

GREAT POWER PROJECTION IN THE MIDDLE EAST:

**The China-Russia Relationship
as a Force Multiplier?**



by Jonathan Fulton and Li-Chen Sim

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Cover: Chinese President Xi Jinping and Russian President Vladimir Putin attend a ceremony dedicated to the 70th anniversary of the establishment of diplomatic relations between Russia and China, in Bolshoi Theatre in Moscow, Russia June 5, 2019. Source: Sputnik/Alexei Druzhinin/Kremlin via REUTERS

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The Atlantic Council's Scowcroft Middle East Security Initiative honors the legacy of Brent Scowcroft and his tireless efforts to build a new security architecture for the region. Our work in this area addresses the full range of security threats and challenges including the danger of interstate warfare, the role of terrorist groups and other nonstate actors, and the underlying security threats facing countries in the region. Through all of the Council's Middle East programming, we work with allies and partners in Europe and the wider Middle East to protect US interests, build peace and security, and unlock the human potential of the region. You can read more about our programs at www.atlanticcouncil.org/programs/middle-east-programs/.

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INTRODUCTION

Russia and China are often mischaracterized as allies. There is a perception that their revisionist preferences for international order align, and that their desires for a less US-centered international order mean they are collaborating toward this end. The challenge they pose to the United States has been acknowledged by the Obama, Trump, and Biden administrations, and “great power competition” (GPC) or “strategic competition” has replaced counterterrorism at the center of US strategy. The Biden administration’s 2021 Interim National Security Strategy Guidance states that “we face . . . growing rivalry with China, Russia, and other authoritarian states.” It describes China as “the only competitor potentially capable of combining its economic, diplomatic, military, and technological power to mount a sustained challenge to a stable and open international system,” and Russia as “determined to enhance its global influence and play a disruptive role on the world stage.”¹ The Pentagon’s “2+3” framework for GPC has China and Russia as the two primary threats, and North Korea, Iran, and terrorism as the three secondary threats, reinforcing a two-tiered system that implies that “China and Russia are similar threats while the others are lower in priority.”²

In the Middle East and North Africa (MENA),³ their behavior—tandem vetoes on Syria at the United Nations,⁴ mutual anger about Libya, arms exports to traditional US allies, and cooperating with Iran despite multilateral sanctions⁵—feeds into the perception that they have a coordinated agenda to push out the United States, or at least to challenge its preponderance there. In a February 2021 speech by General Kenneth F. McKenzie, commander of the US Central Command overseeing MENA and Central Asia, he noted that “the United States faces increasing competition in the region from Russia and China, both vying for power and influence through a combination of diplomatic, military, and economic means. This adds another layer of tension and instability to an already complex and challenging region.”⁶

This report provides a comparative analysis of the approaches that China and Russia have adopted to develop their regional presence in MENA across four realms of influence: political, economic, security, and public diplomacy. It addresses four questions:

1 White House, “Interim National Security Strategic Guidance,” March 2021, 6, 9.

2 Arun Iyer, “Recalculating the Math of Great-Power Competition,” Atlantic Council, April 2, 2021, <https://www.atlanticcouncil.org/blogs/new-atlanticist/recalculating-the-math-of-great-power-competition/>.

3 Definitions of MENA vary. The US State Department does not include Turkey, but China and Russia do. Since China’s multilateral forums (discussed in this report) are based on Arab League memberships, some countries that are not usually considered part of MENA appear throughout. For Russia’s definition of MENA, see regional maps in the state-owned Russian Export Center: www.exportcenter.ru.

4 Rosemary Foot, “China’s Vetoes during the Syrian Conflict,” *East Asia Forum* (online platform), February 28, 2020, <https://www.eastasiaforum.org/2020/02/28/chinas-vetoes-during-the-syrian-conflict/>.

5 The European Union (EU), UN, and United States use a range of sanctions against Iran, and some Chinese and Russian companies fall afoul of US sanctions; see “US Sanctions Chinese, Russian Firms over Iran Dealings,” *Al Jazeera*, November 28, 2020, <https://www.aljazeera.com/news/2020/11/28/us-sanctions-chinese-russian-firms-over-iran-dealings>.

6 “Transcript of Remarks by General Kenneth F. McKenzie Jr., Middle East Institute,” US Central Command (CENTCOM website), February 8, 2021, <https://www.centcom.mil/MEDIA/Transcripts/Article/2497526/general-kenneth-f-mckenzie-jr-middle-east-institute-engagement-feb-8-2021/>.

- What are their objectives?
- What tools do they use?
- How do their objectives and tools of influence impact vital US interests?
- Do they pose a similar level of challenge to regional order and US power in MENA?

Its starting point is that neither China nor Russia are radical revisionist powers out to upend the current international order, and neither has any interest in replacing the United States as the preponderant power in MENA.⁷ Both are taking advantage of US strategic drift in MENA to make gains in specific areas of interest, and they are finding local actors receptive. Furthermore, as described below, much of their

regional foreign policy is meant to address domestic pressures and their leaders' belief that the United States is trying to undermine government stability in China and Russia, rather than to challenge US leadership. Susan Shirk's assessment from 2007 of China as a "fragile superpower,"⁸ still holds true in many ways today. Chinese leadership demonstrates an "unfortunate combination of external confidence and internal anxiety," she said, that underscores the intense domestic vulnerabilities driving much of the behavior of the People's Republic of China (PRC). In Russia's case, its National Security Strategy, adopted in July 2021, laid bare the securitization of most of the country's internal and external challenges compared to its 2015 iteration. Described as "paranoid" and a manifesto by "occupants of a besieged fortress,"⁹ the document appears to be consistent with the preferences of President Vladimir Putin in Russia's foreign policy over and above systemic, geostrategic, or cultural considerations.¹⁰

7 For a typology of revisionism, see Alexander Cooley, Daniel Nexon, and Steven Ward, "Revising Order or Challenging the Balance of Military Power? An Alternative Typology of Revisionist and Status-quo States," *Review of International Studies* 45, no. 4 (2019): 689-708, <https://doi.org/10.1017/S0260210519000019>.

8 Susan Shirk, *China: Fragile Superpower* (Oxford, United Kingdom: Oxford University Press, 2007).

9 Mark Galeotti, "New National Security Strategy Is a Paranoid's Charter," *Moscow Times*, July 5, 2021, <https://www.themoscowtimes.com/2021/07/05/new-national-security-strategy-is-a-paranoids-charter-a74424>; and Julian Cooper, "Russia's Updated National Security Strategy," *Russian Studies Series* 2 (July 19, 2021), NATO National Defense College, <https://www.ndc.nato.int/research/research.php?icode=704>.

10 Michael McFaul, "Putin, Putinism, and the Domestic Determinants of Russian Foreign Policy," *International Security* 45, no. 2 (Fall 2020): 95-139, doi: [org/10.1162/isec_a_00390](https://doi.org/10.1162/isec_a_00390); and M. Steven Fish, "What Has Russia Become?," *Comparative Politics* 50, no. 3, Special Issue: Wither Russia? Twenty-Five Years After the Collapse of Communism (April 2018): 327-346.

TABLE 1: LEVELS OF CHINESE STRATEGIC PARTNERSHIPS

| Partnership | Priorities |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Comprehensive strategic partnership | Fully pursue cooperation and development on regional and international affairs. |
| Strategic partnership | Coordinate more closely on regional and international affairs, including military matters |
| Comprehensive cooperative partnership | Maintain sound momentum of high-level exchanges, enhanced contacts at various levels, and increased mutual understanding on issues of common interest |
| Cooperative partnership | Develop cooperation on bilateral issues, based on mutual respect and benefit |
| Friendly cooperative partnership | Strengthen cooperation on bilateral issues such as trade |

Source: *South China Morning Post*, “Quick Guide to China’s Diplomatic Levels,” January 20, 2016.

TABLE 2: CHINA'S MENA PARTNERSHIPS

| State | Level | Year Signed |
|----------------------|-------------------------------------|-------------|
| Algeria | Comprehensive strategic partnership | 2014 |
| Djibouti | Strategic partnership | 2017 |
| Egypt | Comprehensive strategic partnership | 2014 |
| Iran | Comprehensive strategic partnership | 2016 |
| Iraq | Strategic partnership | 2015 |
| Jordan | Strategic partnership | 2015 |
| Kuwait | Strategic partnership | 2018 |
| Morocco | Strategic partnership | 2016 |
| Oman | Strategic partnership | 2018 |
| Qatar | Strategic partnership | 2014 |
| Saudi Arabia | Comprehensive strategic partnership | 2016 |
| Turkey | Strategic partnership | 2010 |
| United Arab Emirates | Comprehensive strategic partnership | 2018 |

Source: Jonathan Fulton, “China’s Changing Role in the Middle East,” Atlantic Council Rafik Hariri Center for the Middle East, 2019, 4.

POLITICAL APPROACHES

In recent years, both China and Russia have developed stronger political and diplomatic presences in MENA, with regional partnerships, multilateral forums, and deeper engagement on regional issues. In this area, there is a fair degree of convergence in the goals they are trying to achieve. Both desire to establish a consensus on non-Western political norms and standards, and have found receptive audiences in the governments of the MENA region. The September 2021 enlargement of two China and Russia-led organizations, where decisions are adopted by consensus with all votes carrying equal weight, is a case in point. The Shanghai Cooperation Organization, an intergovernmental organization based in Beijing, included Iran as a full member (contingent on administrative procedures) along with Egypt, Saudi Arabia, and Qatar as dialogue partners; meanwhile, the New Development Bank, a Beijing-based organization created by Brazil, Russia, India, China, and South Africa, welcomed the United Arab Emirates (UAE), together with Uruguay and Bangladesh, as members.

China's approach to developing stronger bilateral relationships differs substantially from Washington's. Beijing has a long-standing nonalliance policy and instead has adopted a hierarchy of partnerships (see Table 1). At the top end is a comprehensive strategic partnership (CSP) and at the bottom is the rarely used friendly cooperative partnership.¹¹ Those countries with CSPs are clearly perceived as the most useful for Beijing in regional affairs and beyond, and to be considered at this level, a country needs to offer more than economic and political objectives.¹² For example, Egypt's control of the Suez Canal gives it added value, as does Saudi Arabia's influence in global Islam. In MENA (see Table 2), five countries have

this level of partnership with China: Algeria, Egypt, Iran, Saudi Arabia, and the UAE. Eight countries are at the next level down as strategic partners, and Israel has a unique designation as an innovative strategic partner.¹³

China's size leads to a preference for bilateral engagement whenever possible; the clear asymmetry gives it a natural advantage in nearly every state-to-state encounter. Over the last two decades, however, Beijing has been building multilateral forums throughout MENA. These are perceived as useful in at least two ways. First, they help build wider consensus on non-Western rules of engagement, which supports the interests and preferences of many leaders in MENA countries and in Beijing. Second, they establish larger blocks of countries that will likely support China's concerns in democratic international organizations like the United Nations. In the case of the Middle East, this second point was seen when several MENA and Arab League countries signed a statement at the forty-seventh session of the UN Human Rights Council in support of China's policies in Xinjiang.¹⁴

It has established three multilateral forums for engaging with MENA countries: the Forum on China-Africa Cooperation (FOCAC), the China Arab States Cooperation Forum (CASCF), and the China – Gulf Cooperation Council (GCC) Strategic Dialogue. FOCAC's relationship with MENA is based on the North African members of the Arab League: Algeria, Djibouti, Egypt, Libya, Mauritania, Morocco, Somalia, Sudan, and Tunisia have membership in both organizations. FOCAC was established in 2000 at the urging of African diplomats who had been seeking greater engagement

MENA/Arab League Signatories of Cuban Statement at Forty-Seventh Session of UN Human Rights Council

ALGERIA

BAHRAIN

COMOROS

DJIBOUTI

EGYPT

IRAN

IRAQ

LEBANON

LIBYA

MAURITANIA

MOROCCO

PALESTINE

SAUDI ARABIA

SOMALIA

SUDAN

SYRIA

TUNISIA

UNITED ARAB EMIRATES

YEMEN

11 "Quick Guide to China's Diplomatic Levels," *South China Morning Post*, January 20, 2016.

12 George Strüver, "China's Partnership Diplomacy: International Alignment Based on Interests or Ideology," *The Chinese Journal of International Politics* 10, no. 1 (2017): 31-66.

13 On China's Middle East partnership diplomacy, see Jonathan Fulton, "Friends with Benefits: China's Partnership Diplomacy in the Gulf," Project on Middle East Political Science Studies, 2019.

14 Permanent Mission of the People's Republic of China to the United Nations Office at Geneva and Other International Organizations in Switzerland, "Joint Statement of 69 Countries at the Interactive Dialogue on High Commissioner's Annual Report at the 47th Session of the Human Rights Council," April 22, 2021, http://www.china-un.ch/eng/dbdt/202106/t20210624_9103595.htm. The UN lists Palestine as a nonmember observer state.



Russian President Vladimir Putin and Chinese President Xi Jinping talk during their meeting at the Kremlin in Moscow, Russia June 5, 2019. Source: Maxim Shipenkov/Pool via REUTERS

from China since the late 1990s. Chinese economic interests in Africa had been growing dramatically, and Chinese leaders saw the forum as a means of ensuring Beijing’s economic and political influence on the continent. It meets every three years, usually at the ministerial level, although the meetings in 2006, 2015, and 2018 were attended by most African leaders and the Chinese president. The CASCF was established in 2004 during a state visit to Egypt by President Hu Jintao. It is structured much like FOCAC, with the goal of coordinating policy between China and the twenty-two Arab League member states.¹⁵ The CASCF has ministerial meetings every second year, during which the foreign ministers of each country attend and map out the policy priorities for the following two years (see Table 3). China has a permanent representative to CASCF, an appointment that is given to an ambassador with significant experience in the Arab world.

That the CASCF only includes Arab countries is an important distinction; non-Arab countries—Israel, Turkey, and Iran—cannot participate. While each of the three has significant economic relations and high-level partnership agreements with China, each also complicates the Middle East political landscape, making it easier for Beijing to deal with them on a bilateral level instead. A more practical consideration is that twenty-two Arab states have the potential to offer China more support in democratic international organizations, giving

TABLE 3: CASCF MINISTERIAL MEETINGS

| | |
|------|---------------------------------------------|
| 2004 | Cairo |
| 2006 | Beijing |
| 2008 | Manama |
| 2010 | Tianjin |
| 2012 | Hammamet |
| 2014 | Beijing |
| 2016 | Doha |
| 2018 | Beijing |
| 2020 | Amman (<i>virtually, due to COVID-19</i>) |

Source: Compiled by authors

¹⁵ On FOCAC and CASCF, see Dawn C. Murphy, “Chinese Diplomatic Outreach to MENA: Cooperation Forums and Special Envoys,” in *Routledge Handbook on China–Middle East Relations*, ed. Jonathan Fulton (London: Routledge, 2022).

TABLE 4: RUSSIA'S MENA PARTNERSHIPS

| State | Level | Year Signed |
|--------------|-----------------------------------------------------|-------------|
| Algeria | Declaration of strategic partnership | 2001 |
| UAE | Declaration of strategic partnership | 2018 |
| Egypt | Comprehensive partnership and strategic cooperation | 2018 |
| Saudi Arabia | Strategic cooperation program | 2019 |

Source: Compiled by authors

them collectively more weight than individual countries like Israel, and going a long way toward explaining why China consistently offers rhetorical support for the Palestinian cause while criticizing Israel, despite the vastly deeper levels of engagement with the Jewish state.

The China-GCC Strategic Dialogue has been a less consequential organization simply because the GCC has essentially been on hiatus as an international organization since a 2017 rupture, when four members cut ties with Qatar in June. It is a semiregular meeting that began in 2010 and has convened three times since. Trade has been a focal point, with a China-GCC free trade agreement (FTA) in the works since 2004. During Xi Jinping's January 2016 state visit to Saudi Arabia, he stressed China's desire to complete an FTA within a year, and four rounds of negotiations were held throughout the year. However, the 2017 split within the GCC seems to have stalled the deal. During Foreign Minister Wang Yi's 2021 visit to the Gulf he emphasized Beijing's commitment to getting the FTA talks back on track.¹⁶ State Councilor Yang Jiechi's visit to Doha earlier this year also indicates that Beijing is ready to resume more productive relations with Qatar, as does Wang's October 2021 visit to Doha to meet with the Taliban and Qatari officials.

China also has appointed two special envoys for the region. The first, the Middle East issues special envoy, was established in 2002 after Arab countries urged China to become more involved in the Arab-Israeli conflict. These special envoys have all been ambassadors with deep regional experience, with five having been appointed so far. The current one, Ambassador

Zhai Jun, assumed this portfolio in 2019. The second position, the special envoy on the Syrian issue, was created in 2016. Xie Xiaoyan, former ambassador to Iran and Ethiopia and head of Chinese Mission to the African Union, has held this position since its creation.

Russia has a less systematic and encompassing bilateral partnership structure compared to China (see Table 4). For example, on the occasion of the visit of King Mohammed VI of Morocco to Moscow in 2016, Russia and Morocco released a statement on their "extended strategic partnership" and followed this up with a series of cooperation agreements in various fields; however, no formal agreement on a strategic partnership appears to have been signed.¹⁷ Likewise, while Russia's Foreign Minister Sergei Lavrov noted Russia and Turkey's intention to "enhance strategic partnership" in 2018, and Putin described cooperation in nuclear energy reaching the "level of strategic partnership," no formal agreement on such a relationship was concluded.¹⁸ In the case of Syria, while it certainly appears to be of significant strategic value for Russia, no specific legal basis for a strategic partnership was signed apart from a 1980 Soviet-era Treaty of Friendship and Cooperation.

Nevertheless, for countries like the UAE and Saudi Arabia that had limited engagement with Moscow during the Cold War, strategic partnership agreements signal qualitative improvements in relations. They also serve to institutionalize, embed, and regularize relations within the respective national bureaucracies, thereby minimizing the vagaries of personal bonds between leaders.

16 "China, Oman Agree to Enhance Cooperation, Push Forward China-GCC Free Trade Talks," ECNS.cn (the official English-language website of China News Service), March 30, 2021, <http://www.ecns.cn/news/2021-03-30/detail-ihaixiqm7137813.shtml>.

17 "Meeting with King Mohammed VI of Morocco," Kremlin (website), March 15, 2016, <http://en.kremlin.ru/events/president/news/51516>.

18 "Russia Vow to Enhance Strategic Partnership," Xinhua, October 8, 2021, http://www.xinhuanet.com/english/2018-08/14/c_137389957.htm; and "Joint News Conference of Vladimir Putin and Recep Tayyip Erdogan," Kremlin (website), April 3, 2018, <http://en.kremlin.ru/events/president/news/57192>.

Russia's multilateral diplomacy in MENA was initially founded on the need for large-scale repair of Russia's standing among Muslims in light of its brutal campaigns in Chechnya, to pacify its own Muslim citizens, and to take the sting out of Islamist movements across the border in Central Asia inspired by resistance to the global war on terror. The fora include the following:

- In 2005, Russia won admittance as an observer to the Organization of Islamic Countries (since renamed as the Organization of Islamic Cooperation); its fifty-seven member states, with a collective population of over 1.8 billion, facilitated Russia's gradual rehabilitation.
- With the support of the Arab League, the Russia-Arab Cooperation Forum was launched in 2009 at the ministerial level to coordinate positions on international issues and strengthen relations. It has met five times, the most recent being in 2019.
- The Gulf Cooperation Council-Russia strategic dialogue at the level of foreign ministers began in 2011 with Abu Dhabi as its first host. It underscores the rapid advances in Russia's relations with the GCC. Thus far, five joint meetings have been held.
- The newest addition to Russia's multilateral engagement in MENA is the Russia-Africa Summit. First launched in 2019 with the next planned for 2022, the platform is symbolic of Moscow's return to Africa, where the former Soviet Union had wielded considerable influence.



Chinese Foreign Minister Wang Yi and Saudi Arabia's Foreign Minister Adel bin Ahmed Al-Jubeir arrive for a news conference at a China Arab forum in Beijing, China, July 10, 2018. Source: REUTERS/Thomas Peter

Over and above these immediate concerns, Russia's political approach in recent years also reflects a larger strategic preoccupation. In the words of a Russian analyst, "Moscow's active participation in regional affairs is an indispensable attribute of a great power capable of defending its idea of justice on a global scale."¹⁹ Special representatives have been appointed to underline the Kremlin's greater attention to MENA affairs. In 2014, Russian Deputy Foreign Minister Mikhail Bogdanov was appointed as the presidential special envoy for the Middle East and Africa.²⁰ Since 2011, Russia's diplomatic outreach in the region includes a special representative of the foreign minister for the Middle East peace process. Additionally, Russia's ambassador to Syria was concurrently named a special representative of the Russian president for the development of relations with the Syrian Arab Republic to better coordinate Russian approaches to Syria with various parties in the Middle East; he shares the Syria file with another presidential envoy on Syrian reconciliation. The diplomatic value of these appointments was underlined by the UAE's award of the Order of Zayed II to Bogdanov in 2019.

For Moscow, the aim of these bilateral and multilateral political platforms is to maintain a visible, credible, and high level of Russian diplomatic presence in MENA. It is not to render Russia as the region's hegemon bar none. In this regard, Russia has been largely successful in inserting itself into MENA affairs; and its views are sought and considered by states in the region.



DOHA, QATAR - MARCH 11, 2021: Russia's Foreign Minister Sergei Lavrov (L) and the Emir of Qatar, Sheikh Tamim bin Hamad al-Thani, hold a meeting. Source: Russian Ministry of Foreign Affairs/TASS

¹⁹ Timofei Bordachev, "Russia in the Middle East: Ten Years After the Arab Spring," Valdai Discussion Club, March 31, 2021, <https://valdaiclub.com/a/highlights/russia-in-the-middle-east-10-years-after-the-arab-/>.

²⁰ Bogdanov was appointed presidential special envoy for the Middle East in 2012. His portfolio was expanded to include Africa in 2014.

ECONOMIC APPROACHES

There is a tremendous gap between Chinese and Russian economic performance in MENA, but it has to be emphasized that they are not playing the same game here. China leans heavily on economic statecraft, knowing that its market size and position as the world's largest exporter by value are the most attractive tools in its kit. Its economic weight gives it leverage in political and diplomatic matters. Russia's economic goals in MENA are comparatively modest and less strategic, with the exception of oil market coordination. They include expanding Russia's exports of hydrocarbons, nuclear technology, food, and arms; attracting foreign direct investment (FDI) from capital-rich Gulf states; and aligning positions in global energy markets.

Economic exchange is the most well-developed facet of China's approach to MENA, which is unsurprising and consistent with its global status as an economic superpower. China's economic prowess in MENA is based on trade, investment, contracting, and finance.

Trade is the deepest aspect of China's regional footprint. In 2020—admittedly a bad year for global trade—China was among the top four export markets for ten MENA countries, and a top four source of imports for every country in the region (see Table 5). Its trade relationships follow a predictable pattern, with much higher values of trade with the energy exporters of the Gulf. In 2020, its top five MENA trade partners were Saudi Arabia, the UAE, Iraq, Turkey, and Oman (see Table 6).

Energy is naturally a central element of the trade relationships. Petroleum made up 20 percent of China's energy use in 2019, consuming on average 14.5 million barrels per day (b/d). Of that, 10.1 million b/d were imported. Middle East producers, led by Saudi Arabia, were responsible for 44 percent of China's imports in 2019, making the region a major feature of the PRC's energy security.²¹ This also gives China an outsized role in the economic health of MENA oil producing countries.

Finance has also seen an increase. China's largest state-owned commercial banks—the so-called Big Four of Industrial and Commercial Bank of China (ICBC), China Construction Bank, Agricultural Bank of China, and Bank of China (BOC)—all have branches operating throughout MENA. Interestingly, the UAE is the only MENA country with branches of all four. Dubai's BOC branch and Doha's ICBC are both used for currency swaps in renminbi.

China's investment and contracting in the region is an especially important indicator of its deeper footprint. In 2016, it became the largest extraregional investor in MENA, accounting for nearly 32 percent of FDI into the region.²² Its international investments have declined sharply since hitting a high point in 2016, as Chinese state-owned enterprises and financial institutions started shying away from making large international transactions, possibly because a “fear of balance of payments and exchange rate weakness has caused rationing of the hard currency used to make investments.”²³ MENA contracting, however, remains substantial in certain countries, as seen in the table below. As state development programs call for economic diversification, synergy is created between programs such as Saudi Vision 2030, Egypt Vision 2030, and China's Belt and Road Initiative (BRI).²⁴ Chinese companies have capitalized, with major construction contracting throughout the region. The China State Construction Engineering Corporation is building the eighty-story Iconic Tower in the central business district of Egypt's new administrative capital, and it has a \$667 million deal with Saudi Arabia to build five thousand residential units in Riyadh. Power China built a 730-megawatt (MW) power plant in Rumaila, Iraq, which was connected to the country's grid in 2021, and it also has signed a contract with the Iraqi government to build solar plants that would produce 2000 MW.²⁵ The top five MENA countries in terms of Chinese construction contracts are the only ones with CSP agreements with China, demonstrating the relationship between political coordination and commercial benefits.

21 US Energy Information Administration, “Country Analysis Executive Summary: China,” September 30, 2020, https://www.eia.gov/international/content/analysis/countries_long/China/china.pdf.

22 “China Is Largest Foreign Investor in Middle East,” *Middle East Monitor*, July 24, 2017, <https://www.middleeastmonitor.com/20170724-china-is-largest-foreign-investor-in-middle-east/>.

23 Derek Scissors, “China's Global Business Footprint Shrinks,” American Enterprise Institute, July 2019, <https://www.aei.org/research-products/report/chinas-global-business-footprint-shrinks/>.

24 Afshin Molavi, “China's Global Investments Are Declining Everywhere Except for One Region,” *Foreign Policy*, May 16, 2019, <https://foreignpolicy.com/2019/05/16/chinas-global-investments-are-declining-everywhere-except-for-one-region/>.

25 John Calabrese, “Towering Ambitions: Egypt and China Building for the Future,” Middle East Institute, October 6, 2020, <https://www.mei.edu/publications/towering-ambitions-egypt-and-china-building-future>; “Saudi Arabia, China's CSCEC Sign \$667m Riyadh Housing Contract,” *Construction Week*, February 24, 2019, <https://www.constructionweekonline.com/projects-tenders/169574-saudi-arabia-chinas-cscec-sign-667m-riyadh-housing-contract>; and “Iraqi Government Signs Contract with Power China to Build Solar Plants,” *Global Times*, August 26, 2021, <https://www.globaltimes.cn/page/202108/1232519.shtml>.

TABLE 5: RANK OF CHINA AND RUSSIA AS IMPORT AND EXPORT MARKETS FOR MENA COUNTRIES, 2020

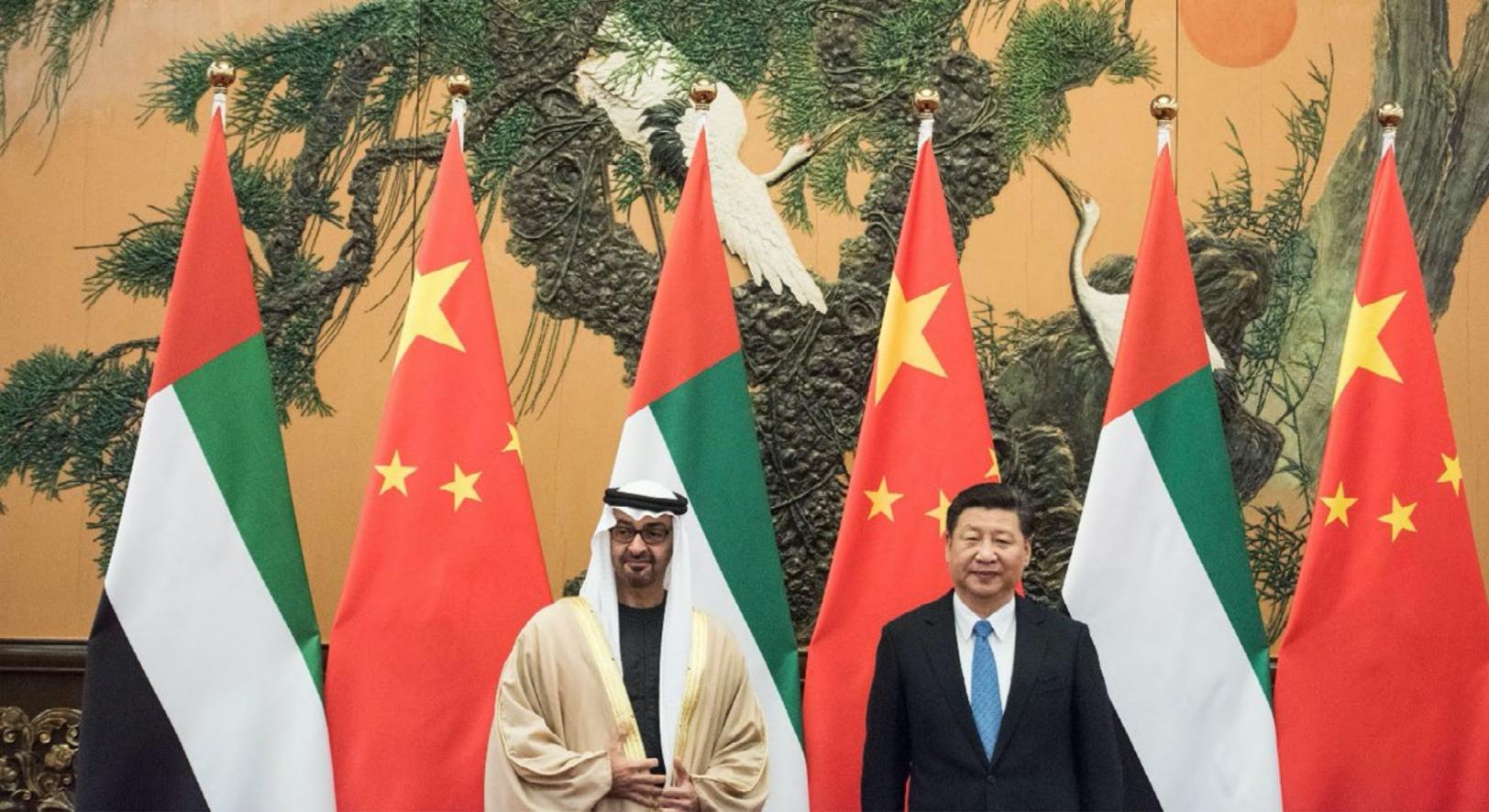
| | Import ranking | | Export ranking | |
|--------------|----------------|--------|----------------|--------|
| | China | Russia | China | Russia |
| Algeria | 1 | NA | NA | 37 |
| Bahrain | NA | 43 | 3 | 44 |
| Egypt | 1 | 7 | 11 | 22 |
| Iran | 1 | 6 | 1 | 6 |
| Iraq | 1 | 27 | 1 | 55 |
| Israel | 2 | 24 | 2 | 18 |
| Jordan | 1 | 21 | 9 | 58 |
| Kuwait | 1 | 27 | 3 | 48 |
| Lebanon | 4 | 8 | 32 | 58 |
| Libya | 1 | 25 | 2 | 85 |
| Morocco | 3 | 9 | 27 | 17 |
| Oman | 3 | 66 | 1 | 62 |
| Qatar | 2 | 20 | 2 | 66 |
| Saudi Arabia | 1 | 38 | 1 | 66 |
| Syria | 2 | 4 | 36 | 26 |
| Tunisia | 3 | 12 | 33 | 43 |
| Turkey | 1 | 3 | 15 | 10 |
| UAE | 1 | 18 | 4 | 57 |
| Yemen | 2 | 11 | 14 | 141 |

Source: International Monetary Fund Direction of Trade Statistics (database), September 2021

TABLE 6: CHINA'S TOP MENA TRADE PARTNERS, 2020 (in billions of US\$)

| | Exports to China | Imports from China | Total Trade |
|--------------|------------------|--------------------|-------------|
| Saudi Arabia | 32,363.5 | 26,754.63 | 59,118.13 |
| UAE | 15,348.38 | 36,475.24 | 51,823.62 |
| Iraq | 16,895.15 | 11,616.5 | 28,511.13 |
| Turkey | 2,865.87 | 23,041.35 | 25,907.22 |
| Oman | 12,642.22 | 1,115.61 | 13,757.83 |
| Iran | 6,172.71 | 6,217.07 | 12,389.78 |
| Israel | 4,199.5 | 7,657.4 | 11,856.9 |
| Qatar | 7,816.25 | 3,905.99 | 11,722.24 |

Source: International Monetary Fund Direction of Trade Statistics (database), September 2021

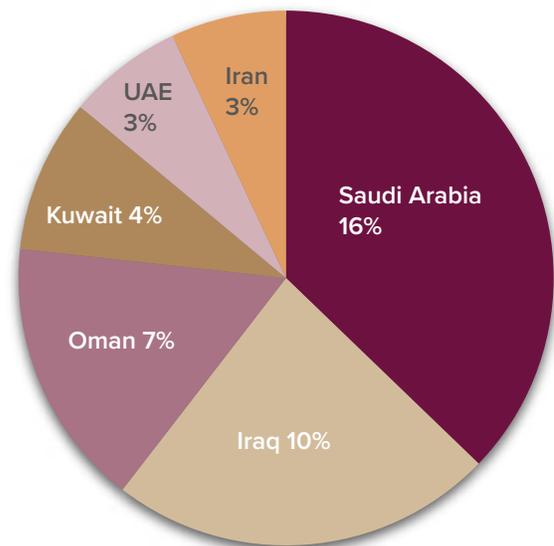


Sheikh Mohammed bin Zayed al-Nahyan (L), Crown Prince of Abu Dhabi and UAE's deputy commander-in-chief of the armed forces meets Chinese President Xi Jinping (R) during a signing ceremony at the Great Hall of the People in Beijing on December 14, 2015. Source: REUTERS/FRED DUFOUR/Pool

Russia's most valuable economic leverage in MENA is its participation in the OPEC+ agreement to coordinate oil production volumes among leading oil producers, including those in MENA, in order to achieve "acceptable" oil prices.²⁶ Against the odds, given the history of Russia's tenuous relations with OPEC, and with the exception of the short-lived price war in April 2020, the agreement has been useful in terms of regularizing contact, encouraging compromise, and building trust. The OPEC+ agreement also has been crucial for Russia's budget, around 35 percent of which is funded by hydrocarbon revenues, and for the Gulf states (excluding the UAE) and Libya, where between 70 and 80 percent of the government's revenues are from oil and gas.²⁷ With oil prices at \$70 to \$80 per barrel in 2021, the highest since October 2018, Russian and MENA producers will need to continue their cooperation to ensure prices do not rise to and stay at \$85 or more, a level that could tempt their competitors, namely US shale oil producers, to ramp up production.²⁸ China also engages the Middle East as the region's largest customer but only as a price taker, not a price setter like Russia.

TABLE 7: CHINA'S CRUDE OIL IMPORTS FROM MENA, 2019

Percentage of Total Chinese Crude Imports



Source: US Energy Information Administration, September 2020

26 Li-Chen Sim, "Russian-Saudi Breakup May Not End in Divorce," Arab Gulf States Institute in Washington (blog), <https://agsiw.org/russian-saudi-breakup-may-not-end-in-divorce/>.

27 Mike Coffin, Axel Dalman, and Andrew Grant, "Beyond Petrostates," Carbon Tracker Initiative, February 2021, <https://carbontracker.org/reports/petrostates-energy-transition-report/>.

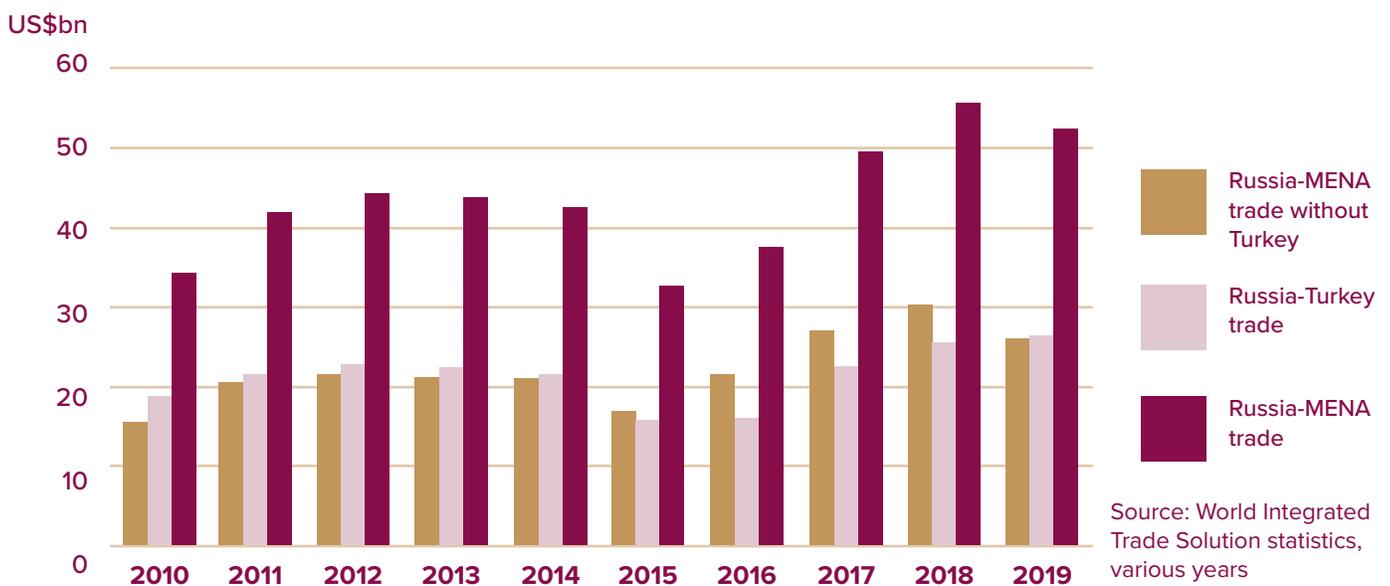
28 The threshold is cited in "Shale Rushes to Lock In Oil's Rally as OPEC+ Rift Roils Market," Bloomberg, July 6, 2021, <https://www.bloomberg.com/news/articles/2021-07-06/shale-rushes-to-lock-in-oil-s-rally-as-opec-rift-roils-market?sref=bw0lgMUo>.

TABLE 8: CHINESE CONSTRUCTION CONTRACTING IN MENA

| MENA Country | Value of Chinese Construction Contracting, billions of US\$, 2005 - 2021 |
|--------------|--------------------------------------------------------------------------|
| Algeria | \$24.61 |
| Bahrain | \$1.42 |
| Egypt | \$19.13 |
| Iran | \$21.84 |
| Iraq | \$12.33 |
| Israel | \$2.75 |
| Jordan | \$4.54 |
| Kuwait | \$10.46 |
| Lebanon | No data available |
| Libya | \$2.6 |
| Morocco | \$1.91 |
| Oman | \$5.41 |
| Qatar | \$7.7 |
| Saudi Arabia | \$35.57 |
| Syria | \$0.3 |
| Tunisia | \$0.11 |
| Turkey | \$10.51 |
| UAE | \$28.37 |
| Yemen | \$1.24 |

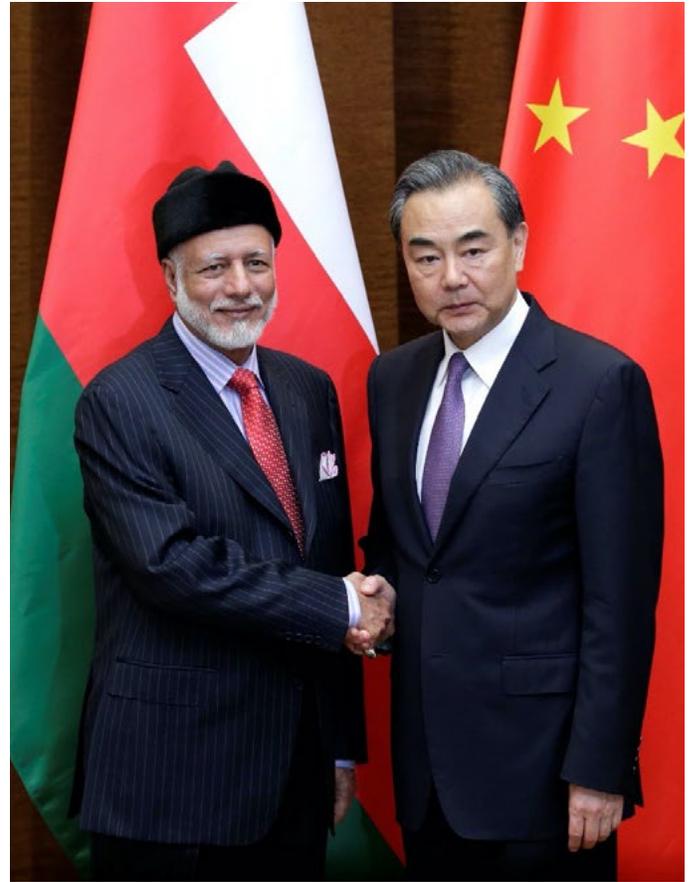
Source: American Enterprise Institute, China Global Investment Tracker

TABLE 9: RUSSIA - MENA TRADE (in billions of US\$)



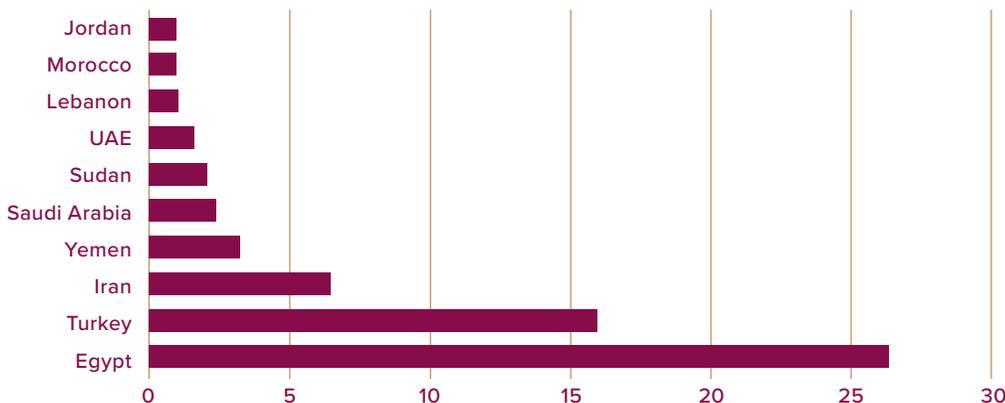
As Table 5 above illustrates, Russia’s economic significance in MENA on an aggregate level pales in comparison to China. For instance, Russia’s trade with MENA in 2019 amounted to \$52.6 billion, which was just below Sino-Saudi trade in 2020. At the same time, it is important to acknowledge the upward trajectory in commercial exchanges (see Table 9). Russia-MENA trade accounts for a growing proportion of Russia’s total trade at 7.8 percent in 2019, up from 5.5 percent in 2010; approximately half of this trade is with Turkey alone. Intergovernmental mechanisms—such as the Russia-Arab Business Council that meets twice a year, the UAE-Russian Business Council, and the Algerian-Russian Joint Economic Commission—contribute to economic diversification, which opens up more avenues for trade and improves the business environment.

One exception to China’s economic dominance is Russia-MENA grain trade, a key but often overlooked aspect. Russia has come a long way from the 1980s when it was a net importer of grain; today, it is the largest global exporter of wheat by weight and by value, surpassing traditional exporters including the United States and Canada. Grain exports generate welcome income for its sanctions-constrained economy and is among the country’s top five export revenue earners. MENA’s rapidly growing population has driven the growth of Russia’s grain exports: the region accounts for almost two-thirds of Russia’s grain exports in 2019, up from one-third in 2000. For MENA, Russia is the third-largest supplier of grain at 14.2 percent of imports, up from just over 1 percent in 2005. In Egypt, Sudan, and Turkey, Russia plays an outsized role, supplying 40 to 45 percent of their grain imports (see Table 9).



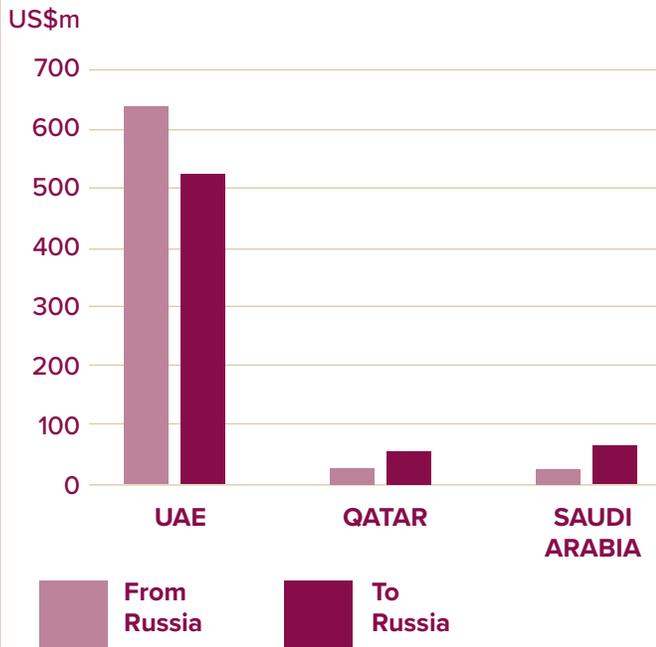
China’s Foreign Minister Wang Yi (R) meets Omani Foreign Minister Yusuf bin Alawi in Beijing, China May 15, 2018. Source: REUTERS/Jason Lee/Pool

TABLE 10: TOP TEN EXPORT DESTINATIONS IN MENA FOR RUSSIAN GRAIN, 2019
(as % of total Russian grain exports)



Source: Data from Observatory of Economic Complexity, an online data visualization and distribution platform currently designed and developed by Datawheel.

TABLE 11: GREENFIELD FDI BETWEEN RUSSIA AND SELECTED COUNTRIES IN MENA, 2011-2020



Source: Data from fDi Markets (database), Financial Times, 2021.

Russia is expected to build upon and enhance its “wheat diplomacy” in MENA—to some disquiet in US policy circles²⁹—thanks in part to global warming, which will increase the acreage of arable land in Russia and extend the growing season there, while it puts greater stress on grain cultivation in MENA. By contrast, China is a net importer of grain, including wheat and corn.

Nuclear energy is the second sector-specific niche where Russia, a global leader in the nuclear power industry, has made more extensive inroads compared to China.³⁰ Russia has completed phase one of Iran’s Bushehr nuclear plant. It is currently constructing nuclear power plants in Egypt and Turkey along with additional phases at Bushehr, and it has signaled its interest in undertaking similar projects in other MENA countries, including Jordan and Saudi Arabia. Given that nuclear plants have an operating life of at least forty years and require regular maintenance, operator training, and fuel deliveries, nuclear energy projects could help to lock-in long-term bilateral relations between Russia and the nuclear host country. Nevertheless, the lower price point and much shorter delivery schedule offered by solar and wind energy, coupled with battery storage, threaten the sustainability of Russia’s nuclear pathway in MENA.

With an economy ten times smaller than China’s and one that is sanctions-constrained to boot, Russia is not a significant source of FDI for MENA as a whole. For Iraq, however, investments by Russian oil and gas companies are



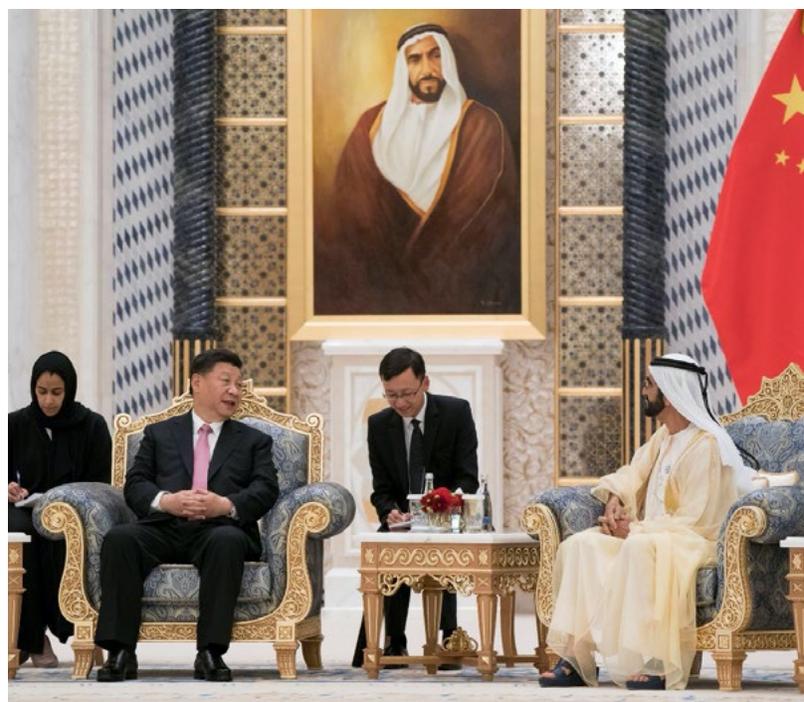
Iran’s President Hassan Rouhani, Russia’s Vladimir Putin and Turkey’s Tayyip Erdogan meet in Sochi, Russia November 22, 2017. Source: Sputnik/ Mikhail Metzel/Kremlin via REUTERS

29 See, for example, Sherri Goodman and Clara Summers, “Will Russia Weaponize Its Wheat as the World Combats the Coronavirus?,” *National Interest*, July 18, 2020, <https://nationalinterest.org/feature/will-russia-weaponize-its-wheat-world-combats-coronavirus-165031>.

30 For an assessment of Russia’s role in MENA’s nuclear uptake, see Li-Chen Sim, “Powering the Middle East and North Africa with Nuclear Energy: Stakeholders and Technopolitics,” in *Low Carbon Energy in the Middle East and North Africa*, eds. Robin Mills and Li-Chen Sim (London: Palgrave, 2021).

a lifeline, with Lukoil's West Qurna-2 in Basra accounting for 12 percent of Iraq's oil exports.³¹ As for the GCC, FDI is as much a commercial undertaking as an inducement to elicit or sustain cooperation from Russia on regional matters such as Syria and Iran. Examples include equity in St Petersburg's Pulkovo airport, EN+ (a power and aluminum company), a fitness chain, retail ventures, oil companies, and Novomet (an oil services company). In MENA, the volume of greenfield FDI (i.e., investing in establishing operations in a country, and excluding portfolio FDI) is highest between Russia and the UAE (see Table 11).

Last but not least, tourism receipts generated by Russian visitors to MENA are particularly significant for the tourism-dependent economies of Turkey, Egypt, and the emirate of Dubai (Table 12). Before the coronavirus pandemic, tourism accounted for 12 percent of Turkish and Egyptian gross domestic product (GDP) and 18 percent of Dubai's GDP.³² In 2019, Dubai welcomed more than 728,000 Russian tourists (4 percent of all inbound tourists), while Turkey hosted greater than six million Russians (16 percent of inbound tourists). Egypt, which used to receive more than three million Russian tourists per year (around one-third of inbound tourists) prior to the 2015 moratorium on direct flights between the two countries (due to an air crash in Sinai), is expecting the return of more than one million of them in 2021, with the resumption of direct flights. By contrast, tourist arrivals from China to MENA will take longer to return to pre-pandemic levels given travel restrictions in China.



Prime Minister and Vice President of the United Arab Emirates and Ruler of Dubai Sheikh Mohammed bin Rashid al-Maktoum meets with Chinese President Xi Jinping at the Presidential Palace in Abu Dhabi, United Arab Emirates July 20, 2018. Source: WAM/Handout via REUTERS

TABLE 12: RUSSIAN AND CHINESE VISITORS TO TURKEY AND DUBAI (in millions)

| | 2019 | | 2018 | | 2017 | |
|---------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | Russia | China | Russia | China | Russia | China |
| Turkey | 7.0 | 0.43 | 6.0 | 0.39 | 4.7 | 0.25 |
| UAE | 0.728 | 0.989 | 0.678 | 0.857 | 0.530 | 0.764 |

Source: Data from Tourism Statistics, Ministry of Culture and Tourism of the Republic of Turkey, <https://www.ktb.gov.tr/EN-249283/tourism-statistics.html>; and Tourism Performance Reports, Department of Economy and Tourism, Dubai, <https://www.dubaitourism.gov.ae/en/research-and-insights>.

31 "Iraq," Lukoil (website), <https://mideast.lukoil.com/en/Activities/Iraq>.

32 "Turkey Eyes 50 Million Tourists by 2023, Minister Says," *Daily Sabah*, October 26, 2021, <https://www.dailysabah.com/business/tourism/turkey-eyes-50-million-tourists-by-2023-minister-says>; "Travel, Tourism Contribute to Egypt's GDP by 11.9 Percent," *Egypt Today*, March 19, 2019, <https://www.egypttoday.com/Article/3/67255/Travel-tourism-contribute-to-Egypt%E2%80%99s-GDP-by-11-9>; and "S&P Expects Weak Tourism to Weigh on Dubai Economy until Late 2022," Reuters, October 19, 2021, <https://www.reuters.com/world/middle-east/sp-expects-weak-tourism-weigh-dubai-economy-until-late-2022-2021-10-19/>.

SECURITY APPROACHES

In terms of security, there is an opposite dynamic, with Russia taking a more assertive position and China maintaining its relatively modest approach. Russia's key goal in MENA is to minimize sources of instability, including terrorism and revolutions, near its southern borders; this allows Moscow to continue prioritizing the security of its western borders. An additional objective is to opportunistically undermine the unity of US-led security partnerships in MENA in order to create openings for a growing Russian engagement. Meanwhile, China has seemingly been content to free ride under US security commitments, although given the depth of Chinese interests, assets, and expatriate citizens in MENA it is unlikely that it will continue indefinitely. Much of this will be a response to the China-US relationship; if the current trajectory continues, then Beijing will likely feel pressure to pursue a more muscular security presence in the region.

The prospect of China playing a larger role in regional security affairs leads to assumptions that the PRC's goal is to challenge

US preponderance in MENA. The reality, however, has been a consistently minimal engagement from Beijing on security matters. On the one hand, China—like many other countries with deep MENA interests—has been free riding under the US security umbrella; and on the other hand, there is a more complex explanation rooted in Chinese approaches to security in general. When asked about international security and military commitments, PRC officials have been consistent in articulating a view that security is a puzzle best solved through development rather than military means. They apply this logic when discussing MENA, with leaders from Xi on down all expressing this belief. Articulating the party line in 2014, CASCF Ambassador Li Chengwen said, “The root problems in the Middle East lie in development and the only solution is also development.”³³ This perspective partly explains why Chinese officials bristle at the accusation of free riding; they believe that a combination of aid, infrastructure development, and commerce contribute to state-led development, and that military intervention from outside forces exacerbates security



Russian Industry and Trade Minister Denis Manturov aims a weapon during the International Defence Exhibition (IDEX) in Abu Dhabi February 22, 2015. Russian firearms maker Kalashnikov Concern aims to concentrate on its markets in the Middle East and Africa and diversify its product range to offset the impact of Western sanctions, its chief executive said on Sunday. Source: REUTERS/ Stringer

33 “Development Key to Solving Middle East Problems: Chinese Diplomat,” Xinhua, August 25, 2016, http://news.xinhuanet.com/english/2016-08/25/c_135630804.htm.

instability. This approach is consistent with China's own path from third world to economic superpower, and is attractive to many countries in the Middle East.

At the same time, there is evidence of more conventional security approaches to the region. China's first overseas base, the Peoples' Liberation Army Support Base, opened in Djibouti in 2017, providing it with a physical presence in the Red Sea. Chinese officials describe it as a facility to support its ongoing participation in the United Nations anti-piracy mission in the Gulf of Aden, but it also should be considered as a means of protecting China's growing Red Sea interests while also providing a link to the Mediterranean Sea and China's largest trading partner, the European Union. It was reported in 2021 that China was building a second regional base, this one in the UAE, although apparently the project has been abandoned as a result of US pressure.³⁴ Given the UAE's Defense Cooperation Agreement with the United States, a substantial Chinese military installation would strain the US relationships of both the UAE and China. During a 2021 Senate Foreign Relations subcommittee hearing, Department of Defense Deputy Assistant Secretary for the Middle East Dana Stroul warned, "We understand that there will be an economic or trade relationship with China, just like the United States has, but there are certain categories of activities or engagement that our partners may be considering with China that, if they do, will pose a risk to US defense technology, other kinds of technology, and ultimately force protection."³⁵

Chinese arms sales are another aspect of its security presence in MENA, although they are quite modest compared with the United States and Russia. Over the five-year period of 2016 to 2020, China was the world's fifth-largest arms exporter, although its sales decreased by nearly 8 percent from the preceding five-year period.³⁶ While the Middle East market continues to grow, China has not made substantial gains. One sector where it has is unmanned aerial vehicles (UAVs). During a 2017 state visit to Beijing by Saudi King Salman, a deal was signed between King Abdulaziz City for Science and Technology and China Aerospace Science and Technology

Corporation to build a factory in Saudi Arabia to assemble and service Chinese UAVs.³⁷ Beyond Saudi Arabia, this factory sells to Egypt, Jordan, Iraq, and the UAE. The Conventional Arms Transfer policy places restrictions on US UAV sales. China is not a signatory to the Missile Technology Control Regime or the Wassenaar Arrangement on Export Controls for Conventional Arms and Dual-Use Goods and Technologies, and does not have to clear the same kind of hurdles. As a result, a US official complained that "China has been selling the hell out of its drones" to Gulf militaries.³⁸

To a greater extent than Beijing, Moscow wants to reduce US security preponderance in MENA—and in the process carve out a role for itself—but not to upend it. This is consistent with Russia's strategic preoccupation to behave as and be perceived as a great power on par with the United States; it also aligns with an observation of US political scientist Robert Legvold that Russia seeks status not responsibility.³⁹ In MENA, this first means concocting and maintaining a seat at the table in various regional conflicts though its role as a relatively "neutral" power broker, compared to the United States. At times, this requires selectively upholding the role of United Nations-backed processes such as the P5+1 over Iran (involving the United States, United Kingdom, France, China, Russia, and Germany) or the Government of National Unity (regarding Libya), since Russia derives influence from its permanent seat on the UN Security Council.⁴⁰ At other times, gaining a seat at the table has required creating parallel mechanisms (such as the Astana format in the Syrian conflict or the deployment of private military security contractors) that have undermined UN-led processes for conflict resolution.

Second, Russia's approach entails presenting itself as an alternative security partner—but not guarantor—to exploit and widen rifts between the United States and its traditional regional allies. Toward this end, Russia is the region's second largest arms supplier. Companies linked to a politically connected Russian oligarch conduct influence operations to sow divisions helpful to Russia in Libya, Syria, and Sudan.⁴¹ Russia regularly participates

34 Gordon Lubold and Warren P. Strobel, "Secret Chinese Port Project in Persian Gulf Rattles U.S. Relations with U.A.E.," *Wall Street Journal*, November 19, 2021, <https://www.wsj.com/articles/us-china-uae-military-11637274224>.

35 Joel Gehrke, "US Warns Middle East Allies Not to Give China a Military Base," *Washington Examiner*, August 10, 2021.

36 "International Arms Transfers Level Off After Years of Sharp Growth; Middle Eastern Arms Imports Grow Most, Says SIPRI," Stockholm International Peace Research Institute (SIPRI), March 15, 2021, <https://www.sipri.org/media/press-release/2021/international-arms-transfers-level-after-years-sharp-growth-middle-eastern-arms-imports-grow-most>.

37 Minnie Chan, "Chinese Drone Factory in Saudi Arabia First in Middle East," *South China Morning Post*, March 26, 2017, <https://www.scmp.com/news/china/diplomacy-defence/article/2081869/chinese-drone-factory-saudi-arabia-first-middle-east>.

38 Natasha Turak, "Pentagon Is Scrambling as China 'Sells the Hell out of' Armed Drones to US Allies," CNBC, February 21, 2019, <https://www.cnbc.com/2019/02/21/pentagon-is-scrambling-as-china-sells-the-hell-out-of-armed-drones-to-americas-allies.html>.

39 Robert Legvold, "The 'Russian Question,'" in *Russia and Europe: The Emerging Security Agenda*, ed. Vladimir Baranovsky (Oxford: Oxford University Press for SIPRI, 1997), 67.

40 On Russia's selective adherence to multilateralism, see Anna Borshchevskaya and Andrew J. Tabler, "Triangular Diplomacy: Unpacking Russia's Syria Strategy," *Policy Notes*, July 2021, <https://www.washingtoninstitute.org/media/4679>.

41 Facebook, "Removing Coordinated Inauthentic Behavior from France and Russia," Meta, December 15, 2020, <https://about.fb.com/news/2020/12/removing-coordinated-inauthentic-behavior-france-russia/>; and "U.S. Blacklists Individuals, Entities Linked to Leader of Russia's IRA," Reuters, September 23, 2020, <https://www.reuters.com/article/us-usa-russia-sanctions-idUSKCN26E2HO>.



Russia's President Vladimir Putin (2nd L), his Egyptian counterpart Abdel Fattah al-Sisi (2nd R) and Russia's Defence Minister Sergei Shoigu (L) attend a welcoming ceremony onboard guided missile cruiser Moskva at the Black Sea port of Sochi, August 12, 2014. Source: REUTERS/Alexei Druzhinin/RIA Novosti/Kremlin

in bilateral naval drills with Iran, Turkey, and Egypt. Russia also has proposed its own plan for a Middle East collective security architecture that contrasts with the far less inclusive version put forth by the United States or Iran. According to Khalid Almezaini, “the UAE announced in November 2019 that it was studying the Russian proposal. However, no progress has been made since that time.”⁴² Other Arab commentators have been more vocal about what is perceived to be the plan’s shortcomings, such as the pro-Iran bias and a limited role for the Gulf states.⁴³ Nevertheless, recent attempts to deescalate regional tensions, including the Abraham Accords, Gulf outreach to Iran and Turkey, and the rehabilitation of Syria’s Assad, may yet result in a reconsideration of the merits of the plan. By contrast, while China has welcomed Russia’s initiative, it is disinclined to be drawn into sponsoring a new regional security architecture, as noted above.

The volume of Russia’s arms sales in MENA is far larger than China’s, and with it, the propensity for influence that arms sales beget. For Russia, MENA accounted for 39 percent of its global revenues from arms sales during the 2016-2020 period, up

from 19 percent in 2011-2015. Countries in MENA, particularly Algeria, Egypt, and Iraq, are sourcing a growing share of arms from Russia; the latter accounted for 13 percent of the region’s supplies during the 2016-2020 period, compared to 8.2 percent in 2011-2015, although this pales beside the US share of 52 percent in 2016-2020.⁴⁴ In Egypt’s case, it has even purchased and taken delivery of advanced Russian Sukhoi Su-35 fighter planes. The selling point for Russian arms goes beyond the saying “Chinese price for European quality”;⁴⁵ Russia places far fewer restrictions on the use of supplied weapons. Local production of Russian arms, such as rocket-propelled grenade launchers in Jordan since 2013 and potentially Kalashnikovs in Saudi Arabia, also support employment and technology-transfer priorities in these states.

Nevertheless, high-spending Gulf countries are unlikely to pivot to Russia and away from the United States for their defense requirements. For instance, between 2016 and 2020, the United States supplied 52 percent of the region’s arms purchases by value, a decline of merely 1 percent over the previous five-year period. Moreover, the United States accounted for 47 percent of the region’s arms sales between 2016 and 2020, an increase compared to its 41 percent share in the previous five-year period.⁴⁶ The Gulf states have purchased tanks, small arms, and helicopters for policing, but purchases of anti-missile systems or combat aircraft remain on paper as they are perceived to be “red lines” that could incur US sanctions, as was the case with Turkey’s purchase of the S-400 system from Russia. In this regard, Russia’s wedge strategies in the Gulf have their limits.

Finally, a third approach is thought to be establishing a permanent military presence through acquiring bases in MENA. Russia’s air and naval bases in Syria are seen as harbingers for similar facilities in Libya, Yemen, and Sudan. Syria appears to be a one-off in terms of post-Soviet bases, although Sudan’s new leader may yet approve a plan discussed by his predecessor to host a Russian naval base. Moreover, Russia’s financial constraints could be better spent on acquiring access rights from host countries instead of maintaining permanent Russian bases.⁴⁷

42 Khalid Almezaini, “The UAE’s Security Perceptions in the Middle East: Regional Challenges, Alliances and the Diversification of Partners,” in *Fostering a New Security Architecture in the Middle East*, eds. Silvia Colombo and Andrea Dessì, Foundation for European Progressive Studies and Istituto Affari Internazionali, 2020, 219, <https://www.iai.it/sites/default/files/9788833653501.pdf>.

43 Abdel Aziz Aluwaisheg, “Reviving Russia’s Gulf Security Proposal Faces More Hurdles,” *Arab News*, December 22, 2020, <https://www.arabnews.com/node/1781381>.

44 SIPRI, Arms Transfers Database (data from various years).

45 Nikolay Kozhanov, “Russian Policy Across the Middle East: Motivations and Methods,” Chatham House Research Paper, February 2018, <https://www.chathamhouse.org/sites/default/files/publications/research/2018-02-21-russian-policy-middle-east-kozhanov.pdf>.

46 Pieter D. Wezeman et al., “Trends in International Arms Transfers, 2020,” SIPRI (fact sheet), March 2021, https://sipri.org/sites/default/files/2021-03/fs_2103_at_2020.pdf; and Aude Fleurant et al., “Trends in International Arms Transfers 2015,” SIPRI (fact sheet), February 2016, <https://www.sipri.org/sites/default/files/SIPRIFS1602.pdf>.

47 On Syria being an exceptional case in Russia’s foreign policy, see a transcript of an interview with Vitaly Naumkin (president of the Institute of Oriental Studies, Russian Academy of Sciences), in “What Is Going on in the Middle East? Russia’s Interests and Logic of Action in the Region,” Dialogue Club International (meeting), PIR Center (Russian nongovernmental organization), July 5, 2017, <http://www.pircenter.org/media/content/files/13/15000294451.pdf>.

PUBLIC DIPLOMACY APPROACHES

In their soft power pushes into MENA, there are similar objectives. In much of the world, China's "wolf warrior" diplomacy under Xi has undermined the considerable soft power gains it had achieved under Hu Jintao. Public opinion polling in recent years has underscored a growing distrust of the PRC in most democracies. In the MENA region, however, China's public diplomacy has been effective, with data from the Arab Barometer in 2021 showing that China compares favorably with the United States across several categories.⁴⁸ China wants to build upon these gains in its regional public diplomacy, promoting its social and political values as an alternative to Western liberal democracy.

Chinese leaders have long been aware of the importance of image and perception in international politics. Joseph Nye's writings on soft power found a receptive audience in Beijing, where Chinese Communist Party leaders have taken the lesson to heart. Hu made it an emphasis during his presidency, saying in a 2009 speech: "The main strategic objectives in the coming years should be to promote abroad a China that is more politically influential, more economically competitive, more appealing in its image, and more ethical."⁴⁹ It has continued to increase in importance under Xi, who claimed early in his administration that "efforts are needed to promote China's cultural soft power by disseminating modern Chinese values and showing the charm of Chinese culture to the world."⁵⁰ The BRI white paper lists "people-to-people bonds" as one of five cooperation priorities, describing efforts of "promoting extensive cultural and academic exchanges, personnel exchanges and cooperation, media cooperation, youth, and women exchanges and volunteer services, so as to win public support for deepening bilateral and multilateral cooperation."⁵¹ In the MENA region, this has been especially evident in education and media outreach.

In education, Chinese language training has become an important factor in its soft power push. Confucius Institutes have been used as a means of enhancing Chinese language and culture internationally, with over 550 in operation. In MENA



Saudi Arabia's King Salman bin Abdulaziz shakes hands with Russia's Foreign Minister Sergei Lavrov in Riyadh, Saudi Arabia March 5, 2019. Source: Bandar Algaloud/Courtesy of Saudi Royal Court/ Handout via REUTERS

states, there are twenty-three Confucius Institutes as of 2021 (see Table 13). Chinese language has been added to national curricula as well, with Saudi Arabia and the UAE both offering Chinese classes in their public schools.⁵² Students from MENA have also been taking advantage of generous university scholarship programs that bring international students to China. Yemen (with 2,686 students in 2020), Turkey (2,146), and Saudi Arabia (1,584) are the MENA countries with the highest number of nationals studying at Chinese universities.⁵³

Chinese officials have long been concerned about "media hegemony," i.e., the US ability to dominate international narratives through its overwhelming media power. Over the past two decades, there has been a concentrated effort to develop its own voice internationally to present Chinese perspectives. China Central Television (CCTV) launched a twenty-four-hour Arabic-language channel in 2009, with

48 Michael Robbins, "U.S. & China's Competition Extends to MENA," Arab Barometer, January 12, 2021, <https://www.arabbarometer.org/2021/01/u-s-chinas-competition-extends-to-mena/>.

49 Zhao Kejian, "The Motivation Behind China's Public Diplomacy," *The Chinese Journal of International Politics* 8, no. 2 (2017): 170.

50 "Xi Jinping: China to Promote Cultural Soft Power," Xinhua, January 1, 2014.

51 National Development and Reform Commission, Ministry of Foreign Affairs and Ministry of Commerce of the People's Republic of China, "Vision and Actions on Jointly Building Silk Road Economic Belt and 21st-Century Maritime Silk Road," 2015, http://en.ndrc.gov.cn/newsrelease/201503/t20150330_669367.html.

52 "Chinese Language Programme to Launch Officially in UAE Schools in September," *Khaleej Times*, July 23, 2019, <https://www.khaleejtimes.com/news/education/chinese-language-programme-to-launch-officially-in-uae-schools-in-september>; and Ruba Obaid, "Students Begin Studying Chinese in Public Schools in Saudi Arabia," January 20, 2020, <https://www.arabnews.com/node/1615436/saudi-arabia>.

53 Chai Shaojin, "China's Nascent Soft Power Projection in Middle East and North Africa: Cultural, Educational, and Media Initiatives," in *Routledge Handbook on China–Middle East Relations*, ed. Jonathan Fulton (London: Routledge, 2022).

TABLE 13: LOCATION OF CONFUCIUS INSTITUTES IN MENA AND ARAB LEAGUE NATIONS

| | |
|------------|-----------------------------------------------|
| Manama | Bahrain University |
| Cairo | Cairo University |
| Mvouni | University of Comoros |
| Ismalia | Suez Canal University |
| Tehran | University of Tehran |
| Babolsar | Mazandaran University |
| Jerusalem | Hebrew University |
| Tel Aviv | University of Tel Aviv |
| Amman | Talal Abu-Ghazaleh Global-Confucius Institute |
| Benghazi | University of Libya |
| Beirut | St Joseph University |
| Nouakchott | University of Nouakchott Al Aasriya |
| Tétouan | Abdelmalek Essaâdi University |
| Casablanca | Hassan II University |
| Rabat | Mohammed V University |
| Abu Dis | Al-Quds University |
| Jedda | University of Jedda |
| Khartoum | Khartoum University |
| Istanbul | Boğaziçi University |
| | Okan University |
| | Istanbul Yeditepe University |
| Ankara | Orta Doğu Teknik Üniversitesi |
| Dubai | University of Dubai |
| Abu Dhabi | Zayed University |



TABLE 14: ROSSOTRUDNICHESTVO IN MENA

| |
|---------------------------------------|
| Russian Center of Science and Culture |
| Egypt |
| Jordan |
| Morocco |
| West Bank* |
| Syria |
| Tunisia |
| Turkey |
| Russian House |
| Israel |
| Lebanon |
| Representative Office Within Embassy |
| Iran |
| UAE |

*The West Bank city of Bethlehem also hosts The Putin Foundation for Culture and Economics, which opened in 2017 on Putin Street.

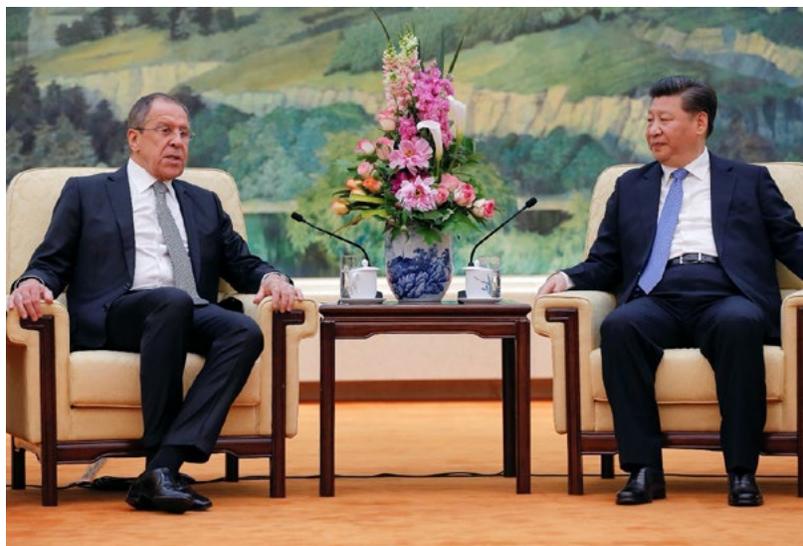
Source: Rosotrudnichestvo, <https://www.rs.gov.ru/en/contacts>.

its vice president describing it as “an important bridge to strengthen communication and understanding between China and Arab countries.”⁵⁴ The network has since rebranded as China Global Television Network (CGTN) and established a regional headquarters for its Middle East operations in Dubai Media City.

Russia’s public diplomacy outreach in MENA includes four elements: cultural and educational exchanges, media, ties with Islamic countries, and new frontiers like space and health. Rossotrudnichestvo—which is the Federal Agency for the Commonwealth of Independent States, Compatriots Living Abroad, and International Humanitarian Cooperation, and is under the jurisdiction of the Ministry of Foreign Affairs—is the government agency charged with promoting an “objective image of contemporary Russia” abroad through cultural and educational realms.⁵⁵ It has a presence in eleven MENA countries in various forms (see Table 14) and Russia is within the top ten most popular destinations for students from non-GCC countries enrolled in higher education abroad.

Russia’s state-funded RT English-language channel and the Sputnik Arabic-language networks include traditional and social media platforms. In 2015, RT was among the top three most-watched news channels in six Arab countries in MENA; RT Arabic’s online website was the region’s most popular in September 2020, outdoing Saudi Arabia’s Al Arabiya or Qatar’s Al Jazeera. They have helped to drown out voices on other media platforms, such as the 2012 denunciation of Russia as “enemy number one for Islam and Muslims” by authoritative Doha-based Muslim leader Sheikh Yusuf al-Qaradawi, whose sermons are often broadcast on state television and radio.⁵⁶ RT and Sputnik leverage the region’s opacity of decision-making processes, lack of independent news outlets, limited appeal of ideologies with compelling narratives, and growing reliance on social media across most age groups for news.

While both China and Russia seek to shape narratives in MENA and they use common techniques to achieve this goal, China tends to focus more on promoting its respectability while Russia’s messaging concentrates more on discrediting others (i.e., “black PR”), such as emphasizing the unreliability



China’s President Xi Jinping (R) listens to Russian Foreign Minister Sergey Lavrov as they meet at the Great Hall of the People in Beijing, China April 28, 2016. Source: REUTERS/Damir Sagolj

of the United States in the Middle East. Additionally, Russia’s intelligence services and former personnel play more direct roles than in China, where they often facilitate the setting up of groups but do not partake directly in influence activities.⁵⁷

Russia’s public diplomacy in MENA draws from its self-perception as a defender of conservative values; as a multiethnic, multiconfessional state, it sees itself as tolerant and respectful of traditional cultural heritage in contrast to hyper-secularist, liberal, and assimilationist practices in Europe and the United States.⁵⁸ This self-perception is reflected in its domestic legislation and foreign policy.⁵⁹ Putin’s Russia presents itself as a defender of MENA’s Christian communities in Syria, Iraq, Egypt, Lebanon, and Israel. At the same time, a Russian Muslim population numbering fourteen to twenty million (or 10 to 14 percent of the total domestic population) also facilitates outreach to other parts of the Middle East.⁶⁰ In 2015, for instance, Putin opened one of the largest mosques in Europe, the Moscow Cathedral Mosque. Putin also has leveraged outreach by subnational Muslim leaders to Gulf states that champion a modern vision of Islam. Chechnya’s

54 “CCTV Launches Arabic International Channel,” CCTV, July 24, 2009, <http://www.cctv.com/program/newshour/20090724/104693.shtml>.

55 Russotrudnichestvo (website), <https://www.rs.gov.ru/en>.

56 Quoted in Alexey Malashenko’s *Russia and the Arab Spring*, Carnegie Moscow, 2013, 14, https://carnegieendowment.org/files/russia_arab_spring2013.pdf.

57 For a comparison of influence operations, see Jean-Baptiste Jeangène Vilmer and Paul Charon, “Russia as a Hurricane, China as Climate Change: Different Ways of Information Warfare,” *War on the Rocks*, January 21, 2020, <https://warontherocks.com/2020/01/russia-as-a-hurricane-china-as-climate-change-different-ways-of-information-warfare/>; and Peter Mattis, “Contrasting China’s and Russia’s Influence Operations,” *War on the Rocks*, January 16, 2018, <https://warontherocks.com/2018/01/contrasting-chinas-russias-influence-operations/>.

58 See Peter Rutland, “Putin’s Nationality Dilemma,” *Moscow Times*, January 29, 2012, <https://www.themoscowtimes.com/2012/01/29/putins-nationality-dilemma-a12220>.

59 See Melissa Hooper, “Russia’s ‘Traditional Values’ Leadership,” The Foreign Policy Center, May 24, 2016, <https://fpc.org.uk/russias-traditional-values-leadership/>; and Alicja Curanović, *The Religious Factor in Russia’s Foreign Policy* (Abingdon, United Kingdom: Routledge, 2012).

60 See Marlene Laruelle, ed., *Russia’s Islamic Diplomacy*, Central Asia Program Paper 220, June 2019, <https://centralasiaprogram.org/wp-content/uploads/2019/07/CAP-paper-220-Russia-Islamic-Diplomacy.pdf>.

Ramzan Kadyrov is a frequent visitor to the UAE and draws on the popularity of mixed martial arts and its Chechen stars in the UAE to burnish Russia's appeal; the Russian Republic of Ingushetia's former leader and current deputy defense minister, Yunus-bek Yevkurov, has forged diplomatic and commercial relations with Qatar. Russia's practice is clearly distinct from China, where its Muslim population is viewed as a foreign policy problem rather than an asset.

Finally, space and health represent relatively new frontiers for Russia's public diplomacy in MENA. Russia has had a stranglehold over facilitating foreign satellite launches, including those from Morocco, Saudi Arabia, and the UAE. Since 2000, for instance, Russian launch vehicles have put more than fourteen Saudi satellites into space, including the latest Shaheen satellite for tracking ships in March 2021.⁶¹ By comparison, its support for manned space flights is more recent. The UAE's first astronaut was launched from Russia's Baikonur Cosmodrome, and Russia is currently training Saudi cosmonauts for a joint space mission. Space, much like the export of nuclear technology, offers Russia an alternative and

status-enhancing narrative as a modern and high-tech country instead of a raw materials supplier. Russia will face challenges in its ability to continue to capture the imagination of the MENA public given the rise of alternative spaceports in China and Japan as well as private facilities in the United States.

After a slow start, Russia's vaccine diplomacy has been quite successful to the extent that over seventy countries have approved the use of the Sputnik V vaccine. The number of MENA countries that authorized the Sputnik V is greater than that for China's Sinopharm vaccine (see Table 15). This could be indicative of the favorable perception of Russia's scientific prowess among MENA countries relative to China's. In the case of the UAE, it secured an agreement with China to manufacture Sinopharm locally. However, the distribution of Sputnik V in Lebanon and East Africa via a UAE-based intermediary has been criticized for price gouging, which has sullied Russia's public outreach.⁶² Even Iran, which has good relations with Russia, has not been spared from delivery delays, having received only two million doses of Sputnik V as of August 2021 out of the 60 million ordered.

TABLE 15: APPROVAL FOR USE OF SPUTNIK V AND SINOPHARM VACCINES IN MENA

| Country/territory | Approval for use of Sputnik | Approval for use of Sinopharm | Country/territory | Approval for use of Sputnik | Approval for use of Sinopharm |
|-------------------|-----------------------------|-------------------------------|-------------------|-----------------------------|-------------------------------|
| Algeria | ● | X | Morocco | ● | ● |
| Bahrain | ● | ● | Oman | ● | ● |
| Egypt | ● | ● | Qatar | X | X |
| Iran | ● | ● | Saudi Arabia | X | X |
| Iraq | ● | ● | Syria | ● | X |
| Israel | X | X | Tunisia | ● | ● |
| Jordan | ● | ● | Turkey | ● | X |
| Kuwait | ● | ● | UAE | ● | ● |
| Lebanon | ● | ● | West Bank | ● | X |
| Libya | ● | X | | | |

Source: Wego (a flight booking website), accessed January 29, 2022, <https://blog.wego.com/sputnik-approved-countries-list/> and <https://blog.wego.com/sinopharm-approved-countries/>.

61 As cited by Grigory Kosach and Elena Melkumyan in their policy brief, "Possibilities of a Strategic Relationship Between Russia and Saudi Arabia," Russian International Affairs Council, August 2016, <https://russiancouncil.ru/upload/Russia-SaudiArabia-policy-brief-6-en.pdf>.

62 See Anton Mardasov, "Kremlin's Vaccine Diplomacy Finds Trouble in Middle East," *Al-Monitor*, July 16, 2021, <https://www.al-monitor.com/originals/2021/07/kremlins-vaccine-diplomacy-finds-trouble-middle-east>.



CONCLUSION

Chinese President Xi Jinping and Russian President Vladimir Putin attend a ceremony dedicated to the 70th anniversary of the establishment of diplomatic relations between Russia and China, in Bolshoi Theatre in Moscow, Russia June 5, 2019.
Source: Sergei Ilnitsky/Pool via Reuters

Chinese and Russian leaders encourage perceptions that the two countries are in an undeclared alliance. Xi said in 2019, “In the past six years, we have met nearly thirty times. Russia is the country that I have visited the most times, and President Putin is my best friend and colleague.”⁶³ Likewise, China’s foreign minister noted in mid-2021 that the two countries will “always be each other’s strong backers.”⁶⁴ Putin, for his part, has described Sino-Russian ties as “an allied relationship” and highlighted the relationship as a “model of effective inter-state interaction in the twenty-first century.”⁶⁵ This is because their relationship serves as a force multiplier within and across different realms

of influence. For example, Russia’s more prominent security role in MENA augments China’s larger economic footprint; together they function as wedge strategies vis-à-vis US relations with traditional interlocutors in the region. There is, however, little evidence that China and Russia proactively coordinate their approaches in MENA.

Do they pose a threat to vital US interests in MENA? The MENA region is not a core interest for any of the countries discussed here. The United States has identified the Indo-Pacific as its priority theater, while both Russia and China, with their enormous peripheries, are surrounded by multiple

63 “China’s Xi Praises ‘Best Friend’ Putin during Russia Visit,” BBC, June 6, 2019, <https://www.bbc.com/news/world-europe-48537663>.

64 Laura Zhou, “Russia Relationship Better than an Alliance, Chinese Foreign Minister Says,” *South China Morning Post*, July 12, 2021, <https://www.scmp.com/news/china/diplomacy/article/3140798/russia-relationship-better-alliance-chinese-foreign-minister>.

65 “Excerpts from the Transcript of the Valdai International Discussion Club Session,” Kremlin (website), October 3, 2019, <http://en.kremlin.ru/events/president/news/61719>; and “Some Western Partners Trying to Drive a Wedge between Moscow and Beijing—Putin,” Tass, November 18, 2021, <https://tass.com/world/1363453>.

immediate challenges. There are few vital interests at stake for any of them in the Middle East. For the United States, its main interests remain access to energy for global markets, freedom of navigation, and Israeli security. None of these are inconsistent with Chinese or Russian regional interests, meaning there is potential for policy coordination to contribute to stabilizing a region where all three powers have strategic and economic concerns. Granted, it is hard to see how this could be achieved given the many serious issues they face beyond the Middle East, but the point remains: their interests in MENA are not naturally divergent.

Not discussed in this report is how MENA officials and publics perceive and respond to their region as a theater of great power competition. Emirati presidential adviser Anwar Gargash recently commented, “We are all worried very much by a looming cold war. That is bad news for all of us, because the idea of choosing is problematic in the international system, and I think it is not going to be an easy ride.”⁶⁶ At the same time, having more options can be helpful, and MENA countries will no doubt find opportunities in this competitive environment to address development, economic, and strategic concerns of their own.

Among MENA publics, the trends have been interesting. Arab Barometer survey data from early 2021 show that Arabs are increasingly receptive to larger roles for China and Russia in MENA, while data from late 2020 show a preference for China over the United States in each of the countries polled.⁶⁷ While not conclusive, it does indicate that Beijing and Moscow have had some success in MENA bridge building. A sense of “US fatigue” may be a contributing factor, but it is worth considering that other countries have already made significant

gains at a time of global structural change. Russia’s support for the Syrian government is attractive when US retrenchment is a very real concern. Similarly, Chinese development is appealing compared to Western-led models and institutions that have done little to address the global south’s development needs. If the United States is worried about these gains, it needs to articulate and offer credible alternatives.

The recent promise by General Kenneth F McKenzie, Commander of the US Central Command, to help target Houthi missiles and drones before more are launched towards the UAE is a step in the right direction.⁶⁸ It follows the interception of missile strikes in January 2022 from the Houthis by US missile defense systems, including those located in US military bases in Abu Dhabi, and underscores the fundamental role the US continues to play for its regional allies and partners. After the first attack on January 17, the UAE’s US embassy tweeted that Abu Dhabi Crown Prince Mohamed bin Zayed and US Secretary of Defense Austin “agreed on unity of action in response to Houthi terror attack. They discussed urgent steps to tighten air defenses against missiles and drones & enhanced maritime security to stop weapons flows.”⁶⁹ In contrast, Chinese Foreign Minister Wang Yi had remarked the day before that the Middle East does not have a “power vacuum, and there is no need from patriarchy from outside.”⁷⁰ Although he was drawing a distinction between China’s economic-centered approach and the US militarized presence in MENA, the subsequent drone and missile strikes imply that the regional security environment is significantly more complex than is acknowledged. For now at least, neither Russia nor China offer the same level of support, and despite their substantial gains into the region in recent years, they still lag far behind the US in the security realm.

66 “UAE Official Says It’s Time to Manage Rivalry with Iran and Turkey,” Reuters, October 3, 2021, <https://www.reuters.com/world/middle-east/uae-official-says-time-manage-rivalry-with-iran-turkey-2021-10-03/>.

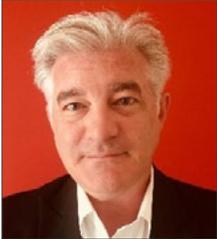
67 Li-Chen Sim and Lucille Greer, “What Does the Arab Street Think of China and Russia? The Answers May Surprise You,” *MENASource* (blog), Atlantic Council, June 15, 2021, <https://www.atlanticcouncil.org/blogs/menasource/what-does-the-arab-street-think-of-china-and-russia-the-answers-may-surprise-you/>.

68 “US Plans to Target Houthi Launchers before Attempted Strikes on UAE,” *The National*, February 8, 2022, <https://www.thenationalnews.com/uae/2022/02/08/uae-armed-forces-chief-welcomes-head-of-us-central-command/>

69 UAE Embassy US, Twitter Post, January 19, 2022, 7:52PM, https://twitter.com/UAEEmbassyUS/status/1483829616829771779?ref_src=twsrc%5Etfw

70 “Middle East Has No ‘Power Vacuum,’ Needs No ‘Foreign Patriarch’: Wang Yi,” *Global Times*, January 16, 2022, <https://www.globaltimes.cn/page/202201/1246036.shtml>

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