By Category), in 2013–2016.**⁵¹

Weapons category	Trends	Imports, billion dollars			
		2013	2014	2015	2016
Combat aircraft and UAVs	The current trends will continue throughout this period; combat aircraft and UAVs will remain the biggest category of arms exports to the Middle East, in dollar terms An estimated 41 billion dollars' worth of weaponry will be bought in this category, which represents 40 percent of the total figure of arms exports to the region As a proportion of arms exports to the region, exports in this category will increase from 33.2 percent in 2005–2012 to 38.27 percent in 2013–2016	7.466	10.492	11.653	11.37
Armored vehicles	Armored vehicles as a category are expected to slip from second to fourth place; the value of the armor contracts expected to be signed in 2013–2016 is estimated at 8.594 billion dollars (about 8 percent of the projected total)	2.056	2.132	2.445	1.962
Other weapons systems	The “Other weapons” category is expected to slip to sixth place The time between the signing of the contract and actual deliveries is usually much shorter for this category compared with other categories That is why many contracts for weaponry to be delivered in 2013–2016 have yet to be signed, so the data in this table are preliminary	1.346	1.727	0.618	0.058
Helicopters	Helicopters as a category are expected to rise from fourth to second place; with 27.721 billion dollars' worth of contracts expected to be signed in the indicated period (26 percent of the total) The share of this category in arms exports to the Middle East is expected to rise by 14.25 percentage points, from 11.64 percent in 2005–2012 to 25.89 percent in 2013–2016 In other words, this category is expected to show the fastest growth	2.707	4.443	9.511	11.059
Air defense systems	This category is expected to rise from fifth to third place A total of 17.249 billion dollars' worth of sales to the Middle East are expected to be made in this category during the reported period, which constitutes 16.1 percent of the total As a share of the total, exports in this category are expected to increase from 11.5 percent in 2005–2012 to 16.1 percent in 2013–2016	0.772	1.34	6.5	8.639
Naval weapons	Some 6.18 billion dollars' worth of exports are expected in this category, which represents 5.77 percent of the total As a proportion of the overall arms exports to the Middle East, this category is expected to shrink by 1.55 percentage points from 7.32 percent Nevertheless, in the ranking of weapons categories, naval weapons are expected to rise from sixth to fifth place due to even bigger changes in other categories	2.383	0.835	1.142	1.82
Missiles and artillery	The Missiles and Artillery category is expected to remain in seventh place A total of 2.61 billion dollars' worth of contracts are expected to be signed in this category, which represents 2.44 percent of the total As a share of the total, the category is expected to show an increase of 4.74 percentage points to 7.18 percent	1.312	0.508	0.654	0.135

Source: Breakdown of arms exports to the Middle East by weapons categories in 2013–2016. CAWAT. February 17, 2013, <http://www.armstrade.org/includes/periodics/news/2013/0217/134017134/detail.shtml> (last accessed July 26, 2013).

Table 5. **Ranking of Middle Eastern States by Projected Value of Arms Imports**

Conventional arms imports by Middle Eastern states in all categories outlined in the UN Register					
Country	2013–2016	2013	2014	2015	2016 ⁵²
Entire Middle East	107.084 billion dollars ⁵³	18.042 billion dollars	21.478 billion dollars	32.522 billion dollars	35.041 billion dollars
Saudi Arabia	40.827 billion dollars (38.1 percent of the total for the Middle East) In the four years to 2012, Saudi Arabia imported 12.222 billion dollars' worth of weaponry, so its imports are expected to increase by 230 percent in the coming four-year period	5.183 billion dollars	8.223 billion dollars	14.018 billion dollars	13.403 billion dollars
UAE	15.417 billion dollars (14.4 percent of the total for the region) In the previous four-year period to 2012 the country's arms imports stood at 13.705 billion dollars, so the increase projected for 2013–2016 is about 2 billion dollars	3.441 billion dollars	2.737 billion dollars	4.93 billion dollars	4.309 billion dollars
Qatar	11.302 billion dollars (10.55 percent) Qatari arms imports are expected to rise by 360 percent from 2.243 billion dollars in the four-year period to 2012. The bulk of the increase is expected to happen in 2015, and imports will continue to rise in later years. Based on the available data, Qatari arms imports will rise faster than for any other country in the region, propelling Qatar from tenth place in the 2009–2012 country ranking to third	13 million dollars	198 million dollars	4.682 billion dollars	6.409 billion dollars
Turkey	10.697 billion dollars				
Iraq	7.079 billion dollars				
Kuwait	6.797 billion dollars				
Egypt	4.997 billion dollars				
Oman	4.57 billion dollars				
Israel	3.069 billion dollars				
Syria	2.105 billion dollars, if contacts already signed with Russia are fulfilled				



exports, with 7.681 billion dollars' worth of sales (24.58 percent of the total). In 2013–2016 the region will account for about 26.5 percent of French arms exports.

In the ranking of the top weapons exporters to the Middle East, the United States, Britain, and France will likely be followed by Germany,³⁴ Italy, Russia, Canada, South Korea, Switzerland, and Ukraine.


Each of these countries will control a relatively small share of the Middle Eastern market. For Germany, the figure will be about 2.2 percent, for Italy 2.13 percent, and for Russia 2.05 percent. If the contracts already signed between Russia and Syria are actually fulfilled, Russia will rise from sixth to fifth place in the ranking—but such a scenario is unlikely. The rest of the countries in the Top 10 will control less than 3 percent of the Middle Eastern defense market between them; the share of each individual country will be in the region of 0.6–0.78 percent.

Positions from 11 to 20 in the ranking of arms exporters to the Middle East will be held, in descending order, by Sweden, Israel, the Netherlands, Turkey, Serbia, Spain, the UAE, Saudi Arabia, Singapore, and South Africa. Each will control from 0.35 to 0.05 percent of the Middle Eastern market. Belgium, Norway, Portugal, and Austria are also expected to make some sales, but their share of the market will be miniscule.

FURTHER INTO CONFLICT

Trends in the Middle Eastern market for conventional arms fully reflect the ongoing process of the region's militarization, which has already led to tectonic shifts in the Arab world, with spiraling tensions and unpredictable consequences for the rest of the world.

Changes in the global economy and politics, internal transformations in the Middle East, and actions (or inaction) of the great powers make it almost inevitable that the region will plunge further into conflict. The outcomes of these fundamental and irreversible changes are impossible to predict. Another important thing to understand is that the indicators of possible catastrophe include not only the uncontrolled events of the Arab Spring, but also the policies of the arms exporters—who are trying to prevent an escalation of violence in the Middle East, but continue to arm the entire region.

Until the international community comes to realize that arms supplies and the fate of the protest movement in the countries affected by the Arab Spring are tightly intertwined, there is no reason at all to expect peace in the Middle East. 

NOTES

¹ For more details about the causes and the progress of these conflicts, please see materials of the Institute for Middle East Studies: <<http://www.iimes.ru/index.html>>, last accessed July 26, 2013.

² The decision to impose an embargo on arms supplies is made in accordance with Article 41 Chapter VII of the UN Charter; such a decision requires the approval of 9 UN Security Council members out of 15, including all five permanent members.

³ Complete database on embargos, as well as database of embargos imposed by the EU, "SIPRI Arms Embargoes Database," [http <http://www.sipri.org/databases/embargoes>](http://www.sipri.org/databases/embargoes), last accessed July 26, 2013.

⁴ "United Nations Arms Embargoes: Their Impact on Arms Flows and Target Behaviour," a report by D. Fruchart, P. Holtom, S.T. Wezeman, D. Strandow and P. Wallenstein, SIPRI, 2007.

⁵ In the period between 2004 and 2011 global defense spending rose in nominal figures from 994.965 billion dollars to 1,639.972 billion—an increase of 65 percent.

⁶ For detailed information about the defense spending of all Middle Eastern and North African countries in 2004–2011, please see: Center for Analysis of World Arms Trade (CAWAT) 2012 Annual Report, Section 1: "Global Defense Spending in 2004–2011," <<http://armstrade.org/pages/main/magazines/yearly/report/1/index.shtml>>, last accessed July 26, 2013.

⁷ Sam Perlo-Freeman, Elisabeth Skuns, Carina Solmirano and Helen Wiland, "Trends in World Military Expenditure, 2012" (SIPRI Fact Sheet, April 2013), <http://books.sipri.org/product_info?c_product_id=458#>, last accessed July 26, 2013.

⁸ The ranking of the world's most militarized states, according to the Bonn International Center for Conversion, is led by Israel; Syria is 3rd, Jordan 5th, Kuwait 8th and Saudi Arabia 10th. See: "Likelihood of an Escalation of Violence in the Middle East and North Africa: Predictions by Experts," January 19, 2012, <<http://www.centrasia.ru/newsA.php?st=1327503600>>, last accessed July 26, 2013.

⁹ Global arms imports in 2004–2011 stood at 356.159 billion dollars.

¹⁰ The regional ranking of the global arms market in 2004–2011, by value of the contracts signed, stood as follows: 1. Asia Pacific (155.488 billion dollars); 2. Middle East (142.592 billion dollars); 3. Western Europe (51.671 billion dollars); 4. South America and Mexico (35.291 billion dollars); 5. North America (32.602 billion dollars); 6. Northern and north-eastern Africa (17.526 billion dollars); 7. Former Soviet republics (10.123 billion dollars); 8. Eastern Europe (6.456 billion dollars); 9. Sub-Saharan Africa, including South Africa (5.382 billion dollars); 10. Central America and the Caribbean (791 million dollars). For more details, see: Center for Analysis of World Arms Trade (CAWAT) 2012 Annual Report, Chapter 3: "Global Arms Exports in 2004–2011." See: Center for Analysis of World Arms Trade, <<http://www.armstrade.org>>, last accessed July 26, 2013.

¹¹ "Middle Eastern Defense Market in 2005–2012 and Forecast for 2013–2016," analysis produced ahead of the IDEX 2013 exhibition. CAWAT, <<http://armstrade.org/includes/periodics/mainnews/2013/0217/102717125/detail.shtml>>, last accessed July 26, 2013.

¹² For more details about the Top 20, see: "Twenty Biggest Weapons Deals," *Vestnik aktualnykh prognozov*, January 15, 2013 <<http://www.vestnikrf.ru/news/info/1510/>>, last accessed July 26, 2013; CAWAT, "Ranking of the 20 Biggest Weapons Deals in 2012," December 26, 2012, <<http://armstrade.org/includes/periodics/mainnews/2012/1226/100516383/detail.shtml>>, last accessed July 26, 2013.

¹³ The ranking includes seven expanded weapons categories included in the UN Register: armored vehicles; military aircraft and UAVs; helicopters; naval weaponry; missiles and artillery; air defense systems; and other weapons systems.

¹⁴ The exports figure includes deliveries of new weapons; weapons from MoD surplus of the exporter countries; and repair and upgrades programs. The analysis uses CAWAT figures released ahead of the opening of the IDEX-2013 exhibition in Abu Dhabi, <<http://armstrade.org/includes/periodics/mainnews/2013/0217/102717125/detail.shtml>>, last accessed July 26, 2013.

¹⁵ Ranked in descending order hereafter.

¹⁶ For reference, actual deliveries of U.S.-made weapons in the "Armored vehicles" category to the Middle East reached 10.033 billion dollars over the same period.

¹⁷ See: CAWAT, "Middle Eastern Market for Armored Vehicles," February 13, 2013, <<http://armstrade.org/includes/periodics/mainnews/2013/0213/094917053/detail.shtml>>, last accessed July 26, 2013.

¹⁸ Ibid.

¹⁹ Speaking at a UN conference to review progress achieved in implementing the program of preventing and eradicating illegal trade in small arms and light weapons (August 27–September 7, 2012), deputy UN secretary-general Jan Eliasson announced another figure: bullets kill about 500,000 people every year.

²⁰ UN Security Council document S/PV.6288 (Resumption 1) of March 19, 2010.

²¹ A report by the UN secretary-general, entitled "Small Arms," UN Security Council document S/2011/255, April 5, 2011.

²² "2012 Small Arms Survey: Moving Targets." See: Small Arms Survey, <<http://www.smallarmssurvey.org/>>, last accessed July 26, 2013.

²³ For more details, see: Amnesty International, "Arms Trade Treaty: international controls over international trade," 2009, <<http://amnesty.org.ru/node/703>>, last accessed July 26, 2013.

²⁴ A distinctive feature of man-portable SAM systems is that they can be used to take out not only civilian but also military planes at a distance of 5–7km. Most of the missiles of this type,



including the Soviet (Russian) SA, the U.S.-made Stinger, and the Chinese-made Vanguard, are very light and use infrared homing heads. The Middle Eastern and North African countries demonstrate growing interest in such systems.

²⁵ For more details, see: N.I. Kalinina, ed., *Russia's Military and Technical Cooperation with Other Countries: Current State, Problems, and Outlook* (Moscow: IMEMO RAN, 2010), pp. 70–77.

²⁶ Ibid.

²⁷ For more detailed statistics on the Middle Eastern defense market, see: *Mirovaya trgovlya oruzhiem*. 2013, No. 2.

²⁸ Ibid.

²⁹ Ibid.

³⁰ For more details, see: “Breakdown of Arms Exports to the Middle East by Weapons Categories in 2005–2012,” *Mirovaya trgovlya oruzhiem*. 2013, No. 2.

³¹ *Mirovaya trgovlya oruzhiem*. 2013, No. 2.

³² *Mirovaya trgovlya oruzhiem*. 2013, No. 2.

³³ The forecast is based on: 1. SIPRI, “Government and Industry Data on the Financial Value of National Arms Exports, 1994–2011,” SIPRI, May 2013, <http://www.sipri.org/research/armaments/transfers/measuring/financial_values/gov_exp.xls>, last accessed July 26, 2013; 2. CAWAT-2012 Annual Report: Statistics and Analysis of the World Arms Trade, Chapter 3. Section 3.5: “Breakdown of Arms Exports by Importer Country,” and Section 3.6: “Breakdown of Russian Arms Exports by Importer Country in 2004–2011 and 2012–2015,” CAWAT, <http://www.armstrade.org/files/yearly_2012_3_1_1_1.pdf>, last accessed July 26, 2013.

³⁴ In the ranking of top importers of German weaponry, the Middle East is third; in the coming years the region will account for about 4 billion dollars (25.5 percent) of German arms exports.

³⁵ The data hereafter can also be verified against the SIPRI database: “Transfers of Major Conventional Weapons: Sorted by Recipient. Deals with Deliveries or Orders made for Year Range 2004 to 2012,” SIPRI Arms Transfers Database, <http://armstrade.sipri.org/armstrade/page/trade_register.php>, last accessed July 26, 2013.

³⁶ The military aircraft and UAVs category includes multirole fighters, ground attack aircraft; refueling aircraft, patrol aircraft, military transports, AWACS planes, reconnaissance planes, radioelectronic reconnaissance planes, communications planes, combat trainer jets, turbo-prop trainer aircraft, and all types of UAVs.

³⁷ CAWAT, “Middle East Market for Military Aircraft and UAVs in 2005–2012, and a Forecast for 2013–2016,” February 15, 2013. <<http://armstrade.org/includes/periodics/mainnews/2013/0217/102717125/detail.shtml>>, last accessed July 26, 2013.

³⁸ The “Armored vehicles” category includes main battle tanks, infantry fighting vehicles, heavily armed fighting vehicles, armored personnel carriers, armored reconnaissance vehicles, armored trucks, and repair and evacuation vehicles.

³⁹ The “Other weapons” category includes all the types of weapons not covered by other main categories, including: small arms, fighting compartments for armored vehicles, ammunition, radios, engines of all types, dynamic protection systems for armor, targets, helmet-mounted systems, communications systems, target designation systems, thermal imagers, simulators, and other hardware.

⁴⁰ For more details, see: CAWAT, “Breakdown of Arms Exports to the Middle East by Weapons Categories in 2005–2012,” February 17, 2013. <<http://armstrade.org/includes/periodics/mainnews/2013/0217/102717125/detail.shtml>>, last accessed July 26, 2013.

⁴¹ The “Helicopters” category includes attack helicopters, AWACS helicopters, anti-submarine and naval patrol helicopters, heavy transport helicopters, and multirole medium and light helicopters.

⁴² For more details, see: CAWAT, “The Middle Eastern Market for Military Helicopters in 2005–2012 and a Forecast for 2013–2016.” <<http://armstrade.org/includes/periodics/mainnews/2013/0214/100217078/detail.shtml>>, last accessed July 26, 2013. See also: “Breakdown of Arms Exports to the Middle East by Weapons Categories in 2005–2012.”

⁴³ The “Air defense systems” category includes long, medium, and short-range anti-aircraft missile systems, man-portable SAM systems, and anti-aircraft artillery.

⁴⁴ “Breakdown of Arms Exports to the Middle East by Weapons Categories in 2005–2012.”

⁴⁵ The “Naval weapons” category includes the main types of warships (aircraft carriers, destroyers, frigates, corvettes, minesweepers, and amphibious assault ships), submarines, and boats (missile, artillery, patrol, amphibious assault, coastal and sea-going boats).

⁴⁶ The exports figure includes deliveries of new weapons; weapons from MoD surplus of the exporter countries; and repair and upgrades programs. See: CAWAT, “Ranking of Exporter Countries by Actual Arms Deliveries to the Middle East in 2005–2012,” February 17, 2013. <<http://armstrade.org/includes/periodics/news/2013/0217/115517128/detail.shtml>>, last accessed July 26, 2013.

⁴⁷ The “Missiles and artillery” category includes anti-tank missile systems (anti-tank guided missiles), MLR systems, all types of artillery (field artillery and self-propelled artillery systems), tactical and operational-tactical missile launchers, and mortars.

⁴⁸ For numbers and categories of small arms and light weapons sold to the aforementioned and other countries not categorized as unstable, See UN GA document A/65/113 of June 15, 2010.

⁴⁹ For types and numbers of the supplied SALW—see: “The Global Reported Arms Trade: The United Nations,” <<http://www.un-register.org/SmallArms/Index.aspx>>, last accessed July 26, 2013.

⁵⁰ For numbers and categories of small arms and light weapons sold to the aforementioned and other countries not categorized as unstable, See UN GA document A/67/212 of July 30, 2012, and A/67/212/Add.1 of September 21, 2012.

⁵¹ The projections also rely on the following source: Paul Holtom, Mark Bromley, Pieter D. Wezeman and Siemon T. Wezeman, “Trends in International Arms Transfers, 2012,” SIPRI Fact Sheet, March 2013, <http://books.sipri.org/product_info?c_product_id=455#>, last accessed July 26, 2013.

⁵² The figures hereafter are from CAWAT estimates released ahead of the IDEX-2013 exhibition in Abu-Dhabi, <<http://www.armstrade.org/includes/periodics/news/2013/0221/115517211/detail.shtml>>, last accessed July 26, 2013.

⁵³ The figure includes expected deliveries of new weapons; weapons from MoD surplus of the exporter countries; and repair and upgrades programs.

