



# The Tactical Side of Russia's Arms Sales to the Middle East

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## **Summary**

Russia is the world's top arms exporter, second only to the United States. The Middle East and North Africa (MENA) region has emerged in recent years as Moscow's second most important arms market after Asia. Moscow has made great strides in this region since Vladimir Putin came to power, and especially in recent years, after it embarked on major military reform following August 2008. Arms sales matter to the Kremlin because they are a major source of financial gain, but these arms sales are also a tactical foreign policy instrument for wielding influence.

Russia's arms—generally speaking—are well made, sometimes on par with the US, and well suited for the region's needs. These platforms and armaments are also more affordable than Western weaponry. The US simply will not sell weapons to certain countries, which, therefore, turn to Moscow. Politically, Russian arms come with few strings attached and thus are a great choice when a country wants to diversify away from the West, or at least signal such an intent. Moscow has made inroads with traditional clients such as Iran, Syria and Egypt, but also diversified toward countries closer to the West, such as the Arab Gulf states, Morocco and Turkey. Russia's overall influence in the region is growing in the context of Western retreat. The Russian defense sector has problems, but also demonstrated improvements, learning and flexibility. Undoubtedly, Russia's arms sales to the MENA region will continue to present a challenge for American interests in this region in the coming years.

## **Introduction**

Russia is one of the world's top arms exporters, second only to the United States since at least 1999.<sup>1</sup> In recent years, the Middle East and North Africa (MENA) region emerged as Russia's second most important arms market after Asia. From 2000 to 2016, almost a fifth of Russia's arms

exports went to the MENA region.<sup>2</sup> To put this in perspective, in 2009, Moscow sold approximately \$9 billion worth of arms to this region. In 2016, it sold \$21.4 billion.<sup>3</sup> Many of these sales are upgrades to existing packages.<sup>4</sup> Since 2000, Moscow also diversified from traditional Soviet-era regional clients.

Since officially coming to power in May 2000, if not before, Russian President Vladimir Putin sought to restore Russia's image as a Great Power in the context of zero-sum anti-Westernism—for Russia to win, the West had to lose. His approach to the Middle East is the extension of former Russian prime minister Evgeniy Primakov's vision of a "multipolar world," driven by desire to prevent the West from dominating any region, and curb Western support for democratization efforts in other countries. For the last 17 years, Putin worked to regain political influence and raise Russia to the status of a competitor to the United States by increasing emphasis on Russia's business interests—primarily arms, energy and high-tech goods such as nuclear reactors.<sup>5</sup>

Russia's economy remains over-reliant on raw materials and natural resources, but the defense industry is one technology-intensive sector where Russia holds an international leadership position. Domestically, Russia's defense industry is a major source of employment. Russian President Vladimir Putin renewed his emphasis on modernizing the armed forces, especially the navy, on May 7, 2012, on the same day as he took office as president for a third time.<sup>6</sup> Internationally, the Russian defense industry is a source of important revenue. Thus, Putin lamented in February 2012 about Iraq and countries undergoing the Arab Spring, "Russian companies are losing their decades-long positions in local commercial markets and are being deprived of large commercial contracts."<sup>7</sup> As Sergei Chemezov, chief of the powerful state industrial holding Rostec, said in February 2015, "As for the conflict situation in the Middle East, I do not conceal it, and everyone understands this, the more conflicts there are, the more they [clients] buy weapons from us. Volumes are continuing to grow despite sanctions. Mainly, it is in Latin America and the Middle East."<sup>8</sup>

Yet, arms sales entail far more to the Kremlin than mere financial gains. They are also Moscow's tactical foreign policy tool for wielding political influence and changing power balance dynamics. Indeed, in July 2012, Putin said that arms exports are "an effective instrument for advancing [Moscow's] national interests, both political and economic."<sup>9</sup> In December 2013, Deputy Prime Minister Dmitry Rogozin said that Russia's arms sales are the most important element of Moscow's relations with other countries.<sup>10</sup> And Moscow's chief goal—regime survival, which it hopes to achieve through reduction of Western influence—runs counter to Western interests and values. Thus, in the MENA region, Moscow courts virtually everyone, and competes with the West whenever an opportunity arises. Arms exports are a major component of these efforts.

## **Measurement Issue**

Several obstacles hamper a complete understanding of Russia's arms trade. Rosoboronexport, Russia's arms export agency, does not publicize total annual sales figures. In addition, some companies can sell arms directly to clients, bypassing Rosoboronexport, and may not disclose information. When Moscow does disclose Russia's arms sales figures, the details are generally sparse. Unlike Western countries, Moscow does not provide disaggregated data. The recipient

countries in the Middle East are also not consistently forthcoming with details about receiving Russian weaponry.<sup>11</sup>

Theoretically, as Chatham House points out, two measures are available to understand arms trade: military capabilities transfer, which involves estimating the material volume of arms transfer, and the financial value of arms transfers.<sup>12</sup> Both present challenges. For example, some countries pay more than others do for the same weaponry. Also, countries and sources use different definitions of what constitutes an arms transfer, often with substantial variation. These issues hamper a complete understanding of Russia's arms sales, and some, such as the Stockholm International Peace Research Institute (SIPRI), have come up with their own measures to overcome these difficulties.<sup>13</sup> Yet, the available data, though incomplete, is sufficient to gain at least an outline, and occasionally a more complete picture of Russian arms exports.

### **Why Choose a Russian Weapon?**

When countries prefer Russian weaponry over American systems, it is usually for evident reasons. The US will not sell weapons to many of Russia's clients for a variety of reasons. Russian weaponry is relatively inexpensive and, generally speaking, often more robust than comparable American systems. In some areas, Moscow's systems lag severely behind the US in terms of quality and capabilities, but in others, it is a near-peer competitor. For instance, Moscow is quite good at building anti-aircraft missiles, such as the S-300 and S-400 systems, based on lessons-learned from the Kosovo Air War. The American F-35 joint strike fighter can likely currently beat an S-400 (although there is no way to know for sure unless they engage in direct combat). However, Moscow is developing the next generation, the S-500, whose full capabilities are unknown. Russian current-generation aircraft and ballistic missile defenses are on par with those of the US in terms of defense technology. Some Russian missiles have as long a range as American missiles, a few of them even longer.<sup>14</sup> In addition, the US Foreign Military Sales (FMS) system is very slow, bureaucratic and cumbersome, while Moscow takes less time to deliver after a contract is signed.

Moscow is weak when it comes to follow-up support of sales, and Russian weaponry is not always as technically advanced as America's, but it is good enough for the needs of many markets, and is often far better than what the purchasing countries can build themselves. Russian weaponry is also a good choice for states on a budget. Moscow advertises this fact. For example, in early October 2015, days after Russia's Syria intervention, Moscow fired 26 cruise missiles from primarily small corvettes in the Caspian Sea to hit targets in Syria.<sup>15</sup> Moscow made a public display of the event, not only to demonstrate Russia's own might but also to show other countries they need not purchase a large expensive warship to achieve strong naval capabilities, and that Moscow would be happy to help them achieve this goal.

Another practical consideration is that many local military personnel in the MENA region have trained on Russian weaponry and feel comfortable operating it. As one American source familiar with the situation explained it, "If you have an AK-47, why change to an M-16?"<sup>16</sup> For example, helicopters are especially crucial to Egypt's anti-Islamist campaign; and according to first-hand pilot accounts, Russia's less expensive helicopters fit Egypt's needs well. Overall, Russian attack

helicopters are not necessarily superior technologically, but they bring heavy firepower to a fight. They may fare worse in a contested air space, but the Sinai airspace is not contested. The Russian MiG-29 is a highly advanced aircraft, easier to maintain than an American one, and cheaper than an F-22<sup>17</sup> (which the US is currently not even exporting).

Beyond these advantages, Russian weaponry comes with few strings attached, in contrast to arms sales from Washington. Moscow, unlike the US, does not prohibit secondary arms sales. This means, for example, that when the US sells weapons to Egypt, the weapon must stay in Egypt.<sup>18</sup> But in Egypt's context, buying a Russian weapon it can easily resell to someone else for profit may be a preferable option.

Moscow also does not burden arms sales with preconditions, such as mandated improvements of human rights. In addition, many in the MENA find Russia easier to deal with—no one needs to worry about falling afoul of a theoretical Russian equivalent of the US Foreign Corrupt Practices Act, for example. Thus, countries turn to Moscow when they wish to signal to Washington that they have other options if they do not like the United States' pre-conditions. At the same time, some Arab states are genuinely interested in diversifying supplies away from the US. Indeed, after the 1991 Gulf War, several GCC states bought Russian systems. The West should not discount Arab countries making such decisions. Russia, unlike the America, invests effort across the MENA region to sell weapons systems. Western analysts tend to point out Russia could never replace the United States. Nevertheless, such views discount another option: Moscow does not have to replace the US. Other authoritarian leaders can choose to move closer to Russia because the Kremlin offers Arab states different advantages including quicker delivery and better negotiating terms. When it comes to arms sales in the MENA region, Moscow has made major inroads during the Putin era with Iran, Syria, Egypt, Libya and Algeria, and to a lesser extent with Turkey, Iraq, and elsewhere in the Arab Persian Gulf. It is also making small inroads with Tunisia and Morocco.

## **Iran**

Russia and Iran share a complicated and primarily adversarial centuries-long history, but things slowly began to change following the end of the Iran-Iraq war in 1988, the death of Iran's revolutionary leader, Ayatollah Ruhollah Khomeini, and Soviet withdrawal from Afghanistan in 1989. Between 1989 and 1991, the Kremlin signed several arms-supply deals with Tehran worth \$5.1 billion, and Iran emerged as one of the Soviet defense industry's biggest clients. When Putin became president, many hardline Russian politicians and generals endorsed improving relations with Iran in anticipation of major arms sales. Soon Moscow began assisting Tehran's nuclear program. In October 2000, another important event took place. Putin publicly repealed the 1995 Gore-Chernomyrdin pact—an agreement that limited Russia's sale of conventional arms to Iran. According to press reports, in practice the agreement actually gave Russia “a free pass to sell conventional weapons to Iran” until 1999.<sup>19</sup> Moreover, the public cancelation of the deal signaled Putin's interest in closer cooperation with Iran.

By 2001, Iran became the third largest foreign buyer of Russian weaponry.<sup>20</sup> The increased arms trade raised Russia-Iran cooperation to a new level, based on mutual interests. Upon Putin's invitation, Iranian president Mohammad Khatami came to Moscow in March 2001—the first high

level visit since June 1989, when Iranian Parliament Speaker Ali Akbar Hashemi Rafsanjani traveled to Russian, and the first visit by an Iranian president since the 1979 Islamic Revolution

In December 2005, Tehran signed a billion-dollar arms deal that included 29 Tor-M1 missile-defense systems to protect the Bushehr nuclear power plant. According to press reports, in early 2006, Russia also invested \$750 million in energy projects in Iran.<sup>21</sup> The same year, Moscow strongly endorsed the P5+1 format<sup>22</sup> for negotiating with Tehran on the nuclear issue. This new context gave Russia increased diplomatic leverage, and the Kremlin used it to repeatedly dilute sanctions against Iran and extract concessions from the West in exchange for Russia's cooperation. Indeed, in 2010, the Kremlin extracted an unprecedented concession: Moscow would support some sanctions on Iran in exchange for the US lifting sanctions against the Russian military complex, which would allow Moscow to sell anti-aircraft batteries to Tehran. The same year, under American and Israeli pressure, Moscow froze the sale of S-300 air-defense missiles to Iran.

Several factors explain Moscow's more permissive stance toward Iran's nuclear program. First, Moscow never envisioned the threat of Iran's nuclear program as the West did. For Moscow, a pro-Western Iran would be more threatening than a nuclear Iran.<sup>23</sup> Moscow for decades has been surrounded by nuclear powers and while one more may not be desirable, it is something Moscow feels it could also live with. Soviet and then Russian diplomat on arms-control and non-proliferation issues Victor Mizin wrote in October 2000 that while "certain people in Russia pay lip service to the politically correct notion that proliferation is dangerous," Moscow rejects the Western term "rogue states." Deployed ballistic missiles would not threaten Russian troops stationed abroad as they do American troops, and Russia has no domestic lobbies to pressure the government on such issues as is prevalent in the West. "That is why one always hears very politically correct words from Russian political scientists about concerns that Iran is developing missile capabilities. No one in the Russian political elite is seriously considering the threat of this development."<sup>24</sup>

Second, Moscow wanted to increase trade with Iran, and sanctions hampered these aspirations. In 2013, Russia's and Iran's political interests converged more than ever before. Russia's state-run Atomstroyexport helped Tehran complete the Bushehr nuclear power plant and officially gave Iran control of the facility in September 2013. In November 2014, Russia's state nuclear corporation Rosatom announced an agreement to build two new reactor units in Iran, possibly to be followed by six more. As nuclear deal negotiations advanced, the Kremlin highlighted Russia's indispensable role in them. He also lifted the freeze on the S-300 sale, and deliveries began in April 2015, despite Israeli concerns. Putin may have lifted the freeze to strengthen Iran's hand as the nuclear negotiations were ending. When the negotiating parties concluded the agreement in July 2015, Putin praised the nuclear deal and emphasized Russian diplomacy in the process. Some might argue Tehran did not obtain the best deal from a commercial perspective—by this time Russia had S-400s and was developing the S-500—but an S-300 is a formidable weapon in its own right, and should not be discounted.

Third, Russia has been trying to expand its military cooperation with the Islamic Republic. In August 2016, Moscow used Iran's Hamadan airbase to bomb targets in Syria. This action surprised not only the world, but many within Iran itself. Not since World War II did a foreign power base itself in Iran. The Iranian public was outraged and Iranian Defense Minister Hossein

Dehghan accused Moscow of “ungentlemanly”<sup>25</sup> behavior for publicizing Russia’s use of the base—but not for the use of the base itself. Furthermore, Iranian Parliament Speaker Ali Larijani said only days afterwards, “The flights [of Russian warplanes] haven’t been suspended. Iran and Russia are allies in the fight against terrorism,” though the Hamedan air base, he claimed, was only “used for refueling.”<sup>26</sup> The next month, Putin said that it would be “just” if Iran reached the pre-sanction’s level of oil production.<sup>27</sup> In November 2016, Putin began discussing a \$10 billion arms deal with Tehran.<sup>28</sup> And in August 2017, Germany’s *Die Welt* reported that Tehran was transferring weapons to Russia via Syria for maintenance, which violated United Nations Security Council Resolution 2231.<sup>29</sup> Meanwhile, the Tartus naval base, at least theoretically, provides Moscow with another opportunity to arm Iranian proxy Hezbollah indirectly through Syria if it chooses to do so.

## Syria

Damascus is historically not only Moscow’s closest ally in the Arab world, but also one of its biggest arms customers. Putin improved bilateral ties further after meeting with President Bashar al-Assad in January 2005. Upon the meeting’s conclusion, Moscow announced it would write off most of Syria’s \$13.4 billion debt and sell arms to Damascus in return for Syria’s permission to establish permanent Russian naval facilities in Tartus and Latakia.<sup>30</sup> Soon Russia emerged as Syria’s primary weapons supplier. From 2007 through 2010, Russian arms sales to Syria reached \$4.7 billion, more than twice the figure for the previous four years.<sup>31</sup> According to SIPRI, Russia accounted for 78 percent of Syria’s weapons purchases between 2007 and 2012. And press reports indicate that Russian ships have been involved in several Syria-related incidents in international waters.<sup>32</sup>

When anti-al-Assad protests broke out in Damascus in March 2011, Putin supported the Syrian president unequivocally and in multiple ways—politically, diplomatically and economically. But Moscow’s Syria intervention in September 2015 was a game changer that officially returned Russia to the Middle East. The Kremlin had many interests in Syria. While, from an arms sales perspective, it was the perfect advertising arena.

In early October 2015, just days after launching its intervention, Moscow fired 26 cruise missiles from the Caspian Sea Flotilla. The cruise missiles travelled across Iran and Iraq into Syria to strike what Moscow claimed were Islamic State targets. From a military standpoint, it was questionable at best whether strikes from this location were truly necessary.<sup>33</sup> For one thing, Moscow could have easily hit the same targets from Russia’s existing assets in Syria. But the advertising benefits for Moscow were clear. The attack displayed formidable capabilities of the relatively new Kalibr cruise missile, which Moscow exports as the shorter-range “Club.” Moscow also showed that even Russia’s small missile corvettes are quite powerful, and that a country on a budget looking for strong naval capabilities does not need to pay for a large and expensive ship.<sup>34</sup>

During the next two years, Moscow amplified Russia’s military presence by expanding the Tartus port and the Khmeimim airbase. These ensured Russia’s military presence for the next 49 years, providing Russia with ideal strategic military access to the region while limiting the West’s ability to maneuver. Indeed, after Putin announced yet another faux “withdrawal” from Syria in December

2017,<sup>35</sup> he almost immediately called for further expanding Russia's naval presence in Tartus.<sup>36</sup> At the same time, Moscow used Syria to test weaponry and equipment in real battles, advertise these efforts, project power and train the Russian military, especially the pilots. That Moscow went to great lengths to publicize Russia's arms exports shows how important the arms sales element has been for Moscow's Syria campaign.<sup>37</sup>

True, Moscow failed to react to American cruise missiles, which flew well within the orbit of Russia's S-300s and S-400s. The no-show may seem like a missed advertising opportunity to display Russian surface-to-air missiles (SAM), but shooting down a cruise missile would have been a big risk, and could have triggered a major escalation. Shooting down a cruise missile is much harder than an aircraft. Cruise missiles have much smaller radar cross-section and lower flight profile.<sup>38</sup> Second, when the US launched its Tomahawk cruise missiles, Washington, at least by some accounts, first told Moscow about its intent and provided specific locations as part of de-confliction with Russia. Therefore, if Moscow had attempted to intercept an American missile, Washington would have read this action as a direct challenge, rather than give Moscow the benefit of the doubt and consider it a mistake.<sup>39</sup> Moreover, for all of Putin's bluster, he presumably knew the US far outmatched him in the region. A direct military confrontation is not what he sought—only to create the perception that he might, in order to scare the US into thinking letting him do what he wanted in Syria was the only option to avoid war.

Meanwhile, Moscow's advertising efforts paid off. "This [Russia's Syria operations] is colossal advertising and Russia expects new purchases worth tens of billions of dollars," said Alexander Markov, a political analyst and member of Russia's Council on Foreign and Defense Politics, in April 2016.<sup>40</sup> More recently, Russian Deputy Defense Minister Yuri Borisov said in August 2017, "Customers have started queuing up for the weapons that have proven themselves in Syria."<sup>41</sup> To give one example of such success, Russian Su-34 and Su-35 jets, which Moscow tested and used extensively in Syria, began to sell well.<sup>42</sup> China bought 24 Su-35 jets in November 2015, and Algeria ordered 12 Su-34s in January 2016.<sup>43</sup> The United Arab Emirates began discussion with Russia in February 2017 about purchasing Su-35s.<sup>44</sup> Many other countries have expressed interest, such as India and Indonesia, but also many African countries, including Nigeria, Uganda and Ethiopia.<sup>45</sup> Russian Deputy Defense Minister Alexander Fomin said, in October 2016, "[W]e know that the African continent has a great potential and it [cooperation] can be market-oriented and based on mutual interest."<sup>46</sup> Africa is a region increasingly important to watch for Russia's arms sales as a tactic to enter the Sahel.<sup>47</sup>

## **North Africa**

Speaking at Russia's annual Valdai conference in October 2016, President Putin said Africa "cannot be on the periphery of international relations."<sup>48</sup> Indeed, Moscow is looking at the entire African continent, whose demand for military hardware is growing as GDP rises. In the context of Western sanctions and the Kremlin's desire to boost Russia's global power status, reduce Western influence, and make money to keep the Russian government afloat, Putin has already made strides in much of Africa that are impossible to ignore.<sup>49</sup> North Africa is a major part of his calculus. According to Russian sources, in 2016 Moscow delivered over \$1.5 billion in arms to Algeria and \$37 million to Egypt.<sup>50</sup>

Moscow's relationship with Cairo, steadily on the rise in recent years, is most robust in the military sector. In September 2014, Russia and Egypt initialed arms contracts worth \$3.5 billion, their largest deal in many years, to be funded by Saudi Arabia and the United Arab Emirates. The contract reportedly stipulates that Russia will supply the Egyptian military with MiG-29 fighter jets, Mi-35 attack helicopters, air-defense missile complexes, ammunition, and other equipment. There is no direct evidence that the transaction has happened yet, although according to some credible reports in July 2016, Russia began building 46 MiG-29M fighter jets as part of a contract worth at least \$2 billion. No public information about the recipient is available, but Egypt is probably the leading candidate.<sup>51</sup>

Regardless of whether or not Egypt is indeed the buyer in question, Russian-Egyptian military cooperation is visibly growing. The two countries held their first joint naval drills in June 2015, and other military exercises in October 2016.<sup>52</sup> In September 2017, Cairo finalized negotiations with Moscow to build Egypt's first nuclear power plant, approximately two years after inking a preliminary agreement in February 2015.<sup>53</sup> According to later reports in spring 2016, Moscow will lend Egypt \$25 billion for construction.<sup>54</sup> In this context, it is worth recalling that Cairo used to be Washington's partner on energy cooperation as part of the George W. Bush administration's Global Nuclear Energy Partnership (GNEP).<sup>55</sup> President Barack Obama, however, effectively scrapped parts of GNEP in June 2009<sup>56</sup> and showed little interest in expanding an energy partnership with Egypt. This episode provided a gap for Putin to move in.

In November 2017, Moscow and Cairo began to discuss an agreement to allow Russia and Egypt to access the other's airspace and air bases, perhaps the clearest sign of growing bilateral military cooperation.<sup>57</sup> In March 2017, Moscow deployed special forces to Egypt on the Libyan border, signaling Russia's growing role in that country.<sup>58</sup>

Libya historically is another major Russian arms customer. Following NATO's 2011 intervention, Russia lost billions of dollars' worth of arms contracts in Libya. While the Russian government and analysts typically quantified this loss at \$4 to \$4.5 billion, "the real lost revenue," according to Mikhail Dmitriyev, who heads Russia's Federal Service on Military and Technical Cooperation, "could top tens of billions of dollars."<sup>59</sup> Lost contracts covered a wide range of military equipment, including Su-35 fighters, Yak130 combat and training planes, Project 636 submarines, advanced S-300 systems, Mi-17 transport helicopters, and many others. Importantly, Moscow also lost access to the port of Benghazi. Libya is a good candidate for another potential Moscow intervention under the guise of fighting Islamic terrorism, albeit on a smaller scale than in Syria. As a result of Western disinterest in Libya, Putin has been able to insert himself, both in leaning heavily on General Khalifa Haftar in Libya's oil-rich east, and by establishing contacts with all other major actors on the ground. Putin is now reportedly eyeing Tobruk and other ports for potential berthing agreements.<sup>60</sup> Such a development would entail significant Russian investment, but a permanent naval presence in Libya by Russia as a regional power broker is a serious possibility.

Moscow is also making some headway in Tunisia. In June 2015, Moscow signed a Memorandum of Understanding on nuclear cooperation with Tunisia "[f]or the first time in the history of Russian-Tunisian relations," according to Rosatom, Russia's state nuclear regulatory corporation.<sup>61</sup> In September 2016 the memorandum was expanded into a nuclear cooperation agreement.<sup>62</sup> Morocco

is a traditionally Western ally, but reportedly, the country is talking with Moscow about purchasing S-400s.<sup>63</sup> In October 2016, the two countries signed 11 agreements, and Russian Prime Minister Dmitry Medvedev announced Russia's decision to "deliver military equipment" to Morocco, though he did not disclose details.<sup>64</sup>

Algeria has long been in Moscow's camp and remained a top buyer of Russian arms throughout the 2000s. Since 2001, when Russia and Algeria signed a declaration of strategic partnership, bilateral relations have been strongest in the military sector. In 2006, Russia concluded a \$7.5 billion arms deal with Algeria, its largest post-Soviet weapons sale, which included a military modernization and training program and cancellation of a \$4.7 billion Soviet-era debt. In 2014, the two countries signed a \$1 billion arms deal, which a Russian military expert in business-oriented *Vedomosti* described as "possibly the largest export contract for main battle tanks in the world."<sup>65</sup> Weapons sales from Russia in 2010, 2012, 2013 and 2015 provided Algeria with additional military equipment, including helicopters, tanks and submarines. In 2016, Algeria and Russia also began sharing intelligence on terrorist group movement across North Africa, and they announced additional plans for deeper military cooperation.

### **The Arab Persian Gulf and Turkey**

The West traditionally dominates the Gulf arms market, but the Kremlin has always courted this region. For Moscow, it is important to compete with the West. And as an added benefit, Gulf customers are wealthy and can pay full price for Russian weaponry, unlike clients such as Egypt. Indeed, the UAE has been among major buyers of Russian arms in the 1990s and early 2000s.

Russia's relations with this region deteriorated significantly during the Syrian conflict, with Russians and Arabs generally lining up on opposite sides. Despite this, interest in Russian arms among Arab states remains. In February 2017, the UAE signed a letter of intent to purchase the Sukhoi Su-35, as mentioned above.<sup>66</sup> Only China currently buys these jets from Russia. The Emirates has also purchased ground weapons from Russia, such as BMP-3 infantry combat vehicles and Pantsir S1 air-defense systems. In February 2017, the UAE also signed \$1.9 billion worth of military contracts, which reportedly includes 5,000 anti-armor missiles, in addition to training and logistic support. The country also started talks with Rostec about the development of a fifth-generation MiG-29 aircraft variant; though experts are skeptical, the UAE can co-produce. Very few countries can produce a fifth-generation fighter aircraft. Theoretically, Russia can, but it only recently began production of fourth-generation Su-34s developed in the 1980s.<sup>67</sup>

Reportedly, Qatar is also talking to Russia about purchasing S-400s, and here the discussion appears more realistic. In October 2017, Moscow and Doha signed a military and technical cooperation Memorandum of Understanding, according to *TASS*,<sup>68</sup> and the Qatari government apparently expressed interest in purchasing the S-400s.<sup>69</sup>

In October 2017, Saudi King Salman bin Abdulaziz Al Saud became the first ever Saudi monarch to visit Russia. The fact that the visit occurred shows how much influence Putin has achieved in the Middle East. Upon the meeting's conclusion, Salman and Putin signed a packet of documents on energy, trade and defense, and they agreed to several billion dollars' worth of joint investment.<sup>70</sup>

Reportedly, Saudi Arabia also decided to purchase Russia's S-400 air defense system, making it, after Turkey, the second American ally to do so.<sup>71</sup>

Russia's presence in Iraq is relatively small but important. In 2012, the Kremlin signed a \$4 billion arms deal with the Iraqi government—one of the larger arms deals of Putin's tenure. This agreement places Russia as the second largest arms supplier to Iraq after the United States.<sup>72</sup> Reportedly, Moscow began deliveries in October 2013, after a delay due to internal corruption claims in the Iraqi parliament.<sup>73</sup> The same month Putin identified Iraq as an important Middle East partner and announced Russia's readiness, in this context, to help Iraq, including through "military-technical" cooperation.<sup>74</sup>

In the early 2000s the Kremlin began expanding areas of cooperation with Turkey, a NATO member, and these included modest arms contracts.<sup>75</sup> But in September 2017, in the context of deteriorating relations with the West, Turkey signed what many called a landmark \$2.5 billion deal, Ankara's first major arms agreement with Russia, to purchase the S-400 missile system.<sup>76</sup> The deal raises several questions. First, the Russian system is not compatible with NATO systems. Second, it is unclear how Turkey intends to use the S-400. Some question whether the deal will go through at all, but the fact of the matter is, the signing alone is significant. It shows how much influence Putin has gained with the NATO ally, who for years now has increasingly turned away from Western democratic values. Nor should analysts dismiss the possibility that the deal will go through either, as Turkey is falling deeper into Moscow's sphere of influence.

## **Conclusion**

Russia's defense industry is not without problems. As mentioned previously, Russian weaponry often lags far behind the United States in terms of effectiveness or technological innovation. China, meanwhile, wields a level of commercial influence Russia cannot compete with; and indeed, some countries, such as Algeria, are increasingly looking toward China, even as Algiers signed its blockbuster deal with Moscow. China is also starting to dominate in high-growth areas such as unmanned aerial vehicles (UAV), where Russia is no match.<sup>77</sup> Another element is Western sanctions on Russian dual-use high-technology imports, especially effective toward Russia's defense industry. Commercially available technologies such as microelectronics and quantum computing have increasingly important modern military applications, but Russia cannot produce them independently. It has tried to resort to import substitution, but so far with poor results. In addition, Russian weapons met no real opposition in Syria. Therefore, despite Moscow's tests and displays, questions about the full extent of these weapons' capabilities remain.

Nonetheless, there is no denying that Putin is making great strides overall in the MENA region since May 2000, and more recently in the defense sector as part of Russia's tactic to use weapons sales to garner closer relations with Arab states at the expense of the US and Europe. Moscow's military reform efforts since 2008 have clearly paid off, and arms sales have been an effective tactical tool in Moscow's foreign policy arsenal. In dollar terms at least, Russian arms sales to the Middle East continue to increase every year. In addition, the advantages Russian arms offer to this region continue to outweigh the disadvantages, both practically and politically. Russia's overall economic trajectory is on a slow and long-term path of deterioration, but still nowhere near a

collapse. As a July 2016 NATO Defense College report points out, the West should not confuse Russia's weakness with fragility.<sup>78</sup> Even if Moscow boasts more than it achieves in reality, the Kremlin has been playing a diminishing hand very well. While most US defense experts believe Russia will be unable to produce much next-generation weaponry, Moscow is making significant strides with its existing technology. Russian arms are sufficient for most of Moscow's clients—particularly those who cannot afford top-of-the-line American technology. In the context of US retreat from the region, Moscow has stepped into a vacuum where the Kremlin's efforts generate a multiplier effect of real power. As long as US leadership is absent from the region, Russia's arms sales to the Middle East and North Africa will remain a serious problem for American interests.

## Endnotes

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<sup>3</sup> Based on data author obtained from IHS Jane's on November 23, 2017.

<sup>4</sup> Author interview with anonymous US aviation source, November 14, 2017, Washington, DC.

<sup>5</sup> Robert O. Freedman, "Russian Policy toward the Middle East under Yeltsin and Putin, Jerusalem Letter/Viewpoints 461 (Jerusalem Center for Public Affairs, September 2, 2001), <http://www.jcpa.org/jl/vp461.htm>.

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<sup>7</sup> "Russia and the Changing World," RT, February 27, 2012, available at <https://www.rt.com/politics/official-word/putin-russia-changing-world-263/>.

<sup>8</sup> "Глава "Ростеха" сообщил о росте продаж: 'Чем больше конфликтов, тем больше у нас покупают вооружения'" Newsru.com, February 23, 2015 <http://www.newsru.com/russia/23feb2015/chemezov.html>.

<sup>9</sup> President of Russia, Meeting of the Commission for military technology cooperation with foreign states," Kremlin.ru, July 2, 2012, <http://en.kremlin.ru/events/president/news/15865>.

<sup>10</sup> "Rogozin: Russia Ranks Second in the World on Export Supply of Military Goods," Daily News Light, December 11, 2013, <http://dailynewslight.ru/?u=11122013868>.

<sup>11</sup> Author email exchanges with SPIRI, November 2017.

<sup>12</sup> Richard Connolly and Cecilie Sendstad, *Russia's Role as an Arms Exporter: The Strategic and Economic Importance of Arms Exports for Russia*, Chatham House, p 5, <https://www.chathamhouse.org/publication/russias-role-arms-exporter-strategic-and-economic-importance-arms-exports-russia>.

<sup>13</sup> SIPRI has developed a system called "trend indicator values" (TIV), rather than actual dollar values. For a more detailed explanation see: SIPRI has developed a unique system to measure the volume of international transfers of major conventional weapons using a common unit, the trend-indicator value (TIV).

<sup>14</sup> Author interview with anonymous US aviation source, November 14, 2017, Washington, DC.

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<sup>15</sup> Thomas Gibbons-Neff, “Pentagon: Some Russian cruise missiles crashed in Iran,” *The Washington Post*, October 8, 2015, <https://www.washingtonpost.com/news/checkpoint/wp/2015/10/07/these-are-the-cruise-missiles-russia-just-sent-into-syria/>.

<sup>16</sup> Author interview with anonymous US aviation source, November 14, 2017, Washington, DC.

<sup>17</sup> Ibid.

<sup>18</sup> Unless the US grants special permission.

<sup>19</sup> “Gore's Secret Pact,” October 18, 2000 *The Wall Street Journal*, <https://www.wsj.com/articles/SB971819748452949326>.

<sup>20</sup> Ariel Cohen and James A. Phillips, “Countering Russian-Iranian Military Cooperation,” Backgrounder 1425 on Russia (Heritage Foundation, April 5, 2001), <http://www.heritage.org/research/reports/2001/04/countering-russian-iranian-military-cooperation>.

<sup>21</sup> For example, a recent survey of Syrian refugees in Germany—the first survey of Syrian refugees in Europe—found that approximately 70 percent of Syrian refugees are fleeing Assad. Complete survey results are available at <http://washin.st/1RMy3sj>. According to the Office of the UN High Commissioner for Refugees (UNHCR), at the end of 2013 the total number of displaced people worldwide, for the first time since World War II, surpassed 51 million, a 6-million-person increase over the previous year. This rise, UNHCR found, is due largely to the Syria crisis. See UNHCR, “World Refugee Day: Global Forced Displacement Tops 50 Million for First Time in Post-World War II Era,” June 20, 2014, <http://www.unhcr.org/53a155bc6.html>.

<sup>22</sup> The five permanent United Nations Security Council members United States, United Kingdom, France, Russia and China, plus Germany.

<sup>23</sup> Indeed, Russian Middle East expert Georgiy Mirsky wrote in his blog on the liberal website *Echo Moskvy* in April 2015, “Several years ago, I heard from the lips of one MIA [Ministry of Internal Affairs] employee such reasoning: ‘For us, a pro-American Iran is worse than a nuclear Iran.’ ”

<sup>24</sup> Quoted in Carnegie Endowment for International Peace, Proliferation Brief, Vol. 3, no. 22, July 25, 2000, Richard Speier, “Iran-Russia Missile Cooperation Richard Speier, Rober Gallucci, Robbie Sabel, Viktor Mizin,” section “The Russian View,” [http://carnegieendowment.org/files/Repairing\\_12.pdf](http://carnegieendowment.org/files/Repairing_12.pdf).

<sup>25</sup> Anne Barnard, Andre E. Kramer, “Iran Revokes Russia’s Use of Air Base, Saying Moscow ‘Betrayed Trust’” *The New York Times*, August 22, 2016 <https://www.nytimes.com/2017/11/30/world/middleeast/syria-talks-geneva.html?ribbon-ad-idx=3&rref=world/middleeast&module=ArrowsNav&contentCollection=Middle%20East&action=swipe&region=FixedRight&pgtype=article>.

<sup>26</sup> Allen Cone, “Russia gets permission to use Iran's Hamadan air base for Syria airstrikes,” UPI, November 30, 2016, [https://www.upi.com/Top\\_News/World-News/2016/11/30/Russia-gets-permission-to-use-Irans-Hamadan-air-base-for-Syria-airstrikes/8251480520159/](https://www.upi.com/Top_News/World-News/2016/11/30/Russia-gets-permission-to-use-Irans-Hamadan-air-base-for-Syria-airstrikes/8251480520159/).

<sup>27</sup> “Путин: справедливо, если Иран достигнет досанкционного уровня добычи нефти,” RIA Novosti, September 5, 2016, <https://ria.ru/economy/20160905/1476118270.html>.

<sup>28</sup> Adam Kredo, “US officials ‘concerned’ as Iran, Russia plan \$10 billion arms deal,” November 15, 2016, <http://www.foxnews.com/world/2016/11/15/us-officials-concerned-as-iran-russia-plan-10-billion-arms-deal.html>.

<sup>29</sup> Von Christina Brause, Julia Smirnova, and Walter Wolowelsk, “Neue Schmuggelroute zwischen Russland und dem Iran,” *Welt N24 TV* (Berlin), August 13, 2017, <https://www.welt.de/politik/ausland/article167624550/Neue-Schmuggelroute-zwischen-Russland-und-dem-Iran.html>.

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<sup>30</sup> Van Hipp, “Russia’s Putin Is Making His Moves in Syria and Beyond,” Fox News, June 27, 2012, <http://www.foxnews.com/opinion/2012/06/27/russia-putin-is-making-his-moves-in-syria-and-beyond.html>; Ariel Cohen, “Russia’s Troubling Arms Sales,” Washington Times, March 19, 2007, <http://www.washingtontimes.com/news/2007/mar/19/20070319-0920463099r/print/>.

<sup>31</sup> Richard F. Grimmett, “Conventional Arms Transfers to Developing Nations, 2003–2010,” Congressional Research Service, September 22, 2011, <https://www.fas.org/sgp/crs/weapons/R42017.pdf>. See also reference in David M. Herszenhorn, “For Syria, Reliant on Russia for Weapons and Food, Old Bonds Run Deep,” New York Times, February 18, 2012, <http://www.nytimes.com/2012/02/19/world/middleeast/for-russia-and-syriabonds-are-old-and-deep.html>.

<sup>32</sup> See for example the following articles:

“A Ship Comes Loaded with Timber...or Weapons?” Utrikesperspektiv, December 12, 2013, <http://utrikesperspektiv.se/?p=348.208>; “Russia Denies Hijacked Ship Was Carrying Missiles,” CNN, September 8, 2009, <http://www.cnn.com/2009/WORLD/europe/09/08/russia.missing.ship/index.html?iref=nextin>; Luke Harding, Michael Schwartz, “More Questions about a Hijacked Ship,” New York Times, October 10, 2009, [http://www.nytimes.com/2009/10/11/world/europe/11arctic.html?\\_r=0.209](http://www.nytimes.com/2009/10/11/world/europe/11arctic.html?_r=0.209); Interfax, “EU Rapporteur Presumes Arctic Sea Transported Russian Missiles,” August 19, 2009, <https://archive.is/RWW5z.210>.

<sup>33</sup> Dave Majumdar, “Cruise Missile Strikes in Syria: Russia’s Big Ad Campaign?” *The National Interest*, October 8, 2015 <http://nationalinterest.org/blog/the-buzz/cruise-missile-strikes-syria-russias-big-ad-campaign-14032>.

<sup>34</sup> Dave Majumdar, “Cruise Missile Strikes in Syria: Russia’s Big Ad Campaign?” *The National Interest*, October 8, 2015, <http://nationalinterest.org/blog/the-buzz/cruise-missile-strikes-syria-russias-big-ad-campaign-14032>; Thomas Gibbons-Neff, “Pentagon: Some Russian cruise missiles crashed in Iran,” *The Washington Post*, October 8, 2015, <https://www.washingtonpost.com/news/checkpoint/wp/2015/10/07/these-are-the-cruise-missiles-russia-just-sent-into-syria/>.

<sup>35</sup> In March 2016, for example, Putin announced a withdrawal of the “main part” of Russia’s armed forces in Syria, but in reality Russia’s presence continued to grow.

<sup>36</sup> “Putin Asks Lawmakers to Expand Russia’s Navy Presence in Syria,” *The Moscow Times*, December 13, 2017, [https://themoscowtimes.com/news/patin-asks-lawmakers-to-expand-russias-navy-presence-in-syria-59928?utm\\_source=push&utm\\_medium=push&utm\\_campaign=131217](https://themoscowtimes.com/news/patin-asks-lawmakers-to-expand-russias-navy-presence-in-syria-59928?utm_source=push&utm_medium=push&utm_campaign=131217).

<sup>37</sup> Alex Luhn, Russia’s campaign in Syria leads to arms sale windfall,” *The Guardian*, March 29, 2016, <https://www.theguardian.com/world/2016/mar/29/russias-campaign-in-syria-leads-to-arms-sale-windfall>; Andrew O’Reilly, “Russian sale of fighter jets to UAE highlights shift toward Kremlin amid US hesitancy,” Fox News, March 2, 2017, <http://www.foxnews.com/politics/2017/03/02/russian-sale-fighter-jets-to-uae-highlights-shift-toward-kremlin-amid-u-s-hesitancy.html>; “Going Global: Russian Su-34 on the Way to Become Export Bestseller,” Sputnik, June 1, 2016, <https://sputniknews.com/military/201601061032735202-russia-su34-bomber-algeria/>.

<sup>38</sup> Author email exchange with anonymous US aviation source, December 7–9, 2017.

<sup>39</sup> Author conversation with anonymous US aviation sources, Washington, DC, December 7, 2017.

<sup>40</sup> Mansur Mirovalev, “Syria’s war: A showroom for Russian arms sales,” Al Jazeera, April 6, 2016, <http://www.aljazeera.com/news/2016/04/syria-war-showroom-russian-arms-sales-160406135130398.html>.

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<sup>42</sup> Daniel Brown, “Russia is using Syria as a testing ground for some of its most advanced weapons,” *Business Insider*, May 24, 2017, <http://www.businessinsider.com/russia-is-using-syria-testing-ground-some-advanced-weapons-2017-5>.

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where several large countries would provide enriched uranium to smaller countries. This plan aimed to address crucial concerns about nuclear weapons proliferation and waste management, and to eliminate the need for smaller countries to build facilities for uranium processing and disposal in the first place, saving them billions.

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<sup>68</sup> “Russia, Qatar sign agreement on military and technical cooperation,” *TASS*, October 25, 2017

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