

RUSSIA'S ARMS EXPORTS TO THE MENA REGION: TRENDS AND DRIVERS

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Introduction

The Middle East and North Africa (MENA) region is undergoing rapid militarisation with a number of intra- and interstate conflicts and terrorist threats. Military arsenals in the area have grown significantly over the last two decades by receiving a high number of weapons from several large arms suppliers such as the United States (US), Russia and France. Several MENA states have rapidly increased their arms imports in the past 10 years. According to the SIPRI Arms Transfers Database, five MENA states (Algeria, Egypt, Saudi Arabia, Turkey and the United Arab Emirates [UAE]) are listed among the top-10 largest importers of major arms, accounting for 22% of the total volume of arms imports in the world in 2009-2018.

Russia is the second largest exporter of major arms in the world. In 2009-2018, Russia was the second largest arms supplier to the MENA region. The country accounted for 18% of the total volume of arms imports by MENA states, following the US (44%), the world's leading exporter of arms.

In recent years, Russia has further expanded its arms transfers to MENA seeking to re-establish its influence in the region. To MENA countries, acquiring arms from Russia is advantageous. It allows them to diversify their sources of arms supply and thereby become less dependent on Western suppliers. Consequently, this has enabled Russia to compete with other established arms suppliers such as the US and France.

As the MENA region is at the forefront of international attention, issues related to arms transfers to the region have broadly been discussed. However, earlier research on trends

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and developments in arms exports to the MENA region over time has been predominantly qualitative, or papers including statistics or quantitative assessments are severely outdated and need a significant update.

This Policy Brief aims to support relevant debates with verifiable and objective data on Russia's arms exports to the MENA region, using both qualitative and quantitative approaches. Arms exports trends and figures presented in this paper are based on the recently updated SIPRI Arms Transfers Database.¹ This paper is a first step in a joint endeavour² to better understand the changing role of Russia in the MENA region.

The Policy Brief begins by outlining Russia's growing interest in the MENA region. It identifies both the strategy and motivations driving Russia's arms exports, and equally the region, and the demand for arms by MENA countries. The paper then reviews the cases of three of Russia's traditional arms trading partners (a) Algeria (b) Syria and (c) Egypt. It also examines (d) the case of the Gulf, a region with which Russia is currently attempting to deepen cooperation. Conclusions and recommendations are provided in the final section.

The Overview of Russia's Arms Exports to the MENA Region

Since the early 2000s, Russia has made several attempts to establish closer relations with MENA countries. In 2005, Russia was granted observer status in the Organization of the Islamic Conference (renamed in 2011 the Organization of Islamic Cooperation, OIC). In the mid-2000s Russian officials, including President Vladimir Putin, made several official visits to MENA countries, including Algeria, Egypt, Morocco and Saudi Arabia. The visits served as stimulus to the development of cooperation between Russia and the MENA states. In addition, Russia wrote off several MENA country debts inherited from the Soviet Union era³ (Alexandrova, 2012). Given Russia's growing strategic and economic interest in the region, settling these debt issues was particularly important. The debt relief acted to accelerate the convergence between Russia and the MENA states and opened new engagement opportunities. For example, Russia signed a number of significant arms trade deals with several countries in the region including Algeria and Iraq. Combined, these developments laid the foundations for strengthening Russia's relations with the MENA states.

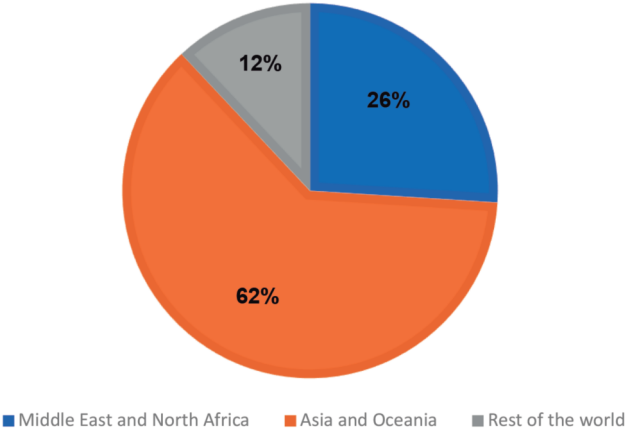
¹ From 11 March 2019 the freely accessible SIPRI Arms Transfers Database (which includes data on arms transfers in 2018 and updated information for 1950-2017). The SIPRI Arms Transfers Database contains information, often estimates, on all international transfers of major weapons (including sales, gifts and production under licence) to states, international organisations and armed non-state groups since 1950. It is the only publicly available resource providing consistent data on arms transfers for this length of time. The database is accessible at <http://www.sipri.org/databases/armstransfers/>

² This paper is published as part of a larger project, "The Role of Russia in the Middle East and North Africa: Strategy or Opportunism" coordinated by ISPI – Italian Institute for International Political Studies, in the framework of the EuroMeSCo ENI Project, co-financed by the European Union and the IEMed.

³ In 2005, 2006 and 2008 Russia wrote off and restructured the debts of Syria, Algeria and Iraq.

Arms exports have traditionally been a core element of Russia’s cooperation strategy with MENA countries. The MENA region is the second most important and growing foreign market for Russian arms sales after Asia and Oceania (see Figure 1).

Figure 1. Russian arms exports to regions, 2009-2018



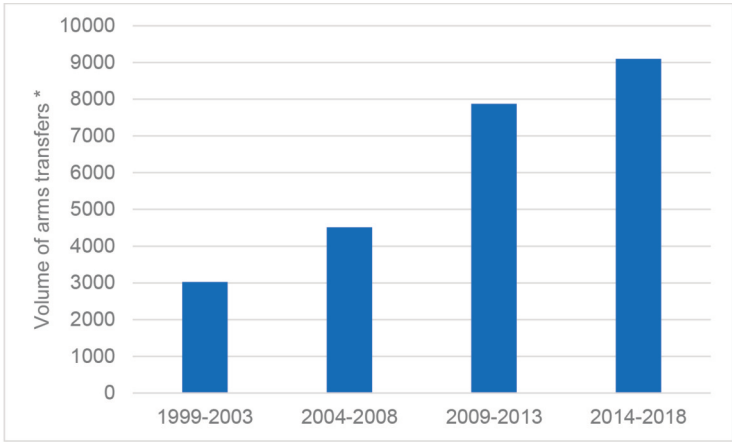
Source: SIPRI Arms Transfers Database, 2019.

Russian deliveries to the MENA region increased by 125% between 1999-2008 and 2009-2018. Since 1999, the most recent 5-year period (2014-18) accounted for 37% of all Russia’s exports to the MENA region. In 2014-18 Russia’s arms exports to the MENA region increased by 16% compared to 2009-2013 (see Figure 2). In the past 10 years (2009-2018) Russia delivered arms to 14 countries in the region, which accounted for 26% of the total volume of Russia’s arms exports, while in 1999-2008 it was 14% (see Figure 3).

Over the last decade, Algeria and Syria have remained major recipients of Russian arms. At the same time, Egypt has emerged as one of the largest importers of Russian arms. In recent years other countries in the region, including some Arab Gulf states, have taken an interest in Russian arms.

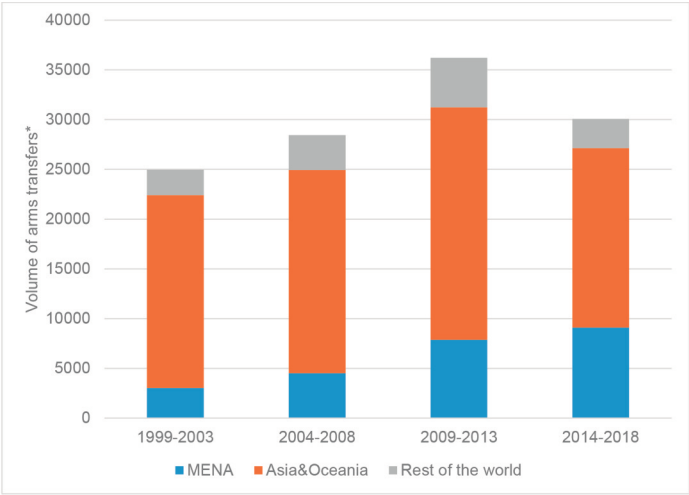
Russia’s military involvement in the Syrian civil war in 2015 led the country to reaffirm its status as an important player in the MENA region. Foremost, it presented an opportunity for Russia to test its military hardware in an armed conflict environment, as well as to develop its tactics and procedures for using its weapons. In terms of arms trade, the demonstration of Russian military technologies and capabilities during the Syrian civil war may have attracted interest from potential foreign buyers and provided possibilities for Russia to enter new markets.

Figure 2. Russian arms to MENA since 1999⁴



Source: SIPRI Arms Transfers Database, 2019.
*Transfers are measured in millions of trend-indicator values

Figure 3. Russian arms exports to regions, 1999-2018



Source: SIPRI Arms Transfers Database, 2019.
*Transfers are measured in millions of trend-indicator values

⁴ The SIPRI trend-indicator value (TIV) is a measure of the volume of international transfers of major weapons. The method used to calculate the SIPRI TIV is described on the SIPRI website at <<https://www.sipri.org/databases/armstransfers/sources-and-methods>>

Economic and Political Drivers of Russia's Arms Exports to the MENA Region

Russia's arms sales to the MENA region support its economic, political and security interests.

1. Arms sales play an important role in Russia's economy. Although the Russian arms industry is dwarfed by Russia's energy resources sector, in terms of manufactured goods, arms production is significant in Russia's economy. Growing international and domestic demand for weapons makes Russia's arms industry a strategically important sector through which Russia can further integrate into the global economy (Connolly & Sendstad, 2017).
2. Arms exports are a tool in the framework of Russia's broader economic and foreign policy. For example, Russia used arms deals as one of the key elements of its debt relief policy. In 2006 Russia wrote off Algeria's debt worth USD4.7 billion. At the same time, Algeria signed a number of significant contracts for the acquisition of Russian arms. Thus, Russia has further strengthened its dominant position in the Algerian arms market. In addition, by increasing arms trade with Algeria, Russia has further expanded its influence in other areas such as agriculture and energy.
3. Shared threat perceptions such as terrorist threats (ISIS, al-Qaeda) and organised crime may influence Russia's decisions to supply weapons to any region. Russia may use arms exports to reinforce its priorities in its regional security policies. For example, according to Russia, it delivered different types of weapons to Tajikistan to expand the capabilities of the country's armed forces to counter the terrorist threat on the Tajikistan-Afghanistan border ("Russian Arms and Military Equipment Delivered to Tajikistan", 2017). Russia may use the same approach in its arms exports to the MENA states.

MENA Region's Demand for Major Arms

1. Many countries in the MENA region lack the domestic technological base needed to design and produce advanced weapons. Poor arms production capabilities drive the demand for (Russian) arms and military technologies from external/non-domestic suppliers.
2. Western suppliers sometimes limit or cease to sell weapons to countries for political or humanitarian reasons. Alternatively, Russian arms sales come either without or with far fewer conditions about the domestic affairs of the (potential) weapon recipients ("Russia Among Arms Ind. Leaders as Doesn't Impose Political Conditions", 2018). For example, the US, Egypt's long-standing ally, froze arms deliveries and military assistance to Egypt after the 2013 military coup removed the first democratically-elected civilian-led government. In contrast, the military coup did not negatively impact Russian-Egyptian relations and, as their relations improved, Russian arms sales to

Egypt increased (“Mezhgosudarstvennyye otnosheniya Rossii i Yegipta”, 2016). Russia’s willingness to provide weapons without attached political conditions makes them an attractive option for some MENA countries.

3. Diversification of sources of arms supplies towards other exporters like Russia and China allows MENA countries to become less dependent on Western suppliers. A diverse source of supply enables an importing country to benefit from competition both in terms of prices and conditions.

4. Russian weapons are generally considered less expensive than Western weapons.

Algeria: An Important Market for Russian Arms Sales

As the 5th largest importer of major arms in the world, Algeria represents an important market for arms exports (SIPRI Arms Transfers Database). Russia is by far the main supplier of major arms to Algeria. For many years Algeria has been one of Russia’s main trade and economic partners in Africa and in the Arab world (“Medvedev vystupil za sozdaniye”, 2017).

A significant step towards strengthening trade relations and military cooperation between Russia and Algeria was in 2006 when Russia wrote off Algeria’s Soviet-era military debt of USD4.7 billion, as mentioned above. In the same year, Algeria agreed to a USD7.5 billion deal with Russia to purchase tanks, rocket systems and combat and training aircraft (“Obmen podarkami”, 2006). Specifically, the deal included orders of 28 Su-30MK combat aircraft, 3 S-300PMU-2 SAM⁵ systems, 185 T-90S tanks and 2 submarines. An additional part of this deal was contracts to modernise tanks and armoured vehicles that were supplied to Algeria during the Soviet-era (SIPRI Arms Transfers Database).

In 2010-15 a number of new contracts were signed for the purchase for additional Russian tanks and combat aircraft. Since 2006, Algeria has received more than 300 Russian T-90S tanks and about 50 Su-30MK combat aircraft (SIPRI Arms Transfers Database). In 2014 Rosoboronexport⁶ reached an agreement with Algeria to produce under licence about 200 T-90 tanks in Algeria.

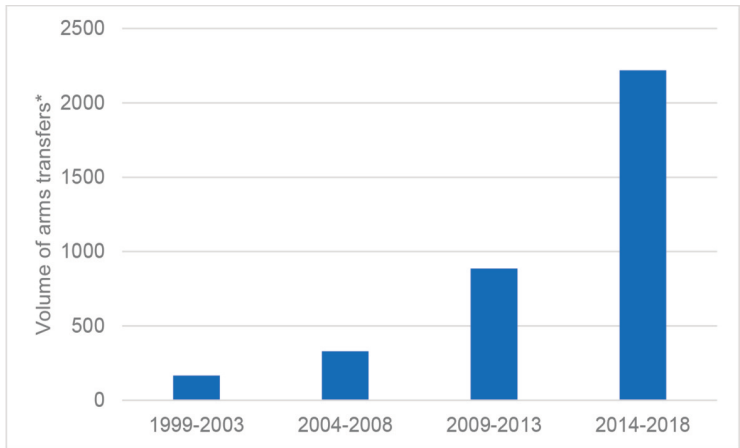
In 2017 Algeria became the second buyer of Russian Iskander-E tactical missile systems after Armenia. In addition, the country received 42 combat helicopters and 2 submarines from Russia, and thus substantially improved its armed forces, which were already the best equipped forces in Africa (SIPRI Arms Transfers Database). Furthermore, in November 2018, Victor Bondarev, the head of the Russian Federation Council Committee on Defense and Security, stated that Russia and Algeria are currently discussing the possibility of creating a

⁵ A surface-to-air missile (SAM).

⁶ Rosoboronexport is the only state organisation in Russia responsible for exporting the entire range of military, dual-use products and services and technologies.

joint venture in Algeria for the production, life extension and disposal of guided and unguided ammunition (“Rossiya i Alzhir obsuzhdayut sozdaniye SP po proizvodstvu boyepripasov”, 2018).

Figure 4. Russian arms exports to Algeria, 1999-2018



Source: SIPRI Arms Transfers Database, 2019.

*Transfers are measured in millions of trend-indicator values

During 2009-2018, Russia supplied 75% of Algeria’s arms imports. During that decade, Russian arms exports to Algeria increased by 129%, a significant rise compared to the previous 10-year period. In 2014-18 Russia’s arms exports were 14% higher than in 2009-2013 and 67% higher compared to 2004-2008 (see Figure 4). According to Victor Bondarev, Algeria has purchased Russian weapons and military equipment worth more than USD26 billion (“Rossiya i Alzhir obsuzhdayut sozdaniye SP po proizvodstvu boyepripasov”, 2018).

Although Algeria has purchased a significant number of weapons from Russia, in recent years imports from other suppliers also grew significantly, notably from China and Germany. In 2014-18 China and Germany emerged as important suppliers of arms to Algeria, accounting for 13% and 10%, respectively, of all Algeria’s imports of major weapons. In 2014-18 Russia accounted for the largest part of all Algeria’s imports (66%), while in 2009-2013 it was 90% (SIPRI Arms Transfers Database).

In 2014-18 Algerian arms imports increased by 55% compared to 2009-2013. The country implemented an army modernisation programme to enhance its military capabilities (Ghanem, 2017). It has dealt with domestic insurgencies, transnational terrorist threats and instability in bordering countries such as Mali and Libya in the context of the civil war, while also supporting Front Polisario, a group seeking to expel Moroccan troops from Western Sahara. In addition, the Algerian armed forces still play an important role in Algeria’s domestic and foreign policies

(“An Algerian Military Purge as a Survival Strategy”, 2018). Considering the current context, demand and orders for weapons will likely continue unless non-military solutions to military and security issues are implemented.

Syria and Russia: Long-Term Relations

Syria is Russia's closest ally in the MENA region and also one of its largest arms recipients. Russia's close relationship with Syria dates back to the Cold War, when the Soviet Union had significant influence in Syria and provided political support, as well as military and economic aid. At the same time, the Soviet Union was the largest supplier of arms and military equipment to Syria.

Following the period of stagnation after the collapse of the Soviet Union, relations between Russia and Syria improved after a meeting in the Kremlin in January 2005 between President Putin and President Bashar al-Assad. Both leaders agreed to strengthen bilateral cooperation between their countries and signed six agreements on cooperation in various areas including arms trade. President Putin also wrote off 73% of debt owed to Russia worth USD13.4 billion. At the same time, this write off was aimed at enlisting the support of the Syrian government to develop a framework for Russia to re-establish its position in the Middle East (“A.Kudrin: Rossiya prostila Sirii \$9,6 mlrd dolgov”, 2005). In the following years, Russia signed a number of arms supply deals with Syria, thus emerging as the largest arms supplier to this country.

In 2009-2013, Russia accounted for 85% of all Syria's arms imports. Specifically, during this period arms deliveries to Syria included 8 Buk-M2E SAM systems and an estimated 33 Pantsir-S1 air defence systems (SIPRI Arms Transfers Database). Russia, a permanent member of the United Nations Security Council (UNSC), opposed a resolution for a UN arms embargo on Syria in 2011 and instead planned further deliveries, including 24 MiG-29M2 combat aircraft and 36 Yak-130 trainer/combat aircraft (Holtom, 2012). However, since 2011, the planned deliveries of aircraft have been postponed a number of times for unspecified reasons and are yet to be fulfilled.

In 2015 Russia intervened in the Syrian civil war in support of the Syrian government. Russia's direct involvement in the war is considered to have turned the tide of the war in favour of the Syrian government (Tharoor, 2018). Russia deployed troops and combat aircraft at Khmeimim airfield (Latakia Province). In addition, Russian military advisers stationed in Syria assisted the Syrian army in the planning of hostilities and troop control (“Ekspert otmetil uchastiye rossiyskikh voyennykh sovetnikov v operatsii v Sirii”, 2017). Furthermore, in 2017 Russia and Syria signed an agreement on the expansion and modernisation of its Soviet era naval facility in Tartus, a foothold for Russia's naval presence in the Mediterranean region (“Soglasheniye mezhdru Rossiyskoy Federatsiyey i Siriyskoy Arabskoy Respublikoy”, 2017). The agreement granted Russian warships access to Syrian waters and ports, thus contributing to the expansion of Russia's presence in the region.

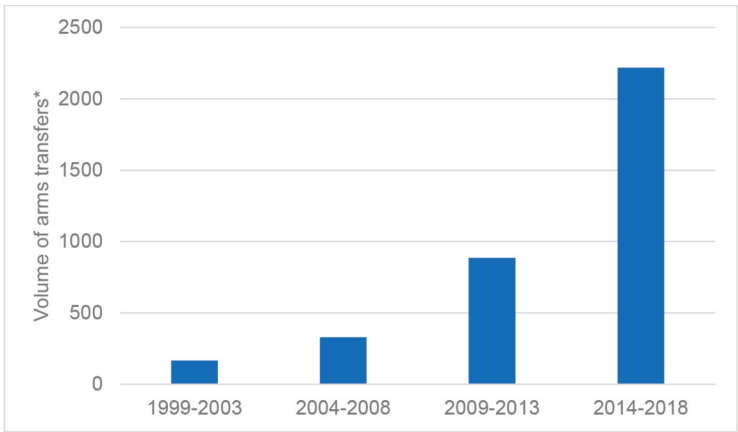
As part of Russia’s military support to the Syrian government, Russia delivered 25 T-62 tanks and an estimated 10 BMP-1 infantry fighting vehicles (IFV) to Syria. In 2018 Russia delivered over three divisions of second-hand S-300PM to Syria (SIPRI Arms Transfers Database). In addition, it is likely that Russia delivered ammunition and weapon spare parts to the Syrian army through the “Syrian Express” logistics supply network.

Moreover, the Syrian civil war provided Russia with a testing ground for its new or upgraded weapons systems and provided its armed forces to receive practical combat experience (Giles, 2017). Russia reported that it battle-tested more than 200 “advanced types of weapons” and military equipment, and several weapon systems demonstrated high performance. These include Pantsyr air defence systems and the sea-launched Kalibr and air-launched Kh-101 cruise missiles, as well as Russian combat aircraft (“Voyenno-prakticheskaya konferentsiya po itogam spetsoperatsii v Sirii” 2018). The deployment of Russian weapons systems in Syria has been portrayed by many scholars as a marketing campaign aimed to attract new clients (Mirovalev, 2016). Recently, Alexander Mikheev, Chief Executive Officer of Rosoboronexport, confirmed that some countries have already shown their interest in acquiring weapons that Russia tested in Syria (“Portfel' zakazov ‘Rosoboroneksporta’ rastet iz-za Sirii”, 2018).

Egypt: Russia’s Growing Clout in Egypt’s Arms Market

Egypt was the world’s third largest importer of major arms in 2014-18, accounting for 5.1% of the total volume of arms imports. Most of Egypt’s weapons are older generations of Eastern European and US hardware. More recently, Egypt has invested heavily in its armed forces while developing relations with major arms suppliers such as France and Russia.

Figure 5. Russian arms exports to Egypt, 1999-2018



Source: SIPRI Arms Transfers Database, 2019.
*Transfers are measured in millions of trend-indicator values

In 2009-2018, Russia and France emerged as the largest arms suppliers to Egypt accounting respectively for 31% and 28% of Egypt's imports of major weapons. Hence, they surpassed Egypt's long-standing ally, the US, which accounted for 26% of Egypt's imports in 2009-2018 (see Box 1). This was mostly due to the substantial increases in French and Russian arms exports to Egypt over the last five years (2014-18). In 2014-18, Russia's arms exports to Egypt increased by 150% compared to 2009-2013 and were 572% higher than in 2004-2008 (see Figure 5) (SIPRI Arms Transfers Database).

After a military coup removed the country's first democratically-elected leader in 2013, the US administration decided to cut its substantial military aid to Egypt and to delay planned deliveries of military equipment including F-16 combat aircraft. The souring of relations between Egypt and the US was a driving factor for strengthening the relationship between Egypt and Russia. Russia was quick to confirm its willingness to sell Egypt weapons and consequently there have been significant increases in Russian arms transfers to Egypt.

Box 1. US military Aid to Egypt

Although Egypt has been increasingly turning to Russia and France for arms sales, the US still remains the most influential ally of the country. For many decades Egypt has been one of the largest recipients of US military assistance within the US Foreign Military Financing (FMF) programme, receiving about USD1.3 billion per year in military aid exclusively for procurement of weapons systems and services from the US. Notable examples of arms acquired through the FMF are F-16 combat aircraft and the M1A1 Abrams tanks.

Sources: Security Assistance Monitor, SIPRI Arms Transfers Database

Egypt's burgeoning arms trade with Russia was solidified by contracts to procure Russian weapons in 2014 and 2015. These included the acquisition of three divisions of S-300 SAM systems, an estimated 50 MiG-29M combat aircraft and 46 Ka-52 combat helicopters. Some batches of weapons were delivered to Egypt between 2016 and 2018. Others are planned to be delivered by 2020 (SIPRI Arms Transfers Database). Furthermore, avoiding risks of over-dependence on a single foreign arms exporter, Egypt has invoked a further diversification strategy by signing a number of arms deals with France and Germany.

Relations between Egypt and Russia are not confined to arms sales alone: military cooperation is increasing as well. In recent years, Egypt and Russia have held several joint military exercises. Following Russia's agreement with Syria on the expansion of the Tartus naval facility, in 2017 Russia reached a preliminary agreement with Egypt allowing both countries to share airspace and airbases ("Rasporyazheniye Pravitel'stva

Rossiyskoy Federatsii", 2017). Furthermore, in 2018, Russia and Egypt agreed to develop the first Egyptian nuclear power plant in the city of El Dabaa. This represents Russia's growing presence in the region with opportunities to project its power towards itgion.

New "Promising" Partners in the Gulf?

Western countries including the US, France, the United Kingdom and Germany have traditionally dominated the market for arms in the Gulf region. For example, in 2014-18 the US accounted for 64% of all imports to the UAE, followed by France (10%). Russia accounted for only 1.5% for the same period. In recent years, Russia has shown an increased interest in the Gulf region. Despite disagreements over Syria, Russia has made several important steps towards arms trade cooperation with the Gulf states, among other arrangements.

During a meeting in Moscow in October 2017, Russia and Saudi Arabia reached a preliminary agreement for the potential acquisition of Russian weapons. The agreement included S-400 air defence systems and possible transfer of technologies for the local production of Russian weapons including Cornet-EM anti-tank missile systems and TOS-1A multiple rocket launcher systems. Some Russian experts believe that Saudi Arabia may also be interested in Russian aviation and aircraft production, in particular in the Su-30SM, Su-35S and Su-34 combat aircraft that were tested during operations in Syria ("Araviyskiy proryv: Rossiya tesnit SSHA na rynke oruzhiya Blizhnego Vostok", 2017). However, to date, no orders have been placed.

In theory, if Saudi Arabia aspires to reduce its dependence on Western suppliers, Russian weapons would represent a viable and important alternative. Moreover, Saudi Arabia has made significant efforts to expand its domestic defence industry. Therefore, it is interested in building indigenous capacities with regards to the production of military systems and technologies, which Russia is ready and willing to share.

The UAE is an additional country in the Gulf region with which Russia has expanded its cooperation. In February 2017, it signed a contract with Russia for the supply of anti-tank missiles worth more than 700 million US dollars. The UAE has also initiated discussions with Russia about the co-development of a fifth-generation combat aircraft. In addition, it has signed an agreement of intent for the purchase of the Su-35 combat aircraft from Russia ("RF i OAE podpisali soglasheniye o namerenii zakupki istrebiteley Su-35", 2017). Taking into account its previous interest in purchasing F-35 combat aircraft from the US, despite ongoing discussions between the US and the UAE, it remains unclear whether it is willing to implement the agreement with Russia or use the agreement as leverage in its attempts to gain concessions from the US on certain military equipment including the acquisition of F-35 combat aircraft (SIPRI Arms Transfers Database).

Conclusions and Recommendations

Russia intends to strengthen its relations with the MENA countries and to promote itself as being a more appealing partner than the West. By making inroads in the region, notably through trade deals, Russia has established itself as an arms trade partner. In addition, increasing arms exports is seen as an instrument of political influence, giving Russia greater visibility among other suppliers. Committed to developing long-standing relations with countries in the MENA region, Russia is interested in pursuing cooperation in other areas such as nuclear energy, commodity trade and investments.

The following recommendations are relevant for policy-makers and experts working with arms transfer issues:

1. Carefully assess possible impacts of arms exports on regional security, taking into account the principles of the arms export control regimes. Failure to comply with export control laws and regulations by arms suppliers may lead to negative implications such as violations of humanitarian law. In addition, the challenges for arms export control compliance such as the growing employment of dual-use technology in defence equipment need to be addressed.
2. Further analyse and understand how arms suppliers use arms exports to the MENA region as a foreign policy tool to meet their national security and foreign policy goals.
3. Possible implications of arms imports by the MENA countries need to be carefully assessed. Although arms imports by the MENA countries are often a major element of national security requirements, a high level of arms procurement may also result in growing tensions in the region as well as risks of the accumulation of surplus weapons and their diversion into the illicit market.

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