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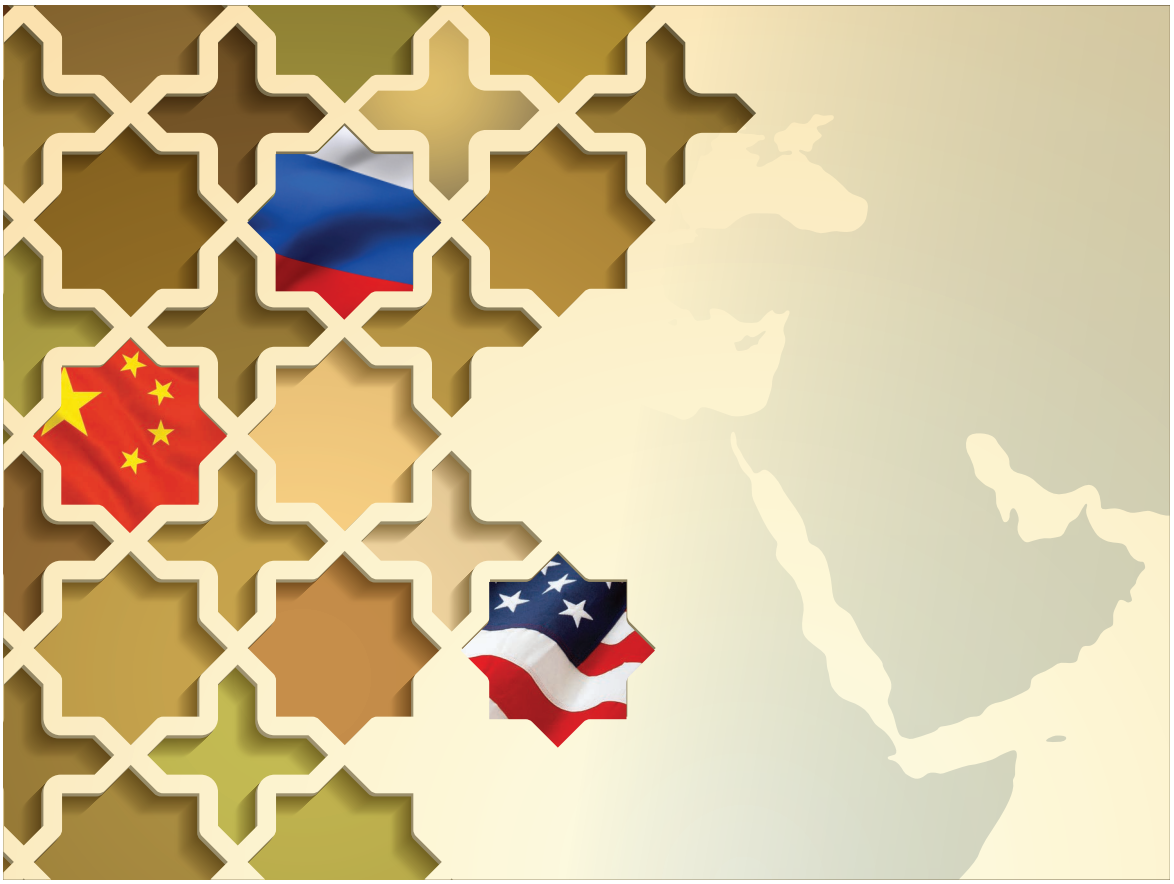
Crossroads of Competition

China, Russia, and the United States in the Middle East



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Preface

The 2017 U.S. National Security Strategy and 2018 U.S. National Defense Strategy elevated strategic competition with China and Russia as the key feature for U.S. strategy, a paradigm shift from the low-intensity conflicts against nonstate actors that the United States had been fighting since 2001. Although strategic competition is intended to be global in nature, much of the focus has been on Europe and Asia, leaving other regions understudied.

This report focuses on one such region: the Middle East, where competitive dynamics are already apparent among the United States, China, and Russia. China has built economic partnerships in energy trade, infrastructure, ports, and communications technology; these economic ties have given China regional influence. Russia, meanwhile, has attempted to position itself as a mediator and alternate weapon provider; by intervening in Syria, Russia also has increased its influence and established itself as an important external power in the region. Such efforts by China and Russia have challenged U.S. interests in the region, such as protection of allies and partners, defense of U.S. troops, stabilization of energy markets, and promotion of free and open trade. Furthermore, China and Russia will continue to contest the U.S. role in the Middle East. In this report, we consider these trends with the goal of providing U.S. policymakers and planners with approaches to help the United States better compete with China and Russia in the region to protect U.S. interests.

Human Subject Protections (HSP) protocols were used in this study in accordance with the appropriate statutes and DoD regulations governing HSP. Additionally, the views of the sources rendered anonymous by HSP are solely their own and do not represent the official policy or position of DoD or the U.S. government.

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Summary

Central to the 2017 U.S. National Security Strategy (NSS) and 2018 National Defense Strategy (NDS) is the concept of *strategic competition*, defined in the NSS as a new era of interstate rivalry characterized by "growing political, economic, and military competitions." The NSS and NDS deprioritized threats that guided previous iterations of these documents, such as terrorism, and instead elevated strategic competition with China and Russia as the proper focus of U.S. security policy. This reprioritization is based on China's and Russia's desires to export their authoritarian models; erode the U.S.-led international order; and gain economic, political, and military influence over other countries. Therefore, the most recent NSS and NDS represent a paradigm shift from the low-intensity conflicts against nonstate actors that the United States had been fighting since 2001. Instead, these strategies refocus U.S. national effort toward great-power competition—a peacetime competition between strong states—and implicitly recognize that the global environment is no longer unipolar.

Although strategic competition is theoretically global in nature, recent U.S. competitive efforts have tended to concentrate on Asia and Europe. Focusing on these two regions reflects another common theme of the NDS and NSS: the United States has finite resources and therefore must prioritize its activities. However, in much the same way that the Cold War was fought in countries outside the United States' and Soviet Union's respective spheres of influence, the periphery could once again play an important role in this new era of competition.

In this report, we examine strategic competition among the United States, China, and Russia in one such peripheral area. The Middle East is a region of interest for all three major powers but not geographically adjacent to any of them, and all three countries have varying degrees of influence there. Given its historic role in the region, the United States is the dominant player compared with China and Russia, but the latter two are gaining ground in certain areas. Although the U.S. emphasis is on Europe and Asia as the primary areas for competition, further study is required to understand how U.S.-China-Russia competition—which will not be limited to those two regions—might unfold elsewhere.

We examine Chinese and Russian actions using qualitative methods (historical research, analysis of primary and secondary sources, and interviews with policymakers and experts from those countries) and quantitative ones (analysis of economic data, arms sales, and key leader engagements). We find that China is focused on economic access; Russia is primarily concerned with security issues. Thus, the United States will face different competitive dynamics with each. A separate online appendix provides additional detail regarding (1) Chinese and Russian diplomatic, economic, and military engagement in the Middle East and (2) areas of strategic competition among China, Russia, and the United States in that region.

At the time of writing, there is little overlap in Chinese and Russian approaches to the region. This has created a situation in which China and Russia both pursue their primary aims—and the secondary aim of eroding U.S. influence and leverage—without creating friction in their bilateral relationship. Despite the lack of competition between Beijing and Moscow to date, there are discrete areas where a limited competitive dynamic could emerge in the future—particularly in niche arms markets, such as unmanned systems, infrastructure contracts, and hydrocarbons.

Additionally, although competition is occurring, Chinese and Russian officials and analysts interviewed for this project all raised the potential for cooperation with the United States. Whether these are mere talking points or represent a genuine aspiration is unclear, but it is worth noting that cooperation could be beneficial to all parties—although this cooperation should occur in a manner that does not give Beijing or Moscow an undue edge.

Ultimately, strategic competition is the stated policy driving U.S. policy toward (and engagements with) China and Russia—and both of those countries include elements of strategic competition in their own policies and actions, with all three vying to improve their own positions while eroding those of their competitors. Accordingly, there are several approaches that U.S. policymakers can consider in seeking to improve the U.S. position vis-à-vis China and Russia in the Middle East:

- There is much that the United States can do—if it so chooses—in the Middle East, regardless of the activities of Russia and China. Examples are working to settle international disputes, helping build trade and investment relations between U.S. companies and the region, and providing aid where necessary and useful. Such actions would reinforce the role of the United States as the leading external power in the region.
- Some Chinese and Russian activities could be beneficial to countries in the region, such as China's infrastructure projects. The United States might engage to help local actors take advantage of those activities in ways that magnify benefits to the region without disadvantaging the United States.
- Accordingly, the United States should be selective in the Chinese and Russian activities it tries to counter in the region. Not doing so could become cost-imposing to the United States over time, and the United States should avoid tying up attention and resources. Such selectivity should be driven by a strong understanding of China's and Russia's goals in the region and decisionmakers should be especially alert to activities that do not match those goals. In response, the United States should undertake competitive actions when Washington assesses its core interests in the region to be at risk.
- The United States might consider prioritizing activities in countries hosting significant Chinese and Russian activities that run counter to U.S. interests. Top contenders for future competition are Bahrain, Egypt, Qatar, Oman, Saudi Arabia, Syria, Turkey, and the United Arab Emirates, which are also important to core U.S. interests in the region.
- The United States might choose to implement competitive strategies intended to create dilemmas for Beijing and Moscow that tie up their resources and attention and reduce their ability to compete. Such competitive strategies in the Middle East would complement those already being implemented in Asia and Europe, and are likely to be lower risk.
- Although the United States might try to counter Chinese and Russian activities, the determinant as to whether any strategic actions succeed or fail is ultimately the countries in the Middle East. The United States can wield a variety of levers of influence but should weigh likely regional reactions and the extent to which vital U.S. interests will be safeguarded.

- Finally, although there might be few opportunities, the United States should identify limited areas of cooperation with China and Russia. A cooperative stance could prove more attractive to countries of the region in some cases and would reduce the risk of them being forced into a choice and choosing to go against U.S. interests.

Acknowledgments

We thank the U.S., Russian, and Chinese policymakers and experts who spoke to us about the issues discussed in the report. Reviews by Jon Alterman and Michael Mazarr greatly strengthened the report. At the RAND Corporation, we thank Christine Wormuth for the opportunity to examine an important issue and for her guidance throughout the project. Yousuf Abdelfatah provided necessary research assistance for the project. Matthew Byrd guided publication at RAND, Arwen Bicknell provided expert editing and greatly improved the manuscript, and Rick Penn-Kraus designed the cover. All errors of fact and interpretation remain our sole responsibility.

Abbreviations

5G	fifth-generation mobile telephony
BRI	Belt and Road Initiative
CCP	Chinese Communist Party
COVID-19	coronavirus disease 2019
EU	European Union
GCC	Gulf Cooperation Council
GDP	gross domestic product
GRU	Main Intelligence Directorate (Glavnoe Razvedyvatelnoe Upravlenie [Главное разведывательное управление])
ISIS	Islamic State in Iraq and Syria
JCPOA	Joint Comprehensive Plan of Action (Iran nuclear deal)
MFA	Ministry of Foreign Affairs
MTCR	Missile Technology Control Regime
NATO	North Atlantic Treaty Organization
NDS	National Defense Strategy
NEO	noncombatant evacuation operation
NSS	National Security Strategy
PLA	People's Liberation Army
PRC	People's Republic of China
SITC	Standard International Trade Classification
SVR	Foreign Intelligence Service (Sluzhba Vneshnei Razvedki [Служба внешней разведки])
UAV	unmanned aerial vehicle
SEA-ME-WE 5	Southeast Asia-Middle East-Western Europe 5 fiber-optic cable
WDI	World Development Indicators

CHAPTER ONE

Introduction

The 2017 U.S. National Security Strategy (NSS) and 2018 National Defense Strategy (NDS) both feature the concept of *strategic competition*, defined as a new era of interstate rivalry characterized by "growing political, economic, and military competitions."[1] These iterations of the NSS and NDS prioritize long-term strategic competition with great powers over long-standing threats (notably terrorism), a switch from previous strategic guidance.[2] The strategies cite China and Russia as the biggest threats to the United States because of their desires to export their authoritarian models and erode the U.S.-led international order to gain economic, political, and military influence over other countries.[3] In many respects, the NSS and NDS herald the return of great-power competition (a peacetime competition between strong states) and of a multipolar environment for the first time since the Cold War—a paradigm shift from the low-intensity conflicts against nonstate actors that the United States had been fighting since the terrorist attacks of September 11, 2001.

Emerging from those documents are new efforts to define what strategic competition actually entails and how the United States can best compete with China and Russia.[4] Although strategic competition is theoretically global in nature, the majority of recent U.S. efforts have concentrated on Asia and Europe.[5] The logic in that approach is that strategic competition is

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[1] White House, *National Security Strategy of the United States of America*, Washington, D.C., December 2017, p. 2. Also see U.S. Department of Defense, *Summary of the 2018 National Defense Strategy of the United States of America: Sharpening the American Military's Competitive Edge*, January 20, 2018.

[2] For example, see White House, *The National Security Strategy of the United States of America*, Washington, D.C., September 2002; U.S. Department of Defense, *The National Defense Strategy of the United States of America*, March 2005; U.S. Department of Defense, *National Defense Strategy*, June 2008; White House, *National Security Strategy*, Washington, D.C., May 2010; U.S. Department of Defense, *Sustaining U.S. Global Leadership: Priorities for 21st Century Defense*, Defense Strategic Guidance, January 2012.

[3] U.S. Department of Defense, 2018, pp. 1–2. The new administration of President Joseph R. Biden, Jr., issued a new strategy document in March 2021. The new document said that the United States was operating in a world of strategic competition and noted rivalry with China and Russia, but it elevated the challenge of China above that of Russia. White House, "Interim National Security Strategic Guidance," Washington, D.C., March 2021, pp. 6, 8, and 20.

[4] Uri Friedman, "The New Concept Everyone in Washington Is Talking About," *The Atlantic*, August 6, 2019; Michael J. Mazarr, Jonathan S. Blake, Abigail Casey, Tim McDonald, Stephanie Pezard, and Michael Spirtas, *Understanding the Emerging Era of International Competition: Theoretical and Historical Perspectives*, Santa Monica, Calif.: RAND Corporation, RR-2726-AF, 2018, p. 2; Katie Bo Williams, "What's Great Power Competition? No One Really Knows," *Defense One*, May 13, 2019.

[5] Ronald O'Rourke, *Renewed Great Power Competition: Implications for Defense—Issues for Congress*, Congressional Research Service, R43838, Washington, D.C., March 12, 2020, pp. 5–8; Royal United Services Institute, "A Conversation with the US Secretary of Defense," London, September 6, 2019; U.S. Department of Defense, *Indo-Pacific Strategy Report: Preparedness, Partnerships, and Promoting a Networked Region*, June 1, 2019a.

likely to play out in the backyards of both China and Russia, given their greater interests in these regions and concerns over U.S. involvement in Europe and the Indo-Pacific. The concentration on these two regions also reflects another common theme of the NDS and NSS: that the United States has finite resources and therefore must prioritize its activities. However, in much the same way that the Cold War was fought in peripheral states outside the United States' and Soviet Union's respective spheres of influence, the periphery—such geographic locations as the Middle East—could once again play an essential role in this new stage of competition.[6]

Strategic Competition in the Middle East

Owing in part to its strategic location and abundance of resources, the Middle East has long been an area of competition for great powers. The "Great Game"—the 19th-century competition between the British and Russian Empires over commercial trade routes, many of which flowed through the Middle East—took on a new imperative for military transit, overflight, and basing rights following World War I. Early oil exploration bolstered this dynamic, introducing U.S. companies backed by the U.S. government into the competitive environment.[7] World War II reinforced the need for both commercial and military access rights, and the competition for regional access and influence between the Soviet Union and the United States became more prominent in the postwar era. The Cold War saw both the United States and the Soviet Union wield their economic, military, and political power—including sizable military presence—to bring Middle Eastern states into their respective spheres of influence while denying access and influence to each other.[8] As a result, it has long been said that for a country to be a great power, it must be active and have influence in the Middle East.[9]

Today, elements of strategic competition as defined by the NSS and NDS appear to be taking place in the Middle East. China and Russia have both increased their economic ties to the region and their bilateral and multilateral diplomatic engagement. Moscow, for its

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[6] This report builds on and complements research that RAND has conducted on strategic competition, particularly as it relates to Russian and Chinese strategy in the Middle East. For example, see Andrew Scobell, Bonny Lin, Howard J. Shatz, Michael Johnson, Larry Hanauer, Michael S. Chase, Astrid Stuth Cevallos, Ivan W. Rasmussen, Arthur Chan, Aaron Strong, Eric Warner, and Logan Ma, *At the Dawn of Belt and Road: China in the Developing World*, Santa Monica, Calif.: RAND Corporation, RR-2273-A, 2018; Andrew Scobell and Alireza Nader, *China in the Middle East: The Wary Dragon*, Santa Monica, Calif.: RAND Corporation, RR-1229-A, 2016; James Sladden, Becca Wasser, Ben Connable, and Sarah Grand-Clement, *Russian Strategy in the Middle East*, Santa Monica, Calif.: RAND Corporation, PE-236-RC, 2017; Becca Wasser, *The Limits of Russian Strategy in the Middle East*, Santa Monica, Calif.: RAND Corporation, PE-340-RC, 2019. Christine Wormuth, Director of the International Security and Defense Policy Center at RAND, testified recently to the House Foreign Affairs Subcommittee on Middle East, North Africa, and International Terrorism on many of the key themes we explore in this report. See Christine Wormuth, *Russia and China in the Middle East: Implications for the United States in an Era of Strategic Competition*, Santa Monica, Calif.: RAND Corporation, CT-511, 2019.

[7] For example, the Arabian American Oil Company was established by U.S. oil companies, supported by the U.S. government and Saudi Arabia in 1933. See Ellen Wald, *Saudi, Inc.: The Arabian Kingdom's Pursuit of Profit and Power*, New York: Pegasus Books, 2018.

[8] John C. Campbell, "The Soviet Union and the United States in the Middle East," *Annals of the American Academy of Political and Social Science*, Vol. 401, May 1972.

[9] L. Carl Brown, *International Politics and the Middle East: Old Rules, Dangerous Game*, London: IB Tauris Publishers, 1984, p. 3.

part, has attempted to position itself as an alternate weapon provider—and potentially a full security partner—in the wake of regional states' displeasure with the depth of U.S. commitments. China has leveraged its Belt and Road Initiative (BRI) to focus on building economic partnerships, largely in infrastructure and communications technology.[10] These economic ties have given China a modicum of political influence in the region—particularly with poorer states—and secured Beijing's continued access to oil, among its top interests in the region. Russia, on the other hand, has built outsized political influence on regional states and established itself as an important external power in the region, partly through its intervention in Syria.

But the Middle East is the crossroads of all three powers—the United States, China, and Russia—so this competition is more than simply gaining influence: It is also about eroding the advantages of the other powers. Therefore, many of the Chinese and Russian efforts have undercut U.S. policy objectives in the region.

Beijing's numerous deals to build or operate port infrastructure throughout the region could complicate existing U.S. military access or undermine U.S. attempts to expand access. Similarly, China's sale of commercial technologies—such as Huawei's infrastructure for fifth-generation mobile telephony (5G) networks—to countries in the Middle East with U.S. bases, such as Bahrain, poses increased intelligence and collection risks to U.S. military personnel.[11] U.S. defense officials have warned that Chinese investments are likely to create opportunities for economic coercion, often at the expense of these countries' relationships with the United States.[12]

Moscow's intervention in Syria, shoring up Syrian President Bashar al-Assad's regime, challenged U.S. policy to remove Assad from power.[13] Moscow's actions also complicated the U.S.-led Coalition fight against the Islamic State in Iraq and Syria (ISIS) in Syria: Russia added to airspace congestion, and more than 90 percent of its airstrikes in October 2015 were not striking ISIS territory or ISIS groups, units, or activities.[14] As Acting Assistant Secretary of Defense for International Security Affairs Kathryn Wheelbarger noted, "Russia's low-cost intervention in Syria has not only allowed it to buttress the Assad regime, but also to secure valuable basing locations and increase its convening leverage over regional partners."[15] Additionally, Russia's break with Saudi Arabia and other OPEC producers in March 2020 has led to

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[10] BRI was initially called One Belt One Road (OBOR) and is still referred to as such in China.

[11] For example, Bahrain struck a deal in March 2019 with Huawei, a Chinese telecommunications company with ties to the government, to roll out a commercial 5G network despite U.S. warnings that this posed intelligence and collection risks for the U.S. Fifth Fleet and U.S. service members based in Bahrain. Alexander Cornwell, "Bahrain to Use Huawei in 5G Rollout Despite U.S. Warnings," Reuters, March 26, 2019.

[12] Aime Williams, "Pentagon Warns of China's Growing Influence in the Middle East," *Financial Times*, August 21, 2019.

[13] U.S. policy under President Barack Obama was that Assad should step aside and did not have a role to play in a future Syrian government. During the Trump administration, U.S. priorities shifted to ensuring the enduring defeat of ISIS, expelling Iranian and Iranian commanded forces, and achieving a political settlement of the Syrian conflict in accordance with UN Security Council Resolution 2254—tacitly accepting that Assad could remain in power or be part of a future Syrian government. Macon Phillips, "President Obama: 'The Future of Syria Must Be Determined by Its People, but President Bashar al-Assad Is Standing in Their Way,'" White House, blog post, August 18, 2011; James F. Jeffrey, "Briefing on Syria," U.S. Department of State, Washington, D.C., November 14, 2018.

[14] John Kirby, "Daily Press Briefing—October 7, 2015," U.S. Department of State, Washington, D.C., October 7, 2015.

[15] Kathryn Wheelbarger, "Russia's Resurgence in the Middle East: How Does US Policy Meet the Challenge?" keynote address, Atlantic Council, Washington, D.C., May 30, 2019.

producers flooding the energy market, crashing oil prices and directly threatening the already overleveraged U.S. oil and gas sector.[16] Through these efforts and others, China and Russia are actively competing with the United States in the Middle East to challenge U.S. interests and gain advantages in the region.

Enduring U.S. Interests in the Middle East

To better understand why the Middle East has emerged as an arena for strategic competition, it is essential to understand the core U.S. interests in the region. Although U.S. policies are mutable and vary from administration to administration, these interests have remained constant and provide the basis for continued U.S. involvement and presence in the region. Elucidating what these U.S. interests are could also shed light on the strategic approaches that Russia and China have adopted and the types of actions that they have chosen to undertake in order to counter—and perhaps even undercut—U.S. influence in the Middle East. These enduring U.S. interests can be broken into four pillars: ensuring regional stability, maintaining access to and guaranteeing the free flow of oil for global markets, protecting allies and partners, and defending U.S. troops in the region.[17]

A Carter administration official noted in a 1978 congressional testimony that "it is imperative that the United States seek to prevent conflict in the Middle East."[18] At the time of this statement, interstate conflict between Israel and the Arab states was of chief concern. Although interstate conflict would remain an issue for the United States—specifically, the Iran-Iraq war from 1980 to 1988 and Iraq's invasion of Kuwait in 1990—it has largely dissipated in recent years.[19] Intrastate conflict and violent extremism have risen and eclipsed interstate conflict as drivers of regional instability; intrastate conflict has been more recently typified by the civil war in Syria and the transitions in power in Tunisia and Egypt during the Arab Spring. The September 11, 2001, terrorist attacks in the United States and the rise of violent extremist organizations, such as ISIS and Iranian proxy groups, have presented a direct threat to U.S. forces in the region and to the U.S. homeland.[20] Numerous U.S. strategies have sought, through dif-

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[16] Benoit Faucon, Georgi Kantchev, and Summer Said, "Russia Takes Aim at U.S. Shale Oil Producers," *Wall Street Journal*, March 13, 2020. Russia and Saudi Arabia subsequently agreed to a new deal, brokered by President Donald J. Trump (Clifford Krauss, "Oil Nations, Prodded by Trump, Reach Deal to Slash Production," *New York Times*, April 12, 2020). However, the steep decline in economic activity and travel wrought by the novel coronavirus disease 2019 (COVID-19) pandemic kept oil prices down for several more months.

[17] For a broad discussion of U.S. military interests in the Middle East, see Karl P. Mueller, Becca Wasser, Jeffrey Martini, and Stephen Watts, *U.S. Strategic Interests in the Middle East and Implications for the Army*, Santa Monica, Calif.: RAND Corporation, PE-265-A, 2017.

[18] Harold H. Saunders, "Statement by Assistant Secretary of State for the Middle East Harold H. Saunders," *Review of Developments in the Middle East, 1978*, hearing before the Subcommittee on Europe and the Middle East of the Committee on International Relations, House of Representatives, Ninety-Fifth Congress, Second Session, June 12, 1978, p. 3.

[19] Although such conflicts do continue, the United States remains a third party in them—for example, providing aerial refueling and limited support to the Saudi-led coalition in the Yemen conflict. Jeffrey Harrigian, "Department of Defense Press Briefing by Lieutenant General Harrigian via Teleconference from Al Udeid Airbase, Qatar," U.S. Department of Defense, February 13, 2018.

[20] Rory Carroll and Joanna Walters, "FBI Investigating San Bernardino Attack as an Act of Terrorism," *The Guardian*, December 5, 2015; Ariane Tabatabai, Jeffrey Martini, and Becca Wasser, *The Iran Threat Network (ITN): Four Models of Iran's Nonstate Client Relationships*, Santa Monica, Calif: RAND Corporation, RR-4231-A, forthcoming.

ferent approaches, to combat terrorism and the spread of radicalism in the Middle East.[21] As these strategies changed, so did U.S. presence in the region. The First Gulf War opened the region to a permanent basing constellation, particularly in the Gulf. The U.S. invasion of Iraq in 2003 marked a steep change in U.S. involvement and greatly expanded its role, particularly in stability operations.

Ensuring access to the Middle East's vast oil reserves has long been a stated U.S. interest.[22] The United States has historically pledged to address threats to the continued free flow of this natural resource from the Middle East—in part to the United States but especially to U.S. allies.[23] Even as early as 1953, a report to the National Security Council noted that wartime access to oil from the Middle East would be absolutely vital, especially for Europe, so that "nothing can be allowed to interfere substantially with the availability of oil from those sources to the free world."[24] Since then, this sentiment has been upheld by numerous U.S. administrations.[25]

In 2018, the Middle East supplied less than 8 percent of total U.S. oil consumption and 16 percent of total U.S. imports; likewise, the Middle East sent only 6 percent of its total exports to the United States.[26] China, Europe, India, and Japan received far more crude oil and oil products from the region than did the United States, which has been dramatically reducing its dependence on external sources of energy. However, the United States still seeks to protect energy flows that remain essential to the global economy and the stability of global markets. Although the nature of the threats to the free flow of energy resources has changed over time, the United States has demonstrated a continued willingness to protect the commercial shipping of Middle Eastern oil, most notably during the so-called Tanker War during the Iran-Iraq war of 1980 to 1988. More recently, the United States has pledged to guarantee safe passage of commercial shipping through the Strait of Hormuz as part of the International Maritime Security Construct, formerly known as Operation Sentinel, in light of Iranian maritime provocations.[27]

The protection of allies and partners in the region first emerged in the form of U.S. public statements of support for Israel. As the aforementioned official noted in his testimony, "Our irrevocable commitment to the security, strength, and well-being of Israel has been reaffirmed

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[21] For instance, the George W. Bush administration adopted the Freedom Agenda, which sought to eradicate factors that led to terrorism by creating political space in the region, spreading U.S. governance, and reinforcing good governance while simultaneously intervening in the region to topple Saddam Hussein from power in Iraq. White House, "Fact Sheet: President Bush Calls for a 'Forward Strategy of Freedom' to Promote Democracy in the Middle East," Office of the Press Secretary, Washington, D.C., November 6, 2003.

[22] National Security Council, "Analytical Summary of IG Response to NSSM 66," Washington, D.C., June 4, 1970; Saunders, 1978.

[23] Jimmy Carter, "State of the Union Address 1980," January 23, 1980.

[24] U.S. Department of State, U.S. Department of Defense, U.S. Department of the Interior, and U.S. Department of Justice, *Report to the National Security Council by the Departments of State, Defense, the Interior, and Justice*, Washington, D.C., NSC 138/1, January 6, 1953, p. 1321.

[25] Leonardo Maugeri, *The Age of Oil: The Mythology, History, and Future of the World's Most Controversial Resource*, Westport, Conn., and London: Praeger, 2006.

[26] BP, *BP Statistical Review of World Energy 2019*, 68th ed., London, June 2019.

[27] C. Todd Lopez, "Esper: Operation Sentinel Prevents Escalation of Middle East Waterways Conflict," U.S. Department of Defense, July 24, 2019.

by every American administration since the modern State of Israel was born thirty years ago."[28] The Carter Doctrine extended the security umbrella to the Gulf, regarding any "attempt by any outside force to gain control of the Persian Gulf region . . . as an assault on the vital interests of the United States of America" and threatening to repel such an assault "by any means necessary, including military force."[29] The United States has followed through on this security guarantee, notably coming to the aid of Kuwait and other Gulf states in the First Gulf War. To fulfill these commitments, the United States requires continued access and overflight rights in the region, which have become increasingly essential to global military operations as well.[30]

The enduring interests of ensuring regional stability and protecting allies and partners can be seen as coming together in the recent normalization agreements brokered by the Trump administration in 2020. On August 13 of that year, Israel, the United States, and the United Arab Emirates (UAE) announced the normalization of relations between Israel and the UAE, making the UAE only the third Arab country—after Egypt and Jordan—to normalize relations with Israel.[31] A few weeks later, on September 11, the White House announced the normalization of relations between Bahrain and Israel, making Bahrain the fourth Arab country to formally normalize relations with Israel.[32] The three Middle Eastern countries—all close partners of the United States—signed their agreements at the White House on September 15.[33] The agreements, designed to strengthen the economies of all three countries, also have a security dimension; they can be viewed to strengthen the security position of these states vis-à-vis Iran. Because the UAE is a major oil producer (as is the Gulf region), any measures to improve security should also help safeguard global oil markets, a core U.S. and Gulf Arab interest.

Report Intent, Organization, and Methodology

In this report, we seek to analyze strategic competition in the Middle East among the United States, China, and Russia. We do so with the intent of informing U.S. policymakers and defense planners as they work to fulfill the goals of the NSS and NDS and plan for new iterations of these two strategic documents. The fact that U.S. efforts intended to counter China and Russia focus on competing in Asia and Europe, coupled with a concept of strategic competition that is still being defined, makes it difficult to fully understand how this competition might play out in the Middle East. Therefore, in this report, we unpack the concept of strategic competition by detailing the political, economic, and military interests and activities of China

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[28] Saunders, 1978, p. 3.

[29] Carter, 1980.

[30] Mueller et al., 2017; National Security Council, 1970.

[31] White House, "Joint Statement of the United States, the State of Israel, and the United Arab Emirates," August 13, 2020b.

[32] White House, "Remarks by President Trump on the Announcement of Normalization of Relations Between Israel and the Kingdom of Bahrain," September 11, 2020c.

[33] White House, "President Donald J. Trump Is Promoting Peace and Stability in the Middle East," September 15, 2020f. We refer to the agreements between Israel and Egypt and between Israel and Jordan as peace agreements because Israel had been in a state of war with those two countries. In contrast, Israel had not been in a state of war with the UAE or Bahrain, so we refer to those agreements as normalization agreements.

and Russia in the region and identifying where their efforts intersect with U.S. interests and activities. Research for this report was completed in early October 2020.

We define the Middle East as Egypt, Turkey, the countries and territories of West Asia (specifically Iran, Iraq, Israel, Jordan, Lebanon, the Palestinian Territories—the West Bank and Gaza—and Syria), the Gulf Cooperation Council (GCC) countries (specifically Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE), and Yemen. We have excluded the North African states of Algeria, Libya, Morocco, and Tunisia in large part to focus on the U.S. Central Command area of responsibility.[34] We chose to focus on the Middle East because it is a region of interest for all three major powers that is not geographically adjacent to any of them. All three countries have preexisting levels of influence in the Middle East, so we do not assert that it is a level playing field. We recognize that the United States has an outsized level of influence compared with China and Russia. However, the balance of competition in the Middle East is greater than competition in Asia or Europe. In examining contemporary modes of competition in the Middle East, we aim to consider the long-term implications of how this competition might evolve over time. Our goal is to provide U.S. policymakers and planners with approaches to help the United States better compete with China and Russia in the region.

We drew on a variety of sources for this report. On the qualitative side, these are histories of the region; policy documents published by the United States, China, and Russia; and analytic reports produced by governments and researchers. We examined reports and research in Arabic, Chinese, English, and Russian. We also interviewed knowledgeable policymakers and experts from all three countries and drew on presentations by experts at a variety of conferences. In all cases, we safeguard the anonymity of these sources. On the quantitative side, we drew from data on economic exchanges and weapon sales, and we constructed new data sets on senior leader visits to the region. These sources are discussed more fully where they are first used in the report.

This report is divided into three parts. Drawing on official policy documents and interviews with U.S., Chinese, and Russian academics and policymakers, we first identify Chinese and Russian views of strategic competition along with regional views of Chinese and Russian activity in the Middle East. Second, we discuss Chinese and Russian interests in the Middle East, drawing on the previous sources and on academic literature and policy reports. In this part of the report, we detail Chinese and Russian political, economic, and diplomatic activities in the region to identify patterns of activities. In most cases, we focus on bilateral activities. Broader diplomatic efforts by China and Russia can frame their approaches to the region, but intraregional competition and diversity of income, economic structure, and even such societal characteristics as religion mean that much of the most important activity takes place on a bilateral basis.

Lastly, we identify areas of overlap among U.S., Chinese, and Russian activities in the region to project where, how, and why the three countries might compete in the Middle East. Notably, prioritization of the competing challenges and responding investments is one of the

[34] Although Israel and Turkey were in the U.S. European Command area of responsibility at the time research for this report was complete, they are essential components of the Middle East in terms of geography and influence. Algeria, Libya, Morocco, and Tunisia are part of the U.S. Africa Command area of responsibility. On January 15, 2021, the Department of Defense announced that it had changed the Unified Command Plan and shifted Israel to the U.S. Central Command area of responsibility. U.S. Department of Defense, "Department of Defense Statement on Unified Command Plan Change," Washington, D.C., January 15, 2021.

core guiding concepts of the NSS and the NDS.[35] In line with this, it is important to recognize that many of China's and Russia's activities to advance their own interests in the region do little or even no harm to U.S. interests. Even actions that do harm U.S. interests might not be worth responding to if a response were to cause disproportionate costs to the United States. With this in mind, and building on the findings of Chapters One through Three, we conclude with a set of policy recommendations for the United States intended to focus and improve its ability to compete with China and Russia in the Middle East while securing vital U.S. interests. A separate online appendix provides additional detail regarding (1) Chinese and Russian diplomatic, economic, and military engagement in the Middle East and (2) areas of strategic competition among China, Russia, and the United States in that region.

[35] U.S. Department of Defense, 2018, p. 1.

CHAPTER TWO

Views of Strategic Competition

When the United States refocused its national security strategy in 2017 to feature strategic competition, the document highlighted competition in the political, economic, and military domains.[1] This simultaneity of competition across these three domains that affect desired U.S. interests and outcomes was the heart of the concept.[2] Underlying all of those domains was a focus on technology—especially new technologies, such as autonomy, artificial intelligence, robotics, and sensors—that would enable the United States to protect what the strategy identified as four vital national interests: protecting the American people, homeland, and way of life; promoting American prosperity; preserving peace through a strong military; and advancing U.S. influence in the world.[3]

The NSS identified China and Russia as first-tier challengers. Of the two, China looms larger.[4] Although Russia presents a more acute short-term military threat, China is economically and demographically larger, globally engaged, and has been strengthening its armed forces across all domains of warfare. As a result, China presents a greater threat over the long term.

Building on the new NSS, the NDS noted that strategic competition is occurring across economic, diplomatic, and security domains, and it highlighted the military and defense aspects of that competition.[5] Amplifying the NSS, the NDS also emphasized the importance of technology to strategic competition: "New technologies include advanced computing, 'big data' analytics, artificial intelligence, autonomy, robotics, directed energy, hypersonics, and biotechnology—the very technologies that ensure we will be able to fight and win the wars of the future."[6]

This focus in both documents on China, Russia, and advanced technology seems unconnected to the Middle East, which lags technologically and economically and has been the locus of two decades of U.S. counterterrorism efforts against violent nonstate groups—an effort deemphasized in both the NSS and the NDS. Although the Middle East might not feature prominently in either strategy document, it does fit within the priorities laid out in both of

[1] White House, 2017, p. 2.

[2] As discussed in Chapter One, we interviewed several people knowledgeable with the formulation of strategy in the United States, China, and Russia, some of whom were involved in high-level deliberations about those strategies. Information in this chapter about the U.S. view of strategic competition draws from those interviews.

[3] White House, 2017, p. 4.

[4] Telephone interview with former U.S. national security official, March 2020. Also see James Dobbins, Howard J. Shatz, and Ali Wyne, *Russia Is a Rogue, Not a Peer; China Is a Peer, Not a Rogue: Different Challenges, Different Responses*, Santa Monica, Calif.: RAND Corporation, PE-310-A, 2019.

[5] U.S. Department of Defense, 2018, p. 2.

[6] U.S. Department of Defense, 2018, p. 3.

them. Competition with China and Russia is expected to occur worldwide, including in the Middle East, and both countries have interests in the region that could run counter to U.S. interests. Therefore, it is essential to understand how these countries, which the United States identified as its leading competitors, view strategic competition.

Furthermore, strategic competition is playing out in a region that comprises 16 countries and territories. These states possess their own interests, which do not always align with those of the United States despite many of these nations having close relationships with Washington. Given the agency held by these regional states, it is important to assess their perceptions of strategic competition and their views of China and Russia.

Chinese Views of Strategic Competition

In the eyes of the Chinese Communist Party (CCP) rulers of the People's Republic of China (PRC), their country is in perpetual competition with other great powers. In their view, the PRC exists in a world in which only the most-vigilant great powers remain secure and continue to prosper.[7] Therefore, PRC documents routinely reference hegemonistic power politics—with *hegemon* referring to other great powers—both in the Asia-Pacific region and in the world more broadly.[8] But the intensity of great-power competition, as well the identity of the PRC's top competitor, has changed over time.

During the first 30 years of the PRC's existence—roughly corresponding to the height of Cold War tensions, when the country was dominated by leader Mao Zedong—Beijing assessed that strategic competition was acute, and "war and revolution" were the main trends of the era.[9] For two of these three decades, the Soviet Union was the hegemon that most concerned Chinese leaders.[10] In the aftermath of Mao's death in 1976, Beijing undertook a strategic appraisal and concluded that strategic competition was easing somewhat, the strategic environment had shifted, and China was ready to enter a new era of "peace and development."[11] After the fallout from the Tiananmen Square events of 1989, the United States became the focus of concern as Beijing has become convinced that successive administrations in Washington have sought to contain China and have worked tirelessly to undermine CCP rule.[12]

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[7] Thomas J. Christensen writes that China is the "high church of realpolitik" (Thomas J. Christensen, "Chinese Realpolitik: Reading Beijing's World View," *Foreign Affairs*, Vol. 75, No. 5, September/October 1996, p. 37). This is consistent with Alastair Iain Johnston's research on strategic culture: *Cultural Realism: Grand Strategy in Chinese History*, Princeton, N.J.: Princeton University Press, 1995.

[8] For example, see "Section 1: International Security Situation," in State Council Information Office of the People's Republic of China, *China's National Defense in the New Era*, Beijing: Foreign Languages Press, July 2019a.

[9] Mao Zedong ruled from 1949 to 1976.

[10] The United States dominated Chinese threat perceptions from 1949 until the late 1950s.

[11] Deng Xiaoping, "Peace and Development Are the Two Outstanding Issues in the World Today, March 4, 1985," in *Selected Works of Deng Xiaoping*, Vol. III, *(1982–1992)*, Beijing: Foreign Languages Press, 1994, pp. 110–112.

[12] For example, see Wang Jisi and Hu Ran, "From Cooperative Partnership to Strategic Competition: A Review of China-U.S. Relations, 2009–2019," *China International Strategic Review*, July 2019, p. 7.

China in the U.S. National Security Strategy and National Defense Strategy

China is cited as a "revisionist power" in the Trump administration's strategic guidance.[13] In both the NSS and NDS, and reinforced by subsequent statements by senior U.S. officials, China is the primary threat to the United States, followed by Russia, Iran, North Korea, and violent extremist organizations. According to the NSS, China is competing "across political, economic, and military arenas," to "displace the United States," and "reorder the [Indo-Pacific] region in its favor."[14] This regional reordering is one reason why the United States transformed the U.S. Pacific Command to the U.S. Indo-Pacific Command: Doing so was meant to elevate other potential partners that might play an important role in the competition.[15] Furthermore, the strategic guidance alleges that China's military modernization and economic expansion have benefited from access to the U.S. innovation economy and U.S. universities, but, rather than liberalizing, China has "expanded its power at the expense of the sovereignty of others."[16] The NDS agrees that China is seeking to displace the United States to "achieve global preeminence in the future" and contends that China is attempting to reshape the world order to be more "consistent with their authoritarian model."[17] The focus on Beijing's future goals in both documents has made long-term strategic competition the priority for the U.S. Department of Defense and for the interagency more broadly.

Chinese Reactions to the U.S. National Security Strategy and National Defense Strategy

After the Cold War, Chinese officials determined that great-power competition was continuing, albeit at a less acute level.[18] This did not mean PRC leaders assessed that military conflict was out of the question. Instead, they assessed that a major global conflict was less likely, although limited localized wars involving other powers were quite possible.[19] Although this assessment gave rise to the PRC's decision to concentrate on economic development, it also shifted Beijing's focus to the United States as a competitor in both the economic and security spheres.[20]

To Chinese officials, the nature of the more recent concept of strategic competition is not unlike the rivalry of the Cold War.[21] PRC documents routinely accuse the United States of maintaining a "Cold War mindset." Chinese officials view modern strategic competition as similar to the Cold War in that it is global in scope and not geographically contained to the Indo-Pacific region.[22] To Beijing, Washington is engaged in an ideological competition, intent

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[13] White House, 2017, p. 25.

[14] White House, 2017, p. 25.

[15] Telephone interview with former U.S. national security official, March 2020.

[16] White House, 2017, p. 25.

[17] U.S. Department of Defense, 2018, p. 2.

[18] For example, see "Section I: The International Security Situation," in State Council Information Office of the People's Republic of China, *China's National Defense*, Beijing, July 1, 1998.

[19] For example, see "Section I: National Security Situation," in State Council Information Office of the People's Republic, *China's Military Strategy*, Beijing: Xinhua, May 27, 2015.

[20] Wang Jisi and Hu Ran, 2019, p. 7.

[21] PRC documents routinely accuse the United States of maintaining a "Cold War mindset." These accusations say as much about Beijing's own mindset as it does about Chinese perceptions of U.S. thinking.

[22] Minghao Zhao, "Is a New Cold War Inevitable? Chinese Perspectives on US-China Strategic Competition," *Chinese Journal of International Politics*, Vol. 12, No. 3, Autumn 2019, p. 374.

on undermining the political legitimacy of the CCP. Therefore, the popular revolts against dictatorships around the world—including those in the Middle East (the so-called Arab Spring)—alarmed PRC rulers, who concluded that these uprisings were either masterminded or instigated by the United States, similar to views held by their Russian counterparts.[23]

The public articulation of the Trump administration's characterization of a world rife with great-power competition did not surprise PRC leaders. Chinese assessments of regional and global security environments have become more pessimistic in official documents since the mid-2010s. This evolution preceded the 2016 U.S. presidential election and the subsequent NSS and NDS guidance, which Chinese leaders took as confirmation of earlier assessments.[24] As one Chinese scholar notes, "Chinese observers predicted well over a decade ago that US-China relations would become more competitive."[25] Even so, leaders noted the shift in weight from Russia to China, having observed Russia as the United States' main strategic rival before 2017.[26]

Washington's articulation of its strategic competition concept served as justification for the PRC to publish its own review of the state of the international order and the threat posed by the United States. In a defense white paper published in late 2019—the first such document issued in four years—Beijing declared that "international strategic competition is on the rise."[27] The document continued: "The US has adjusted its national security and defense strategies and adopted unilateral policies. It has provoked and intensified competition among major countries."[28]As a result of this assessment, Beijing has become more willing to directly challenge Washington and engage in more-overt strategic competition. Under Xi Jinping, the CCP has articulated a vision of a world order in which China supplants the United States as the leading global power and the United States must accommodate Chinese interests.[29] Although China sees itself as being in direct strategic competition with the United States, the U.S. publication of the NSS and NDS and the popularization of the strategic competition concept gave the PRC post hoc justification to publicize this assessment.

Despite viewing international politics in zero-sum terms, Chinese leaders do have a moral or idealist component to their worldview. Official statements laced with such vocabulary as "peace," "harmony," and "win-win outcomes" are not empty rhetoric. Chinese leaders refer def-

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[23] For example, see Andrew J. Nathan and Andrew Scobell, "How China Sees America: The Sum of Beijing's Fears," *Foreign Affairs*, Vol. 91, No. 5, September/October 2012.

[24] "Section I: National Security Situation," in State Council Information Office of the People's Republic, 2015. This document states, "International competition for the redistribution of power, rights, and interests is tending to intensify."

[25] Minghao Zhao, 2019, p. 373.

[26] This observation stems from an interview with Chinese officials in the greater Washington, D.C., area, November 2019.

[27] "Section I: International Security Situation," in State Council Information Office of the People's Republic of China, 2019a.

[28] "Section I: International Security Situation," in State Council Information Office of the People's Republic of China, 2019a.

[29] State Council Information Office of the People's Republic of China, *China and the World in the New Era*, Beijing, September 2019b. Also see Feng Zhang, "The Xi Jinping Doctrine of China's International Relations," *Asia Policy*, Vol. 14, No. 3, July 2019, p. 15; Nadège Rolland, *China's Vision for a New World Order*, Seattle, Wash.: National Bureau of Asian Research, Special Report No. 83, January 2020; and Xi Jinping [习近平], *Secure a Decisive Victory in Building a Moderately Prosperous Society in All Respects and Strive for the Great Success of Socialism with Chinese Characteristics for a New Era* [*Juéshèng quánmiàn jiànchéng xiǎokāng shèhuì duóqǔ xīn shídài zhōngguó tèsè shèhuì zhǔyì wěidà shènglì,* 决胜全面建成小康社会 夺取新时代中国特色社会主义伟大胜利], report to the 19th National Congress of the Communist Party of China, October 18, 2017.

erentially to their own philosophical and ethical traditions and believe that these are relevant in the contemporary world.[30] For example, although U.S. officials have drawn from Confucius to explain strategic competition, Chinese officials say they prefer to draw from Laozi to reflect on competition, citing the phrase "no contention is contention" [不争是争].[31] The idea is that one succeeds not through competition with others but by concentrating on oneself. Our Chinese interlocuters noted that "competition in business" is expected and positive but competition in international affairs can move from rivalry to enmity.

But this harmony is viewed through a lens of Chinese leadership. One approach that PRC leaders see for getting countries to order their affairs through the precepts of Chinese philosophy would be if the PRC realized its Chinese dream of national rejuvenation and if China assumed its rightful place as the most important power in the international system.[32] If China assumed the role of the most influential state in the world, in the view of PRC elites, then Chinese norms of statecraft would predominate and produce a more peaceful and harmonious global order. Chinese preponderance would not constitute hegemonism the way that it would if another great power dominated the world; rather, Chinese would exert the "kingly way" [王道] of enlightened and moral leadership.[33]

Russian Views of Strategic Competition

During the Cold War, the Soviet Union—as Russia's predecessor—was engaged in a decades-long ideological rivalry with the United States. The resulting competition spanned every aspect of society, from politics to ideas to military issues. The all-encompassing nature of the rivalry led to proxy conflicts throughout the world, and the Middle East emerged as a major hot spot. After the collapse of the Soviet Union, a hobbled Russia spent the better part of two decades seeking to rebuild itself as a nuclear-armed great power that could extend its influence and secure its interests beyond its immediate region.

Although the ideological competition has receded, Russian objectives still often place Moscow in opposition to the goals of the United States and its allies. These objectives include security for Russia, preservation of its form of government, and economic prosperity—objectives

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[30] Andrew Scobell, *China's Use of Military Force: Beyond the Great Wall and the Long March*, New York: Cambridge University Press, 2003, p. 27.

[31] Interview with Chinese officials in greater Washington, D.C., area, November 2019. On National Day at the Chinese embassy in September 2018, Matthew Pottinger, then U.S. National Security Council Senior Director for Asia, quoted in Chinese the rectification of names section from the Analects of Confucius. The passage calls for all things to be called by their correct names, and Pottinger said it was of value to frankly state that China and the United States were engaged in competition (Jeremy Goldkorn, "Trump Official Matt Pottinger Quotes Confucius, in Chinese, to Make Point About Language and Truth," SupChina, October 1, 2018; SinoVision, "What's the Future of the China-US Relationship?" YouTube, September 28, 2018). The phrase cited by Chinese officials is an apparent paraphrase from Chapter 22 of the Daodejing, "Now: only because he does not strive / Therefore no one in the world can strive against him [夫唯不爭 /故天下莫能與之爭]." (Laozi and Daodejing can also be transliterated as Lao Tzu and the Tao Te Ching. This passage from the Daodejing is via Bruce R. Linnell, *Dao De Jing by Lao Zi: A Minimalist Translation*, Project Gutenberg eBook, 2015.)

[32] Rolland, 2020.

[33] "Section II: China's Development Is an Opportunity for the World," in State Council Information Office of the People's Republic of China, 2019b. An oft repeated refrain is "China will never seek hegemony," as appears in this document.

that could apply to any country.[34] Looking internationally, Russia seeks recognition as a great power, which it considers itself to be.[35] It also sees itself as occupying a place of privilege in its immediate post-Soviet neighborhood and expects a significant amount of influence as a result of that status. Related to this and other objectives, Russian leaders work to stop the enlargement of the European Union and the North Atlantic Treaty Organization (NATO) and to stop or reverse their influence among the countries and regions that Russia considers to be within its own sphere of influence.[36] These objectives are not necessarily translated into a well-articulated strategy. Rather, Russia tends to try a variety of actions (for example, hostile measures that are various forms of aggression short of war) with the intent that some will result in helping the country achieve its objectives. This approach—which is more flexible but at times reactive—keeps options open, allowing for contingency planning and tactical action.[37]

Russia in the U.S. National Security Strategy and National Defense Strategy

Although the NSS and NDS identify China as the primary long-term threat to the United States, Russia is a close second.[38] According to the NSS, Russia "seeks to restore its great power status and establish spheres of influence near its borders."[39] The strategic guidance argues that through a "combination of Russian ambition and growing military capabilities," conflict "due to Russian miscalculation" is becoming more likely in Eurasia.[40] Similarly, the NDS describes "the reemergence of long-term, strategic competition" with China and Russia as the "central challenge to U.S. prosperity and security."[41] Strategic competition with Russia is therefore a priority for the U.S. Department of Defense and requires "the seamless integration of multiple elements of national power—diplomacy, information, economics, finance, intelligence, law enforcement, and military."[42]

Russian Reactions to the U.S. National Security Strategy and National Defense Strategy

Officials throughout the Russian government have reacted to the U.S. concept of strategic competition. A central theme apparent in these reactions is the tension between the perceived

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[34] This paragraph draws from Raphael S. Cohen and Andrew Radin, *Russia's Hostile Measures in Europe: Understanding the Threat*, Santa Monica, Calif.: RAND Corporation, RR-1793-A, 2019, pp. 5–13.

[35] Others have noted that being considered a legitimate great power is important to Russia and that one of the sources of global security problems as of 2019 was Russia's dissatisfaction with its international status (Michael J. Mazarr, "Toward a New Theory of Power Projection," *War on the Rocks*, April 15, 2020; Michael J. Mazarr, "This Is Not a Great-Power Competition," *Foreign Affairs*, May 29, 2019).

[36] Opposition to NATO as a danger to Russia has been a consistent theme of Russian policy documents since at least 2010 (Stephanie Pezard and Ashley L. Rhoades, *What Provokes Putin's Russia? Deterring Without Unintended Consequences*, Santa Monica, Calif.: RAND Corporation, PE-338-A, January 2020).

[37] Cohen and Radin, 2019, pp. 13–15.

[38] Secretary of Defense Mark Esper stated in congressional testimony, "As reflected in the National Defense Strategy, the Department of Defense prioritizes China, and then Russia, as our Nation's top national security challenges" (Mark T. Esper, "Remarks by Secretary of Defense Mark T. Esper at the House Armed Services Committee Hearing on Syria and Middle East Policy," U.S. Department of Defense, December 11, 2019).

[39] White House, 2017, p. 25.

[40] White House, 2017, p. 26.

[41] U.S. Department of Defense, 2018, p. 2.

[42] U.S. Department of Defense, 2018, p. 5.

aggressive nature of the concept and the desire to cooperate on key issues. Some Russian officials have highlighted that the concept mirrors their own approach in some ways and therefore could present an opportunity for Moscow and Washington to negotiate as equals on issues that both sides deem to be of vital interest. Reflecting this theme, one Russian diplomat noted to us that competition was normal in economic and trade relations, such as arms trading, but that cooperating on shared responsibilities while understanding each other's interests and concerns was a safer path for the world.[43]

Immediately after the release of the NSS in December 2017, the Russian Ministry of Foreign Affairs (MFA) released a terse, four-paragraph response. Regretting the "confrontational thrust" of the NSS, the unsigned release argued that the NSS's key message—"peace from a position of strength"—showed Washington's "ambition to preserve at all costs a noticeably weakened American dominance in the international arena" instead of setting the stage for constructive cooperation. By characterizing growing Russian (and Chinese) economic and military strength as a threat to the United States, Washington "clearly does not want to see our countries as strong powers, fearing the complete loss of its former status." The MFA noted that this is why the NSS accused Russia of "infringing upon the 'world order,'" which the MFA understood to mean "a unipolar world order consisting entirely of American interests and needs." According to the MFA, the NSS merely confirmed something that Russia has already observed: "[T]he new strategy did not change anything here, but instead bluntly named what the United States is really seeking and reflected a growing uncertainty in Washington about the strength of its position."[44]

Meanwhile, the Kremlin's official response noted a few "modest positive aspects" in the NSS despite decrying its overall "imperial character" and Washington's "insistent aversion to and rejection of a multipolar world." Highlighting U.S.-Russian cooperation in counterterrorism, Kremlin spokesperson Dmitry Peskov said that the document does argue that U.S. cooperation with Russia is possible when in America's interest—not unlike Russia's approach.[45] Anatoly Antonov, Russian ambassador to the United States, reiterated Russia's willingness to work with the United States, despite "many flawed points" in an "unfriendly concept."[46]

Senior Russian officials have also sought to assess the strategic competition concept and identify how Russia should respond to this new approach. Foreign Minister Sergey Lavrov wrote an expansive essay for the Russian International Affairs Council in which he discussed generally the approach laid out in the NSS and NDS—without naming them explicitly. Lavrov argued that:

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[43] Interview with Russian diplomat, December 2019.

[44] Ministry of Foreign Affairs of the Russian Federation, "Commentary by the Information and Press Department of the Russian Ministry of Foreign Affairs on the New U.S. National Security Strategy [Kommentarii Departamenta informatsii i pechati MID Rossii v svyazi s novoi Strategiei natsional'noi bezopasnosti SShA, Комментарий Департамента информации и печати МИД России в связи с новой Стратегией национальной безопасности США]," December 19, 2017.

[45] "Kremlin Announces Imperial Nature of the U.S. National Security Strategy [V Kremle zayavili ob imperskom kharaktere strategii natsbezopasnosti SShA, В Кремле заявили об имперском характере стратегии нацбезопасности США]," *RIA Novosti*, December 19, 2017.

[46] "Russia Prepared to Work with U.S., Despite Its National Security Strategy [Rossiya gotova rabotat' s SShA, nesmotrya na ikh strategiyu natsbezopasnosti, Россия готова работать с США, несмотря на их стратегию нацбезопасности]," *RIA Novosti*, December 30, 2017.

> Our American colleagues persistently strive to mobilize essentially all their international partners to deter Russia and China. At the same time, they do not conceal their desire to drive a wedge between Moscow and Beijing, or to disrupt and undermine developing multilateral organizations outside of American control and regional integration structures in Eurasia and the Asia-Pacific region. They exert pressure on countries that do not play by the "rules" imposed upon them and dare to make the "wrong" choice in favor of cooperation with America's "opponents."[47]

This interpretation was further reinforced by Russian President Vladimir Putin during a 2017 meeting in which he discussed his prioritization of current and future focus areas for Russian defense policy. He observed that the balance of power in Europe had shifted, with NATO and the United States "rapidly building up their infrastructure," in line with what was "recently laid out in their defense strategy." He characterized the new strategy as "offensive in nature" and "certainly aggressive." Putin advised his audience of Russian defense officials that "we must take this into consideration in our practical work."[48] In other words, Putin's directive meant that Russian defense planning must take into account the new U.S. approach to strategic competition, although the contours of how Russian planning has done so are not yet clear.

As of mid-2020, there have been no revisions to major Russian foreign and security policy documents in light of the U.S. approach to strategic competition, and the views discussed are largely consistent with existing documentation. The 2016 Russian National Security Strategy described an emerging "polycentric world order" accompanied by the "growth of global and regional instability," with interstate competition "increasingly embracing the values and models of social development, as well as human, scientific, and technological potential."[49] The 2016 Russian Foreign Policy Concept characterized U.S. policy (and that of its allies) as "containment" of Russia and claimed that the United States and its allies are putting "political, economic, information, and other pressure" on Russia in ways that undermine "regional and global stability, are detrimental to the long-term interests of all sides and run counter to the growing need for cooperation and addressing transnational challenges and threats in today's world." Meanwhile, the concept highlights Russia's interest in "building mutually beneficial relations" with the United States because the two countries "bear special responsibility for global strategic stability and international security in general."[50]

Notably, despite Lavrov's warning about the United States attempting to drive a wedge between Russia and China, messaging to us from other Russian officials provides somewhat more-nuanced perspectives. They, too, say that they recognize that China is on an upward trajectory, but this is not necessarily attractive to Russia. Rather, there is a desire for some kind of accommodation with the United States. However, this seems not to have manifested in a

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[47] Sergey Lavrov, *The World at a Crossroads and the System of International Relations in the Future* [*Mir na pereput'e i sistema mezhdunarodnykh otnoshenii v budushchem, Мир на перепутье и система международных отношений в будущем*], Russian International Affairs Council, November 6, 2019.

[48] Kremlin, "Expanded Meeting of the Defense Ministry Board [Rasshirennoe zasedanie kollegii Ministerstva oborony, Расширенное заседание коллегии Министерства обороны]," December 22, 2017.

[49] Kremlin, Order of the President of the Russian Federation, *On the Strategy of National Security of the Russian Federation* [*O Strategii natsional'noi bezopasnosti Rossiiskoi Federatsii, О Стратегии национальной безопасности Российской Федерации*], No. 683, Moscow, Russia, December 31, 2015.

[50] Ministry of Foreign Affairs of the Russian Federation, "Foreign Policy Concept of the Russian Federation," November 30, 2016.

specific Russian strategy; at least one of our Russian interviewees questioned whether Russia had any strategic response to the U.S. idea of strategic competition.[51]

Regional Views of Strategic Competition

Strategic competition among the United States, China, and Russia in the Middle East is not taking place in a vacuum. Rather, it is taking place in a region comprising 16 countries and territories, all with their own interests and objectives. In some instances, these interests align with those of the three strategic competitors highlighted in this report and enable success of the actions that China, Russia, and the United States are attempting to take. In other instances, Middle Eastern states' interests do not align with the priorities of the great-power competitors and instead limit the success of those actions. In short, although China, Russia, and the United States can pursue strategic competition and attempt to achieve their objectives in the Middle East, the regional countries have a say in aiding or limiting these aims.

Regional Perceptions of the United States

Before detailing regional views of China and Russia, it is critical to understand the contextual background that undergirds the Middle Eastern states' perceptions and engagement of the two strategic competitors. Essential to this context is the role of the United States in the Middle East and recent changes in regional perceptions of Washington.

The United States has long played an essential role in the Middle East, acting as a security guarantor for several states. In many respects, the United States was viewed as "the only game in town" by regional leaders.[52] However, this perception began to shift following the U.S. intervention Iraq in 2003 and the concomitant rise in instability there. The U.S. intervention reordered regional politics by changing the balance of power among Middle Eastern states and their internal political dynamics. It also led to increased instability, fueling terrorist organizations such as al-Qa'ida, and it altered how regional countries viewed the U.S. security role in the region.[53]

Regional states' perceptions of the United States further soured during the Obama administration. The announced "pivot to Asia" created fears of U.S. retrenchment from the region.[54] When coupled with Washington's decision to side with protesters in Egypt and Tunisia during the Arab Spring protests and U.S. inaction against the Assad regime in Syria despite stated red lines, the fears of retrenchment led several Middle Eastern leaders to lose faith in the U.S. security commitment.[55] Many of these states—Egypt, Saudi Arabia, and the UAE, in particular—have initiated military action in pursuit of their own security interests without the

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[51] Discussion with a Russian diplomat. We recognize that this stance may have been messaging on the part of Russia.

[52] Characterization by a Gulf leader, as quoted in Emile Hokayem and Becca Wasser, "The Gulf States in an Era of American Retrenchment," in Toby Dodge and Emile Hokayem, eds., *Middle Eastern Security, the U.S. Pivot and the Rise of ISIS*, London: International Institute for Strategic Studies, 2014, p. 143.

[53] Frederic Wehrey, Dalia Dassa Kaye, Jessica Watkins, Jeffrey Martini, and Robert A. Guffey, *The Iraq Effect: The Middle East After the Iraq War*, Santa Monica, Calif.: RAND Corporation, MG-892-AF, 2010.

[54] Yousef Al Otaiba, "The Asia Pivot Needs a Firm Footing in the Middle East," *Foreign Policy*, March 26, 2014.

[55] Mohammed bin Nawaf bin Abdulaziz Al Saud, "Saudi Arabia Will Go It Alone," *New York Times*, December 17, 2013.

United States in such places as Libya and Yemen.[56] Additionally, more-recent changes to U.S. posture in the region—such as the decision to withdraw U.S. forces from Syria in December 2019, only to return them in 2020—have reinforced perceptions of a vacillating U.S. security commitment while the Trump administration's maximum-pressure campaign led to greater instability with Iran. By 2019, the Arab Youth Survey stated that 59 percent of young Arabs viewed the United States as an adversary, nearly doubling since 2016.[57]

It is against this backdrop of regional perceptions of uncertainty regarding the U.S. security role in the region that views of strategic competition in the region must be understood. These views of U.S. retrenchment have given rise to renewed engagement with China and Russia—both as a means for regional states to signal to the United States that they have other options and as genuine engagement to pursue individual state interests.

Regional Perceptions of China

Almost every country in the Middle East has welcomed ties with China, expressing the belief that there are sufficient gains to glean from the relationship. That said, each nation has engaged with China in pursuit of different objectives. Iran, for instance, views its relationship with China as economically and politically essential amid U.S. and European financial and diplomatic pressure over its nuclear program.[58] Objectives of other countries are economic gain and obtaining military capabilities that the United States has refused to sell, as will be noted in Chapter Four.

China has made political decisions in recent years that have proven unpopular in the Middle East, such as backing strongmen in Libya and Syria and a failure to make any concrete policy statement toward the Arab Spring protests in Tunisia, Egypt, and Yemen.[59] Additionally, the Gulf states have been frustrated by China's inability or unwillingness to temper what they view as Iran's belligerent behavior.[60] This, coupled with the displeasure of regional publics over China's treatment of its Muslim Uighur minority, have presented China with challenges in deepening its relations in the Middle East.[61] However, these have been easily overcome because displeasure with U.S. policies far outweighs any frustration with China's policies among Middle Eastern states.

Regional states have used greater engagement with China to signal to the United States that they have other options. This is also a hedging strategy employed by these states to ensure that they are not without alternate partners and that they are not ignoring a rising power. According to one analyst, "China is a blank canvas on which Middle Eastern countries project their aspirations for a different kind of great-power relationship."[62] Thus, several Middle

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[56] David D. Kirkpatrick and Eric Schmitt, "Arab Nations Strike in Libya, Surprising U.S.," *New York Times*, July 26, 2014; "Saudi Arabia Launches Air Strikes in Yemen," BBC News, March 26, 2015.

[57] ASDA'A BCW, *A Call for Reform: 11th Annual ASDA'A BCW Arab Youth Survey 2019*, Dubai, 2019.

[58] Kahyan Barzegar, "Persia Is Back, But in a Different Form," Atlantic Council, *IranSource*, blog post, January 28, 2019; Dina Esfandiary and Ariane M. Tabatabai, "Will China Undermine Trump's Iran Strategy?" *Foreign Affairs*, July 20, 2018.

[59] Abdulkhaleq Abdulla, "The Arab Perspective on Relations with China," *Middle East Insights*, April 12, 2012.

[60] Yitzhak Schichor, "Middle Eastern Perceptions of China's Rise," University of Nottingham, blog post, May 7, 2013.

[61] Mohammed Alwan, "China: Is It the Alternative We Want?" *Al-Watan*, June 23, 2011; "Clashes Between Han and Uighurs in the Streets of Urumqi: The Death Toll Has Reached 156 . . . and 1,434 People Arrested," *Al-Riyadh*, July 8, 2009; Mohammend Turki Al-Sudairi, *China in the Eyes of the Saudi Media*, Jeddah, Saudi Arabia: Gulf Research Center, GRC Gulf Papers, February 2013, p. 14.

[62] Jon Alterman, "The Other Side of the World: China, the United States, and the Struggle for Middle East Security," Center for Strategic and International Studies, March 4, 2017, p. 13.

Eastern leaders have strengthened their relationship with China in recent years. In some countries, narratives of greater cooperation with China have been pushed by state-owned media organizations, creating the perception of a stronger relationship than is actually the case.[63] Furthermore, in the perception of Middle Eastern leaders and commentators, Chinese regional engagement represents a foil to the United States: It is disinterested—at least for now—in military and political interventions and does not pursue "strings attached" policies.[64]

Middle Eastern public opinion polls have shed some light on regional perceptions of China. These polls do not cover all countries treated in this report, nor do they sufficiently capture public and elite views. They are, however, useful in inferring trends across the region with regard to China. In general, China is viewed favorably by Middle Eastern publics as a key power and economic actor engaged in the region. Turkey, however, appears to be an outlier in these polls, viewing China less favorably, likely in response to China's treatment of its Muslim Uighur population.[65]

Regional Perceptions of Russia

Russia's regional approach is predicated on maintaining relations with every country in the Middle East. This has led Russia to balance states that are in opposition to one another, such as Israel and Iran or Saudi Arabia and Iran. Moreover, Russia and various Middle Eastern states have failed to see eye to eye on several policy issues, particularly those related to Syria. This, in turn, has produced an inherent tension because regional states hold a healthy mistrust of Russian intentions.[66] However, this mistrust has been surmountable because engagement with Moscow has achieved several objectives for Middle Eastern countries.

President Putin's personalist authoritarian rule resonated with regional autocratic governments and provided an initial jumping-off point.[67] Such engagement was amplified following Russia's intervention in Syria, despite several regional countries disagreeing with Russia's use of military force. This was not only because the intervention provided Russia with a greater stake in regional events, but also because the loyalty demonstrated by Russia's intervention on behalf of a long-standing ally resonated in regional capitals. Thus, the perception of Russia's preference for the status quo stood in contrast with the unreliability of the United States, especially for countries where Washington had backed the Arab Spring protests, such as Egypt and some in the Gulf.

Russia's renewed engagement in the Middle East has been facilitated by regional perceptions that the United States has been retreating from the region. This initially led several countries, particularly those in the Gulf, to engage Russia in their search for additional exter-

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[63] Mohammed Turki Al-Sudairi, "Some Observations on the Significance of President Xi Jinping's Visit and the Problem of the Sino-Saudi Relationship," King Faisal Center for Research and Islamic Studies, September 13, 2017.

[64] Alterman, 2017, pp. 12–13; "Sino-Arab Cooperation," *Saudi Gazette*, May 15, 2010, as quoted in Schichor, 2013.

[65] Polling information was drawn from the Arab Barometer, "Arab Barometer Wave V 2018–2019," webpage, 2020; Laura Silver, Kat Devlin and Christine Huang, "People Around the Globe Are Divided in Their Opinions of China," Pew Research Center, December 5, 2019; and Shibley Telhami, "2011 Annual Arab Public Opinion Survey," College Park, Md.: University of Maryland, October 2011. Also see Guy Burton, "Public Opinion in the Middle East Toward China," Middle East Institute, December 11, 2018.

[66] Abdullah bin Abdelmohsin Al-Faraj [عبدالله بن عبدالمحسن الفرج], "Saudi-Russian Relations from the Past to the Future [Al-'Alaqat Al-S'audiah Al-Rusiah min Al-Madhi 'Ila Al-Mustaqbal; العلاقات السعودية الروسية من الماضي إلى المستقبل]" *Makashafat (Discoveries) Magazine* [مجلة مكاشفات], Vol. 1, March 2017; Wasser, 2019, pp. 2, 8–10.

[67] Dmitriy Frolovskiy, "Russia's Involvement in the Middle East: Building Sandcastles and Ignoring the Streets," Middle East Institute, June 1, 2020; Liz Sly, "In the Middle East, Russia Is Back," *Washington Post*, December 5, 2018.

nal security providers.[68] For example, a Saudi commentator noted that Russia is an "attractive party with which to establish a partnership," while also remarking that Saudi Arabia would pursue affiliations beyond the United States because a partnership "does not mean a Catholic marriage that prevents the establishment of other relations."[69]

As Russia has become a greater player in the Middle East and solidified its gains in Syria, positive perceptions of Moscow have risen in the region. The 2019 Arab Youth Survey noted that 64 percent of respondents viewed Russia as an ally, with greater support stemming from the Levant rather than the Gulf or North Africa. Most notably, respondents were split between determining whether Russia or the United States was a better ally, with Russia receiving 37 percent—just 1 percentage point less than the United States.[70]

Conclusion

The publication of the NSS and NDS generated reactions in both China and Russia. But the template on which they landed was quite different in each country. China had a largely coherent global strategy to start with. Russia, in contrast, appears to have been acting without benefit (or liability) of a coherent, global strategy, instead focusing primarily on its nearby regions in an opportunistic, sometimes pragmatic, and often short-term manner.

In neither case did the shift in stated U.S. security priorities cause major changes in either country's actions. As noted, China had already started focusing on the United States after the Tiananmen Square events of 1989. Russia, while publicly expressing hope for a partnership with the United States based on shared interests, already viewed the United States as opposing Russia's goals and aiming, with U.S. allies, to dominate world affairs.

The NSS and NDS did coincide with, and even spur, some modifications in the behavior of both countries. In both cases, the strategies gave at least rhetorical justification for the two countries to draw closer together. But that, too, was already in motion, driven largely by the reaction of the United States and its European and global allies to Russia's 2014 invasion and annexation of the Crimean Peninsula—and then Russia's direct support for violent separatist movements in Eastern Ukraine. With its western borders turning unfavorable because of its aggression and a simultaneous plunge in oil revenues because of the 2014 collapse of oil prices, Moscow had little choice but to turn eastward for support. But cooperation between China and Russia has limits, as exemplified by their activities in the Middle East—discussed in the next chapter.

Moreover, Chinese and Russian activities are further limited by the choices made by regional governments in the Middle East. It has been in the interests of many of these countries to engage China and Russia—not only for the gains made by such engagement, but also to use these activities as messages to the United States. Therefore, strategic competition in the Middle East is not solely among China, Russia, and the United States. Instead, the regional states in which these powers are operating also have a say—perhaps even the deciding role—in determining the success or failure of the actions that China, Russia, and the United States are undertaking to obtain a competitive edge.

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68 Al-Faraj, 2017.

69 Hamoud Abu Talib, "The Political Relationship Is Not a Catholic Marriage," *Okaz*, October 16, 2019.

70 ASDA'A BCW, 2019.

CHAPTER THREE

Strategic Competition in the Middle East

Although the NSS and the NDS seemingly highlight Europe and Asia as regions of interest because of the focus on China and Russia, they do not neglect competition throughout the world, including the Middle East. The architects of these strategies recognized that competition occurs in different domains, such as space and air, and in different regions.[1] They expected that actions to fulfill the strategy documents would require ongoing adjustments but that long-standing trends would remain. In the Middle East, they viewed Russia as more of an immediate challenge because of its historical role in the region. But over the long term, they expected China to play a bigger role in the region—as it was already starting to do with infrastructure investments.[2]

The NSS focuses its discussion of the Middle East on ensuring that the region does not serve as a haven for terrorists, that no hostile foreign power dominates it, and that it contributes to a stable global energy market.[3] The document also cites Iran as one of the leading adversaries to be countered.[4] The NDS also addresses the region and cites Iran as a focus, and it calls for the maintenance of a favorable balance of power and development of enduring coalitions to consolidate security gains.[5] But it also recognizes great-power competition *in* the region, saying that Russia seeks to change "Middle East security and economic structures to its favor."[6]

In this chapter, we discuss China's and Russia's interests and activities in the Middle East. We discuss each country's regional strategy and the drivers of its regional approach, then move on to interests and diplomatic, economic, and military activities. As will be seen, China is by far more economically active, and Russia is by far more militarily active. However, both maintain frequent diplomatic and political contacts throughout the region.

Summary of Key Indicators

We start with an overview of these topics to provide an initial indication of the differences. Following this overview, we provide a detailed discussion of China and Russia in the Middle

1 Telephone interview with former U.S. national security official, March 2020.

2 Telephone interview with former U.S. national security official, March 2020.

3 White House, 2017, p. 48.

4 White House, 2017, p. 2 and throughout.

5 U.S. Department of Defense, 2018, pp. 1, 4, 9.

6 U.S. Department of Defense, 2018, p. 2.

East, describing their strategies, interests, and activities. Although both China and Russia are engaged in multilateral initiatives, we focus primarily on country-to-country interactions to investigate Beijing's and Moscow's priorities at a more granular level.

Diplomatic Engagement

Both countries are diplomatically active in the region, as reflected by their senior leaders visiting the Middle East (Figure 3.1). In the first five years of the decade from 2009 through 2018, diplomatic activities as reflected by this measure were fairly close. But in the second half, Russian engagement accelerated, demonstrating the rising importance of the Middle East to Russia's strategic objectives, discussed later in this chapter.

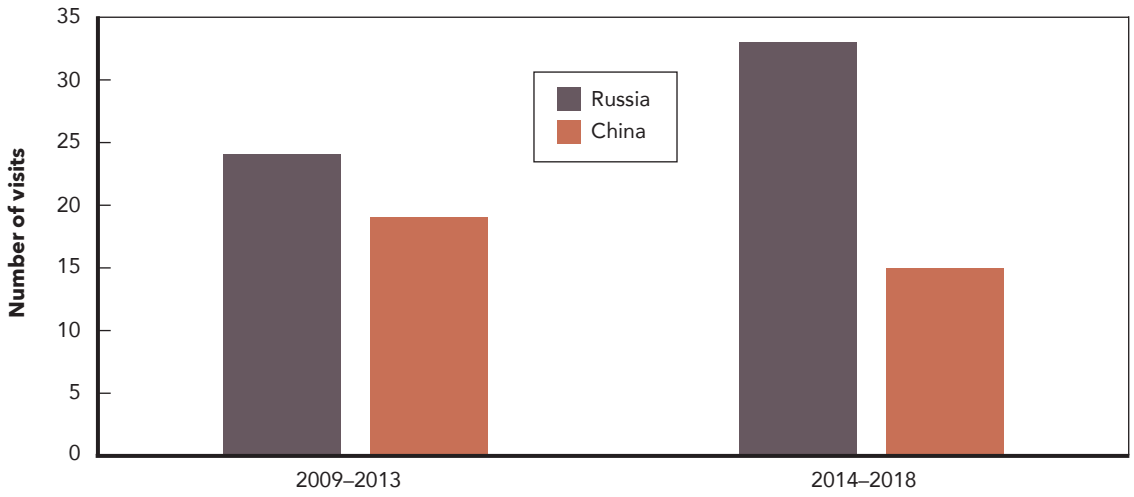
Economic Engagement

The pattern is dramatically reversed when looking at China and Russia's economic engagement in the Middle East, reflecting China's emphasis on regional economic engagement. China's goods trade with the Middle East has averaged seven times that of Russia's throughout the decade of 2009–2018 (Figure 3.2). Much of the volatility in Chinese trade has been driven by oil prices because the Middle East is one of the main suppliers of oil to China. But the imbalance is also present in exports from Russia and China to the region. China's exports have averaged more than four times the value of Russia's exports during this period.

Military Engagement

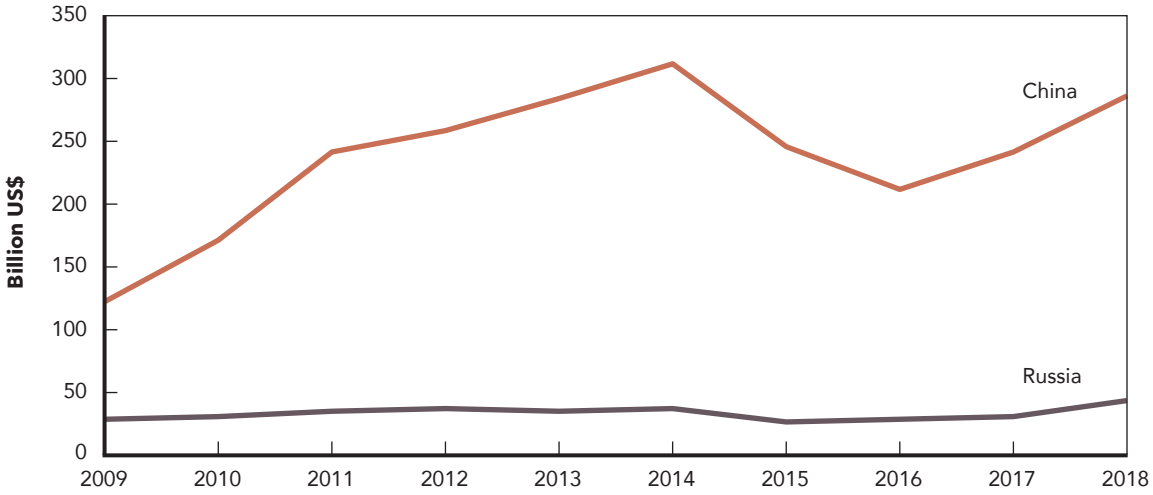
In contrast, Russia has been far more active than China in the military domain, even prior to its military intervention in Syria in 2014. Arms sales provide one such indicator (Figure 3.3). Throughout the decade, Russia's sales to the region averaged almost 12 times those of China.

Figure 3.1
Chinese and Russian Senior Leader Visits to the Middle East, 2009–2018



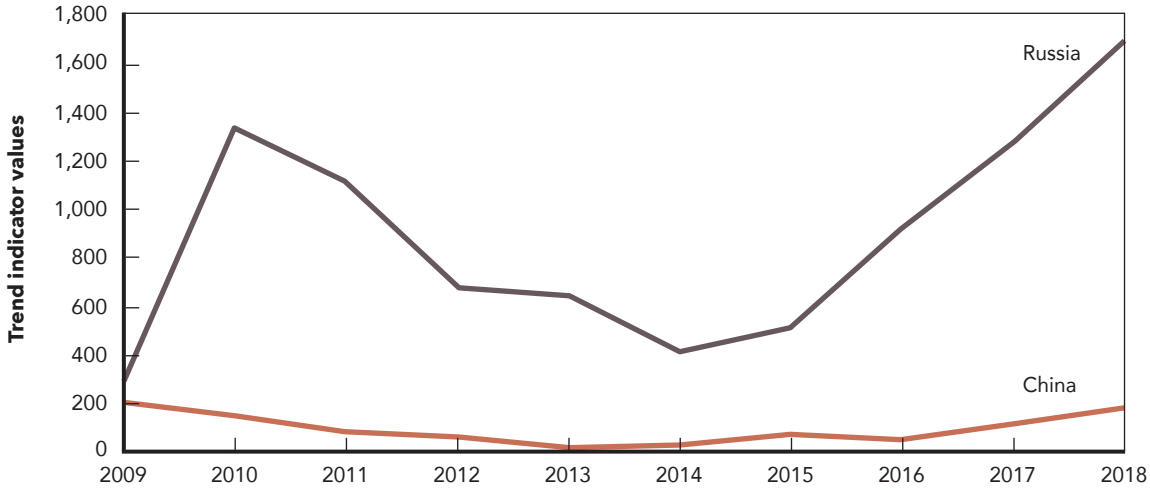
SOURCES: Information on visits by Chinese and Russian officials to Middle Eastern countries from 2009 through 2018 was compiled through Google searches of government websites in China and Russia, international media sources, media sources in Russia and China, local media sources in the Middle East, websites of foreign policy journals, think tank websites, and others.
NOTE: *Senior leaders* refers to the president, prime minister, and foreign minister.

Figure 3.2
Chinese and Russian Goods Trade with the Middle East, 2009–2018



SOURCE: United Nations Comtrade Database, undated. Data retrieved on several dates between October 2019 and September 2020.
NOTES: Figure shows the sum of goods imports and exports between Russia and the Middle East and between China and the Middle East.

Figure 3.3
Chinese and Russian Arms Transfers to the Middle East, 2009–2018



SOURCE: Stockholm International Peace Research Institute, SIPRI Arms Transfers Database, March 11, 2019.
NOTES: The *trend indicator value* is a measure of production costs and is meant to represent the transfer of military resources rather than the sales price of those resources. Data are what SIPRI terms *major weapons*: aircraft, air defense systems, antisubmarine warfare weapons, armored vehicles, artillery, engines, missiles, sensors, satellites, ships, turrets for selected armored vehicles and ships, and air refueling systems as used on tanker aircraft.

These key indicators provide a snapshot of the differing priorities and strategies of each country. We now proceed to a more in-depth discussion of China and Russia in the Middle East.

China in the Middle East

China maintains cordial relations with all countries of the region. This stance allows it to pursue what its officials describe as its three primary interests in the region: access to oil and gas, reduction of any spillovers of instability and terrorism inside its borders, and a desire to act as a stabilizer when possible.[7] Beyond oil and gas, China has growing economic interests, and the Middle East serves as an important region in China's overall connectivity concept of the BRI.

During the Cold War, the Middle East was not a region of high priority for Chinese foreign policy. Instead, Beijing largely viewed the Middle East as a zone of U.S.-Soviet superpower competition. After the Cold War, China's engagement in the region grew slowly, in recognition of the predominant role played by the United States and China's modest economic and diplomatic ties to the region.[8] China's engagement with the region remained limited throughout the 1990s, when China became a net importer of oil, and the early 2000s.[9] Although Beijing professed a desire for closer cooperation with Middle Eastern countries, efforts outside the energy sector remained symbolic at best.[10]

Since the mid-2000s, China has become an increasingly important and influential external power in the Middle East. This reflects China's growing power, buttressed by its economic vision, and a resulting desire to expand this power globally. The 18th Party Congress in 2012 signaled that China would adopt more of a "global horizon" in its foreign policy.[11] Chinese scholars generally agree that their country's involvement in the Middle East entered a new phase following the Arab Spring events of 2011.[12] The Arab Spring created challenges as upheaval in the region threatened Chinese economic interests—including its

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7 Discussion with Chinese officials in greater Washington, D.C., area, November 2019.

8 Li Weijian [李伟建], "From Overall Detachment to Positive Involvement: China's Diplomacy Toward the Middle East Since the Reform and Opening-Up [Cong zhongti chaotuo dao jiji youwei: Gaige kaifang yilai de Zhongguo Zhongdong waijiao, 从总体超脱到积极有为：改革开放以来的中国中东外交]," *Arab World Studies* [*Alabo shijie yanjiu*, 阿拉伯世界研究], No. 5, September 2018b, p. 6.

9 Guy C. K. Leung, Raymond Li, and Melissa Low, "Transitions in China's Oil Economy, 1990–2010," *Eurasian Geography and Economics*, Vol. 52, No. 4, 2011.

10 An example includes the establishment of the China-Arab Cooperation Forum in 2004 (BRICS Policy Center, "The China-Arab States Cooperation Forum (CASCF)," webpage, May 2016). Also see Li Weijian [李伟建], 2018b, p. 7.

11 Wang Bo and Yao Quan [汪波, 姚全], "Research on the Formation of China's Middle East Diplomatic Thinking in the New Era [新时期中国中东外交思想构建研究], *Arab World Studies* [*Alabo shijie yanjiu,*阿拉伯世界研究], No. 2, 2019, p. 77.

12 Li Weijian [李伟建], 2018b, p. 6; Li Weijian [李伟建], "The Evolution of the International System from the Perspective of the Changing Situation in the Middle East" [Cong Zhongdong bianju toushi guoji zhixu de yanbian,从中东变局透视国际秩序的演变]," *West Asia and Africa* [*XiYa Feizhou,* 西亚非洲], Vol. 9, 2011, p. 3; Li Weijian [李伟建], "China-Arab Strategic Partnership Relations: The Foundation, the Present Situation, and Trends [ZhongA zhanlue huoban guanxi: jichu, xianzhuang yu qushi, 中阿战略伙伴关系：基础、现状与趋势]," *West Asia and Africa* [*XiYa Feizhou,* 西亚非洲], No. 4, 2018a, p. 16.

reliance on energy sources in the Middle East—and Beijing sought to refrain from becoming politically entangled.[13]

But China's unveiling in 2013 of its concept for Eurasian and East African connectivity signaled an increased economic role for China across the globe and for its involvement in the Middle East, which features prominently in the BRI. As originally conceived, the initiative included an overland "Silk Road Economic Belt" and an overwater "Maritime Silk Road." The Silk Road Economic Belt proposes networks linking Central Asia to South Asia, the Middle East, and onward to Africa and Europe; the Maritime Silk Road envisions shipping routes through the South China Sea and the Indian Ocean toward South Asia, the Middle East, Africa, and Europe. Notably, both components include the Middle East.[14]

Since 2013, China has increased its economic activity in the region; purchasing and developing key infrastructure assets, building economic partnerships, and securing its access to energy (as the top consumer of Middle East oil).[15] As a byproduct of its renewed economic interests in the region, Beijing has also begun to increase its diplomatic and, to a lesser extent, security activities, such as arms sales and joint exercises, although these remain modest at the time of writing.

Countering U.S. influence, although not the central driver of China's efforts in the Middle East, is an additional factor. This fits within the notion of "marching west"—the idea that China should become involved in a westward direction (including Central Asia and the Middle East) to break the U.S. encirclement strategy, which is not as strong in these regions as it is in East Asia.[16] Therefore, some of China's actions in the Middle East can be viewed through the lens of strategic competition.

However, Beijing recognizes that the United States acting as the region's main security guarantor ensures a stable environment for Chinese economic investment and energy production. One Chinese expert on the region noted that the United States is not withdrawing from the Middle East; instead, it is seeking a new arrangement with less cost and less risk. In this expert's view, not only does China not want to displace the United States, but there is nothing to displace yet.[17] Although the two countries have some complementary interests and priorities (both China and the United States seek stability and the free flow of energy, for example), ample competition also exists between the two, particularly regarding technology sales and adoption and weapon sales (such as drones).[18] Because China does not actively seek to play a major role in regional security affairs, it also does not attempt to appropriate the traditional U.S. role nor confront the United States in the region. China recognizes that its economic

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13 Jingdong Yuan, "The Arab Spring and China's Evolving Middle East Policy," *World Politics Review*, December 20, 2011.

14 National Development and Reform Commission, *Vision and Actions on Jointly Building Silk Road Economic Belt and 21st Century Maritime Silk Road* [*Tuidong gongjian sichou zhilu jingji dai he 21 shiji haishang sichou zhilu de yuanjing yu xingdong,* 推动共建丝绸之路经济带和21世纪海上丝绸之路的愿景与行动], Beijing: Ministry of Foreign Affairs, Ministry of Commerce of the People's Republic of China, with State Council Authorization, March 28, 2015; Scobell et al., 2018 , p. xv.

15 "Factbox: Asia Region Is Most Dependent on Middle East Crude Oil, LNG Supplies," Reuters, January 8, 2020; "China and the Arab World: The Great Well of China," *The Economist*, June 18, 2015.

16 Scobell and Nader, 2016, pp. 10–11; Wang Jisi [王缉思], "'Marching Westwards,' The Rebalancing of China's Geopolitical Strategy ['Xi jin', Zhongguo diyuan zhanlue de zai pingheng, "西进" , 中国地缘战略的再平衡]," *Global Times* [*Huanqiu Shibao* 环球时报], October 17, 2012.

17 Comments at an economics conference in the Middle East, November 2019.

18 Comments at an economics conference in the Middle East, November 2019.

interests, which are arguably its chief cause for activity in the Middle East, are benefited by the outsized security role that the United States plays in the region.

Chinese Strategy in the Middle East

Although China does not have an articulated Middle East strategy, it has pursued economic engagement and sought to remain on good terms with all regional states while remaining cautious about deepening its involvement in regional diplomatic and security affairs.[19] Driven by immediate needs rather than long-term aims or standing commitments, China's regional approach is pragmatic, opportunistic, and flexible.[20] Although China is becoming "an economic heavyweight" as a result, it will likely remain "a diplomatic lightweight" and "a military featherweight in the region for the foreseeable future."[21]

There are three predominant elements of China's approach to the Middle East. First, China seeks to maintain good relations with all state actors in the Middle East.[22] To do so, Beijing has not formalized alliances with any country in the region and refrains from demonstrating preferential treatment toward its partners or adopting policy positions that cause it to pick sides in regional disputes. Chinese scholars stress that China's diplomacy in the Middle East follows the practice of forming partnerships but not alliances.[23] By refraining from joining alliances, China avoids the familiar pitfalls in alliance politics:[24] It escapes entrapment in regional conflicts, and—by discouraging expectations that it might intervene in regional conflicts—avoids scenarios in which it could be accused of abandoning allies. Similarly, China has sought to avoid adopting policy positions that could lead to a need to pick sides in regional disputes. For example, China has called for a return to "unity and harmony" while refusing to take sides in the Gulf rift that emerged in 2017.[25]

Second, China's approach to the Middle East is driven above all by economic interests. Therefore, economic activities dominate China's involvement in the region—an approach that is in line with China's broader BRI strategy, reinforces the first element of Beijing's regional approach, and remains the chief way that China seeks to build leverage in the Middle East.[26]

Lastly, China seeks to avoid challenging U.S. interests, including U.S. status as the primary security guarantor in the Middle East. This is in recognition of China's desire for regional stability to maximize its economic interests and to enable it to remain above the fray of regional politics. As analysts have noted, this approach allows Beijing a "free ride" on U.S.

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19 Scobell and Nader, 2016, pp. 2, 76.

20 Stig Stenslie, *China Debates Its Future Role in the Middle East*, Norwegian Peacebuilding Resource Centre, executive summary, May 2014.

21 Scobell and Nader, 2016, pp. 2, 76.

22 Scobell and Nader, 2016, pp. 5–6.

23 Sun Degang [孙德刚], "On China's Partnership Diplomacy Toward Middle Eastern Countries in the 21st Century [Lun 21 shiji Zhongguo dui Zhongdong guojia de huoban waijiao, 论21 世纪中国对中东国家的伙伴外交]," *World Economics and Politics* [*Shijie jingji yu zhengzhi,* 世界经济与政治], No. 7, 2019; Wang Bo and Yao Quan [汪波，姚全], 2019, p. 82.

24 Jonathan Fulton, *China's Changing Role in the Middle East*, Washington, D.C.: Atlantic Council, June 2019, p. 3.

25 Ben Blanchard, "China Calls for Harmony as It Welcomes Qatar Emir Amid Gulf Dispute," Reuters, January 31, 2019.

26 Henrik Stålhane Hiim and Stig Stenslie, "China's Realism in the Middle East," *Survival*, Vol. 61, No. 6, 2019.

security actions to secure China's interests and achieve its objectives—particularly its economic ones—in the Middle East.[27]

These economic, diplomatic, and even security themes are best illustrated by China's relations with Iran. Some analysts in China have come to see the Middle East as "a strategic extension of China's periphery."[28] Within this strategic extension, China's pivotal partner in the region is Iran, a country with geopolitical and economic influence that also favors alignment with China rather than other great powers.[29] Iran can serve as an important energy supplier, a supporter of the idea of a multipolar world in opposition to the United States, and an important node for China's BRI plans. Iran gives China land routes both to Southwest Asia and to Europe that are alternatives to the routes through Russia and that will be difficult for the United States to disrupt in the event of a contingency. Iran can be central to both east-west and north-south Eurasian transportation routes.[30] Iranian analysts view China's BRI as an opportunity to help Iran rebuild its domestic economy and magnify its role in the global economy.[31] However, there is a firm understanding in Iran that China has its own interests and that cooperation carries risks, suggesting that Iran's role as a key element of China's BRI strategy might shift in the future.[32]

Drivers of China's Regional Approach

Official Chinese foreign policy and national security documents have refrained from describing Beijing's strategy in the Middle East. Similarly, any articulation of China's involvement in the region is not explicitly tied to strategic competition with the United States. Although the Middle East is not in China's immediate neighborhood, it has become more important to China since the 2000s on several dimensions and is close to areas that are more sensitive to China.[33]

An Arab Policy Paper, released in January 2016 on the eve of Xi's historic visit to the region, limits itself to a discussion of China's policy toward the Arab countries, excluding other important countries in the region, such as Iran, Turkey, and Israel.[34] The document is general in policy terms, confining itself primarily to a discussion of China's economic engagement

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27 Hiim and Stenslie, 2019.

28 Li Weijian [李伟建], "The Middle East's Importance in China's Strategy and Bilateral Relations [Zhongdong Zai Zhongguo Zhanlue Zhong De Zhongyaoxing Ji Shuangbian Guanxi, 中东在中国战略中的重要性及双边关系]," *West Asia and Africa* [*XiYa Feizhou,* 西亚非洲], No. 6, 2004, pp. 18–19.

29 Scobell et al., 2018.

30 Hamidreza Azizi, "Iran and the Eurasian Transport Initiatives: Short-Term Challenges, Long-Term Opportunities," *Caucasus International*, Vol. 8, No. 2, Winter 2018.

31 Mohsen Shariatinia and Hamidreza Azizi, "Iran-China Cooperation in the Silk Road Economic Belt: From Strategic Understanding to Operational Understanding," *China and the World Economy*, Vol. 25, No. 5, 2017.

32 Mohsen Shariatinia and Hamidreza Azizi, "Iran and the Belt and Road Initiative: Amid Hope and Fear," *Journal of Contemporary China*, Vol. 28, No. 120, 2019; Fariborz Arghavani Pirsalami, Seyed Javad Salehi, and Hossein Alipour, "Developing Sino-Israeli Relations in the Post-Cold War Era: Analyzing Desecuritization Scenarios for Iran," *MGIMO Review of International Relations*, Vol. 13, No. 3, 2020.

33 Scobell et al., 2018.

34 People's Republic of China, *Document on China's Policy Toward the Arab Countries* [中国对阿拉伯国家政策文件], via Xinhua [新华社], January 13, 2016.

with the region through the BRI, which is detailed in another official document.[35] The only political plan in the Arab Policy Paper is a proposal to create a Palestinian state "based on the pre-1967 borders, with East Jerusalem as its capital."[36] Xi has also stressed his belief that development is the key to solving the Middle East's problems.[37]

In line with these documents and other Chinese foreign policy priorities, Beijing's involvement in the Middle East can be attributed to two primary drivers. First, China seeks to be recognized as a great power, both domestically and by other states.[38] This is in acknowledgement of Beijing's own perspective that it has achieved great-power status.[39] Second, China seeks to secure its economic interests in the Middle East, foremost of which are expansion of the BRI through investment and continued access to energy resources from the region, on which it is heavily dependent. In 2018, China imported from the Middle East 36 percent of its total oil and oil products consumed and 5 percent of its total natural gas consumed.[40]

Beyond these two primary drivers, several other factors influence China's involvement in the Middle East. One is a concern that instability and terrorism might spill into China.[41] A second, related to Beijing's aspirations to great-power status and the fear of terrorism spillovers, is to act as a stabilizer in the region. This is one reason for China's support for the Iran deal (the Joint Comprehensive Plan of Action [JCPOA]) while acknowledging its flaws.[42] Finally, China fears what it calls "strategic encirclement" by the only power that can challenge it, the United States.[43] This fear helps explain China's continued push for greater access in the Middle East to facilitate its power projection and the role of Iran as a potential land route for trade as an alternative to the sea routes that China relies on.

Chinese Interests and Activities in the Middle East

We now consider how China's interests and activities in the Middle East reflect its strategy and the drivers of its regional approach. We cover three domains: diplomatic interests and activities, economic interests and activities, and military interests and activities. For each, we go beyond narrative description and address quantitative measures, such as the number of high-level official visits and the value of trade. These measures offer one form of evidence about where China is choosing to put its resources.[44] The exploration of China's interests and activities in these three domains will help identify trends in China's regional involvement.

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35 National Development and Reform Commission, 2015.

36 People's Republic of China, 2016.

37 Wang Bo and Yao Quan [汪波，姚全], 2019, p. 82.

38 Scobell and Nader, 2016, pp. 15–19.

39 Xi Jinping has called for the United States and China to cooperate to build "a new model of great-power relations" (sometimes translated as "a new model of major-country relations"), indicating that China perceives itself as a great power. See Barack Obama and Xi Jinping, "Remarks by President Obama and President Xi Jinping of the People's Republic of China Before Bilateral Meeting," Sunnylands Retreat, Palm Springs, California, June 7, 2013; Xi Jinping, "Full Text of Xi's Speech on China-US Relations in Seattle," Xinhua, September 24, 2015.

40 BP, 2019.

41 Interview with Chinese officials in the greater Washington, D.C., area, November 2019; Scobell and Nader, 2016.

42 Interview with Chinese officials in the greater Washington, D.C., area, November 2019.

43 Nathan and Scobell, 2012; "The Encirclement of China," *People's Daily*, February 1, 1966, reprinted in *Survival*, Vol. 8, No. 4, 1966.

44 These measures and others were used in Scobell et al., 2018.

China strives to maintain cordial relations with all countries in the Middle East. It channels its broader diplomatic initiatives in accord with the region's divisions. For example, since 2004, one of its approaches to the Arab world has been through the China-Arab States Cooperation Forum, a multilateral forum for dialogue between China and the members of the Arab League formed in 2004.[45] Of necessity, China has had to deal separately with Iran and Israel, penning a 25-year cooperation pact with the former and creating technology, construction, and investment deals with the latter.[46] In contrast, China's relations with Turkey are not nearly as formalized, although the two countries have common interests regarding economic exchange and the creation of trade corridors, and Turkey views relations with China as a counterbalance and hedge to the West.[47]

Various themes emerge from these interactions, such as stability, cooperation, multilateralism, and global governance. But underlying all of these broader initiatives is the effort to establish connectivity through various forms of infrastructure (such as ports and communication networks) and through greater economic relations under the BRI label. Although China can place itself as a convener, its lower-level security involvement and desire to avoid entanglement in intraregional political disputes limit its regional influence. Instead, China accomplishes its goals through more-concrete bilateral interactions.

Chinese Diplomatic Activities in the Middle East

China's efforts to maintain friendly relations with all countries are reflected in its leadership visits to the region (Figure 3.4). *Senior leaders* refers to the president (also the CCP chairman), the premier, and the foreign minister. Notably, the three leading countries for visits by Chinese leaders are Saudi Arabia, Egypt, and Turkey. Saudi Arabia is the largest source of China's Middle Eastern oil imports. Egypt is the region's most populous country by far, at 98 million people in 2018. Turkey also has a large population (at 82 million people in 2018), and, in most years, it is the region's largest economy.

Visits to these countries were spaced out throughout the decade of 2009 through 2018, showing a consistent effort to build relations. Senior leaders visited Egypt three times in 2009, once in 2014, and twice in 2016. They visited Saudi Arabia twice in 2009, once each in 2010, 2012, and 2013, and then twice in 2016. Visits to Turkey occurred twice each in 2010 and 2015, and then once in 2016.

Although visits occurred consistently throughout the decade, they peaked in 2009 and 2016. In 2009, Foreign Minister Yang Jiechi made five separate trips to seven different countries or territories. In 2016, President Xi and Foreign Minister Wang traveled together to three important partners in the region—Saudi Arabia, Egypt, and Iran—and then Wang traveled to Qatar and Turkey later in the year.

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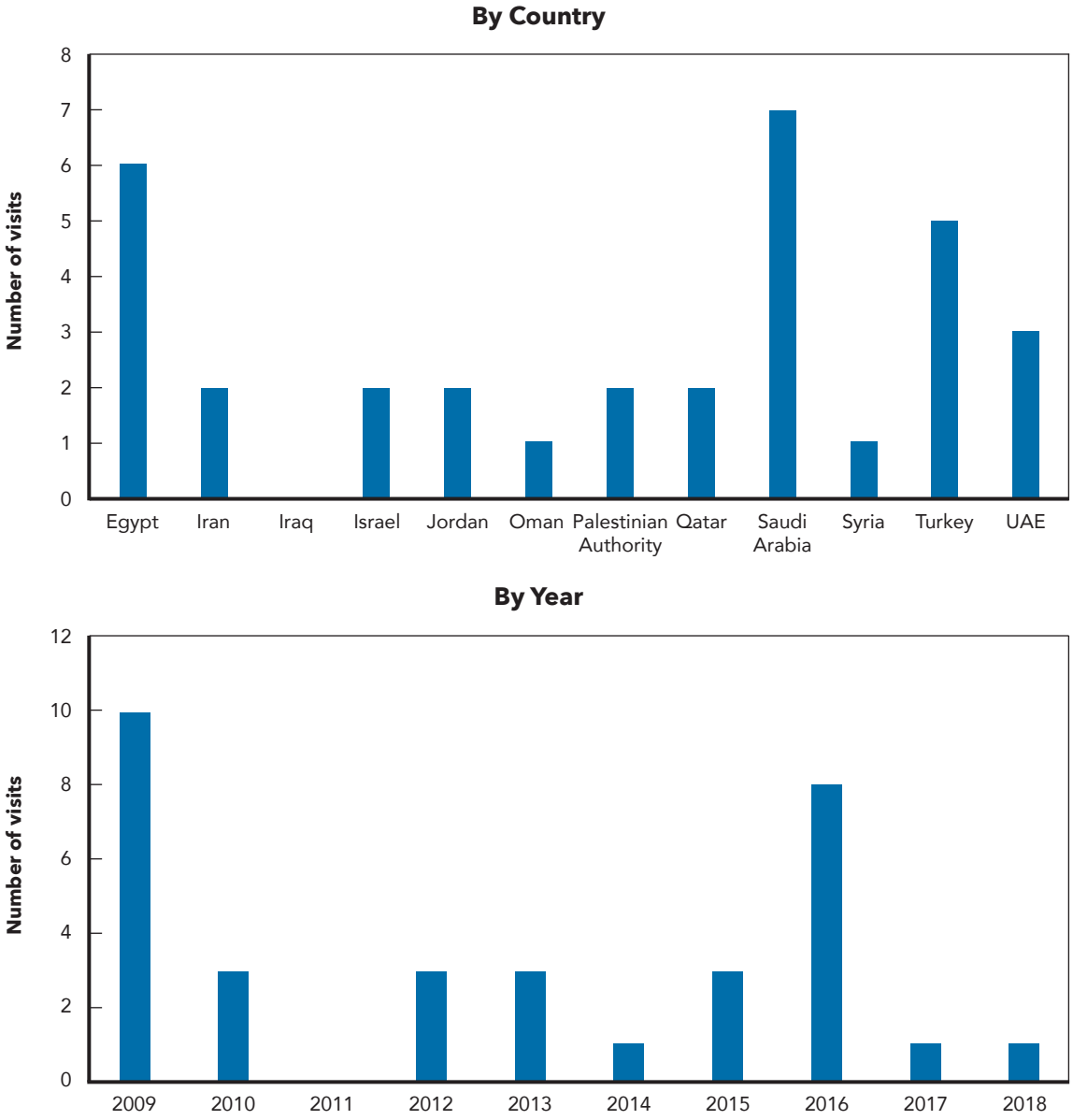
[45] Ministry of Foreign Affairs of the People's Republic of China, "China-Arab States Cooperation Forum Holds Ninth Ministerial Conference," July 6, 2020.

[46] For more information on the Iran deal, see Ellie Geranmayeh, "A Pragmatic Partnership: Why China and Iran Try to Collaborate," European Council on Foreign Relations, July 17, 2020. For more information on relations with Israel, see Shira Efron, Howard J. Shatz, Arthur Chan, Emily Haskel, Lyle J. Morris, and Andrew Scobell, *The Evolving Israel-China Relationship*, Santa Monica, Calif.: RAND Corporation, RR-2641-RC, 2019.

[47] Gönül Tol, "The Middle Kingdom and the Middle Corridor: Prospects for China-Turkey Ties," Middle East Institute, May 29, 2020; Aaron Stein, "Erdogan Doesn't Want Nukes, He Wants to Blow Up the System," *War on the Rocks*, September 12, 2019.

Figure 3.4
Chinese Senior Political Leader Visits to the Middle East, 2009–2018



SOURCES: Information on visits by Chinese officials to Middle Eastern countries from 2009 through 2018 was compiled through Google searches of government websites in China, international media sources, media sources in China, local media sources in the Middle East, websites of foreign policy journals, think tank websites, and others.
NOTES: *Senior leaders* refers the president, prime minister, and foreign minister. Premier of the State Council Li Keqiang plays a major role in economic policymaking with oversight over the entire bureaucracy (see Yuan Wang and James Evans, "Infographic: China's Economic Governance," Fairbank Center for Chinese Studies, Harvard University, December 12, 2018). In July 2018, Wang Yi visited the UAE as both foreign minister and state councilor. We exclude those visits from these charts and include them in the charts showing visits by security, military, and intelligence leaders (Figure 3.9).

In addition to these high-level visits, China has made other diplomatic overtures. In 2002, China named a special envoy to the Middle East, followed by establishing the China-Arab Cooperation Forum in 2004. Although China is less invested in regional negotiations than other actors (such as the United States and Russia), it offered a proposal for Israeli-Palestinian peace in 2013. Overall, however, China has maintained a relatively low diplomatic profile in the Middle East. This cautious approach reflects China's wariness about becoming embroiled in the region's diplomatic disputes.[48]

China also promotes an image of neutrality, pushing familiar tropes of friendship, partnership, and "win-win" relationships, as exemplified by a speech by Xi at the Arab League headquarters in January 2016: "We don't seek agents in the Middle East, but rather urge peace and encourage talks; we don't create spheres of influence, but rather promote everyone together entering the Belt and Road circle of friends; we don't seek to fill a 'vacuum,' but rather weave together a cooperative partnership network of mutual benefit and win-win."[49] Countries elsewhere have noted that "win-win" does not always operationalize into actions, with China expecting less powerful countries to defer to it.[50]

Sun Degang, a Chinese expert on the Middle East, divides the countries of the region into four types for purposes of China's diplomacy: pivotal states, nodal states, key states, and stronghold states.[51] In this framework, the most-important countries in the region from China's standpoint are the *pivotal states*, which can help China to expand its political, security, and economic influence.[52] Among the countries covered in this report, the pivotal states for China are Egypt, Saudi Arabia, Iran, and the UAE, all of which have received visits from Xi since 2016.[53] China has established "comprehensive strategic partnership" relations with these countries. For example, strong economic and energy ties provide the foundation for the China-Saudi Arabia bilateral relationship. Chinese and Saudi leaders have expressed their desire to coordinate efforts through the BRI and the Saudi Vision 2030 development plan.[54] China's economic ties with the UAE, which Xi visited in July 2018, have evolved from 2009 through 2018, with the country growing in importance as an exporter to China but declining in importance as a destination for imports. China also has long-standing diplomatic and economic ties to Egypt, which is host to several BRI projects.[55]

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48 Andrew Scobell, "China's Search for Security in the Greater Middle East," in James Reardon-Anderson, ed., *The Red Star and the Crescent: China and the Middle East*, London: Hurst Publishers, 2018, p. 18.

49 Xi Jinping [习近平], "Jointly Founding a Beautiful Future for China-Arab Relations [Gongtong kaichuang ZhongA guanxi de meihao weilai, 共同开创中阿关系的美好未来]," *People's Daily* [*Renmin ribao,* 人民日报], January 22, 2016.

50 Bilahari Kausikan, "Dealing with an Ambiguous World, Lecture II: US-China Relations: Groping Toward a New *Modus Vivendi*," IPS-Nathan Lectures, Institute of Policy Studies, Lee Kuan Yew School of Public Policy, National University of Singapore, February 25, 2016a; Bilahari Kausikan, "Dealing with an Ambiguous World, Lecture III: ASEAN & US-China Competition in Southeast Asia," IPS-Nathan Lectures, Institute of Policy Studies, Lee Kuan Yew School of Public Policy, National University of Singapore, March 30, 2016b.

51 Sun Degang [孙德刚], 2019, p. 117.

52 Sun Degang [孙德刚], 2019, pp. 111–112.

53 Sun Degang also lists Algeria as a pivotal state in the broader Middle East and North Africa region. Sun Degang [孙德刚], 2019, p. 119.

54 Fulton, 2019, p. 10.

55 Sun Degang [孙德刚], 2019, pp. 118–119; Kingdom of Saudi Arabia, *Vision 2030*, Riyadh, 2016.

Nodal states serve as bridges between China and other great powers—Turkey and Israel serve as important examples in the Middle East. Turkey, a focus for BRI investment in the Central Asia–West Asia Economic Corridor framework and increasingly a partner in defense cooperation, serves as a bridge to Europe and NATO.[56] Israel's cooperation with China in innovation not only can benefit China economically but also potentially serves as a bridge to other powers, such as the United States and the European Union, although the United States has expressed concerns about Israel's ties with China.[57] For example, the United States has criticized Chinese enterprises' participation in Ashdod Port and Haifa Port, arguing that these activities threaten the security of the U.S. Sixth Fleet in the Eastern Mediterranean.[58] Iraq is a *key state* in the region because of its large territorial size and population and growing economic ties with China.[59] *Stronghold states* have small territorial size, small populations, and limited economic weight—such as Qatar, Oman, Jordan, and Kuwait—but China maintains friendly relationships aiming for opportunities for economic cooperation.[60]

China's relations with Iran illustrate how it balances among rivals. Xi became the first foreign leader to visit Iran following the removal of sanctions that accompanied the implementation of the JCPOA (the Iran nuclear deal). During this trip, China raised its relations with Saudi Arabia and Iran simultaneously to the level of "comprehensive strategic partnership relations."[61] For China, Iran serves as a source of crude oil, an important link in the BRI, and a potentially useful adversary of the United States.[62] However, China's relations with Iran also illustrate how it has withheld from challenging the United States in the region. China voted in favor of the UN Security Council sanctions imposed on Iran in 2010 and supported the nuclear negotiations with Iran that led to the JCPOA. China served as a crucial economic lifeline for Iran under the sanctions regime without overtly challenging that regime. Iran's status as an important political and economic partner for China and a significant link in the BRI appeared set to grow following the signing of the JCPOA. However, the U.S. withdrawal from the Iran nuclear deal, which the Trump administration announced in May 2018, put stress on China's relations with Iran. In April 2019, President Trump announced that the United States would reduce Iran's oil exports to zero.[63] China vowed to resist U.S. sanctions on Iran, but in October 2019, the China National Petroleum Corporation announced its withdrawal from a $5 billion project in the South Pars gas field.[64] Although China has remained the largest buyer of crude oil and condensates from

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56 Sun Degang [孙德刚], 2019, pp. 120–121.

57 Efron et al., 2019.

58 Sun Degang [孙德刚], 2019, p. 117.

59 In the broader region, Sudan and Morocco also serve as "key states" for China. Sun Degang [孙德刚], 2019, p. 122.

60 Djibouti, the site of China's recently constructed naval facility on the Horn of Africa, also falls into this category. Sun Degang [孙德刚], 2019, p. 123.

61 Sun Degang [孙德刚], 2019, p. 117.

62 Jo Inge Bekkevold, "China, Russia, and the Great Power Contest in the Middle East," in Jo Inge Bekkevold and Bobo Lo, eds., *Sino-Russian Relations in the 21st Century*, Cham, Switzerland: Palgrave Macmillan, 2019, p. 151.

63 Sun Degang [孙德刚], 2019, p. 130.

64 Benoit Faucon, "China Pulls Out of Giant Iranian Gas Project," *Wall Street Journal*, October 6, 2019.

Iran, those purchases declined from 650,000 barrels per day in 2018, to 400,000 barrels per day in the first half of 2019, to 225,000 barrels per day in the second half of 2019.[65]

Chinese Economic Activities in the Middle East

Economic issues lie at the heart of China's Middle East policy and undergird almost all of China's activities in the region. China's economic engagement in the region includes trade, investment, and construction projects; the most important element is the Middle East's long-standing role as a provider of energy resources to China's economy. Chinese leaders and scholars argue that their country's approach to the region is based on "peace through development," which they contrast unfavorably with what they call other countries' notion of "peace through arms."[66]

China's Trade with the Middle East

The Middle East is a modest player in China's overall goods trade. In the decade from 2009 through 2018, slightly less than 6 percent of China's exports went to the region, and about 7 percent of China's imports came from the region.[67] In overall trade, China is much more important to the Middle East than vice versa. For the decade in question, China's goods exports accounted for more than 11 percent of all imports in the region, and sales to China accounted for almost 10 percent of the Middle East's goods exports worldwide.[68] Despite this, none of China's 15 preferential trade agreements are with any countries in the region as of March 2020.[69]

Although the overall figures are modest, the Middle East plays an outsize role in oil trade. We already discussed China's energy imports from the region. The Middle East is not only an important supplier to China; China is also an important customer for the region. In 2018, 20 percent of all Middle Eastern oil and oil products exports went to China, and 11 percent of the region's liquefied natural gas exports went to China.[70]

The largest share of Chinese goods trade is with the GCC countries (Figure 3.5). These countries received an annual average of almost 47 percent of Chinese goods exports to the region during the decade. Next in importance were Turkey, the region's largest economy, and Iran, at 14 percent and 13 percent, respectively. Stifled by sanctions for much of the decade, Iran was

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65 Brian Scheid and Eklavya Gupte, "As US Sanctions Increase, China Remains Iran's Top Crude, Condensate Importer," S&P Global Platts, January 10, 2020.

66 Wang Bo and Yao Quan [汪波，姚全], 2019, p. 90.

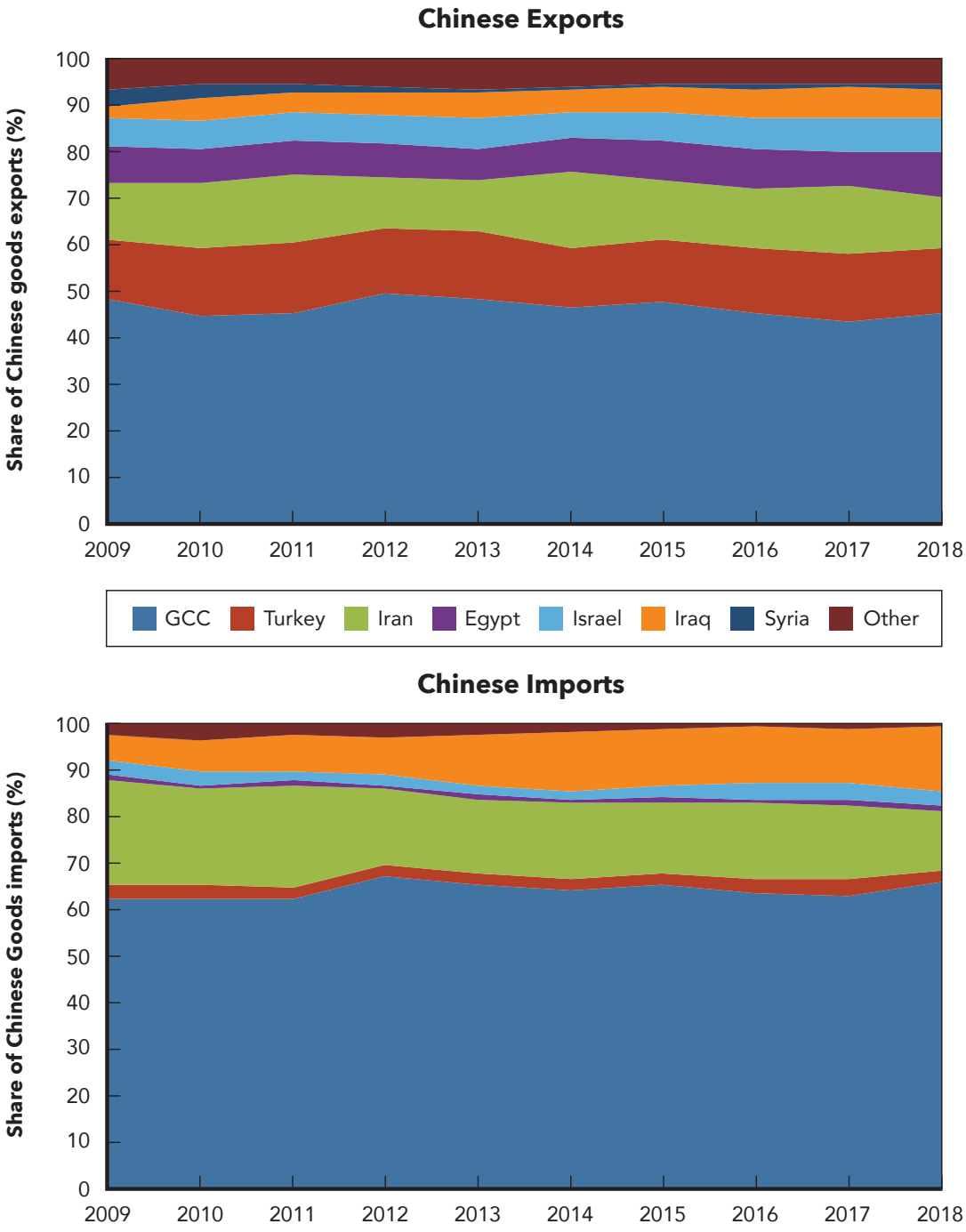
67 Data are from the United Nations Comtrade Database (undated, retrieved on several dates between October 2019 and September 2020).

68 Bilateral data are from the United Nations Comtrade Database (undated; retrieved on several dates between October 2019 and September 2020); each country's total trade is from World Bank, World Development Indicators (WDI) database, undated (data retrieved on several dates between April and September 2020). WDI variables are "Merchandise exports (current US$)," variable TX.VAL.MRCH.CD.WT, and "Merchandise imports (current US$)," variable TM.VAL.MRCH.CD.WT. United Nations Comtrade is the best available database for bilateral goods trade data. However, other sources for country totals are more complete—Comtrade was missing totals for some countries. WDI had two options each for imports and exports: merchandise imports or exports (current US$), sourced from the World Trade Organization, and merchandise imports or exports by the reporting economy (current US$), estimated by World Bank staff using the International Monetary Fund's Direction of Trade Statistics database. Unfortunately, the Comtrade totals and the two WDI totals were often different, in some cases by more than 50 percent. We opted to use merchandise exports or imports (current US$) because these values were closest to the Comtrade data, our source of bilateral data.

69 World Trade Organization, Regional Trade Agreements Database, March 10, 2020.

70 BP, 2019.

Figure 3.5
Chinese Goods Trade with the Middle East, 2009–2018



SOURCE: United Nations Comtrade Database, undated. Data retrieved on several dates between October 2019 and September 2020.
NOTES: The share of Chinese goods exports is each country's share of all Chinese goods exported to the countries we are examining. The share of Chinese goods imports is China's share of goods imported from each country relative to the total from all countries we are examining. *Other* refers to Jordan, Lebanon, Yemen, and the West Bank and Gaza. Countries are listed left to right (in the legend) and bottom to top (in the graph) from largest to smallest share of exports in 2018 except for Other, which we list last.

limited in its choice of trade partners and has relied heavily on China. Egypt, Israel, and Iraq were the next most important, at 8 percent, 6 percent, and 5 percent, respectively. Notably, there were no major changes in share during the decade except a decline in exports to Syria. There were several small changes: The share of exports to Iraq rose strongly, the share to Israel also rose toward the end of the decade, and the share to the UAE fell. Otherwise, the countries of greatest importance in 2009 were also the countries of greatest importance in 2018.

In terms of China's goods imports from the Middle East, the GCC is by far the most important region for China, reflecting that area's oil and gas production. From 2009 through 2018, the GCC accounted for an annual average of 64 percent of those imports. This held steady throughout the decade, although the relative amount coming from Saudi Arabia fell, from 40 percent in 2009 to 29 percent in 2018, and the relative amount coming from the UAE rose, from 4.4 percent in 2009 to 10 percent in 2018. Also increasing in importance were Chinese imports from Kuwait and Qatar from within the GCC, and Iraq, from which the share of Chinese imports from the Middle East rose from 6 percent in 2009 to 14 percent in 2018.

This increase in Iraqi exports reflects the rehabilitation and expansion of the Iraqi oil sector and a major push by China to engage with that country. In 2011, Iraq exported an average of 2.165 million barrels per day worldwide. By 2018, this had risen to 3.5 million barrels per day.[71] China is also a major investor in Iraq's oil sector: China National Offshore Oil Corporation, China National Petroleum Corporation, and subsidiaries are involved in about one-half of Iraq's oil production as operators or junior partners; Zhenhua Oil Company and the Zhongman Petroleum and Natural Gas Group are among the Chinese companies working in the sector.[72] China's Sinopec is also involved in the independent oil sector controlled by the Kurdistan Regional Government.[73]

In contrast, the share of Chinese imports from Iran fell dramatically during the decade, falling from almost 23 percent in 2009 to 16 percent by 2013, staying at about that level through 2017, and then declining to 13 percent in 2018. Beyond the oil producers, imports from other countries in the region as a share of total imports from the Middle East stayed steadily low throughout the decade, although imports from Israel rose from 2.3 percent during the first half of the decade to almost 3 percent during the second half.

In terms of commodities, China's imports from the Middle East are dominated by mineral fuels—specifically oil, oil products, and natural gas—and of all those mineral fuels, largely crude oil. Fuel imports made up almost 77 percent of total imports from the region, on average, each year from 2009 through 2018. China, which became a net oil importer in 1993, has grown steadily more reliant on Middle Eastern energy resources. In 2018, six of the countries covered in this report were among the top 15 sources of crude oil imports to China (behind Russia, the leading source): Saudi Arabia (China's second-largest foreign oil supplier),

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71 "March Oil Revenues Drop Sharply, but Exports Steady," *Iraq Oil Report*, April 2, 2020. These totals reflect exports only from federal Iraq. The Kurdistan Region of Iraq is an independent source of exports. Combined, federal and Kurdistan exports averaged 3.855 million barrels per day in 2018 (Ben Van Heuvelen and Ben Lando, "Iraq Finishes 2018 with Record-Breaking Exports," *Iraq Oil Report*, January 3, 2019). The Kurdistan Regional Government, which governs the Kurdistan Region, began independent exports around July 2012 (Ben Lando, "KRG Crude Now Exported Independently to Turkey," *Iraq Oil Report*, January 9, 2013).

72 "Chinese Consortium in Talks over Nassiriya Deal," *Iraq Oil Report*, July 27, 2017; Jassem Al-Jabiri and Samya Kullab, "Iraq Aims to Double Majnoon Output in Two Years," *Iraq Oil Report*, January 31, 2018; Samya Kullab, "ZhenHua Expands China's Role in Iraq's Oil Sector," *Iraq Oil Report*, March 13, 2018a.

73 Patrick Osgood and Rawaz Tahir, "Taq Taq Decline Highlights Kurdistan Oil Woes," *Iraq Oil Report*, February 1, 2017.

Iraq, Oman, Iran, Kuwait, and the UAE.[74] Another large category of imports from the Middle East is chemicals, especially petrochemicals (themselves derived from hydrocarbon feedstocks). This category averaged 14.6 percent of Chinese imports from the Middle East each year from 2009 through 2018.

Chinese exports to the Middle East are dominated by manufactured items, which constituted almost 91 percent of all exports, on average, each year from 2009 through 2018. Of the different types of manufactured items, machinery and transport equipment constituted the largest category, averaging 38 percent of all exports. China also exported chemicals and related products, but these constituted only 6.2 percent of China's exports to the region during those years, on average.

As noted at the beginning of this section, China is more important to the Middle East's economy than the Middle East is to China's, with China's annual average goods exports accounting for more than 11 percent of all imports in the region during the 2009 to 2018 decade, and sales to China accounting for almost 10 percent of the Middle East's goods exports worldwide.[75] In both cases, this proportion rose during the decade, so that from 2014 to 2018, China's goods exports to the Middle East varied between 12.1 and 13.5 percent of all imports in the Middle East. During that same period, Middle Eastern exports to China varied between 8.9 percent and 11.4 percent of all Middle Eastern exports, hitting double digits in three of the five years.

These proportions vary a great deal by country. Considering annual averages over the decade from 2009 through 2018, 38.3 percent of Yemen's exports, 36.8 percent of Oman's exports, 22.1 percent of Iran's exports, and 17.8 percent of Iraq's exports went to China, rising above 20 percent in every year from 2014 through 2018. Other countries in double digits were Saudi Arabia, at 13.9 percent (rising to almost 15.6 percent in 2018), and Kuwait, at 11.7 percent (hitting 21.4 percent in 2018). These numbers clearly reflect China's imports of energy products from the region.

In the other direction, imports from China averaged more than 10 percent of total imports annually for the decade for nine countries: Iran, 29.5 percent; Yemen, 17.6 percent; Syria, 17.0 percent; Egypt, 14.5 percent; Jordan, 14.4 percent; the UAE, 11.9 percent; Saudi Arabia, 11.7 percent; Iraq, 11.6 percent; and Israel, 10.8 percent. In all cases except for those of Jordan and the UAE, the proportion at the end of the decade was far higher than the proportion at the beginning. This was also true for most countries for which Chinese imports accounted for less than 10 percent of total imports, demonstrating China's growing trade penetration of the region.

China's Investment and Construction in the Middle East

In the decade from 2009 through 2018, Chinese companies made 48 investments worth $40.9 billion in the region. This was only 3.4 percent of the number of China's investment

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[74] Of these, all but the UAE were in the top ten, and the UAE was 11th. Data are for Chinese imports of Standard International Trade Classification (SITC) 333, "petroleum oils and oils obtained from bituminous materials, crude" (United Nations Comtrade Database, undated; retrieved September 1, 2020). Crude oil from the countries analyzed in this report amounted to 44 percent of all crude oil imports into China in 2018.

[75] Bilateral data are from the United Nations Comtrade Database (undated; retrieved on several dates between October 2019 and September 2020); each country's total trade is from WDI (World Bank, undated; data retrieved on several dates between April and September 2020). WDI variables are "Merchandise exports (current US$)," variable TX.VAL.MRCH.CD.WT, and "Merchandise imports (current US$)," variable TM.VAL.MRCH.CD.WT.

transactions worldwide, and 4.0 percent of the value of these worldwide investments.[76] Of the 48 investment projects, 30 were made in the second half of the decade, and 31 can be considered related to the BRI.[77]

As we suggested in our trade discussion, Iraq has been the leading recipient of Chinese investment since 2009 (Figure 3.6). To reconstitute its oil sector, Iraq has conducted five bid rounds since 2009 for oil and gas field exploration, development, and other tasks, and contracted for other oil- and gas-related projects outside these bid rounds.[78] Investment in Iraq totaled almost $10.8 billion, followed by $7.2 billion in the UAE, $5.2 billion in Israel, $4.5 billion in Egypt, and $3.7 billion in Saudi Arabia. Investment in Iran has been relatively modest, at $2.7 billion, considering both the size of that country and the size of its oil sector.

Almost three-quarters of the value of Chinese investments in the region have been in the energy sector. This reflects the region's comparative advantage and resource base; it also reflects China's highest priority in terms of economic engagement. Turkey, Israel, and the UAE have received the most diverse set of investments. Turkey has received investments not just in energy, but in finance, logistics, technology, and automobiles. Israel has received no energy investments but has received investments in agriculture, health, technology, and advanced manufacturing. These investments reflect China's efforts to learn from Israel as it attempts to upgrade its own economy and shift from export industries and manufacturing to innovation industries and consumption.[79] Investments in the UAE have been largely in energy but have also included tourism, logistics, and industry.

Besides investments, China has also been deeply involved in lending and construction. Although the BRI is often presented as an investment program, it is actually far more of a lending and infrastructure construction program. In the Middle East, Chinese companies have contracted for 214 construction projects totaling $123.7 billion in the decade from 2009 through 2018. These represent more than 15 percent of the number of Chinese construction projects worldwide (outside China), and 18 percent of the value of those projects. In the Middle East region, 137 projects were started in the second half of the decade, and 142 can be considered BRI projects.[80]

Slightly more than one-half of all Chinese construction projects have been contracted in the GCC countries, with Saudi Arabia and the UAE the leading two countries in the entire Middle East (Figure 3.7). Egypt and Iran also have contracted for a substantial amount of construction projects, followed by Iraq.

As with investment, the largest share of these construction projects are in the energy sector, with energy projects in 11 countries, including Israel. But there is more sectoral variety than there is with investment. In Saudi Arabia, 49 Chinese construction contracts are spread

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[76] There are several different data sources for Chinese foreign direct investments, none wholly satisfactory. We rely on a widely used database compiled by Derek Scissors at the American Enterprise Institute. Data collection has been consistent and appears to be reasonably comprehensive. American Enterprise Institute and Heritage Foundation, China Global Investment Tracker, undated.

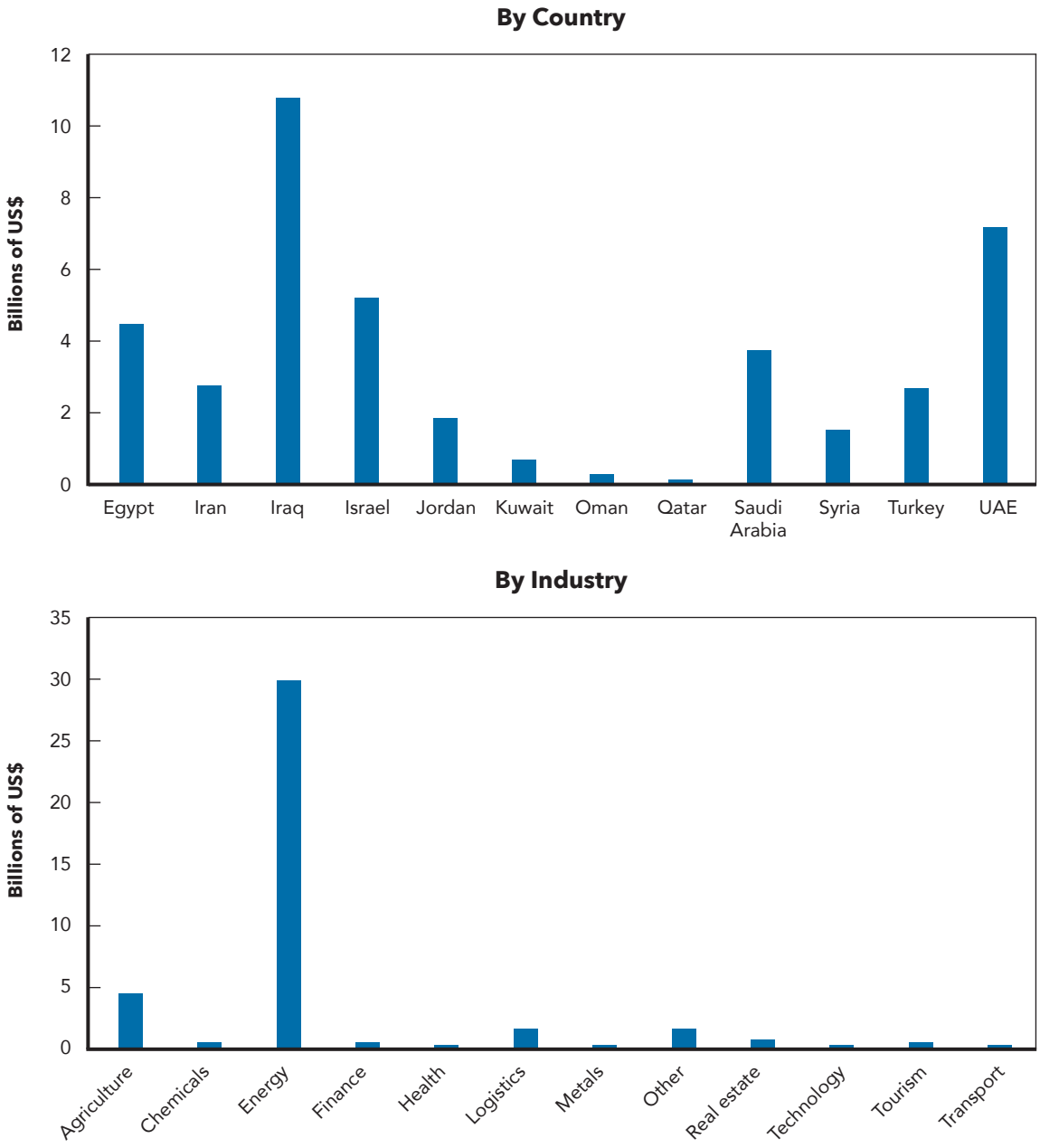
[77] American Enterprise Institute and Heritage Foundation, 2019.

[78] Ahmed Mousa Jiyad, "Comment & Analysis: The Economics of Iraq Oil Investment," *Iraq Oil Report*, December 9, 2009; Samya Kullab, "Discovered Fields Win the Day in Fifth Bidding Round," *Iraq Oil Report*, April 26, 2018b; Ben Lando, "Iraq Approves All 5th Bidding Round Deals, Aims to Boost Gas Supply," *Iraq Oil Report*, January 24, 2020.

[79] Even the agriculture investments are related to technology (Efron et al., 2019).

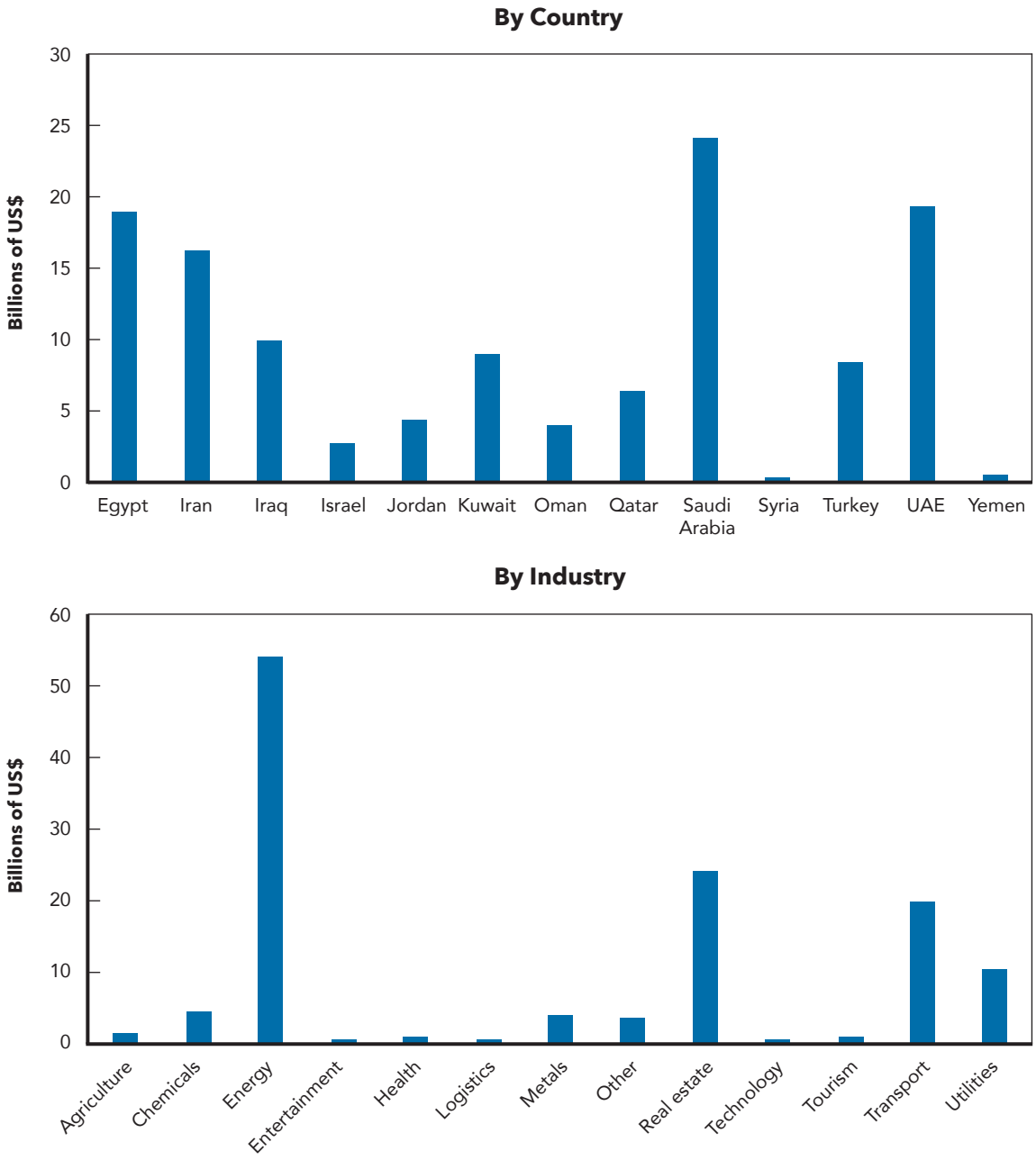
[80] American Enterprise Institute and Heritage Foundation, 2019.

Figure 3.6
Chinese Investments in the Middle East, 2009–2018



SOURCE: American Enterprise Institute and Heritage Foundation, 2019.

Figure 3.7
Chinese Construction Projects in the Middle East, 2009–2018



SOURCE: American Enterprise Institute and Heritage Foundation, 2019.

over agriculture, energy, logistics, education, real estate, transport, and utilities. Likewise, in the UAE, 37 Chinese construction contracts are spread over agriculture, energy, health, consumer goods, real estate (the largest by value), technology, tourism, and transport. Even within energy, there is diversity in some locations. For example, construction contracts in the Iranian energy sector have been for hydro, coal, and gas, in addition to oil.

Official Chinese documents on BRI released in 2015 and 2019 indicate the Middle East's importance, underlining why it has received a high proportion of Chinese construction contracts.[81] The Middle East is the endpoint for the China-Central West Asia Economic Corridor, which is one of the original six economic corridors that China unveiled in 2015. This corridor extends through Central Asia to Iran and Turkey.[82] Some of these projects are industrial parks and ports.[83] Chinese investment in strategically located ports has brought Beijing in direct competition with the United States. Washington remains concerned that Chinese port infrastructure and access rights could be used by China to project naval power or to leverage port rights to curb U.S. military access. This was best demonstrated by the U.S. push to clinch rights to Oman's Duqm Port, despite Chinese agreements to build an industrial zone there.[84]

Each of the GCC countries has introduced "Vision" development plans, which they have sought to integrate with the BRI.[85] China has pursued BRI projects with Iran, most notably the direct freight-train railway from Zhejiang Province to Tehran. China has had to tread carefully in BRI connectivity with Iran, however, given that country's tensions with other regional countries and the international pressure that Iran faces.[86] In addition, although Iran hopes to benefit from BRI, it also has recently become concerned that China would develop too much influence in the political economy of Iran and its neighborhood, setting up competition between the two countries.[87]

In its discussion of BRI cooperation, the Arab Policy Paper described the so-called "1+2+3" cooperation framework. In this conception, energy cooperation is the "axis," infrastructure construction and the facilitation of trade and investment are the "two wings," and nuclear energy, space flight and satellites, and new energy are the three "big new areas for breakthroughs."[88] The introduction of this concept has given additional focus to relations between China and the Arab countries, with energy technology gaining special prominence in these relationships.

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[81] National Development and Reform Commission, 2015; Office of the Leading Group for Promoting the Belt and Road Initiative [Tuījìn "yīdài yīlù" jiànshè gōngzuò lǐngdǎo xiǎozǔ bàngōngshì, 推进 "一带一路" 建设工作领导小组办公室], *Jointly Constructing the "Belt and Road" Initiative: Progress, Contributions, and Prospects* [*Gongjian "Yidai yilu" changyi: jinzhan, gongxian yu zhanwang,* 共建 "一带一路" 倡议：进展、贡献与展望], Xinhua, April 22, 2019.

[82] Fulton, 2019, p. 6.

[83] Fulton, 2019, p. 7. The industrial parks are the Khalifa Port Free Trade Zone in Abu Dhabi, UAE; Oman's Duqm Special Economic Zone Authority (SEZAD); the Jazan City for Primary and Downstream Industries in Saudi Arabia; and the TEDA-Suez zone in Ain Sokhna, Egypt. The ports are Khalifa Industrial Zone Abu Dhabi, SEZAD in Oman, and Port Said in Egypt. Outside the region covered in this report, one additional port is the People's Liberation Army (PLA) Support Base in Djibouti.

[84] Phil Stewart, "With an Eye on Iran, U.S. Clinches Strategic Port Deal with Oman," Reuters, March 24, 2019.

[85] Fulton, 2019, p. 6. These plans are *Saudi Vision 2030, New Kuwait 2035, Abu Dhabi 2030, Qatar National Vision 2030, Oman Vision 2040*, and Bahrain's *Economic Vision 2030*.

[86] Fulton, 2019, p. 8.

[87] Shariatinia and Azizi, 2019.

[88] People's Republic of China, 2016.

China's Technological Investments and Digital Silk Road

In its foundational 2015 document regarding the BRI, China discussed the creation of an "information silk road."[89] Among the elements were "cross-border optical cables and other communications trunk line networks," the improvement of international communications connectivity, and "spatial (satellite) information passageways to expand information exchanges and cooperation."[90]

Since then, the concept has evolved into the Digital Silk Road and encompassed the construction not just of those elements mentioned in the 2015 document but also mobile communications technology (including 5G), e-commerce links, and common technical standards.[91] This places the Digital Silk Road at the heart of both U.S.-China technology competition and technology competition between China and the other communications technology–producing countries of Europe and Asia. Some experts have expressed concern about the prominent role played by the Chinese communications companies Huawei and ZTE (because of their close relationship with the Chinese government) and, more broadly, control of data, data and communications security, and the openness of the internet and communications.[92]

Because of its central location among Asia, Africa, and Europe, the Middle East has a prominent place in the Digital Silk Road. In its 2019 review of progress along the BRI, China noted it had launched the "Belt and Road Digital Economy International Cooperation Initiative," of which Egypt, Saudi Arabia, Turkey, and the UAE were among the seven initial members.[93] Likewise, the 20,000-kilometer Southeast Asia-Middle East-Western Europe 5 (SEA-ME-WE 5) fiber-optic cable project involves Egypt, Oman, Qatar, Turkey, Saudi Arabia, the UAE, and Yemen, and has the involvement of such major Chinese infrastructure companies as China Mobile International, China Telecom Global, and China Unicom, with national companies from along the route.[94]

The United States has been actively discouraging countries from using Chinese telecommunications technology, particularly that of Huawei, and has been focusing on close allies and partners, especially those with which it shares intelligence. Despite their strong security relationship with the United States, numerous Middle Eastern countries have chosen to build out their telecommunications infrastructure with Huawei technology. Of 77 5G contracts Huawei had secured by the end of 2019, 12 were in the Middle East.[95] Among those in the Middle East are Bahrain, Egypt, Kuwait, Oman, Saudi Arabia, and the UAE.[96]

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89 National Development and Reform Commission, 2015.

90 National Development and Reform Commission, 2015.

91 John Chipman, "China's Long and Winding Digital Silk Road," International Institute for Strategic Studies, January 25, 2019.

92 Clayton Cheney, "China's Digital Silk Road: Strategic Technological Competition and Exporting Political Illiberalism," *Net Politics*, Council on Foreign Relations, blog post, September 26, 2019; Andrew Kitson and Kenny Liew, "China Doubles Down on Its Digital Silk Road," *Reconnecting Asia*, Center for Strategic and International Studies, November 14, 2019.

93 Office of the Leading Group for Promoting the Belt and Road Initiative, 2019.

94 Chan Jia Hao, "All May Not Be Smooth Along China's Digital Silk Road," *The Interpreter*, Lowy Institute, August 20, 2019; Submarine Cable Networks, "SEA-ME-WE 5," webpage, undated.

95 Alkesh Sharma, "Huawei Confident of Middle East Growth Despite US Pressure," *The National*, February 19, 2020.

96 Neil Halligan, "Huawei Remains Strong in Middle East Despite US Restrictions," *Arabian Business*, September 19, 2019; Camille Lons, Jonathan Fulton, Degang Sun, and Naser Al-Tamimi, *China's Great Game in the Middle East*, European Council on Foreign Relations, Policy Brief, October 2019.

Chinese Military Activities in the Middle East

Limited by its desire to maintain balance in its Middle Eastern diplomacy, unwillingness to take sides in regional disputes, and policy of nonalliance, China maintains a light military and security footprint in the Middle East. Chinese officials say they view their country's role as a stabilizer, working through the United Nations Security Council and supporting such multilateral efforts as the JCPOA.[97] China would also favor some kind of regional security arrangement, similar to ones instituted elsewhere, such as the Shanghai Cooperation Organization or the Conference on Interaction and Confidence Building in Asia.[98] China also views the region as a potential source of unrest and terrorism, another reason it aims for stability and does not try to block the U.S. security role in the region.[99]

As long as the United States serves as the main external security provider in the region, incentives for China to increase its regional security presence are likely to remain limited. In this scenario, China can continue to rely on the U.S. provision of security, freeing Beijing to focus on its economic activities while ensuring the stability required for these efforts to be successful. In the long run, however, as China's economic interests in the region expand, the possibility of China increasing its security role in the region with the aim of protecting those investments cannot be excluded. China has engaged in greater efforts to protect its civilians abroad, and as its business interests and investments increase, the number of civilians at risk will rise.[100]

Arms Sales

China plays a modest role in arms sales to the region (Figure 3.8).[101] Its leading customers have been Iran, Saudi Arabia, the UAE, and Turkey, but sales have not been consistent through the years. In the decade from 2009 through 2018, China sold the largest amount of arms in 2009 and 2010, and then again in 2017 and 2018. Sales in those early years went to Egypt, Iran, Syria, and Turkey, and less so to Saudi Arabia. Sales continued at a high level to Iran and Turkey the following two years, then declined precipitously for both those countries. Sales to Syria ended in 2011, as that country entered civil war.

China has since shifted its customer base and its approach to the arms market in the Middle East. China has developed a niche role in the arms market—primarily selling armed unmanned aerial vehicles (UAVs), such as its indigenously developed Wing Loongs. This specialized market emerged after Washington refused to sell armed U.S. drones to several Gulf states, citing limits imposed by the Missile Technology Control Regime (MTCR), leading

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97 Discussion with Chinese officials in greater Washington, D.C., area, November 2019.

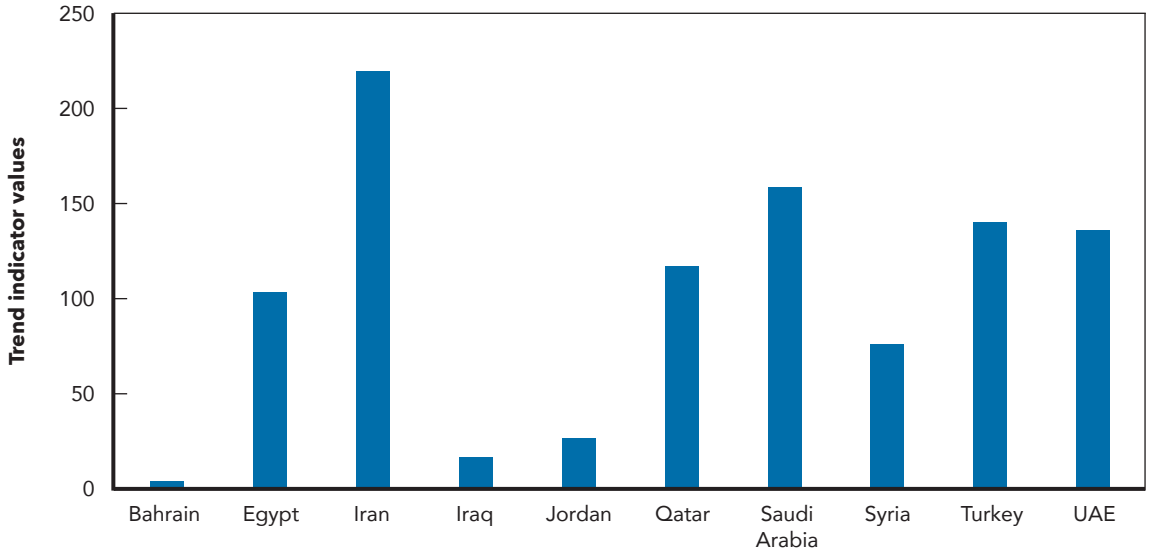
98 Comments at an economics conference in the Middle East, November 2019.

99 Comments at an economics conference in the Middle East, November 2019.

100 A dramatic fictional account of this commitment to protect Chinese nationals anywhere in the world can be seen in the 2018 Chinese movie, *Operation Red Sea*, which hit the top of the current-run box office in China in 2018 (Patrick Frater, "China Box Office: 'Operation Red Sea' Rises to Top Spot," *Variety*, March 4, 2018). In the movie, the PLA Army, Navy, and Marine Corps engages in counterterrorism operations, a civilian evacuation, and hostage rescue operations; the movie concludes with a help-line telephone number that any Chinese anywhere in the world can call.

101 Stockholm International Peace Research Institute, 2019. SIPRI records arms sales in units of trend indicator values. The *trend indicator value* is a measure of production costs and is meant to represent the transfer of military resources rather than the sales price of those resources. Data encompass what SIPRI terms *major weapons*—aircraft, air defense systems, antisubmarine warfare weapons, armored vehicles, artillery, engines, missiles, sensors, satellites, ships, turrets for selected armored vehicles and ships, and air refueling systems as used on tanker aircraft.

Figure 3.8
Chinese Arms Transfers to the Middle East, 2009–2018



SOURCE: Stockholm International Peace Research Institute, 2019.
NOTES: The *trend indicator value* is a measure of production costs and meant to represent the transfer of military resources rather than the sales price of those resources. Data are what SIPRI terms *major weapons*: aircraft, air defense systems, antisubmarine warfare weapons, armored vehicles, artillery, engines, missiles, sensors, satellites, ships, turrets for selected armored vehicles and ships, and air refueling systems as used on tanker aircraft.

these states to turn to Beijing for such items.[102] As the U.S. Department of Defense's annual report to Congress on Chinese military developments notes, although Chinese technology is "considered by some potential customers to be of lower quality and reliability, many Chinese systems are offered with enticements such as gifts, donations, and flexible payment options."[103] Moreover, Chinese weapons "tend to carry fewer end-use restrictions and are monitored less rigorously than competitors' arms exports, a factor that attracts customers with less access to other sources of military equipment because of political or economic reasons."[104]

Therefore, China has benefited from the U.S. refusal to sell these weapons, selling armed UAVs to the UAE, Jordan, Saudi Arabia, and Egypt. Sales to the UAE started in 2013, and sales to Saudi Arabia resumed in 2015. Similarly, China has leveraged Saudi Arabia's drive to increase local weapon manufacturing under its Vision 2030 plan as a means to expand this relationship, agreeing to open a factory in Saudi Arabia to produce its CH-4 UAVs.[105] Qatar has also emerged as a pivotal client—particularly as the geopolitics of the region shifted and the Gulf rift began—as sales started in 2017. By 2018, Qatar was the largest recipient of arms from China in 2018, buying more than twice as much as either Saudi Arabia or the UAE, its GCC rivals.

[102] Natasha Turak, "Pentagon Is Scrambling as China 'Sells the Hell out of' Armed Drones to US Allies," CNBC, February 21, 2019.

[103] Office of the Secretary of Defense, *Annual Report to Congress: Military and Security Developments Involving the People's Republic of China 2019*, U.S. Department of Defense, 2019, p. 28.

[104] Office of the Secretary of Defense, 2019, p. 28.

[105] Christopher Diamond, "China to Open a Drone Factory in Saudi Arabia," *Defense News*, March 28, 2017.

Security Cooperation

Chinese senior security leader visits appear to reflect China's priority countries for economic engagement, with more emphasis on Iran (Figure 3.9). We include the state councilor, the minister of defense, and the chief of staff of the armed forces for these counts. Iran has been the leading site for publicly recorded visits, receiving the defense minister once and the state councilor twice. The UAE and Egypt each received two visits—in each case, two visits by a state councilor.[106] Notably, Israel received the only publicly recorded visit of the chief of the general staff to the region, in 2011, and Iran received the only publicly recorded visit by a defense minister, in 2016. The rest of the visits have all been by the state councilor.

Security official visits to the region were modest through most of the decade from 2009 through 2018 but started picking up in 2015.[107] In 2016, there were four visits by security officials (Egypt, Iran twice, and Saudi Arabia), and two each in 2015 and 2018; the UAE was the site of both visits in 2018. This elevated pace continued with three defense minister visits through September 2019, one each to the UAE, Egypt, and Saudi Arabia.

In addition to senior leader visits, China engages in security activities in the region in other ways because defense cooperation often happens below the senior leader level. For example, in 2010, a delegation of Chinese military officials visited Israel, and senior Israeli Defense Forces officials visited China. In 2018, senior officers from the PLA Army, Navy, and Air Force visited Tehran. Visits have gone from the region to China as well.[108]

China has participated in United Nations Peacekeeping Operations in the Golan Heights since 1990. Three-vessel PLA Navy flotillas have participated in antipiracy operations in the Gulf of Aden since early 2009. Just outside the region, China established its first overseas military base in 2017, a naval logistics facility in Djibouti, in a strategic location on the Horn of Africa that offers access to the Arabian Peninsula. China also conducted evacuation operations of hundreds of its citizens in Yemen in 2015 (and tens of thousands of its citizens in Libya in 2011), reflecting its heightened support for protecting Chinese citizens as it expands its investment and contracting activities. Only the Yemen effort can be described as a noncombatant evacuation (NEO) because the Libyan evacuation was almost exclusively organized and executed by civilians—with only peripheral involvement by the PRC military. In contrast, the Yemen operation was a true NEO, with the military taking center stage: Two PLA Navy vessels evacuated 629 Chinese citizens from Yemen.[109] Notably, China also evacuated 279 non-Chinese foreign nationals.[110]

At the same time that visits have increased, China has conducted exercises in the region. In accordance with China's policy and actions of maintaining cordial relations with all countries, these exercises have taken place separately with bitter regional rivals—Iran and Saudi Arabia. Both exercises with Iran have been naval and have taken place in the Persian Gulf, one

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[106] We include in the UAE's count a visit from former State Councilor Yang Jiechi in April 2018, less than two months after he had stepped down from that position but while he still retained the position of director of the Central Foreign Affairs Commission Office.

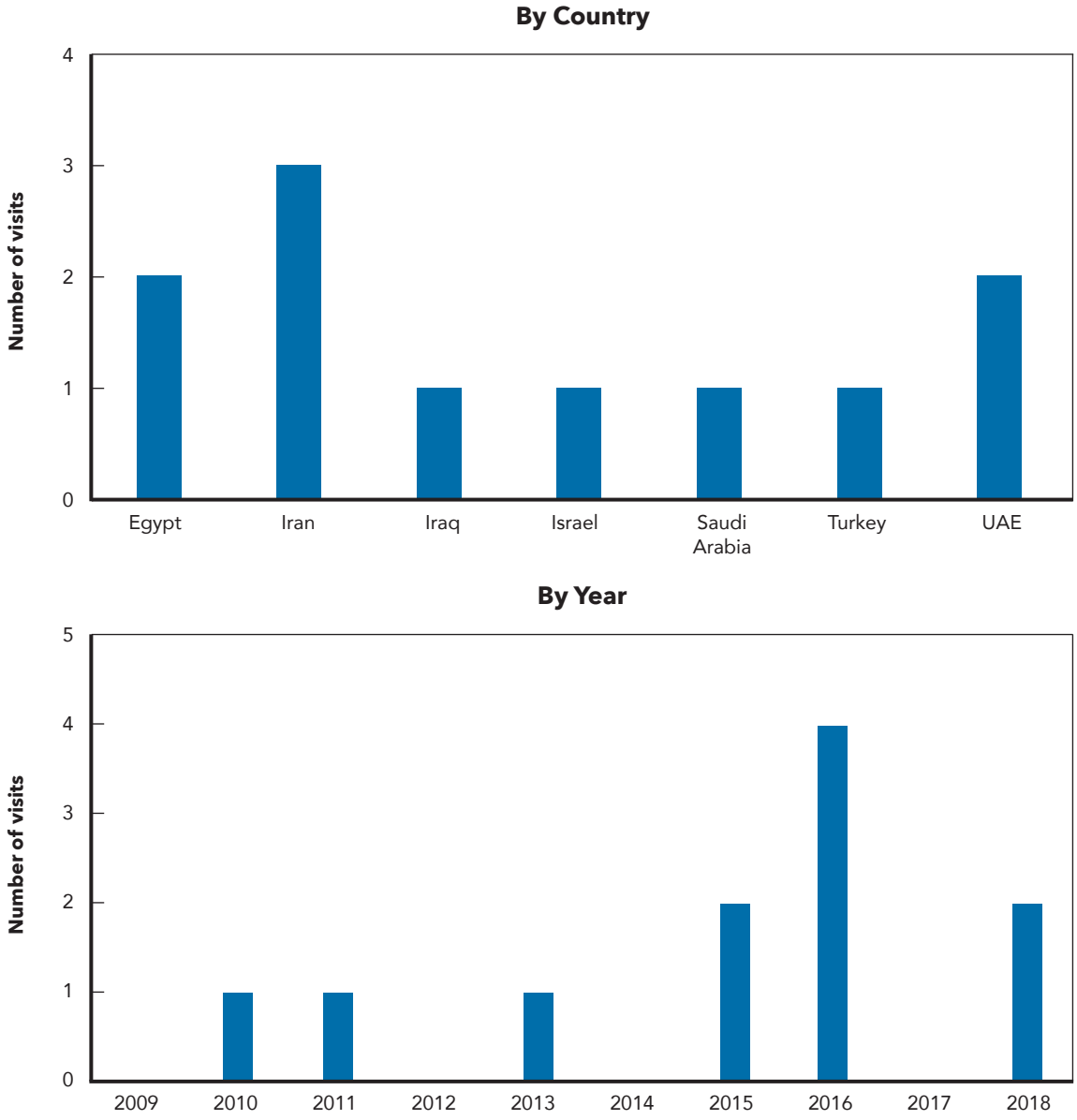
[107] In 2008, just before the global financial crisis and oil price crash upended regional trends and global relations, the Chinese defense minister visited Bahrain, Oman, Qatar, Saudi Arabia, and the UAE (the entire GCC except for Kuwait).

[108] Efron et al., 2019.

[109] Scobell, 2018, pp. 19, 21.

[110] I-wei Jennifer Chang, "China and Yemen's Forgotten War," *PeaceBrief 241*, United States Institute of Peace, January 2018.

Figure 3.9
Chinese Senior Security, Military, and Intelligence Leader Visits to the Middle East, 2009–2018



SOURCES: Information on visits by Chinese officials to Middle Eastern countries from 2009 through 2018 was compiled through Google searches of government websites in China, international media sources, media sources in China, local media sources in the Middle East, websites of foreign policy journals, think tank websites, and others.
NOTES: *Senior security, military*, and *intelligence leaders* are the state councilor, the minister of defense, and the chief of staff of the armed forces. The state councilor is the closest equivalent to a national security adviser and is often the most influential foreign policy official, above the foreign minister. There is no public record of a visit by an intelligence chief. The president also serves as the chairman of the Central Military Commission, but we exclude his visits from these counts. In July 2018, Wang Yi visited the UAE as both foreign minister and state councilor. We include those visits in this figure and exclude them in the figure showing visits by political leaders (Figure 3.4). In addition, these counts include an April 2018 visit to the UAE by Yang Jiechi, who had stepped down as State Councilor but continued as director of the Central Foreign Affairs Commission Office.

in 2014 and the other in 2017.[111] The exercise with Saudi Arabia involved a counterterrorism drill because counterterrorism is a stated priority of both countries.[112]

Russia in the Middle East

After the Cold War, Russia was largely absent from the Middle East. This absence was an anomaly, however, considering that the Soviet Union and its predecessors had played an important role in the Middle East for centuries.[113] Beginning in the early 2000s, Russia slowly began to reinsert itself in the region through diplomatic visits, business exchanges, and increased involvement in regional negotiations. The outbreak of the Arab Spring in 2011 and instability in such places as Libya and Syria presented Russia with an opportunity to increase its engagement in the region, and it represented an important turning point in Russia's return to the Middle East.

In September 2015, Russia launched a series of airstrikes in Syria, starting its direct intervention in the Syrian civil war. Russia viewed the intervention as necessary to shore up a longstanding partner, to preserve its interests in Syria, and to secure its southern flank against security threats emanating from the Middle East. Russia also took the opportunity to consolidate its military presence in Syria, upgrading its naval base at Tartus and establishing the Hmeimim air base near Latakia. President Putin's overarching goal, however, which transcended the stakes of the Syrian civil war itself, was to reestablish Russia as a major actor in the region and, therefore, as a great power at the international level. Moscow's intervention in Syria thus became the means by which to consolidate Russia's regional influence and contribute to cementing its international standing.[114]

This military intervention—Russia's first outside former Soviet territory since the breakup of the Soviet Union—demonstrated that the United States was not the sole external power that could intervene militarily in the Middle East. By the end of 2016, Russia had prevented the collapse of the Syrian state, and it had ensured the survival of the Assad regime and the process of peace negotiations between the regime and the opposition.[115] Although several Middle Eastern states initially opposed Russia's intervention, Moscow's actions stood in contrast to those of Washington, which was viewed by many as unreliable in the wake of the Arab Spring and an expressed desire to pivot to Asia. As a result, these states sought to hedge and diversify their relations with external powers, resulting in renewed interest in building relations with Russia.[116]

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[111] Thomas Erdbrink and Chris Buckley, "China and Iran Conduct Joint Naval Exercises in the Persian Gulf," *New York Times*, September 21, 2014; "Iranian and Chinese Destroyers Hold Joint Drill in Persian Gulf," *Jerusalem Post*, June 18, 2017; "Iran, China Hold Joint Naval Exercise," *Tehran Times*, June 19, 2017.

[112] "China Holds First Anti-Terrorism Drills with Saudi Arabian Special Forces," *South China Morning Post*, October 27, 2016.

[113] Eugene Rumer, "Russia, the Indispensable Nation in the Middle East," *Foreign Affairs*, October 31, 2019.

[114] Dmitri Trenin, *What Is Russia up to in the Middle East?* Medford, Mass.: Polity Press, 2018, pp. 48, 62, 135.

[115] Trenin, 2018.

[116] Hokayem and Wasser, 2014; Irina D. Zviagelskaya and Nikolay Yu. Surkov [Ирина. Д. Звягельская и Николай. Ю. Сурков], *Russian Policy in the Middle East: Dividends and Costs of the Big Game* [*Rossiiskaya politika na blizhnem vostoke: dividendy i izderzhki bol'shoi igry*, *Российская политика на Ближнем Востоке: дивиденды и издержки большой игры*], Moscow: Russian International Affairs Council [Российский Совет по Международным Делам], Working Paper No. 51, 2019, pp. 8–9.

Since then, Russia has increased its economic, political, and military engagement and bolstered its influence throughout the region. Moscow finalized business ventures with Middle Eastern states—from investing in Russian industry to gaining exploration rights to new natural gas fields located in the region. It is playing a pivotal diplomatic role in regional negotiations; it is now party to the numerous talks and negotiations over Syria, Libya, Yemen, and the Arab-Israeli peace process. Russia also has sizable sales of advanced Russian weaponry to regional states and is developing closer security cooperation relationships with many of them. In short, Russia has succeeded in establishing itself as an influential external power.

Russia's actions can also be viewed through the lens of strategic competition with the United States. In this view, Moscow's inroads in the Middle East have helped reestablish Russia as an influential power, thereby strengthening its competitive position. Russia also finds itself in a competitive position with China in the Middle East because both countries seek involvement in hydrocarbon fields, sales of nuclear power plants, and infrastructure construction, in addition to competition with the United States.[117] In this sense, involvement in the Middle East is also a means to an end rather than a rewarding end in itself. That is not to imply that Russia is in the Middle East solely to counter the United States; Russia has several independent interests and objectives that drive its involvement in the region. Undermining U.S. objectives and influence is simply an additional benefit of Russia's presence and activities.[118] That said, Moscow does not seek to usurp the United States. U.S. presence also works in Russia's interest in one other important way: It forestalls undue Chinese influence in the region.[119]

Russian Strategy in the Middle East

Following Russia's intervention in Syria, numerous analysts sought to identify whether Russia had a strategy in the Middle East and if so, what it was (and is). In one view, Russia lacks a grand strategy for the Middle East but has a clear view of its interests and pursues them pragmatically in the region.[120] Another view holds that Russia does have a Middle East strategy: to improve Moscow's short-term economic, military, and political advantages as resources and opportunities allow while reducing those of its prospective competitors.[121] From this perspective, Russia opportunistically presents itself as an alternative to the United States and seeks to fill voids that have emerged in response to U.S. regional disengagement (both real and perceived), Middle Eastern states' displeasure over U.S. policy decisions, and events brought on by regional dynamics.[122] Such events create demand for increased Russian activities and influence in the region. Even if we were to call this a strategy, however, this approach is intrinsically reac-

[117] Interview with a Russian foreign policy expert, September 2019.

[118] Sladden et al., 2017.

[119] Author conversations on various dates with Russian foreign policy experts.

[120] Trenin, 2018, pp. 86, 111–112, 134.

[121] Sladden et al., 2017, p. 2.

[122] Nikolay Kozhanov, "Russian Foreign Policy in the Middle East: New Challenges for Western Interests?" in Stefan Meister and Daniel Hamilton, eds., *The Russia File: Russia and the West in an Unordered World*, Washington, D.C.: Center for Transatlantic Relations, The Paul H. Nitze School of Advanced International Studies, Johns Hopkins University, and German Council on Foreign Relations/Deutsche Gesellschaft für Auswärtige Politik, 2017, p. 109; Sladden et al., 2017, pp. 6–7; Wasser, 2019, pp. 11–12; Zviagelskaya and Surkov, 2019, p. 5.

tive and limits Russia's ability to influence events in the region except as they are occurring.[123] This is largely in keeping with Russia's more tactical approach to international affairs.[124]

In keeping with its foreign policy principles, Russia presents its regional approach as secular and nonideological, which enables Moscow to engage with all actors in the region, including states and entities that appear diametrically opposed (such as Iran and Israel) and those that sometimes have competing agendas (such as the government of Iraq and the Kurdistan Regional Government).[125] This flexibility also increases the number of available opportunities for Russia to extend its influence.

Aside from maintaining good relations throughout the region, Russia also sees opportunities for cooperation with the United States. Beyond the U.S. presence effectively countering China, Russia has mooted the idea of cooperating on Syria, Gulf security, and even Iran, as it did during the negotiations for the JCPOA (the Iran nuclear deal).[126] Whether this push for cooperation is genuine or mere rhetoric is unclear, but it features prominently in Russia's regional approach.

Russia's strategy is also entwined with the availability of resources; in some respects, these resources dictate the extent of its regional involvement. Middle Eastern countries, particularly the Gulf states, have purchased Russian weaponry, struck energy deals, and made investments in the Russian economy.[127] Given Russia's reduced economic resources in light of U.S. and European sanctions and downward oil price volatility, these investments, in turn—to the extent they are realized rather than just announced—can underwrite Russian activities around the globe, including in the Middle East. This creates a transactional flavor to Russia's regional strategy. As a result, Russia actively leverages its flexible, short-term focused approach to limit its commitments and costs in the region.[128]

Drivers of Russia's Regional Approach

Official Russian foreign policy and national security documents, released before the U.S. NSS and NDS, describe Russia's objectives in the Middle East. The 2016 Foreign Policy Concept lists the top priorities as continued efforts to stabilize the region, to counter terrorist groups that operate there, and to advocate "the political and diplomatic settlement of conflicts in states of the region on the basis of respect for their sovereignty and territorial integrity and the right to self-determination without outside interference." The document lists additional goals, such as the promotion of Israeli-Palestinian peace, the creation of a nuclear weapon–free zone, and the development of cooperation with Iran on the basis of upholding the JCPOA.[129]

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[123] Wasser, 2019, p. 15.

[124] Cohen and Radin, 2019, pp. 13–15.

[125] Wasser, 2019, p. 5.

[126] Discussions with Russian foreign policy experts. For a proposed Gulf security plan that involves Russian and U.S. cooperation, see Andrei Baklanov, "Security in the Gulf Area: Russia's New Initiative," Valdai Discussion Club, August 6, 2019. The participation of the United States is referred to indirectly, with the plan "involving the most authoritative states outside the region."

[127] One example is Gulf sovereign wealth fund investments in Russian industry. Russian Direct Investment Fund, "RDIF, Middle Eastern and Asian Co-Investors and Baring Vostok to Acquire an Equity Stake in Pulkovo Airport from VTB Capital," press release, April 20, 2017.

[128] Sladden et al., 2017, p. 10.

[129] Russian Federation, *Concept of the Foreign Policy of the Russian Federation (approved by President of the Russian Federation V.V. Putin on November 30, 2016)* [*Kontsepsiya vneshnei politiki Rossiiskoi Federatsii (utverzhdena Prezidentom Rossi-*

As an example of how these ideas apply to action, they underlie Russia's approach to Syria's reconstruction.[130] In Russia's view (and according to the Foreign Policy Concept), its efforts to end the war, bring in European Union (EU) capital to fund reconstruction, and ensure Russian participation are in line with Russia's consolidation of its position as a center of influence in the world (Paragraph 2.c), its desire for an expanded presence in global markets (Paragraph 40.c.), its goal of tapping new markets (Paragraph 40.d), maintenance of an "intensive and mutually beneficial dialogue" with the EU on foreign policy, military, and political issues (Paragraph 64), and its desire to support "the unity, independence and territorial integrity of the Syrian Arab Republic as a secular, democratic and pluralistic State" (Paragraph 93).

The most recent Russian NSS mentions a few issues concerning the Middle East, such as migration, U.S. regional military deployments, and the effects of general instability in the region. But it offers no systematic account of Russia's approach to the region.[131] The most recent Military Doctrine of the Russian Federation—which was issued in 2014, prior to Russia's military intervention in Syria—makes no mention of the Middle East, although it does note the desire to expand "military-political" and "military technical" cooperation with foreign states.[132]

In line with these documents, Moscow's involvement in the Middle East can be attributed to several drivers.[133] First, as noted earlier, Russia seeks international prestige and recognition as a great power.[134] This means having a level of influence in the region that would require Russia to be recognized as essential to key negotiations and decisions. As a recent report issued by the Russian International Affairs Council noted, considering Russia's intention "to achieve a weightier presence in the world arena and the recognition of its role by international society . . . the Middle East was suitable for this like nothing else."[135] Second, Moscow seeks to strengthen its economy through global trade and investment, including with governments and businesses in the Middle East, and through the energy market, which involves several oil-producing Gulf states.[136] This is reflected in Russia's regional strategy, which is resource-dependent. Arms sales are also an important component of this driver, and have the additional benefit, as communicated by Russian messaging, of allowing purchasers to signal to the United States that it is not the only game in town.[137] Third, Russia seeks to maintain regional

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iskoi Federatsii V.V. Putinym 30 noyabrya 2016 g.), Концепсия внешней политики Российской Федерации (утверждена Президентом Российской Федерации В.В. Путиным 30 ноября 2016 г.], 2016.

[130] Comments by a Russian expert at a Syria conference.

[131] Kremlin, 2015.

[132] Kremlin, Military Doctrine of the Russian Federation [Voyennaya doktrina Rossiskoi Federatsii, Военная доктрина Российской Федерации], December 30, 2014.

[133] Olga Oliker, Keith Crane, Lowell H. Schwartz, and Catherine Yusupov, *Russian Foreign Policy: Sources and Implications*, Santa Monica, Calif.: RAND Corporation, MG-768-AF, 2009, pp. 113–114.

[134] Trenin, 2018, p. 26.

[135] Zviagelskaya and Surkov, 2019, p. 4.

[136] Oliker et al., 2009, pp. 113–114.

[137] Observation by a Russian defense expert.

stability. In Moscow's view, this requires the preservation of existing regimes to avoid instability and failed states and to prevent the spread of terrorism to Russia and its near abroad.[138]

Russian leaders are also concerned with the potential legitimization of Western-led regime-change efforts, believing that allowing such practices to succeed in such places as Syria threatens Russian national security.[139] This driver best explains Russia's intervention in Syria and more-recent actions farther afield in Libya, which Moscow views as essential to preserving regional stability. Furthermore, Russia fears the spread of terrorism from the region to its territory and that of its neighbors.[140] Lastly, although undercutting U.S. policies and objectives in the Middle East is not necessarily a driver of Russia's involvement in the region, it is an added benefit of Moscow's regional involvement in an era of strategic competition. Still, Russian policymakers recognize the benefits of continued U.S. and Chinese presence, and the destabilization that could be caused by a broader U.S. exit from the region. Therefore, Russia will push this element of competition only so far as it does not accidentally undermine Russia's own objectives in the region.[141]

Russian Interests and Activities in the Middle East

We now consider how Russia's interests and activities in the Middle East reflect its strategy and the drivers of its approach to the region. We cover three domains: diplomatic interests and activities, economic interests and activities, and military interests and activities. For each, we go beyond narrative description and provide such quantitative measures as the number of high-level official visits and the value of trade. These measures are one form of evidence about where Russia is choosing to put its resources.[142] The exploration of Russia's interests and activities in these three domains will help to identify trends in Russia's regional involvement.

In all its activities, Russia has sought to maintain balance in its relations with the region's most-important actors and to engage nearly all state actors.[143] It does so by both issuing broader diplomatic initiatives and increasing its bilateral engagement with countries in the region. For example, Russia launched the "Astana format," named after the capital of Kazakhstan (since renamed Nur-Sultan) where the talks occurred, in 2017 to discuss the dynamics of the Syria conflict with Turkey and Iran. Although the group has not succeeded in negotiating an end to the conflict, this approach demonstrates, as Charles Thepaut describes it, "Moscow's agile military and diplomatic strategy in Syria."[144] Moscow has also formulated its own Gulf security concept, which it has been publicizing since July 2019 and would include a "single counterterrorism coalition" among stakeholders as its keystone.[145] Given Russia's poor relations with

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[138] Vladimir Putin, Speech Delivered to the 70th Session of the United Nations General Assembly, New York, September 28, 2015; Russian Federation, 2016.

[139] Wasser, 2019, p. 4; Samuel Charap, Elina Treyger, and Edward Geist, *Understanding Russia's Intervention in Syria*, Santa Monica, Calif.: RAND Corporation, RR-3180-AF, 2019, p. 5.

[140] Sladden et al., 2017.

[141] Discussion with a Russian security and Middle East expert.

[142] These measures and others were used in Scobell et al., 2018.

[143] Kozhanov, 2017, pp. 121–122; Sladden et al., 2017, p. 6; Trenin, 2018, p. 112.

[144] Charles Thépaut, "The Astana Process: A Flexible but Fragile Showcase for Russia," *Policywatch 3308*, Washington Institute for Near East Policy, April 28, 2020.

[145] Ministry of Foreign Affairs of the Russian Federation, "Russia's Security Concept for the Gulf Area," July 23, 2019.

the United States and the EU (both key stakeholders identified in the concept), it is unlikely that the "security and cooperation" organization envisioned will be established in the near term. However, these initiatives reflect Russia's efforts to be seen as important, especially to the region's diplomatic and security issues.

Russian Diplomatic Activities in the Middle East

Russia's efforts to maintain balance are reflected in its diplomatic activities throughout the Middle East. Figure 3.10 details visits of senior Russian leaders to the Middle East, illustrating the wide reach that Moscow has exhibited in the decade from 2009 through 2018. These visits demonstrate a high tempo of diplomatic activity, across a wide variety of state leaders and topic areas.

Except for Lebanon and Yemen, Russian leaders visited every country and territory considered in this report at least once. Some countries have received more visits than others, however. Senior leader visits to Egypt remained consistent throughout the decade, with two in 2009; one each in 2011, 2012, 2013, and 2018; three in 2015; and two in 2017. Egypt was a former Soviet client state—receiving arms, political support, and economic aid—until 1972, when Soviet military advisers were expelled from the country.[146] Given their shared history, Cairo and Moscow remain closely entwined. Furthermore, Russia demonstrated its ability to strengthen its relations with Egypt when it took advantage of U.S. estrangement from Cairo following the 2013 military coup that deposed the government of Mohamed Morsi. After the United States cut off weapon sales to Egypt in protest of the military coup, Russia stepped forward to fill the void.[147]

Likewise, visits to Turkey were consistent throughout the period, with one each year from 2009 to 2016, and then a dramatic increase to four in 2017 and five in 2018. Turkey and Russia are partners in the Astana group, managing and attempting to negotiate a settlement to the Syrian conflict. In addition, Turkey launched significant military operations in Syria in August 2016 with Operation Euphrates Shield. Turkish military objectives do not directly clash with Russia's; Turkish troops have operated in proximity of Russian-supported Syrian forces and continue to do so as operations continue.

In terms of timing, Russian leader visits occurred in every year under consideration. They peaked in 2017, when Russia was harvesting gains from its Syria intervention and the Middle East was experiencing a political split between the camp of Qatar and Turkey and the camp of Saudi Arabia, the UAE, Bahrain, and Egypt. Russian leaders paid two visits to Egypt, one each to Iran, Jordan, Kuwait, Qatar, and Syria, four to Turkey, and two to the UAE.

As can be seen by the diversity of these visits, Moscow's regional diplomacy seeks to balance states in opposition to each other. For example, Russia has deepened its ties with Israel while strengthening cooperation with Iran, a long-standing partner, despite Jerusalem and Tehran being in opposition to each other with competing agendas. More recently, Moscow has consulted closely with Israel in an effort to allay fears that Iran—with whom Russia is cooperating in the Syrian conflict—could use the opportunity to establish a permanent military presence along Israel's northeast border. Among these consultations has been coordination

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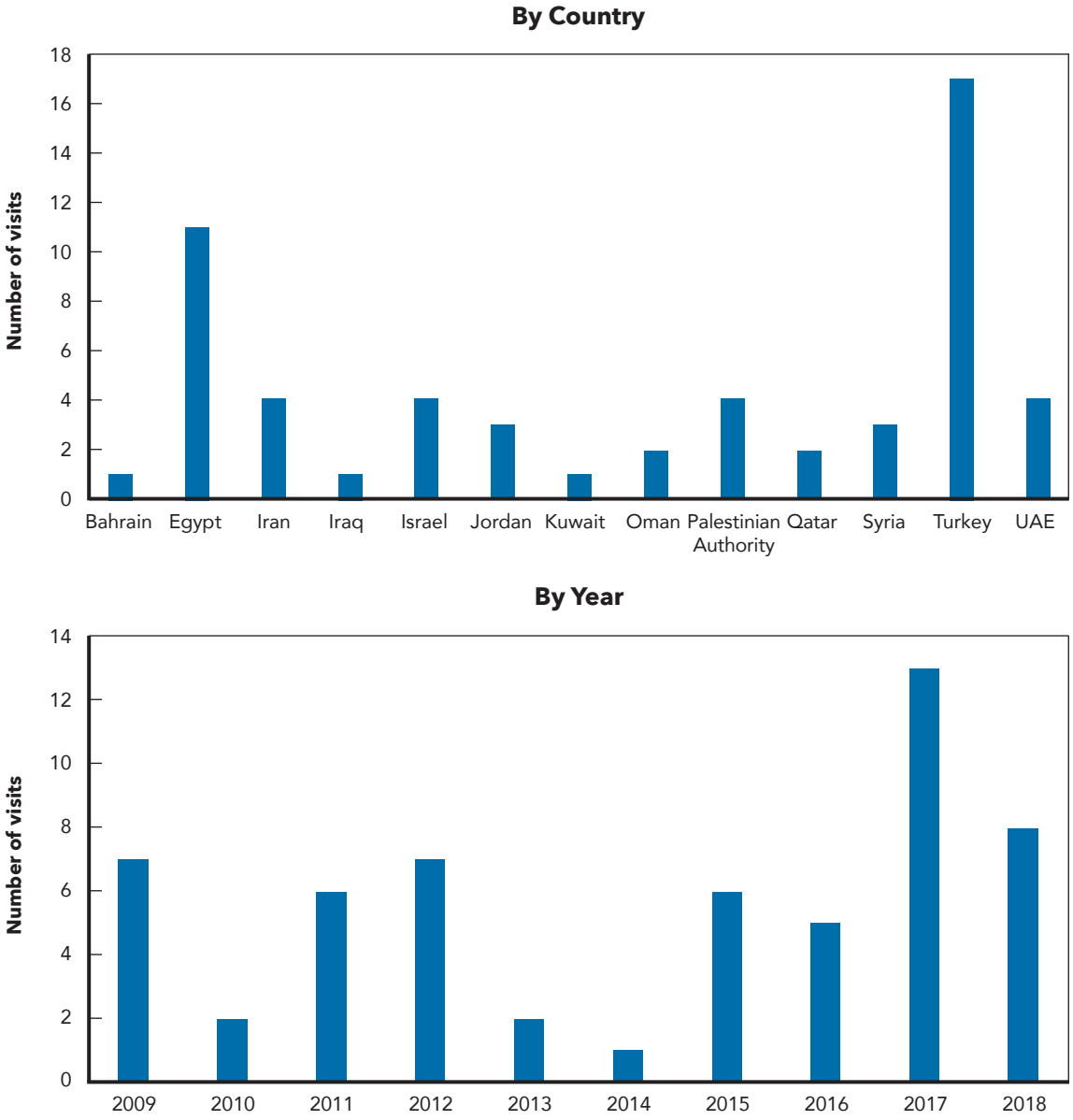
[146] Mohamed Hassanein Heikal, "Egyptian Foreign Policy," *Foreign Affairs*, Vol. 56, No. 4, July 1978.

[147] Oren Dorell, "Russia Offers Egypt No-Strings-Attached Arms Deal," *USA Today*, February 13, 2014; Michael R. Gordon and Mark Landler, "In Crackdown Response, U.S. Temporarily Freezes Some Military Aid to Egypt," *New York Times*, October 9, 2013.

Figure 3.10
Russian Senior Political Leader Visits to the Middle East, 2009–2018



SOURCES: Information on visits by Russian officials to Middle Eastern countries from 2009 through 2018 was compiled through Google searches of government websites in Russia, international media sources, media sources in Russia, local media sources in the Middle East, websites of foreign policy journals, think tank websites, and others.
NOTE: *Senior leaders* refers to the president, the prime minister, and the foreign minister.

on Israeli airstrikes on Iranian positions in Syria, which Russia has not contested.[148] By some accounts, Russia considers Israel not just a Middle East partner but a global partner—sharing

[148] Katrin Benhold and Isabel Kirshner, "Netanyahu to Iran: 'Do Not Test Israel's Resolve,'" *New York Times*, February 18, 2018; "Netanyahu and Putin Discuss 'Further Coordination' on Iran, Syria," *Times of Israel*, July 8, 2019.

some aspects of its global outlook, providing support in the United Nations, and working as a positive business partner, including in military technology.[149]

Russia's intervention in Syria complicated its diplomatic balancing act. Although the intervention provided an opportunity for Russia to solidify cooperation with its long-standing partners of Syria and Iran, these relationships were not untested. Iran, the Syrian regime, and Russia have cooperated militarily, but they have differing objectives and visions of diplomatic end-states in Syria. Iran has sought to leverage the Syrian conflict to extend its reach in the Levant in a bid to establish regional dominance; the Assad regime has sought to ensure its power over the country. For its part, Russia has consistently sought what it characterizes as the "unity, independence and territorial integrity of the Syrian Arab Republic as a secular, democratic and pluralistic State with all ethnic and religious groups living in peace and security and enjoying equal rights and opportunities."[150] To this end, Russia has worked—unsuccessfully so far—to spur refugee returns and forestall the demographic reengineering of the country, and Moscow favors the exit of Iranian and all foreign forces except its own at bases for which it has negotiated with the Syrian regime.[151] Despite these inherent tensions, this tripartite cooperation in the Syrian conflict has been largely successful.[152]

Russia's intervention in Syria also initially caused tensions with the Gulf states, which sought Assad's ouster and supported disparate Syrian militia groups. However, these tensions dissipated over time—partly because of the changing nature of the Syrian conflict, but partly because of the hedging strategy that many Gulf states adopted. As part of this strategy, the Gulf states used economic inducements to strengthen their relationship with Russia, which served as a way to signal displeasure with the United States, their traditional security guarantor.[153] More recently, several of the Gulf states have reopened their embassies in Damascus, demonstrating that any tensions with Russia or Assad have diminished.[154] Furthermore, Moscow has managed not only to improve relations with traditional regional partners, such as Syria and Iran, but also to rebuild relations with countries where its influence had previously been strong but then had waned, such as Egypt, Libya, and Iraq.[155]

Russian Economic Activities in the Middle East

Although not the primary focus of its regional activities, Russia has a variety of economic relations with the Middle East, and has been trying to broaden those relations, especially in the investment realm, with varied success.

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[149] Remarks by a Russian diplomat at a Middle East conference and separately by a Russian foreign policy expert, 2019.

[150] Russian Federation, 2016, paragraph 93.

[151] Remarks by Russian foreign policy experts at a series of conferences on Syria, 2018 through 2019.

[152] Trenin, 2018, pp. 73–84.

[153] Alexander Shumilin and Inna Shumilina, "Russia as a Gravity Pole of the GCC's New Foreign Policy Pragmatism," *International Spectator*, Vol. 52, No. 2, 2017; Sladden et al., 2017, pp. 6–7; Wasser, 2019, p. 10.

[154] "Bahrain Says Embassy Work in Syria Continues After UAE Move," Associated Press, December 28, 2018; Bethan McKernan and Martin Chulov, "Arab League Set to Readmit Syria Eight Years After Expulsion," *The Guardian*, December 26, 2018; Kinda Makieh, Amina Ismail, Tom Perry, Ellen Francis, Asma Alsharif, Aziz El Yaakoubi, Suleiman al-Khalidi, and Jonathan Landay, "UAE Reopens Syria Embassy in Boost for Assad," Reuters, December 27, 2018.

[155] Kozhanov, 2017, pp. 105, 121–122.

Russia's Trade with the Middle East

In terms of overall trade levels, the Middle East is of only moderate interest to Russia. This is largely because—apart from energy—the Middle East is relatively unimportant in the world economy. From 2009 through 2018, the gross domestic product (GDP) of the countries we are considering constituted only 4.8 percent of the global total, peaking in 2012 at 5.2 percent but declining steadily since then, to 4.5 percent in 2018.

Between 2009 and 2018, Russia received an annual average of only 2.8 percent of its goods imports from the region (exports from the Middle East to Russia). This constituted less than 1 percent of all exports from the Middle East to the world. However, Russia sent an annual average of 6.4 percent of its goods exports to the region in the same period, an overweight amount considering the economic size of the region. These goods exports (or imports into the Middle East from Russia) constituted 2.8 percent of all imports received by the Middle East from the world.[156]

Even within these totals, it is the non-Arab portions of the region that are most important for Russian trade (Figure 3.11). Turkey, with only 19.9 percent of the GDP share of the region, accounts for an annual average of 68.2 percent of all Russian imports from the Middle East, although this has trended downward. Israel took second place, with an annual average of 13.6 percent of all Russian imports from the region, compared with its average annual GDP of 9.5 percent. The shares of Russian imports from the GCC, Egypt, and Iran have risen, but remain modest.

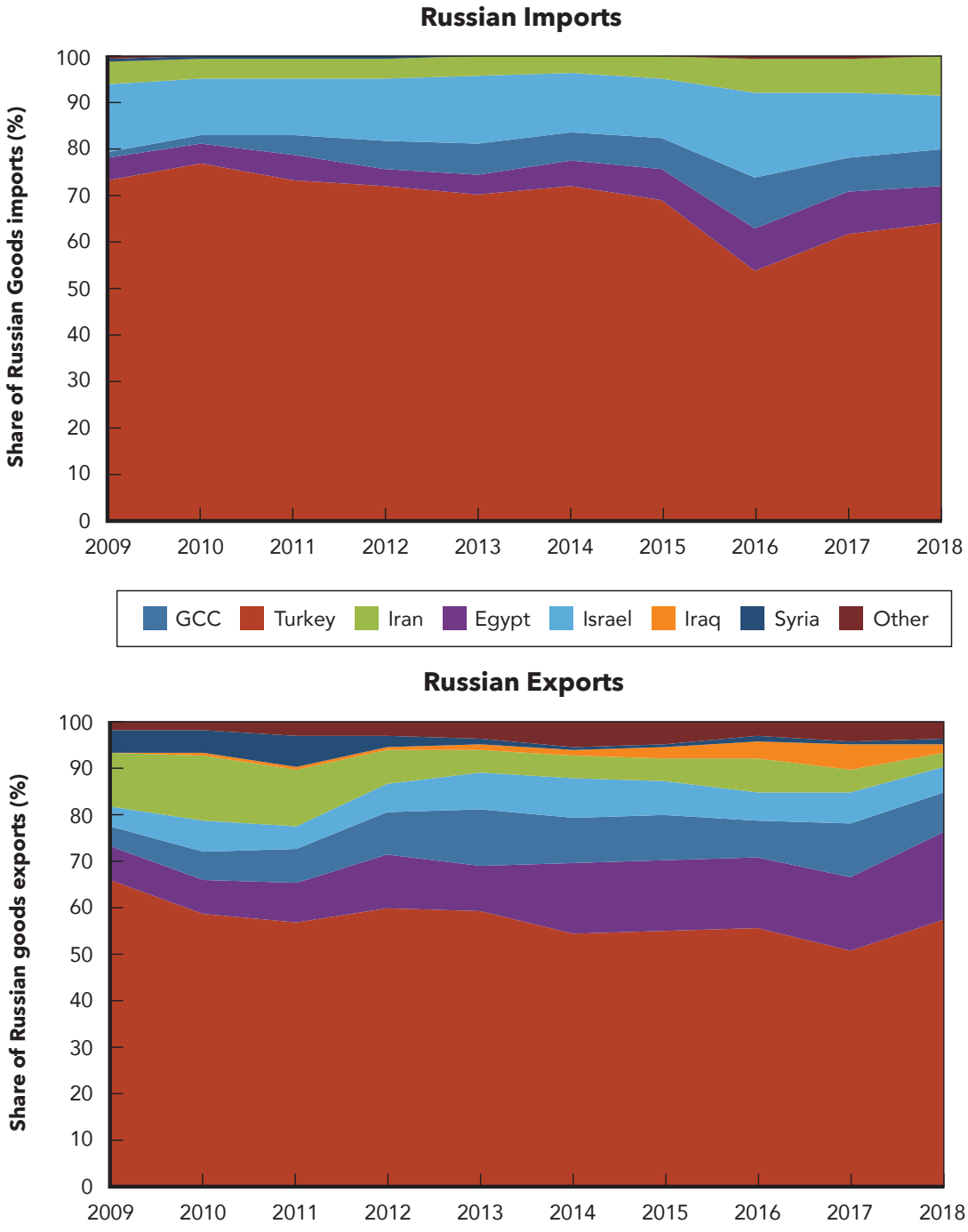
As with imports, Russian exports to the region are strongly tilted toward Turkey, which received an annual average of 57.2 percent of all Russian goods exports to the region during the period. Israel is a much less important recipient of Russian exports, taking an annual average of only 5.2 percent. Aside from those two countries, these figures provide evidence of changing relationships. The share of Russian exports to Egypt rose from 7.3 percent in 2009 to 19.0 percent in 2018, making it the second leading recipient that year. Likewise, the share to the GCC rose, but to a much lower degree, moving from 4.3 percent in 2009 to 11.8 percent in 2017 and falling to 8.5 percent in 2018.

Russian imports are chiefly manufactured goods, which constituted an average of 50.2 percent of total imports between 2009 and 2018, followed by food and live animals, which constituted an average of 31.5 percent of total imports, and then chemicals and related products, at 13.5 percent.[157] This explains the predominance of Turkey and Israel in Russia's import statistics. Both economies are more advanced than those of their neighbors and have sophisticated manufacturing sectors. Turkey was the source of more than 80 percent of Russia's manufacturing imports from the region for every year from 2009 to 2018 except for two; Israel was always the second-leading source, peaking at 15.8 percent in 2016. Furthermore, Turkey has a high level of agricultural exports and was the leading source of Russia's food and

[156] The Russia trade totals are from the United Nations Comtrade database, (undated; retrieved on several dates between October 2019 and September 2020). The Middle East worldwide totals are from WDI (World Bank, undated; data retrieved on September 8, 2020) and are "Merchandise exports (current US$); TX.VAL.MRCH.CD.WT" and "Merchandise imports (current US$); TM.VAL.MRCH.CD.WT."

[157] Manufactured goods include SITC 6, "manufactured goods classified chiefly by material"; SITC 7, "machinery and transport equipment"; and SITC 8, "miscellaneous manufactured articles." "Food and live animals" is SITC 0, and "chemicals and related products" is SITC 5.

Figure 3.11
Russian Goods Trade with the Middle East, 2009–2018, Share of Total to the Region



SOURCE: United Nations Comtrade Database, undated. Data retrieved on several dates between October 2019 and September 2020.
NOTES: *Other* refers to Jordan, Lebanon, West Bank and Gaza, and Yemen. The top chart shows Russian goods imports from the region. The bottom chart shows Russian goods exports to the region.

live animal imports from the Middle East every year from 2014 through 2018. In earlier years, Israel led in 2009 and 2013, and Iran led from 2010 to 2012.

Russia's exports include fuels, averaging 32.3 percent over the decade from 2009 through 2018, manufactured items, averaging 30.8 percent, and food and live animals, averaging 14.0 percent.[158] Turkey was the leading destination for Russian exports of fuels every year; Israel was often in second place, although far behind because its economy is much smaller than that of Turkey. Other larger fuels recipients were Egypt, Syria from 2009 through 2011, and Lebanon starting in 2013, with much of that fuel likely moving onward to Syria. Turkey was by far the leading recipient of Russian manufactured exports every year, with Egypt, Israel, Iran, and sometimes Saudi Arabia and Kuwait receiving sizable amounts. In addition, a large block of exports, rising to above 20 percent in each year from 2016 through 2018, were goods not otherwise classified.[159] (These might be military items.) Turkey was the top recipient in all three years, receiving between 61 percent and 71 percent of all such items Russia sent to the region in those years.

Although Russia is not an important destination for Middle Eastern goods exports, receiving less than 1 percent of all such exports, Russia is a more important supplier to the region, accounting for 2.8 percent of all imports received by the Middle East from the world.[160] The Middle East's share of exports to Russia relative to all Middle Eastern exports did not change appreciably throughout the decade. Imports from Russia relative to all imports were below 3 percent for most of the decade but rose to 3.3 percent in 2017 and 3.6 percent in 2018, a notable increase, although still low compared with China.

These proportions vary a great deal by country. Considering annual averages over the decade from 2009 through 2018, 3.4 percent of Turkey's exports, 1.6 percent of Egypt's exports, and 1.5 percent of Israel's exports went to Russia. For all other countries, those figures were below 1 percent.

In the other direction, imports from Russia averaged above 1 percent of all imports for eight countries: 7.3 percent for Turkey, 6.2 percent for Syria, 5.8 percent for Egypt, 3.6 percent for Iran, 2.5 percent for Israel, 2.3 percent for Yemen, 2.2 percent for Lebanon, and 1.4 percent for Jordan. These proportions largely stayed steady throughout the decade except in two

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[158] Russian export data as recorded in the United Nations Comtrade database (undated; retrieved on several dates between October 2019 and September 2020) had one anomaly. The sum of exports by single-digit commodity equaled the total recorded exports in 2010 through 2018. However, in 2009, the sum of exports by single-digit commodity amounted to only 72.5 percent of recorded total exports. This means either there are errors in the data, or some exports were not recorded by commodity.

[159] These goods are SITC 9, "commodities and transactions not classified elsewhere in the SITC," of which the majority are in SITC 93, "special transactions and commodities not classified according to kind."

[160] Bilateral data are from the United Nations Comtrade Database (undated; retrieved on several dates between October 2019 and September 2020). Each Middle Eastern country's total trade is from WDI (World Bank, undated, data retrieved on several dates between April and September 2020). WDI variables are "Merchandise exports (current US$)," variable TX.VAL.MRCH.CD.WT, and "Merchandise imports (current US$)," variable TM.VAL.MRCH.CD.WT. UN Comtrade is the best available database for bilateral goods trade data. However, other sources for country totals are more complete—Comtrade was missing totals for some countries. WDI had two options each for imports and exports: merchandise imports or exports (current US$), sourced from the World Trade Organization, and merchandise imports or exports by the reporting economy (current US$), estimated by World Bank staff using the International Monetary Fund's Direction of Trade Statistics database. Unfortunately, the Comtrade totals and the two WDI totals were often different, in some cases by more than 50 percent. We opted to use merchandise exports or imports (current US$) because these values were closest to the Comtrade data, our source of bilateral data.

notable cases. Imports from Russia in Egypt averaged 4.0 percent of all Egyptian imports from 2009 through 2013 but rose to 7.7 percent from 2014 through 2018, illustrating the growing trade relationship between the two countries. Imports from Russia in Lebanon averaged 1.4 percent in the first half of the decade and 3.0 percent in the second half, perhaps representing transshipment to Syria.

Aside from its growing trade relationship with Egypt and strong relationship with Turkey, Russia has taken one other step to increase its trade relations with the region. Russia is the leading country in the Eurasian Economic Union, an economic zone modeled on the European Union and consisting of Armenia, Belarus, Kazakhstan, and the Kyrgyz Republic. In 2018, the Eurasian Economic Union signed a reciprocal preferential trade deal with Iran, its first such agreement outside the territory of the former Soviet Union.[161] The agreement entered into force on October 27, 2019. This is one of 11 such reciprocal trade agreements that Russia has signed.[162]

Russia's Investment Relations with the Middle East

Determining Russian investment in the Middle East and Middle Eastern investment in Russia is not straightforward because much of this investment is channeled through third countries for tax and other purposes, so that the ultimate source is shielded. For example, of the $436 billion worth of the stock of Russian outward direct investment recorded as of December 31, 2018, $178 billion was recorded in Cyprus, or almost 41 percent.[163] Given the small economic size of Cyprus, it is unlikely that all of this money stayed there.[164] Likewise, of the total, almost $10 billion can be credited to the Middle East, of which $8.2 billion is in Turkey. The total could be higher because data for some countries are suppressed.[165]

Similarly, direct investment into Russia tends to go through Cyprus and other tax-friendly jurisdictions. As of December 31, 2018, Cyprus was recorded as the source of almost $136 billion worth of the stock of direct investment in Russia, or 27 percent of the total of $497 billion.[166] Of this total, only $2.3 billion can be credited directly to investors from the Middle East, although this total might be higher because data for some countries are suppressed.[167]

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[161] World Trade Organization, 2020.

[162] Technically, this is one of 11 such deals for which Russia has provided the World Trade Organization with formal notification.

[163] Bank of Russia, "Direct Investment of the Russian Federation Abroad: Positions by Instrument and Partner County (Asset/Liability Principle)," spreadsheet (15e-dir-inv.xlsx), February 28, 2020b.

[164] In 2018, GDP in Cyprus totaled $25 billion. Among our Middle Eastern set, the Palestinian territories had the lowest GDP that year (at $14.6 billion) and Syria was next (at $22.0 billion). All others, even Yemen, had GDPs above that of Cyprus. World Bank, undated, data retrieved February 27, 2020 and May 19, 2020.

[165] Bank of Russia, 2020b. Data are suppressed for Iran, the Palestinian Authority, and Saudi Arabia for confidentiality reasons. However, investment in Saudi Arabia totaled only $1 million as of December 31, 2017, and only $2 million as of September 30, 2019, so the total would have been unlikely to be much different at the end of 2018.

[166] Bank of Russia, "Direct Investment in the Russian Federation: Positions by Instrument and Partner County (Asset/Liability Principle)," spreadsheet (dir-inv_in_country_1_e.xlsx), February 28, 2020a.

[167] Bank of Russia, 2020a. Data for Iran and Qatar are suppressed for confidentiality reasons, so the actual total for the Middle East is unknown. Of the $2.3 billion that can be credited to the region, the total for Turkey, the largest source of FDI with available data, was $1.3 billion. Generously assuming that the totals from Iran and Qatar were each twice that of this largest identifiable source country, the total from the Middle East would have still been only $7.5 billion, or 1.5 percent of the total. However, investment from the Middle East might be much higher if funds were to be channeled through Cyprus or other tax-friendly jurisdictions.

Despite the poor quality of data on realized, bilateral foreign direct investment, other sources also suggest that Russian investment activities with the Middle East have been low. One study used the foreign assets of the 20 largest Russian transnational corporations in 2009 as a proxy to measure foreign direct investment and found that only 1 percent of those assets were in the Middle East and North Africa and only 11 out of almost 800 foreign affiliates were in that region.[168]

Despite that, Russia has worked assiduously to strengthen investment relations.[169] One sign of this is partnerships that the Russian Direct Investment Fund, Russia's sovereign wealth fund, has established with investing entities in seven Middle Eastern countries.[170] These agreements are largely aimed at increasing investment in Russia, although some also appear to be aimed at investments in the Middle East. These agreements include a 2014 partnership with Renaissance Holdings of Turkey to develop projects in Russia; an agreement in 2015 to establish an Egyptian investment fund with the Egyptian Ministry of Investment; partnerships with both the Public Investment Fund and the Saudi Arabian General Investment Authority in Saudi Arabia; a partnership with the Kuwait Investment Authority started in 2012 and increased in 2015; an agreement with Mumtalakat, the investment arm of the Kingdom of Bahrain, in 2014; an agreement with the Qatar Investment Authority; and a co-investment fund established in 2013 with Mubadala of Abu Dhabi, UAE.[171]

How much investment these partnerships have actually completed is unclear. As we discuss in the next subsection, Russian companies have been investing in the Middle East in selected sectors. And Russia is continuing to seek investment, largely through the Russian Direct Investment Fund. Some potential deals have fallen through, such as an investment by Saudi Aramco into a Russian liquefied natural gas project; others have taken time to develop, such as a joint petrochemical facility.[172] However, indications are that Gulf investors, at least, are more interested in U.S. technology markets than Russian companies.[173]

Sector Trade and Investment Relations: Energy and Food

Beyond the trade and investment numbers, Russia plays an important role in Middle Eastern energy politics, both through its cooperation with OPEC to set oil prices and through invest-

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[168] Alexey Kuznetsov, Anna Chetverikova, and Natalia Toganova, "Investment from Russia Stabilizes After the Global Crisis," Institute of World Economy and International Relations (IMEMO) of Russian Academy of Sciences and Vale Columbia Center on Sustainable International Investment, June 23, 2011.

[169] Sladden et al., 2017; Wasser, 2019.

[170] Russian Direct Investment Fund, "RDIF Partnerships," webpage, undated.

[171] Russian Direct Investment Fund, "Kuwait's Sovereign Wealth Fund Doubles Its Investment with RDIF to $1 Billion," press release, November 10, 2015c; Russian Direct Investment Fund, "Qatar Fund Commits $2 Billion Investment to Russia: RDIF CEO," press release, May 23, 2014b; Russian Direct Investment Fund, "RDIF and Renaissance Holding to Develop Projects Across Russia's Regions," press release, December 1, 2014c; Russian Direct Investment Fund, "RDIF Attracts Major Investment from Middle East in the Russian Economy: Saudi Arabia's Sovereign Wealth Fund to Commit USD 10 Bn," press release, July 7, 2015b; Russian Direct Investment Fund, "RDIF Mumtalakat to Strengthen Economic and Investment Cooperation Between Bahrain and Russia, Mumtalakat CEO to Join International Advisory Board of RDIF," press release, April 29, 2014a; Russian Direct Investment Fund, "Russian Direct Investment Fund and Egyptian Ministry of Investment to Develop Investment Collaboration," press release, February 10, 2015a; Russian Direct Investment Fund, "Russian Direct Investment Fund and Mubadala Establish Co-Investment Fund," press release, June 20, 2013.

[172] Henry Foy, "Russia Looks to Translate Gulf's Warm Welcome to Cold Cash," *Financial Times*, October 23, 2019.

[173] Foy, 2019.

ments in exploration and production in the region. With its economy and federal budget dependent on energy exports and with global downward pressure on oil prices since 2014, Russia has sought to stabilize energy markets. Russia's cooperation with Saudi Arabia on oil production is a notable example. In November 2016, Putin helped to broker an agreement between Iranian Supreme Leader Ayatollah Khamenei and Saudi King Salman to cut oil production to stabilize world oil prices. Following this agreement, Russia helped strike a deal between OPEC and non-OPEC producers. As a result, the participating oil producers, including Russia, cut oil production, which raised oil prices.[174] In December 2018, the participants agreed to reduce oil production during the first half of 2019 by 1.2 million barrels per day from the October level.[175] This OPEC-Plus deal continued to operate until its breakdown in March 2020, compounding a demand crash caused by the effects of COVID-19, emanating out of China.[176] With the intercession of the United States, OPEC and non-OPEC producers then reached a new deal in April 2020.[177]

Policy coordination in natural gas is much less developed. Russia, Iran, and Qatar are among the world's largest producers of natural gas (the United States is number one, and Canada is number four).[178] As early as 2002, Putin called for the creation of a "gas OPEC," but political differences among gas-producing countries and the fragmented nature of world gas markets prevented such an institution from taking shape.[179]

Russia is most active in oil and gas exploration in countries that have been unable to develop their oil and gas resources because of war and instability. Russian energy companies are most active in Iraq, where Gazprom-Neft is developing three large gas fields and Lukoil is developing the West Qurna-2 and Eridu fields. Tatneft worked in Syria before the outbreak of the civil war and plans to return after the situation is stabilized. Russian companies are also expected to participate in gas production in Egypt and Lebanon.[180] Russia has also gotten involved in other resource plays, such as phosphates in Syria, which has one of the largest phosphate reserves in the world.[181]

Russia also has been playing an increasingly important role in nuclear energy in the Middle East. The Bushehr nuclear reactor in Iran, which Russia agreed in 1995 to complete, became fully operational in 2012. Russia is now building the Bushehr-2 and Bushehr-3 nuclear reactors.[182] In November 2015, Russia and Egypt signed an agreement regarding construction of a nuclear power station. Russia has also discussed cooperation in nuclear energy with Jordan (although that has been canceled) and Saudi Arabia. Russia's willingness to finance the con-

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[174] Trenin, 2018, pp. 106, 126.

[175] Zviagelskaya and Surkov, 2019, p. 15.

[176] Rania El Gamal, Alex Lawler, and Olesya Astakhova, "OPEC's Pact with Russia Falls Apart, Sending Oil into a Tailspin," Reuters, March 6, 2020.

[177] Krauss, 2020.

[178] Data are for 2018. BP, 2019.

[179] Trenin, 2018, p. 127.

[180] Zviagelskaya and Surkov, 2019, p. 15.

[181] Chloe Cornish, Asser Khattab, and Henry Foy, "Moscow Collects Its Spoils of War in Assad's Syria," *Financial Times*, September 1, 2019.

[182] Trenin, 2018, p. 129.

struction of nuclear power stations makes it an attractive partner.[183] Despite all the dealmaking, as of April 2020, Russia had one nuclear plant actually operating in the region. It also had one under construction, five under contract, one ordered, and one canceled proposal.[184]

Finally, Russia plays a role in the Middle East's food consumption, especially through grain exports. From 2009 through 2018, food, live animals, and animal and vegetable oils constituted, on average, 16.6 percent of Russia's goods exports to the region.[185] At least seven countries covered in this report are large-scale importers of Russian grain: Iran, Lebanon, Oman, Saudi Arabia, Turkey, the UAE, and Yemen. Egyptian imports are especially striking: Egyptian demand for Russian grain has been growing for more than 15 years, with Egypt becoming Russia's largest foreign grain purchaser in 2017.[186] Saudi Arabia is a top importer of Russian barley, which has led in part to its interest in investing in Russian agricultural projects.[187] Overall food exports to Egypt and Turkey are especially notable. Between 2009 and 2018, these two countries accounted for between 54 percent and 67 percent of all Russian food exports to the region.[188]

Russian Military Activities in the Middle East

In Russia's view, the geographic proximity of its southern flank to the Middle East provides one reason for Russia to have a direct stake in the region's security.[189] For example, in remarks after a meeting between Russia and the GCC states, Lavrov noted that Russia's "geographical, historical and cultural proximity to the region, as well as the inadmissibility of an irresponsible approach to the future of humanity—encourage us to do all we can to avoid scenarios where force or threats of force are used."[190]

Although its intervention in the Syrian civil war marked a dramatic change in its involvement in regional security, Russia maintains several security interests in the region. In accordance with its foreign policy principles and stated priorities, these interests are counterterrorism, conflict resolution, and nuclear nonproliferation, which are also common themes in its senior leader engagement throughout the region.[191] Furthermore, Russia has a strong interest in sales of arms to the region. Russian officials and experts told us that Russia views weapon sales as a legitimate area of competition with the United States and as a way of creating a wedge between the United States and countries in the Middle East that buy U.S. arms. The Syria

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[183] Zviagelskaya and Surkov, 2019, p. 15.

[184] World Nuclear Association, *Nuclear Power in Russia*, London, April 2020.

[185] United Nations Comtrade Database, undated (data retrieved August 28, 2020).

[186] Zviagelskaya and Surkov, 2019, p. 16.

[187] Russian Direct Investment Fund, 2015b.

[188] United Nations Comtrade Database, undated (data retrieved August 28, 2020).

[189] Bekkevold, 2019, p. 144.

[190] Sergey Lavrov and Abdullah Al Nahyan, "Russian Foreign Minister Sergey Lavrov's Remarks and Answers to Media Questions at Joint Press Conference with UAE Foreign Minister Abdullah Al Nahyan After First Ministerial Meeting of the Strategic Dialogue Between Russia and the Cooperation Council for the Arab States of the Gulf, Abu Dhabi, November 1, 2011," Ministry of Foreign Affairs of the Russian Federation, news release, November 2, 2011.

[191] Russian Federation, 2016.

intervention, which demonstrated both Russian weaponry and commitment to a partner, has helped Russia in its pursuit of arms sales.[192]

The Syrian Intervention as an Exemplar of Russian Security Interests

Russia's decision to intervene in the Syrian civil war reflected a belief among officials that Russia needed to become involved in the conflict to secure its security interests—both in the country and at home. Russian officials feared that the collapse of the Assad regime would lead to regional instability and create an opening for radical Islamist forces that might spread into Russia's periphery or into Russian territory itself. For example, in an interview in 2015, Putin said that the destruction of the Assad government would "create a situation which you can witness now in the other countries of the region or in other regions; for instance, in Libya, where all the state institutions are disintegrated."[193] Likewise, in an interview several days later, Lavrov noted that "we cannot allow the state of Syria to fail. Because the alternative—if we look at this now—is ISIL, Caliphate, and we would forget about the Syria we know now—Syria which has been home for Muslims, both Shi'a and Sunni; home for Christians, for Druses, Armenians; Syria which has always been multiethnic, multiconfessional—cradle of this dialogue of civilizations, cradle of coexistence of civilizations."[194]

A reported 3,200 Russian nationals have traveled to Syria or Iraq since 2014, sparking fears of foreign fighter returnees exporting radical ideology into Russian territory and what it calls its Near Abroad.[195] By September 2015, Russian authorities had concluded that only military intervention could save Assad's regime from falling. As a long-standing client of Moscow, Assad's ouster would reduce Russian influence in Syria and, in effect, diminish its standing in the region.[196] Furthermore, the removal of Assad from power put access to Tartus (Russia's warm water port and reported intelligence outpost) at risk.[197] This port was one of Russia's few military outposts in the Middle East and is useful for its ability to gain a greater foothold in the Mediterranean. As a result of Russia's intervention in Syria, it has solidified its military presence in the country, secured its access to Tartus, and established a permanent presence at Hmeimim Air Base.[198] These bases are important to Moscow's ability to project military power in the region.

Arms Sales

Russia also plays a role in Middle Eastern security through arms sales. After the Cold War, Russia lost its position in regional arms markets. In recent years it has once again become a significant provider of military and weapon technology to the region. As shown in Figure 3.3.,

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[192] Meeting with a Russian security expert, September 2019.

[193] "Vladimir Putin Addresses Russia's Intentions in Syria," CBS News, September 24, 2015.

[194] Ministry of Foreign Affairs of the Russian Federation, "Foreign Minister S. Lavrov's Interview with the 'Russia Today' TV Channel, New York," September 29, 2015. *ISIL* refers to the Islamic State in Iraq and the Levant, also known as the Islamic State in Iraq and Syria.

[195] Catherine A. Fitzpatrick, "How Many Russians Are Fighting for ISIS? A Brief History of the Kremlin's Arbitrary Numbers," *The Interpreter*, December 20, 2016.

[196] Kozhanov, 2017, pp. 113–114; Rumer, 2019.

[197] "New Russia-Syria Accord Allows Up to 11 Warships in Tartus Port Simultaneously," *Deutsche Welle*, January 20, 2017.

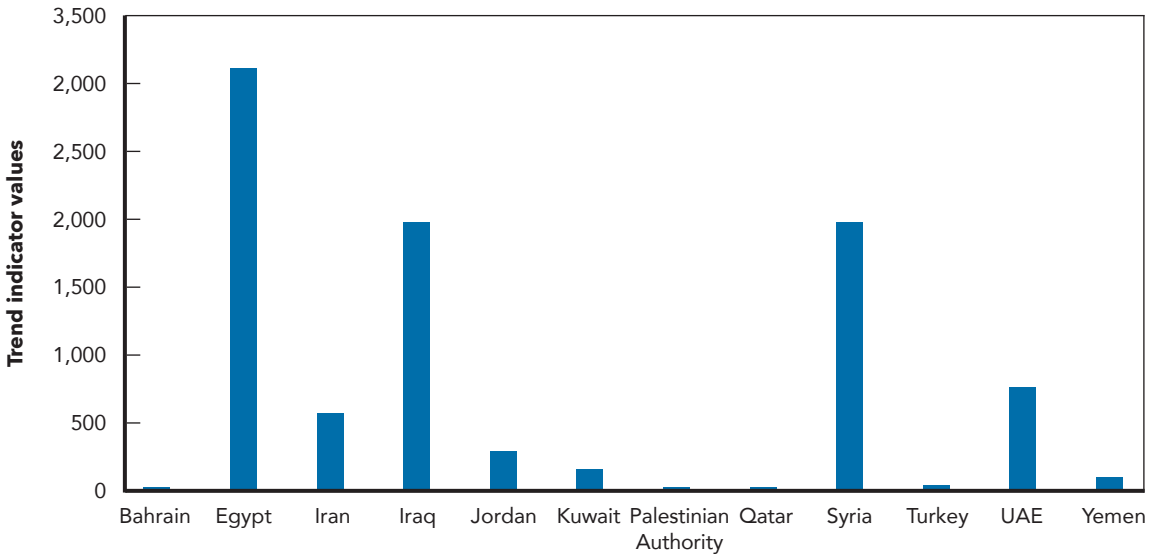
[198] Polina Ivanova, "Russia Establishing Permanent Presence at Its Syrian Bases: RIA," Reuters, December 26, 2017; "New Russia-Syria Accord Allows . . . ," 2017.

Russian arms sales to the Middle East far outstrip sales by China. Among Russia's most-important arms markets in the region are Egypt, Iraq, and Syria (Figure 3.12).

During the decade from 2009 through 2018, almost 35 percent of all Russian arms sales to the region went to Egypt.[199] Most of these sales occurred from 2016 through 2018. In those years, sales to Egypt totaled 54 percent of all Russian sales to the region; in 2017, that figure was almost 87 percent. Russia's sales to Egypt, a longtime U.S. customer, reflect the fact that Russia was able to grasp a moment of opportunity and step in as an alternative weapon provider when the United States placed a hold on arms sales because of human rights concerns over Cairo's military coup that overthrew the democratically elected Muslim Brotherhood government.[200]

As with sales to Egypt, sales to Iraq largely occurred in the second half of the decade from 2009 through 2018, when Iraq was confronted with its war against ISIS and with reconstituting its military forces. For the decade, 22 percent of Russia's arms sales to the region went to Iraq. Finally, sales to Syria occurred largely in the runup to its civil war and continued into the

Figure 3.12
Russian Arms Transfers to the Middle East, 2009–2018



SOURCE: Stockholm International Peace Research Institute, 2019.
NOTES: The *trend indicator value* is a measure of production costs and meant to represent the transfer of military resources rather than the sales price of those resources. Data are what SIPRI terms *major weapons*: aircraft, air defense systems, antisubmarine warfare weapons, armored vehicles, artillery, engines, missiles, sensors, satellites, ships, turrets for selected armored vehicles and ships, and air refueling systems as used on tanker aircraft.

[199] Stockholm International Peace Research Institute, 2019. SIPRI records arms sales in units of trend indicator values. The *trend indicator value* is a measure of production costs and is meant to represent the transfer of military resources rather than the sales price of those resources. Data encompass what SIPRI terms *major weapons*—aircraft, air defense systems, antisubmarine warfare weapons, armored vehicles, artillery, engines, missiles, sensors, satellites, ships, turrets for selected armored vehicles and ships, and air refueling systems as used on tanker aircraft.

[200] Dorell, 2014; Gordon and Landler, 2013; Henry Meyer and Illya Arkhipov, "Russia Strikes First Bahrain Arms Deal After U.K., French Bans," Bloomberg, August 25, 2011; Jim Wolf, "U.S. Delays Bahrain Arms Sale Pending Rights Probe," Reuters, October 19, 2011.

war's early stages. For the decade, another 22 percent of Russia's arms sales to the region went to Syria—but, of all sales to Syria, 85 percent took place from 2010 through 2013.

The Syria conflict provided Russia with an opportunity to show off its high-end weapon capabilities in combat and to generate more sales. Then-Deputy Prime Minister for the Defense Industry Dmitry Rogozin called this Syria's "special effect," suggesting that that combat use was "the best criterion for evaluating our weapons."[201] These systems include the S-300 and S-400 air defense systems, which have become the crown jewels of Russian arms exports.[202] Most notably, Turkey has purchased the S-400 from Russia—a capability that a senior U.S. defense official described as "an absolute no-go."[203] And in July 2019, over strong objections from the United States and other NATO allies, Turkey began to take delivery of the system.[204] Several other countries, such as Qatar and Saudi Arabia, have expressed interest in purchasing this system.[205]

Security Cooperation

Russia's security interests in the region are also illustrated by senior leader visits and joint exercises. Visits by senior security and military leaders reflect the fact that Russia maintains friendly relations with all countries in the region, even countries that are adversaries with each other (Figure 3.13). Along with Syria, where Russia is engaged in hostilities, Israel and Iran have received the most visits, at five each. During the decade, Israel received visits from the secretary of the Security Council, the director of the Foreign Intelligence Service (SVR, for Sluzhba Vneshnei Razvedki [Служба внешней разведки]), the defense minister, and the chief of the Russian general staff. Visits to Iran—at least those with a public record—were paid by the secretary of the Security Council, the defense minister, and the chief of the general staff. Egypt and Turkey also received a relatively large number of visits.

As already noted, defense cooperation with Egypt has accelerated, exemplified by arms sales. Turkey reflects a more complicated relationship: It is Russia's Astana group partner in the Syria war and a purchaser of Russian arms, but it is also one of the Assad government's leading state adversaries in Syria and occupies several large swaths of land in Northern Syria.

The interactions of Russia's top security personnel in the region were modest in the early years of the decade from 2009 through 2018. Russia in 2009 was dealing not only with the global financial crisis but with a large decline in oil prices. Immediately afterward, the Arab Spring and the Syrian civil war broke out. Russia's engagement with the entire region accelerated after it entered the Syrian war. More than 85 percent of its security leader visits took place starting in 2015.

These visits peaked in 2017. In that year, the defense minister went to Egypt twice and to Israel, Qatar, Syria, and Turkey; the chief of the general staff went to Turkey twice and to

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[201] "Rogozin: VKS Actions in Syria Led to an Increase in the Number of Arms Contracts [Rogozin: deistviya VKS v Sirii povlekli rost chisla kontraktov na vooruzheniya, Рогозин: действия ВКС в Сирии повлекли рост числа контрактов на вооружения], *RIA Novosti*, July 3, 2017.

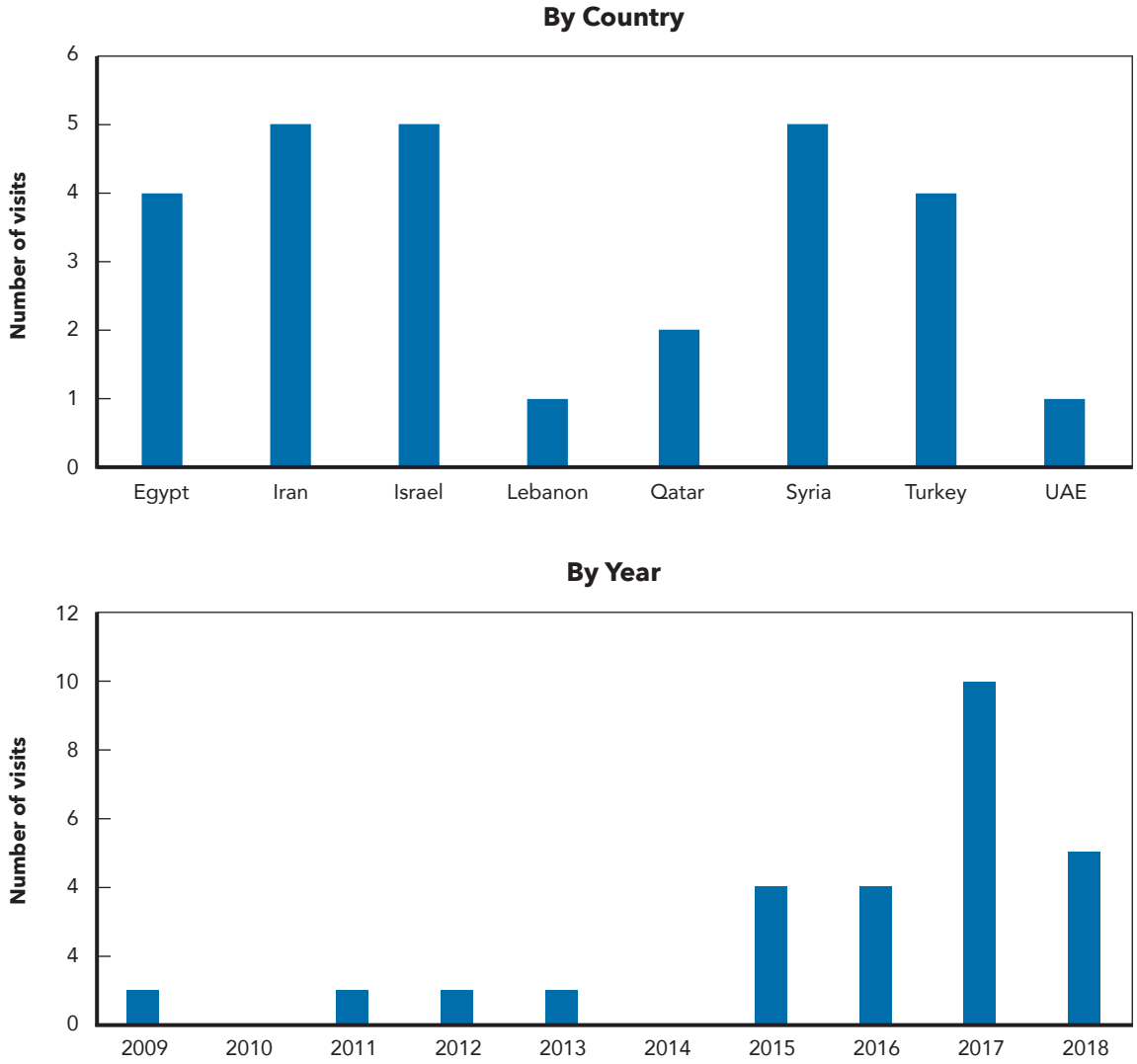
[202] Oriana Pawlyk, "Russia Deploys More S-400 Missile Systems to Syria," Military.com, January 26, 2018; Phil Stewart, "U.S. General Slams Russia's Deployment of S-300 Missiles in Syria," Reuters, October 4, 2018.

[203] Jack Detsch, "Pentagon Official Says 'Campaign' of Iranian Threats Caused US Middle East Surge," *Al-Monitor*, June 11, 2019a.

[204] Jim Garamone, "Turkey Must Drop Russian S-400 to Stay in F-35 Program, DOD Official Says," U.S. Department of Defense, July 10, 2019; "Turkey Defies US as Russian S-400 Missile Defence Arrives," BBC News, July 12, 2019.

[205] "Russia, Saudi Arabia Hold Additional Consultations on S-400 Supplies–Rosoboronexport," TASS, February 17, 2019; Vladimir Soldatkin, "Russia and Qatar Discuss S-400 Missile Systems Deal TASS," Reuters, July 21, 2018.

Figure 3.13
Russian Senior Security, Military, and Intelligence Leader Visits to the Middle East, 2009–2018



SOURCES: Information on visits by Russian officials to Middle Eastern countries from 2009 through 2018 was compiled through Google searches of government websites in Russia, international media sources, media sources in Russia, local media sources in the Middle East, websites of foreign policy journals, think tank websites, and others.
NOTES: Senior security, military, and intelligence leaders are the secretary of the security council, the defense minister, the chief of the general staff, and the heads of the SVR and the GRU intelligence agencies. The Main Directorate (GU, or Glavnoe Upravlenie, Главное управление) is more commonly known as the GRU (Glavnoe Razvedyvatelnoe Upravlenie, Главное разведывательное управление), or Main Intelligence Directorate, and is the Russian military intelligence agency (Global Security.org, "Main Intelligence Administration [GRU], Glavnoye Razvedyvatelnoye Upravlenie [GRU]," webpage, undated; Ministry of Defense of the Russian Federation [Ministerstvo oborony Rossiiskoi Federatsii, Министерство обороны Российской Федерации], "Main Administration of the General Staff of the Armed Forces of the Russian Federation [Glavnoe upravlenie General'nogo shtaba Vooruzhennykh Sil Rossiiskoi Federatsii, Главное управление Генерального штаба Вооруженных Сил Российской Федерации], webpage, undated-b). Several visits are ambiguous. A visit by the chief of the Russian General Staff to Turkey in 2017 was reported as having happened secretly, but there was scant evidence of it. Visits by the head of the GRU to Lebanon in 2016 and by the head of the SVR to Syria also appear in the media but are not as well documented as other visits.

Iran; and the director of the SVR went to Israel. The participation of senior leaders also broadened during that period. All but one of the six visits by intelligence chiefs occurred in 2015 or later; four of the six visits by the head of the Security Council occurred in 2015 or later; ten of the 11 visits by the defense minister occurred in 2015 or later; and all five visits by the chief of the general staff occurred in 2016 or later. This reflects both the growing role of Russia in the security sphere following its intervention in Syria and its embrace of regional events, such as the 2017 Gulf rift, to reinforce its position as a security partner to regional states.

Along with arms sales and senior leader visits, joint exercises in the region have also increased since 2015. Russia had held six exercises with regional partners as of August 2015, starting with a naval exercise in the Caspian Sea with Iran.[206] During a visit of Russia's Caspian Flotilla to the Iranian port of Bandar Anzali, two Russian ships and three Iranian ships conducted a joint exercise to maneuver and manage a detachment of ships in congested conditions. Russia also conducted one naval exercise with Turkey on the Black Sea in April 2017, with three Russian ships and two Turkish ships participating.[207]

But the most notable pattern with exercises is that Russia held four with Egypt. Along with increasing arms sales to Egypt, these exemplify how Russia has capitalized on historic relations, opportunities opened up by both political changes and changes in U.S. engagement, and the priorities of partner nations. These exercises focused on the protection of Mediterranean sea lanes and counterterrorism and featured a demonstration use of Russian equipment, highlighting areas of mutual importance.[208]

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[206] Ministry of Defense of the Russian Federation [Ministerstvo oborony Rossiiskoi Federatsii, Министерство обороны Российской Федерации], "Ships of the Caspian Flotilla Return to Astrakhan After Record-Breaking Military Service" [Korabli Kaspiiskoi flotilii vernulis' v Astrakhan' posle rekordnoi po prodolzhitel'nosti boevoi sluzhby, Корабли Каспийской флотилии вернулись в Астрахань после рекордной по продолжительности боевой службы]," Press Service of the Southern Military District [Press-sluzhba Yuzhnogo voennogo okruga, Пресс-служба Южного военного округа], August 24, 2015b.

[207] Ministry of Defense of the Russian Federation [Ministerstvo oborony Rossiiskoi Federatsii, Министерство обороны Российской Федерации], "A Joint Exercise with the Ships of the Russian Black Sea Fleet and the Turkish Navy Took Place in the Black Sea" [V Chernom more proshlo sovmestnoe uchenie s korablyami ChF Rossii i VMS Turtsii, В Черном море прошло совместное учение с кораблями ЧФ России и ВМС Турции], Press Service of the Southern Military District [Пресс-служба Южного военного округа, Press-sluzhba Yuzhnogo voennogo okruga], April 5, 2017a.

[208] Ministry of Defense of the Russian Federation [Ministerstvo oborony Rossiiskoi Federatsii, Министерство обороны Российской Федерации], "At the Joint Exercise 'Defenders of Friendship 2017,' Egyptian Paratroopers Will Carry Out Combat Training Tasks with the 'Warrior' Russian Military Equipment" [Na sovmestnom uchenii 'Zashchitniki druzhby-2017' egipetskie desantniki budut vypolnyat' uchebno-boevye zadachi v rossiiskoi boevoi ekipirovke 'Ratnik,' На совместном учении «Защитники дружбы-2017» египетские десантники будут выполнять учебно-боевые задачи в российской боевой экипировке 'Ратник,']," Department of Information and Mass Communications of the Ministry of Defense of the Russian Federation [Departament informatsii i massovykh kommunikatsii Ministerstva oborony Rossiiskoi Federatsii, Департамент информации и массовых коммуникаций Министерства обороны Российской Федерации], September 8, 2017b; Ministry of Defense of the Russian Federation [Ministerstvo oborony Rossiiskoi Federatsii, Министерство обороны Российской Федерации], "At the Port of Alexandria, Preparations Are Underway for the Russian-Egyptian Naval Exercise 'Bridge of Friendship—2015' [V portu Aleksandriya zavershaetsya podgotovka k provedeniyu rossiisko-egipetskogo voenno-morskogo ucheniya 'Most druzhby—2015,' В порту Александрия завершается подготовка к проведению российско-египетского военно-морского учения 'Мост дружбы—2015']," Department of Information and Mass Communications of the Ministry of Defense of the Russian Federation [Departament informatsii i massovykh kommunikatsii Ministerstva oborony Rossiiskoi Federatsii, Департамент информации и массовых коммуникаций Министерства обороны Российской Федерации], June 9, 2015a; Ministry of Defense of the Russian Federation [Ministerstvo oborony Rossiiskoi Federatsii, Министерство обороны Российской Федерации], "Joint Russian-Egyptian Counterterrorism Exercise 'Defenders of Friendship 2016' [Sovmestnoe rossiisko-egipetskoe antiterroristicheskoe uchenie 'Zashchitniki druzhby-2016,' Совместное российско-египетское антитеррористическое учение

Conclusion

Although neither China nor Russia appears to be seeking to displace or replace the United States as the security guarantor of the Middle East, both are actively contesting Washington by laying the groundwork for future competition in line with their respective interests and objectives. We recap in Figure 3.14 various forms of their engagement with the region. To date, both have sought cordial relations with all countries in the region. In the future, improved relationships could allow either country to play spoiler to U.S. interests and undermine U.S. policy objectives across the region. Beijing and Moscow have also attempted to diversify their economic and military relationships: Beijing places relatively more weight on the former; Moscow emphasizes the latter. This complementary approach has paved the way for cooperation between the two states. As a result, the United States remains the chief regional competitor for both China and Russia as of mid-2020.

For both China and Russia, the success or failure of their overtures in their respective areas of interest is dependent on regional states. Multiple countries have demonstrated a willingness to embrace China and Russia, often to diversify their options. These states have also engaged China and Russia as a hedge against the United States or to send a message of displeasure to Washington over an action or policy. For now, it is mutually convenient for China and Russia to be engaged in such a manner and play this game, but it does limit the depth of the relationships that both Beijing and Moscow can build in the Middle East.

Overall, China has invested more in pursuing economic engagement with regional states than in becoming entangled in regional security issues. Recognizing the benefits of the United States continuing to play the role of regional security guarantor, Beijing has sought to promote stability to maximize its economic benefits and to protect its investments in the region. That said, there are some examples of Chinese competitive behavior, particularly when seeking to fill a void left by the United States—for instance, by promoting the Chinese unmanned Wing Loong systems when the United States stopped selling UAVs for export-control reasons. China's continued reliance on oil imports from the Middle East and ever-growing investment and loan portfolio suggest that Beijing will continue to expand its influence in the region.

Russia, on the other hand, has increased its influence in the region through its emphasis on military engagement, most notably in Syria. Moscow's gamble on its Syrian intervention proved fruitful because the conflict allowed it to showcase weapons, demonstrate reliability to a key partner, and become a lead negotiator in deciding the future of the conflict. Regional states, particularly those seeking to diversify their security and send messages of displeasure to the United States, have noted Russia's gains and begun to develop closer political, economic, and security ties with Moscow. The decision to intervene in the Syrian civil war, however, occurred because of a unique confluence of political factors and enabling military arrangements, and thus might prove to be the exception rather than the rule for Russian military

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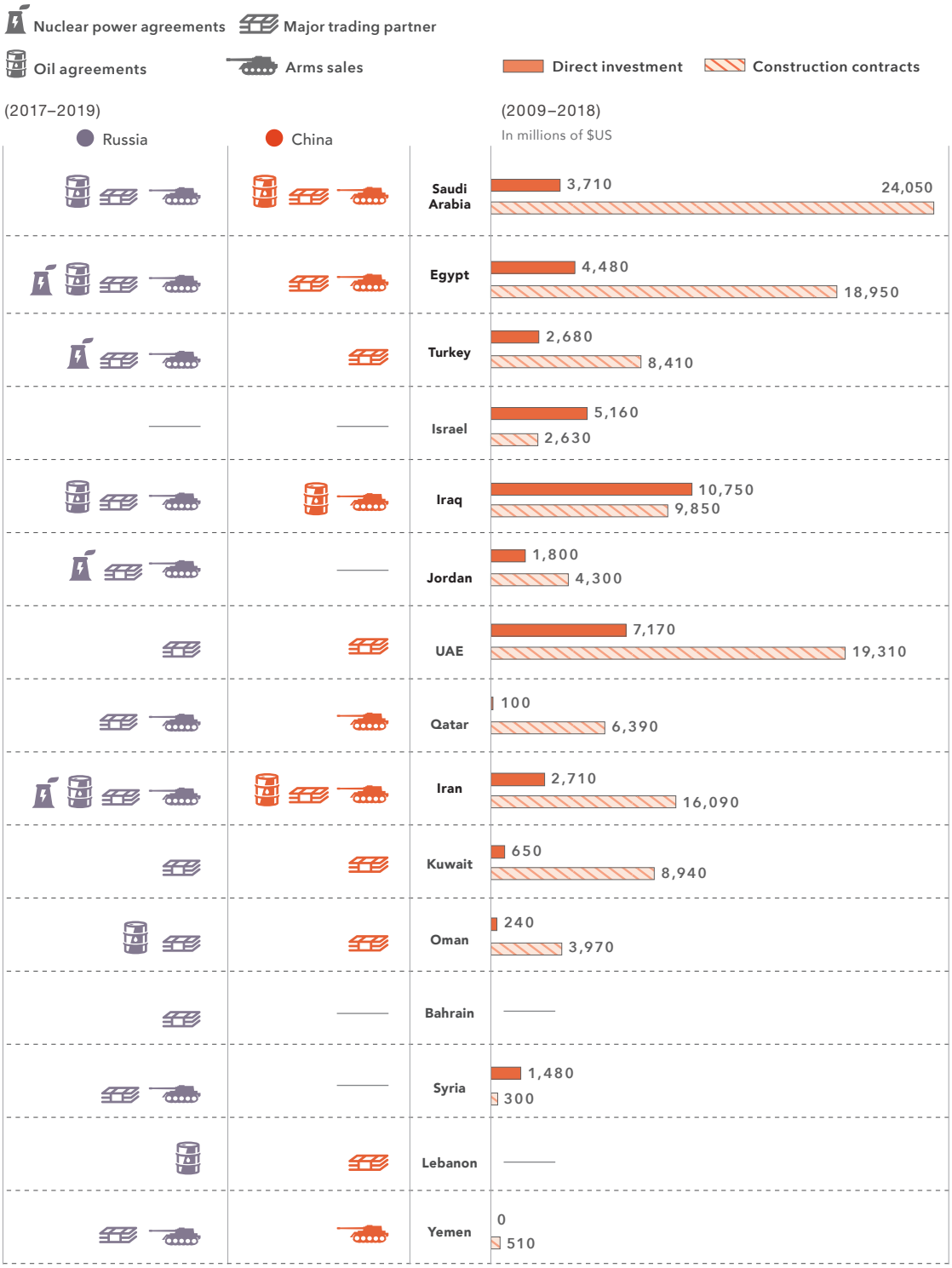
'Защитники дружбы-2016,']" press release, undated-a; Ministry of Defense of the Russian Federation [Ministerstvo oborony Rossiiskoi Federatsii, Министерство обороны Российской Федерации], "Russian Paratroopers Arrived in Egypt to Participate in the Joint Counterterrorism Exercise 'Defenders of Friendship 2018' [Rossiiskie desantniki pribyli v Egipet dlya uchastiya v sovmestnom antiterroristicheskom uchenii 'Zashchitniki Druzhby 2018,' Российские десантники прибыли в Египет для участия в совместном антитеррористическом учении 'Защитники Дружбы-2018']," Department of Information and Mass Communications of the Ministry of Defense of the Russian Federation [Departament informatsii i massovykh kommunikatsii Ministerstva oborony Rossiiskoi Federatsii, Департамент информации и массовых коммуникаций Министерства обороны Российской Федерации], October 14, 2018.

Figure 3.14
Chinese and Russian Engagements in the Middle East



SOURCES: Direct investment and construction contract data are from American Enterprise Institute and Heritage Foundation, undated. Arms sales, nuclear power agreements, major trading partner status, and oil agreements are from Ben Connable, *An Enduring American Commitment in Iraq: Shaping a Long-Term Strategy with Iraqi Army Partners*, Santa Monica, Calif.: RAND Corporation, PE-353-OSD, 2020.
NOTE: No data were listed for the Palestinian Territories.

activity in the region going forward.[209] Ultimately, Russia's improved security ties to the region (as a result of deepening military ties to such key states as Egypt and solidifying its gains in Syria, including basing and access agreements) suggest that Russia seeks long-term influence on regional politics and that it views military activities as the means to achieve this influence.

[209] For a discussion of the various factors that led to Russia's intervention, see Charap, Treyger, and Geist, 2019.

CHAPTER FOUR

Shaping Strategic Competition in the Middle East in the U.S. Interest

Although China and Russia have succeeded in increasing their influence in the Middle East since 2010, the United States is still the dominant external power and de facto security guarantor. China has prioritized economic engagement, particularly to ensure it continues to receive crucial hydrocarbon imports. In addition, the region serves as a node for its broader geoeconomic strategy in the form of BRI investments, with Iran playing a potentially pivotal role as a land-connectivity node. Russia's emphasis on military engagement has led to increased arms sales—at times displacing the United States—and to improved military infrastructure and bilateral military relationships.

The exercise of U.S. influence and power can best be seen in the recent signing of the "Abraham Accords," the normalization agreements between Israel and Bahrain and between Israel and the UAE.[1] In contrast, although both China and Russia have strong relations with the Gulf countries and Israel, they have shown neither the willingness nor the ability to become involved in international disputes or to use their leverage in solving those disputes. Moreover, these normalization agreements were driven by multiple causes, including a desire for greater cooperation both to counter Iran and to foster economic advancement. But the agreements also likely came about as a result of U.S. urging—which might have come with additional U.S. guarantees—and to seek favor from the United States. Even with Chinese and Russian activities in the region, countries there have not shown a willingness to take risks in seeking favor from them. Similarly, China and Russia have not shown evidence of a willingness to offer guarantees that might lead to the settlement of international disputes.

Continued U.S. efforts in the Middle East—including the aforementioned Arab-Israeli normalization agreements—demonstrate that, despite attempts to refocus U.S. strategy away from the Middle East (the recent shifts found in the NDS and NSS and the "Rebalance to Asia" strategy espoused under the Obama administration), the United States still maintains vital interests in the region and behaves accordingly. Although the renewed focus on near-peer competitors in the latest strategic guidance might have turned U.S. attention and efforts toward Europe and the Indo-Pacific, the Middle East remains an arena for strategic competition and therefore requires U.S. involvement.

The emergence of a novel coronavirus (SARS-CoV-2) in China in late 2019 and the ensuing worldwide pandemic of COVID-19 could heighten this competition. The pandemic caused a global economic slowdown, hitting all major economies. Although the Chinese econ-

[1] White House, "The Abraham Accords Declaration," September 15, 2020d; United Arab Emirates and State of Israel, "Abraham Accords Peace Agreement: Treaty of Peace, Diplomatic Relations and Full Normalization Between the United Arab Emirates and the State of Israel," White House, September 15, 2020; White House, "Abraham Accords: Declaration of Peace, Cooperation, and Constructive Diplomatic and Friendly Relations," September 15, 2020e.

omy declined first—down 6.8 percent in the first quarter of 2020 compared with the same period a year earlier—China returned to growth in the second quarter, when the economies of Russia (–8.5 percent), the United States (–9.5 percent), the European Union (–14.4 percent), and the United Kingdom (–21.7 percent) all declined.[2] Projections in September 2020 identified China as the only major economy that would experience positive growth in 2020 and a further acceleration well beyond that of all developed-country economies in 2021.[3] Accordingly, as Middle Eastern economies struggle to recover, China will not only serve as a market for their exports but also be well placed to make further investments and loans or even provide aid to boost their economies.

China and Russia could also serve as sources of a COVID-19 vaccine. The United States could also serve as a source, but China has been far more aggressive about making clear that it will share the vaccine. As of September 2020, it had been testing a vaccine on its own population and announced that it would provide emergency doses to the UAE. In addition, Chinese pharmaceutical company Sinopharm was running trials in Jordan and Bahrain, and Egypt and Saudi Arabia had signed up to run phase-three trials.[4] Should the vaccine be first to market, be widely distributed, and work—without dire negative side effects—China's standing in the region could continue to rise and it could be further viewed as a reliable partner.[5]

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[2] Howard J. Shatz, "COVID-19 and Economic Competition with China and Russia," *War on the Rocks*, August 31, 2020. These figures have since been revised to –8.0 percent for Russia, –9.0 percent for the United States, –13.8 percent for the European Union, and –21.4 for the United Kingdom

[3] Organisation for Economic Cooperation and Development, *Coronavirus (COVID-19): Living with Uncertainty*, OECD Economic Outlook, Interim Report, September 2020.

[4] Eva Dou and Isabelle Khurshudyan, "China and Russia Are Ahead in the Global Coronavirus Vaccine Race, Bending Long-Standing Rules as They Go," *Washington Post*, September 18, 2020.

[5] Subsequent to the completion of research, new vaccine information developed rapidly. The U.S. Food and Drug Administration extended emergency use authorizations to three different vaccines: one developed by Pfizer and BioNTech (approved December 11, 2020); one developed by Moderna (approved December 18, 2020); and one developed by Johnson & Johnson (approved February 27, 2021). Two more vaccines developed by Western companies appeared to be effective—one developed by Oxford and AstraZeneca, the other by Novavax—and were on the path to widespread approval, with the Oxford-AstraZeneca vaccine approved for use in the United Kingdom in late 2020 and Europe in early 2021 (AstraZeneca, "AstraZeneca's COVID-19 Vaccine Authorised for Emergency Supply in the UK," press release, December 30, 2020; "Covid: EU Approves AstraZeneca Vaccine Amid Supply Row," BBC, January 29, 2021; Kathy Katella, "Comparing the COVID-19 Vaccines: How Are They Different?" Yale Medicine, February 27, 2021). At the same time, the Gamaleya National Center of Epidemiology and Microbiology in Russia had completed development of its Sputnik V vaccine, which was found to be as effective as the vaccines developed in the United States and Western Europe (Ian Jones and Polly Roy, "Sputnik V COVID-19 Vaccine Candidate Appears Safe and Effective," *The Lancet*, Vol. 397, No. 10275, February 2, 2021). In contrast, available data indicated that several Chinese vaccines were less effective (Fabian Schmidt, "Coronavirus: How Effective Are the Chinese Vaccines?" DW, February 1, 2021).

Nonetheless, both Russia and China aggressively rolled out their vaccines worldwide. As of February 2021, China had promised supply to more than 45 countries and territories, including at least seven in the Middle East, although it is unclear where the vaccines were actually being used (Huizhong Wu and Kristen Gelineau, "Chinese Vaccines Sweep Much of the World, Despite Concerns," Associated Press, March 2, 2021). More than 45 countries had approved the Russian vaccine, with Russia not only promising supplies but also planning to set up manufacturing facilities abroad (Colleen Barry and Daria Litvinova, "Russia to Make Sputnik V Vaccine in Italy, a First in EU," Associated Press, March 9, 2021; Kristyna Foltynova, "Sputnik V: The Story of Russia's Controversial COVID-19 Vaccine," Radio Free Europe/Radio Liberty, March 4, 2021). Although the United States was participating in the international rollout of COVID-19 vaccines and in international collaborations, its efforts were smaller and lower-profile than those of China and Russia, at least as of February 2021 (Ben Gittleson, "Biden to Announce US Will Donate $4 Billion for COVID-19 Vaccines for Poor Countries," ABC News, February 18, 2021). Given the rapidly evolving nature of the pandemic, vaccine efficacy, and future actions, it is not possible to estimate the ultimate consequences of Russia's or China's vaccine diplomacy, or the extent to which the United States will expand its participation in the international distribution of vaccines.

We have illustrated how China and Russia are actively competing with the United States in the Middle East across diplomatic, economic, and military dimensions. In describing their activities, we have noted where their efforts undermine or undercut U.S. policy and weaken Washington's influence in the region. To better illustrate this tripartite competition, we chart U.S. diplomatic, economic, and military activities in the region to understand how they compare with Chinese and Russian activities.

Comparing U.S., Chinese, and Russian Diplomatic, Economic, and Military Engagement in the Middle East

Diplomatically, Washington engages intensively at the senior leader level with almost every state in the region (Figure 4.1). Senior political and military leaders regularly travel to the region to engage with allies and partners on political issues and to visit U.S. troops located at bases and outposts throughout the region. Given this, U.S. high-level engagements in the region vastly outnumber Russian and Chinese visits. Chinese and Russian leaders do boast more visits to Iran and Syria—two countries with which the United States does not hold formal relations—nevertheless, the overall patterns of U.S. diplomatic activity show that Washington's engagement is greater (in numeric terms) than that of China and Russia.[6]

Economically, China surpasses both the United States and Russia in imports from and exports to the Middle East (Figure 4.2). However, the economic role of the United States is sizable and growing. The Middle East has proved to be a promising export market: U.S. exports to the region grew by 3.8 percent per year from 2009 to 2018, reaching $79 billion; imports grew 2.8 percent per year, reaching $86 billion. Although China has been the destination for 9.8 percent of all Middle Eastern exports on average from 2009 through 2018, the United States has been the destination for 7.5 percent. And although Chinese goods have accounted for 11.4 percent of all Middle Eastern imports on average during the decade, U.S. goods have accounted for 8.0 percent.

U.S. investors have maintained a strong interest in the Middle East. Although the direct investment position abroad of U.S. companies grew 5.9 percent annually worldwide from 2009 through 2018, it grew 6.7 percent annually into the Middle East.[7] It grew rapidly into Iraq (from a low base), the UAE, and Israel. In some countries, it had been high and continued to grow. By 2018, it totaled $85.3 billion, of which 88 percent was in five countries: Israel (32 percent), the UAE (20 percent), Saudi Arabia (13 percent), Qatar (12 percent), and Egypt (10 percent). However, this was still small relative to worldwide U.S. direct investment of almost $6 trillion, with investment in the Middle East amounting to 1.4 percent of that. In the other direction, direct investment from the Middle East into the United States grew more slowly than investment from the world as a whole, 5.6 percent versus 8.8 percent, respectively.[8]

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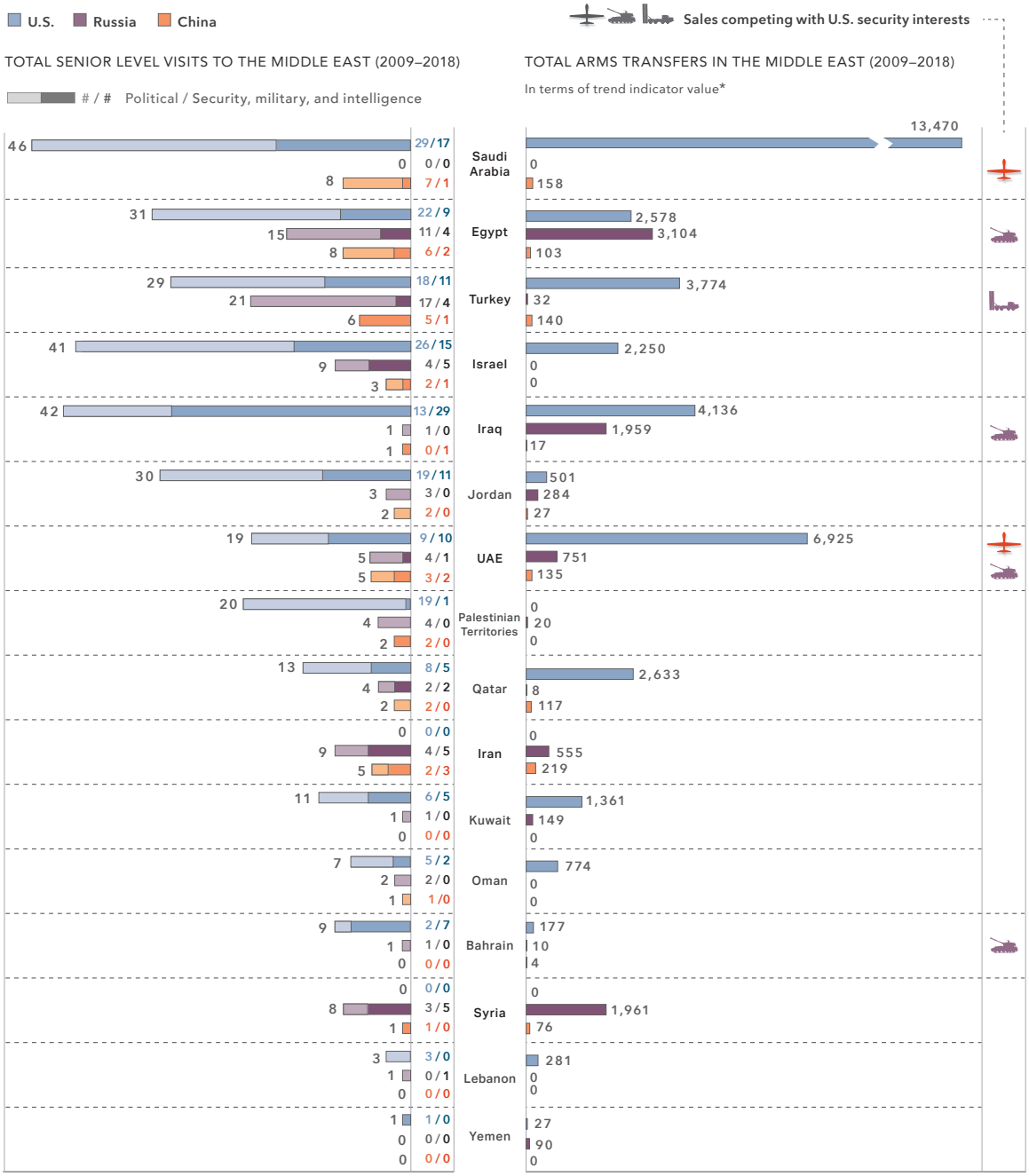
[6] U.S. diplomatic relations with Syria were suspended in 2012 as a result of the Syrian civil war, and the United States has had no formal diplomatic relations with Iran since 1980.

[7] U.S. Bureau of Economic Analysis, "Table 6. U.S. Direct Investment Position Abroad on a Historical-Cost Basis, Country by Industry of Foreign Affiliate, 2019," Excel spreadsheet, downloaded from "Direct Investment by Country and Industry," webpage, July 24, 2019a. Values are nominal.

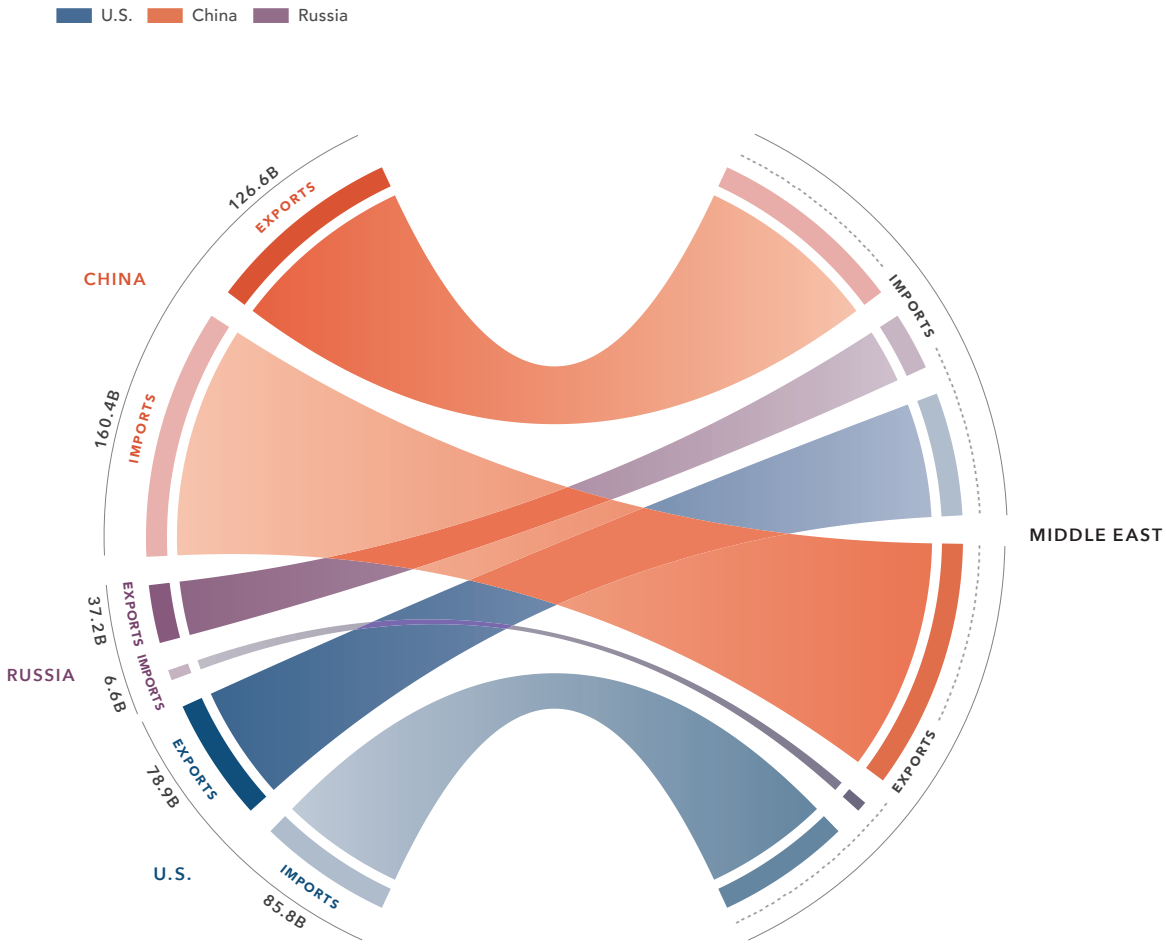
[8] U.S. Bureau of Economic Analysis, "Table 10. Foreign Direct Investment Position in the United States on a Historical-Cost Basis, Country by Industry of U.S. Affiliate, 2019," Excel spreadsheet, downloaded from "Direct Investment by Country and Industry," webpage, July 24, 2019b. Values are nominal.

Figure 4.1
U.S., Chinese, and Russian Senior Leader Visits to and Arms Trade with the Middle East, 2009–2018



SOURCES: Information on visits by U.S. officials to Middle Eastern countries from 2009 through 2018 was compiled from U.S. government websites. Data on Russian and Chinese officials are combined versions of the charts presented in Chapter Three. Information on arms trade is from Stockholm International Peace Research Institute, 2019.
NOTES: *Senior U.S. officials* refers to the President, Vice President, Secretary of Defense, Secretary of State, national security adviser, and CIA director. For arms trade, the *trend indicator value* is a measure of production costs and is meant to represent the transfer of military resources rather than the sales price of those resources. Data are what SIPRI terms *major weapons*: aircraft, air defense systems, antisubmarine warfare weapons, armored vehicles, artillery, engines, missiles, sensors, satellites, ships, turrets for selected armored vehicles and ships, and air refueling systems as used on tanker aircraft.

Figure 4.2
U.S., Chinese, and Russian Goods Trade Flows to and from the Middle East, 2018



SOURCE: United Nations Comtrade Database, undated. Data retrieved on several dates between October 2019 and September 2020.

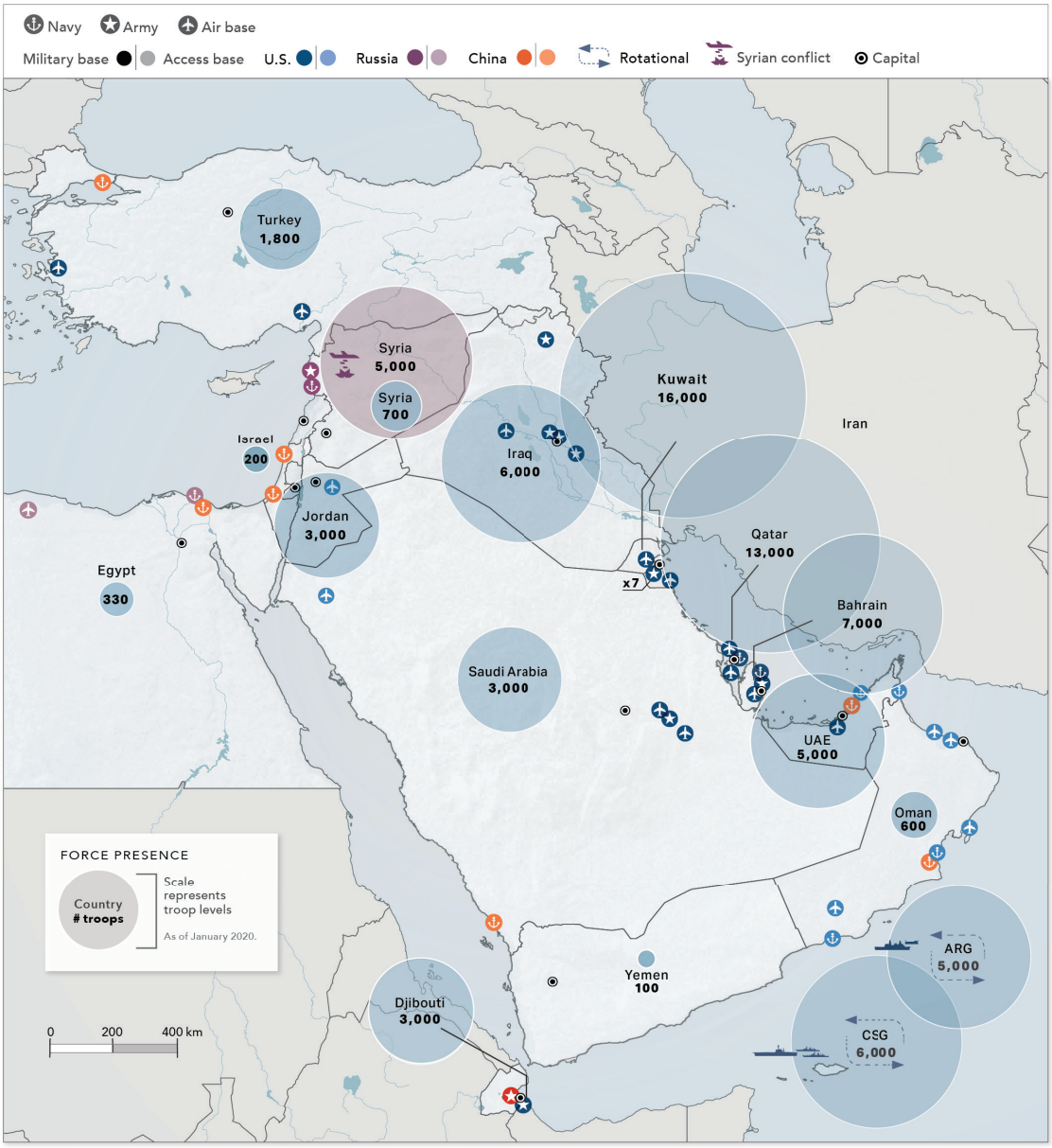
By 2018, direct investment from the Middle East into the United States measured $31.5 billion, only 0.7 percent of all direct investment in the United States.

Although China might be a larger trade partner than the United States or Russia, Washington dominates the arms trade market (as shown in Figure 4.1). From 2009 through 2018, the United States supplied arms to every state in the Middle East except Syria, Iran, and the Palestinian Territories. Only recently did Russia surpass the United States as the top supplier of arms to Egypt, in part because of a recent U.S. freeze on military aid to Egypt.[9]

The United States maintains a large force presence across the Middle East, which greatly outweighs China's and Russia's military presences and access agreements. Moreover, U.S. military forces in the region (estimated at 65,000 as of January 2020) based at these installations are far greater than those of China and Russia (Figure 4.3). Although China has secured some

[9] The Trump administration froze $195 million in military aid to Egypt over its human rights abuses in 2017 and released this hold in July 2018. Mohammad Zargham, Warren Strobel, and Yara Bayoumy, "U.S. Lifts Restrictions on $195 Million in Military Aid for Egypt: Official," Reuters, July 25, 2018.

Figure 4.3
U.S., Chinese, and Russian Force Presence and Access in the Middle East, Early 2020



SOURCES: Lolita C. Baldor, "U.S. General Says Troop Surge in Middle East May Not End Soon," Associated Press, January 23, 2020; Miriam Berger, "Where U.S. Troops Are in the Middle East and Afghanistan, Visualized," *Washington Post*, January 4, 2020; Defense Manpower Data Center, "Military and Civilian Personnel by Service/Agency by State/Country," Excel spreadsheet via "DoD Personnel, Workforce Reports & Publications," webpage, December 31, 2019; Omar Lamrani, "Naval Update Map: Jan. 23, 2020," Stratfor, January 23, 2020; Michael R. Pompeo, "A Force for Good: America Reinvigorated in the Middle East," Cairo, Egypt, Secretary of State speech at the American University in Cairo, January 10, 2019; Clayton Thomas, *U.S. Killing of Qassem Soleimani: Frequently Asked Questions*, Washington, D.C.: Congressional Research Service, R46148, January 13, 2020, pp. 21, 24; U.S. Department of Defense, "DOD Statement on Deployment of Additional U.S. Forces and Equipment to the Kingdom of Saudi Arabia," press release, October 11, 2019b; U.S. Department of State, "U.S. Security Cooperation with Kuwait," fact sheet, March 20, 2020; U.S. Naval Forces Central Command, "Truman Begins Operations in the U.S. Fifth Fleet," December 30, 2019; White House, "Text of a Letter from the President to the Speaker of the House of Representatives and the President Pro Tempore of the Senate," June 11, 2019b.
NOTES: All numbers have been rounded. The 'x7' near Kuwait indicates that there are seven bases in Kuwait. ARG = Amphibious Ready Group; CSG = Carrier Strike Group.

port access agreements with countries in the region (most notably in the UAE), China has yet to deploy forces there on a permanent basis, instead preferring to use its base in Djibouti to project power into the region. Russia has, however, secured a relatively limited footprint in western Syria, in addition to reported outposts and access rights in Egypt.[10]

Chinese and Russian efforts to erode U.S. competitive advantages fall short of displacing the United States as the outsized external power in the region. The United States is not the leader in only one area—trade—and this area is admittedly of lower importance to the United States because it plays only a supporting role in achieving U.S. interests. China and Russia have obvious advantages with Iran, and that is partly because of a suspension of relations between Iran and the United States.[11] Both China and Russia are partners with Iran in the realms of security, economics, or both, and China and Russia both benefit from promoting low-grade tension between Iran and the United States to draw U.S. attention from other issues. Although China lags in diplomatic engagement, arms sales, and basing and access in the region, it exceeds economically—all in line with its stated economic priorities and objective of achieving power through economics. Russia, for its part, is fairly consistent in its approach to the region, opportunistically seeking security involvement, military sales, and economic benefits where there are openings but not creating such openings on its own.

This is likely by design (China and Russia benefit from regional stability ensured by continued U.S. military involvement) and in recognition of their narrower objectives. The continued U.S. role as the regional security guarantor requires less economic, military, and political strain on China and Russia, enabling them to pursue their regional goals while continuing to focus on their respective backyards, which matter more to their national strategies than the Middle East does. Furthermore, China and Russia have learned that competing with the United States does not take much; often, it simply requires being active rather than purposefully attempting to displace and replace the United States.

Areas of Competition Among the United States, China, and Russia

As discussed in Chapter Three and illustrated in the previous section, China's focus is on economic access while Russia's approach to the region is primarily concerned with security issues. To that end, the competitive dynamics confronting the United States differ for each country (see the box, below). In this section, we seek to identify specific issues that drive competition between the United States and either China and Russia and between China and Russia them-

Chinese, Russian, and U.S. Interests in the Middle East

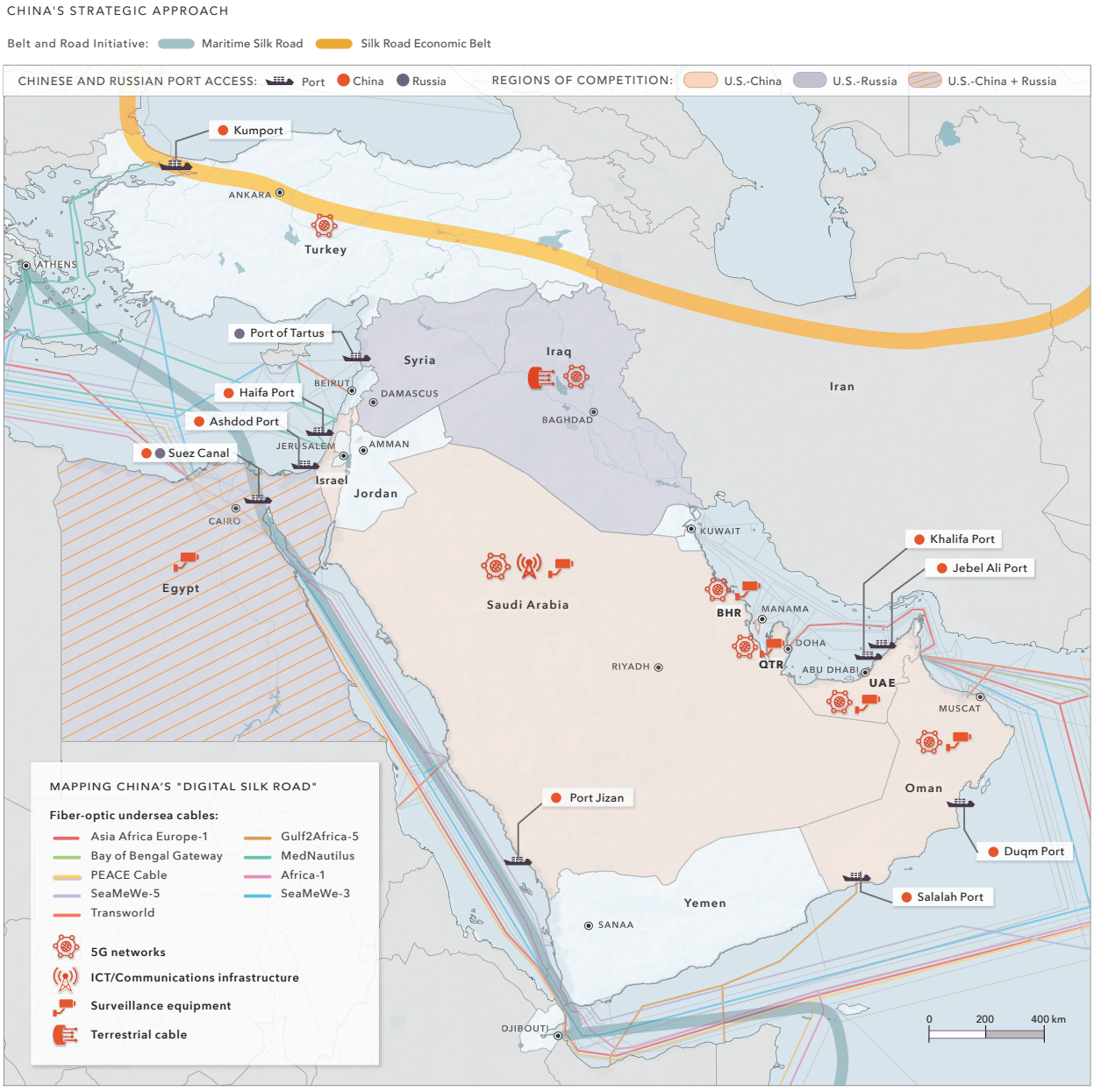
Russia	China	United States
• Achieve great-power status • Bolster economy • Improve regional stability	• Maintain great-power status • Secure economic interests • Support regional stability	• Protect allies and partners • Promote free and open trade • Secure global energy stability • Defend U.S. troops in region

[10] Phil Stewart, Idrees Ali, and Lin Noueihed, "Exclusive: Russia Appears to Deploy Forces in Egypt, Eyes on Libya Role—Sources," Reuters, March 14, 2017.

[11] Russia also has an advantage with Syria because of the U.S. stance toward the Damascus government in the ongoing civil war.

Figure 4.4
Future Areas of U.S.-China and U.S.-Russia Competition in the Middle East

Chinese and Russian efforts to erode U.S. competitive advantages fall short of displacing the United States as the outsized external power in the region. Only in two areas—trade and technology—is the United States not the leader, and trade is of lower importance to the United States, playing only a supporting role in achieving U.S. interests. While China lags in diplomatic engagement, arms sales, and basing and access in the region, it exceeds economically, in line with its stated priorities and objectives. Russia is primarily concerned with security issues and opportunistically seeks security involvement, military sales, and economic benefits.



SOURCES: Authors' analysis and International Cyber Policy Center, Mapping China's Tech Giants database, Australian Strategic Policy Institute, 2019.
NOTE: This figure highlights China's technology activity for its importance in great power competition in the Middle East.

selves. We also identify countries in the Middle East that show the potential for future competition, given the overlap of interests and activities (Figure 4.4).

U.S.-China Competition in the Middle East

U.S. and Chinese competition will likely derive from economic interests. As the head of U.S. Central Command General Kenneth McKenzie has stated, "We see China moving in—principally economically, but not completely—to establish a beachhead" in the Middle East.[12] The outcomes of these interests include not only trade and investment, but financing for and construction of infrastructure. China has also sought to carve a niche market for itself in the sale of specific weapon systems, particularly when the United States has refused to sell certain materiel for technology control–regime reasons. Accordingly, the biggest challenges presented by China in the region are potential limits to U.S. access to ports or other infrastructure, overindebtedness of U.S. partners, weapon sales that undermine U.S. security goals, and surveillance and intelligence activities via telecommunications and information infrastructure.

Port Infrastructure

China has secured or attempted to secure port access and development projects in the Suez Canal Economic Zone, Egypt (several investments); Ashdod and Haifa, Israel; Duqm, Oman; Port Jizan, Saudi Arabia; Kumport, Turkey; and Khalifa, UAE. Although China is developing these ports for ostensibly commercial purposes, Beijing could eventually use them to project power and attempt to block U.S. access—as well as surveil U.S. military and commercial shipping patterns.[13]

The Oman case is instructive to understanding how these ports could emerge as points of competition between the United States and China. In March 2019, the United States and Oman signed an agreement that would allow the U.S. Navy port access at Duqm and Salalah.[14] Aside from ensuring U.S. access options outside the Strait of Hormuz, the agreement likely provided a secondary benefit: displacing growing Chinese investment in Duqm—promised investments total $10.7 billion—to ensure that Beijing does not secure outsized influence over Oman.[15] The United States was able to outposition China for port access rights in Oman, but China retains development projects at Duqm. Therefore, Oman is also likely to remain an area of competition.

In recent years, the UAE and Israel have held the greatest potential for future competition for access between the United States and China. The United States uses the UAE's deepwater

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[12] Middle East Institute, "CENTCOM and the Shifting Sands of the Middle East: A Conversation with CENTCOM Commander Gen. Kenneth F. McKenzie Jr.," transcript, June 10, 2020.

[13] Jennifer Aguinaldo, "Chinese Contractor Wins Jizan Port Deal," MEED, March 6, 2017; Bernd Debussman, Jr., "China's CSP and Abu Dhabi Ports Launch New Terminal at Khalifa Port," *Arabian Business*, December 11, 2018; Nawied Jabarkhyl, "Oman Counts on Chinese Billions to Build Desert Boomtown," Reuters, September 5, 2017; Ron Kampeas, "US Senate Warns Israel Against Letting China Run Haifa Port," *Times of Israel*, June 14, 2019; Tahrir Institute for Middle East Policy, *China's Role in Egypt's Economy*, Washington, D.C., November 21, 2019; Summer Zhen, "Chinese Consortium to Invest in Turkey's No 3 Container Terminal," *South China Morning Post*, September 17, 2015. China has also signed Memorandums of Understanding with the Qatar Free Zone Authority; although none focuses on port access, China could pursue such access in the future. See "Qatar Free Zones Authority Signs MoUs with Leading Entities in China," *Qatar Tribune*, January 31, 2019.

[14] U.S. Embassy in Oman, "U.S. Statement on the Signing of the Strategic Framework Agreement," March 24, 2019.

[15] Stewart, 2019.

port at Jebel Ali for U.S. Navy Fifth Fleet port visits but previously used Khalifa Port, where China now boasts development projects.[16] Similarly, U.S. defense officials remain concerned about Chinese investment in Haifa Port because the U.S. Navy Sixth Fleet uses this for port visits.[17] The Abraham Accords agreement between Israel and the UAE might change this dynamic; in September 2020, Dubai's DP World and Israel's DoverTower agreed to a joint venture to compete for a privatization opportunity at Haifa Port.[18]

5G Technology

Toward the beginning of his third year in office, President Trump signed an executive order that increased restrictions on participation by foreign-owned companies in the U.S. information and communications market.[19] The move allowed the U.S. government to ban Chinese telecommunications firm Huawei from participating in the development of 5G networks in the United States, setting up both sides for competition in the 5G market. This move also reflected concerns that Huawei's close ties to the Chinese government would enable the exfiltration of sensitive information to China. Washington has signaled to some allies and partners that it would rethink intelligence ties should they accept Chinese 5G technology.[20]

Thus far, however, U.S. partners in the Middle East have not changed their activities in response to U.S. pressure, instead continuing to develop agreements with China for 5G investments. For example, the UAE announced in early 2019 that its state-owned telecommunications firm Etisalat would partner with Huawei to upgrade its network.[21] Should China use its 5G support to Middle Eastern countries for espionage purposes, it could take advantage of the large constellation of U.S. bases in the region to obtain confidential information about U.S. service members or critical information about U.S. defense strategy, operational concepts, and military technology.

Given the sizable U.S. bases in Bahrain, Kuwait, Qatar, and the UAE—including the U.S. Naval Forces Central Command, Camp Arifjan, Al Udeid, and Al Dhafra, respectively—these countries are where the United States faces the greatest intelligence and collection risks posed by Huawei's 5G networks. Therefore, these are countries where the United States and China have the greatest incentives to compete over 5G technology.

Arms Sales

In terms of arms sales to Middle Eastern partners, China is nowhere near Russia—let alone the United States. But China has been carving out a niche market for itself, which, in turn, has elicited a response from the United States. As discussed in Chapter Three, China has focused on selling armed drones, such as its indigenously developed Wing Loongs, to countries in the

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16 Awad Mustafa, "USS Rushmore Docking at Port Khalifa a Symbol of Strong US-UAE Ties, Says Ambassador," *The National*, January 28, 2013.

17 Jack Detsch, "Pentagon Repeats Warning to Israel on Chinese Port deal," *Al-Monitor*, August 7, 2019.

18 "Dubai's DP World to Partner with Israeli Firm in Bid for Haifa Port," Reuters, September 16, 2020.

19 White House, "Executive Order on Securing the Information and Communications Technology and Services Supply Chain," May 15, 2019a.

20 Parmy Olson, "U.S. Would Rethink Intelligence Ties If Allies Use Huawei Technology," *Wall Street Journal*, April 29, 2019.

21 Adam Satariano, "U.A.E. to Use Equipment from Huawei Despite American Pressure," *New York Times*, February 26, 2019.

region. Washington had refused to sell its own UAVs, citing limits imposed by the MTCR, and that has led these states to turn to Beijing for such items.[22] Similarly, China has leveraged Saudi Arabia's drive to increase local weapon manufacturing under its Vision 2030 plan, agreeing to open a factory in Saudi Arabia to produce CH-4 UAVs.[23] China has leveraged the U.S. refusal to sell these weapons—based on a desire to retain sensitive technology and keep these weapons from being used in ways that could produce civilian casualties—to gain a foothold in the Middle East arms market while also undermining U.S. policy. In July 2020, the Trump administration announced that it would reinterpret the MTCR as it pertains to unmanned systems exports, arguing that it contained "outdated standards" that "give an unfair advantage to countries outside the MTCR and hurt United States industry" and also hindered the United States' "deterrence capability abroad by handicapping [U.S.] partners and allies with subpar technology."[24] Likely aimed at least in part at countering Chinese drone sales, the effects of this change remain unclear as of late 2020 but could open up the market for the United States to sell armed UAVs to regional countries.

The United States has seen some success in pressuring states, most notably Jordan, to give up their Chinese equipment. In 2019, reportedly in response to U.S. pressure and disappointment over the performance of the Chinese produced CH-4B "Rainbow" UAVs, the Jordanian government sought to sell their fleet of CH-4Bs.[25] This remains an outlier event, however, and countries in the Gulf continue to buy upgraded Chinese UAVs.

Although Chinese arms exports are likely to remain orders of magnitude below those of the United States, Beijing's ability to undermine U.S. policy on the margins could lead to greater competition in the future. Therefore, we assess that Qatar, Saudi Arabia, and the UAE—three countries that have most actively sought armed drones, among other equipment—to be future arenas of competition between the United States and China.

U.S.-Russian Competition in the Middle East

Given that the greatest overlap in interests and activities falls in the military domain, U.S. and Russian competition will likely play out in the security space. Syria stands out as the primary flashpoint between both countries as of 2020, but Moscow has been maneuvering to take advantages of rifts between Washington and Ankara and between Washington and Cairo. Although primarily reactive and tactical, Russia has also shown its ability to shape events through its convening power, primarily illustrated by the Astana Group effort of Russia, Iran, and Turkey regarding Syria. In the following subsections, we detail how the United States and Russia are competing in this space before identifying potential areas of competition in the future.

The Syrian Conflict

Russia's 2015 intervention in the Syrian civil war complicated U.S. policy objectives. More than five years later, Russia's bolstering of the Assad regime undermined the original U.S. policy, which stated that Assad could neither lead nor play a role in the future governance of

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22 Turak, 2019.

23 Diamond, 2017.

24 White House, "Statement from the Press Secretary on Unmanned Aerial Systems Exports," July 24, 2020a.

25 Kyle Mizokami, "Turns Out Buying a Chinese Knock-off Predator Drone Is a Bad Idea," *Popular Mechanics*, June 12, 2019.

Syria.[26] Russia's tacit cooperation with Iran in Syria has enabled the expansion of Iran's influence and physical foothold in the Levant while further undercutting stated U.S. policy: the expulsion of Iranian and Iranian-commanded forces in accordance with UN Security Council resolution 2254.[27] Furthermore, Russia's air campaign in Syria complicated U.S. and Coalition efforts to degrade and defeat ISIS as part of Operation Inherent Resolve.

The U.S. withdrawal and subsequent downsizing of forces in northeast Syria in October 2019 allowed Russia to support the Assad regime as it gained control over more territory. It also provided Russia with a messaging opportunity. Once U.S. forces withdrew from outposts in Manbij, Syria, Russian forces moved in to occupy them. As U.S. forces have since returned to some areas in northeast Syria, they have found themselves in several close calls with Russian forces while patrolling roads, requiring additional force protection measures for U.S. personnel.[28]

As the Syrian conflict continues, it is likely to remain a potential arena for competition between Russia and the United States—in addition to the other actors vying to secure their interests, such as Turkey and Iran.

Arms Sales

Arms sales to states in the Middle East have also become an arena for competition. Following the Arab Spring, Russia positioned itself to benefit from U.S. holds on military aid and arms sales to Egypt and Bahrain by presenting itself as a no-strings-attached weapon provider.[29] It also took advantage of the GCC states' displeasure with the United States resulting from perceptions of regional retrenchment, failure to uphold red lines in Syria, and negotiations with Iran over its nuclear program. The GCC states were actively looking to signal their discontent with Washington, and Russian arms sales became a popular way to send this signal, noting that these states had alternate options for their security. In so doing, they opened—or in Egypt's case, reopened—new markets and opportunities for Russia to achieve greater influence because arms sales are often tied to military cooperation more broadly.

Arms sales have directly inserted Russia into the security sectors of traditional U.S. allies and partners in the region. The fielding of Russian weapons into countries with predominantly U.S.-outfitted militaries has undermined long-standing U.S. efforts toward interoperability with partners. It has also introduced technological and intelligence collection risks. For instance, Turkey, a NATO ally, acquiring and potentially fielding the Russian S-400 air defense missile system makes it difficult for Ankara to cooperate with NATO partners using other U.S. and European air defense systems. Furthermore, integrating the S-400 into NATO's air and missile defense network would provide ample opportunity for Russia to collect intelligence on the capabilities of countries in Europe, arguably the region of greatest importance to the Kremlin.

Using the patterns of activities identified in the previous chapter, there are three primary arenas for current and future competition for arms sales between the United States and Russia: Egypt, Iraq, and Turkey. Although the Gulf states are actively using Russian arms sales as

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[26] "Obama Tells UN: Syria's Assad Must Go," BBC, September 28, 2015.

[27] Jeffrey, 2018.

[28] Eric Schmitt, "Russians Pressure U.S. Forces in Northeast Syria," *New York Times*, February 14, 2020.

[29] Sladden et al., 2017, p. 8.

a hedge, this does not pose an active threat of displacing the United States as their primary equipper or to interoperability. However, should the trend of the rising level of Russian arms to Egypt and Iraq continue, that does create a risk—and, as with Turkey, the integration of Russian equipment into these militaries weakens interoperability with the United States.

Access

Russia's Syria intervention secured and expanded its access to two bases in Syria: Hmeimim airbase and the port of Tartus. Although Russia has shifted its military planning away from naval power, Tartus remains important to its ability to project power in the Mediterranean. This not only shores up its influence in the Levant, but enables it to conduct operations off NATO's southern flank. Additionally because Tartus is reportedly an intelligence outpost, it provides Russia with an opportunity to collect and process intelligence that it receives in the region. Hmeimim, on the other hand, has enabled Russia's air war in Syria. As noted earlier, this complicated U.S. and Coalition efforts to prosecute strikes against ISIS.

Both Tartus and Hmeimim make up the bulk of Russia's basing—with the addition of some forces in Egypt, reportedly to carry out operations in Libya—and access agreements in the Middle East. Given Russia's consolidated military footprint in the Middle East and minimal access agreements, Tartus and Hmeimim are essential to Russia's ability to have a persistent military presence in the region, which it has lacked since the Cold War.[30] Moreover, Russian basing and access in the region provides it with a foothold that it can use to conduct operations elsewhere in the Middle East, including countries where the United States has forces. In contrast, although the United States does not seek basing access in Syria or Egypt, it has forces in Syria and reportedly has overflight rights in Egypt, in addition to a small number of U.S. forces that are part of the Multinational Forces and Observers located in the Sinai peninsula. Therefore, Syria and Egypt remain likely arenas of future competition for presence and access.

Interactions Short of Competition

Although some Chinese and Russian actions in the Middle East erode U.S. security or influence and need to be countered, others might be benign or not of great significance. Such actions can be contained or ignored. There are also some actions that might even be beneficial to all parties. In many respects, Chinese trade and investment can be beneficial to the region. The United States itself trades extensively with China: In 2019, China was the third-leading single-nation partner for goods and services trade, behind only Canada and Mexico and accounting for 11.3 percent of U.S. trade.[31]

Even Chinese infrastructure construction—the haunting bogeyman of BRI debt traps—can be positive as long as there is equal access to it. Infrastructure is associated with long-run economic growth, although the effects vary by country and by type of infrastructure.[32] Although telephones and paved roads are, on average, growth-enhancing, this varies by

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[30] Jeremy M. Sharp, *Egypt: Background and U.S. Relations*, Washington, D.C.: Congressional Research Service, RL 33003, November 21, 2019.

[31] U.S. Bureau of Economic Analysis, "U.S. Trade in Goods and Services by Selected Countries and Areas, 1999–Present," Excel spreadsheet, September 3, 2020. The European Union accounted for 23.8 percent of U.S. goods and services trade in 2019.

[32] David Canning and Peter Pedroni, "Infrastructure, Long-Run Economic Growth and Causality Tests for Cointegrated Panels," *The Manchester School*, Vol. 76, No. 5, Special Issue, 2008.

country. Capacity to generate electricity tends to have positive effects in most countries. Infrastructure can be oversupplied (as might be the case in China) or supplied in a way to create economic indebtedness (as many countries in Africa have found through Chinese construction activities). However, there is a need in many countries for infrastructure to boost productivity.[33]

Likewise, because the United States is not in the nuclear plant export business, efforts by China and Russia to sell nuclear plants and increase capacity to generate electricity could help several countries in the Middle East. The ultimate advantage of infrastructure that provides access on a fair basis is that, by boosting economic productivity and growth, it allows recipient countries to expand their trade and investment ties with all countries, including the United States.

Educational, cultural, and technical exchanges by both China and Russia with countries of the Middle East do not necessarily merit great concern as of late 2020. Such activities might create stronger ties, but the United States and other Western countries are likely to remain more attractive over at least the medium term for such engagement. Educational and cultural exchanges with China and Russia might also create a greater sense of realism in the Middle East about dealing with these countries and the true benefits that they can and cannot provide.

Conclusions and Recommendations

Great-power competition in the Middle East is not just a relic of the past. It is occurring now, with external powers chasing interests through instruments and activities that did not exist during the Cold War. Strategic competition in the Middle East is unfolding diplomatically, economically, and militarily among the United States, China, and Russia and is likely to continue into the future. This report has systematically identified the dimensions and locations in which this competition is most likely to play out in the future, and where it is most likely to threaten vital U.S. interests.

Neither China nor Russia view themselves as competing with other great powers as the United States conceives itself to be doing in the NSS and NDS, nor do they possess a similar concept in their national security or defense strategies. However, they are keenly aware of the U.S. concept as elucidated in the NSS and NDS. In recognition of their designation as the top two competitors to the United States, they have responded accordingly, continuing to exercise influence in various parts of the world, including the Middle East, to achieve their objectives and undermine U.S. interests.

Through fall 2020, our analysis shows that there is little, if any, overlap in Chinese and Russian political, economic, and military activities in the Middle East. China's regional approach is predicated on trade and other economic activities; Russia favors arms sales and demonstrations of military power to achieve influence. This presents a complementary approach in which China and Russia both pursue their aims—and the secondary benefit of eroding U.S. influence and leverage—simultaneously in different domains. This dual-pronged, complementary approach enables the actions of both countries to have a greater effect than those of either would on their own. In a sense, without the other actively competing in the region, the level and success of either country's actions would be lower than it is now.

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[33] United Nations, *World Economic Situation and Prospects 2020*, New York, 2020.

That is not to say that there is not potential for future competition to emerge between China and Russia in the Middle East. There are certain areas where a competitive dynamic could emerge, particularly in niche arms markets (such as unmanned systems), infrastructure contracts, nuclear energy contracts, and hydrocarbons. Friction could emerge on discrete issues, such as competing for contracts or resources, such as phosphates in Syria.

Additionally, although this report focuses on competition, all of the Chinese and Russian officials and analysts interviewed for this project mentioned the potential for cooperation with the United States. Although it is difficult to discern whether this is merely a talking point or a genuine aspiration, it is nevertheless worth noting. From the U.S. perspective, cooperation with China and Russia is not unpalatable, but it must occur in a manner that does not give Beijing or Moscow an undue edge. This accounts for U.S. concern over technological cooperation with China or negotiating with Russia over Syria. However, nascent cooperation could emerge on discrete issues of mutual concern in the Middle East, such as in multinational forums intended to negotiate key political issues in the region.

Ultimately, strategic competition is the state of play among the three powers, each vying to improve its position while eroding those of its competitors. This does not apply solely to China and Russia but also to the United States, which seeks to improve its ability to compete against Beijing and Moscow in the Middle East.

Policy Recommendations for the United States

Using the analysis presented here and the future trends in competition in the Middle East that we have identified, the U.S. government can benefit from several policy directions.

- There is much the United States can do in the Middle East regardless of the activities of China and Russia—if it so chooses. Examples are working to settle international disputes, helping to build trade and investment relations between U.S. companies and the region, and providing aid where necessary and useful. Such actions not only reinforce the role of the United States as the leading external power in the region, they also (and more importantly) fulfill important goals in the NSS, such as advancing U.S. influence to help create a world that supports American interests to make the United States more secure and prosperous.[34] Accordingly, although the United States will need to actively compete with China and Russia in the Middle East, it need not let that competition be the driving force behind U.S. strategy and actions in the region.
- There are also some activities by China and Russia that might be beneficial, especially if the United States engages to help the region take advantage of those activities. For example, as already noted, countries could benefit from Chinese-funded infrastructure. However, the terms for such projects might be unfair, such as having the potential for onerous financing terms or requirements regarding sourcing of components, contracting companies, or labor. Accordingly, for countries that are negotiating to receive Chinese infrastructure financing, the United States can work with those countries to review terms of the deal to make sure it will be sustainable, or even to find other funders and companies that could offer competition to the Chinese offer, improving the overall package. Likewise, if China or Russia are offering nuclear generating plants, the United States could work with recipient countries to conduct energy assessments and help with nego-

[34] White House, 2017, p. 4.

tiations to ensure that any agreements do not place the receiving country at a financial disadvantage. In cases where the partner is a high priority and U.S. or western companies have the ability to supply quality infrastructure, the United States and allied partners can compete directly with support from their own project finance agencies, such as the new U.S. Development Finance Corporation.

- Determining when to exercise U.S. power to compete will be helped by a strong understanding of China's and Russia's goals in the region, along with the time frame each country is working under to achieve those goals. For now, China's goals seem to be largely economic, but they also involve economic-adjacent activities, such as involvement in transportation and communication infrastructure. Russia focuses on security, but opportunistically seeks entry in any domain and with any partner it can. Beyond understanding existing goals, watching for changes in goals (or activities that do not match these goals) can signal when U.S. action to compete might be most useful. Such changes could be China signing new basing agreements or Russia strengthening its economic diplomacy (such as the new Russian Direct Investment Fund office in Saudi Arabia, opened in fall 2019).
- The United States should not try to counter all Chinese and Russian activities in the region; this would tie up attention and resources and could become cost-imposing to the United States over time. Instead, the United States should prioritize when and where to actively compete—that is, go beyond its steady-state activities—to outposition China and Russia. This should occur only when Washington assesses its core interests in the region to be at risk. For instance, Chinese access agreements at ports throughout the Middle East could threaten U.S. freedom of navigation—necessary to protect commercial shipping and ensure global access to Middle Eastern oil, a stated objective. As a result, marshalling U.S. resources to outbid Chinese access or fund activities to defray Chinese control of maritime access are a smarter choice.
- The United States might choose to further prioritize its activities, focusing on countries hosting significant Chinese and Russian activities that run counter to U.S. interests. The countries identified in this report as the top arenas for future competition—Bahrain, Egypt, Qatar, Oman, Saudi Arabia, Syria, Turkey and the UAE—are also important to core U.S. interests in the region. Among these, however, Egypt might be less central to U.S. regional efforts in the future and more central to those of China or Russia, so the United States will want to be particularly judicious with its involvement in that country. Recent evidence suggests that the United States is prioritizing at least some of these countries, outpositioning China for port access in Oman and brokering normalization agreements between Israel and the UAE and between Israel and Bahrain.
- Although the United States might try to counter Chinese and Russian activities, the determinant of whether any strategic actions succeed or fail is ultimately the countries in the Middle East. The interests of individual states in the region are beyond the scope of this report, but their participation is key to U.S. success or failure. Countries might resist U.S. efforts or turn toward China or Russia to counterbalance those efforts. Therefore, although the United States can wield a variety of levers of influence, it should seek to weigh likely regional reactions and the extent to which such actions will safeguard vital U.S. interests. It will also need to consider the package of both negative and positive incentives that it can offer the countries of the region in a way that does not position the United States to act in ways that are not truly in its interests while still demonstrating to

these countries that it is in their interests to cooperate with the United States over China or Russia.

- In recognition of the potential for future competition between China and Russia in several areas, the United States might choose to implement competitive strategies intended to create dilemmas for Beijing and Moscow to tie up their resources and attention and reduce their overall power. By *competitive strategies*, we mean actions taken, even at cost to the United States, that might impose greater costs on China and Russia. Funding activities to defray Chinese control of maritime access or helping introduce regionwide standards-setting for quality infrastructure investment are examples of competitive strategies that could reduce Chinese and Russian advantages in the region. Such competitive strategies in the Middle East would complement those already being implemented in Asia and Europe. Although China and Russia might interpret actions closer to their territory as meddling in their internal affairs, thus running a risk of unintended escalation, competitive strategies implemented in the Middle East are likely to be lower risk.
- Finally, U.S. interactions with China and Russia in the region need not be viewed as entirely zero sum. Although opportunities might be few, the United States should identify limited areas of cooperation with China and Russia. For example, despite the partnership between Russia and Iran in Syria, this relationship is complex and the two countries are in some ways also rivals in Syria, especially regarding control of resources and future contracts. Likewise, China proved helpful when the United States was leading the negotiations with Iran for the JCPOA nuclear deal. Accordingly, there might be scope in the future and under the right circumstances for further cooperation regarding Iran, such as regarding nuclear weapons once again or proliferation. More broadly, the United States, China, and Russia all have a stated interest in the maintenance of stability in the Middle East, in part to ensure their aims and activities in the region are not disrupted. A cooperative stance could also prove more attractive to countries of the region in some cases, reducing the chances of them being forced into a choice and then choosing to go against U.S. interests.

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