



Multipolarity and the Enduring Grip of Militarization in MENA

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Under conditions of American hegemony, U.S. partner governments in the Middle East and North Africa (MENA) have ranked among the world's highest spenders on military and intelligence sectors, with the United States serving as the primary weapons supplier.¹ This arms-centric model has shaped not only regional security but also the political economies of MENA countries, deeply embedding militarization in governance and foreign policy. As the global order shifts toward multipolarity, how might this affect security sector spending by MENA governments? Without the United States in the role of uncontested military hegemon, and the incumbent benefits of purchasing U.S. weapons, could this create opportunities to redirect military budgets or even decenter arms in regional security strategies? Or will the perceived instability of multipolarity instead drive spending even higher, perpetuating reliance on militarized approaches?

The nature of the transition from a unipolar to a multipolar balance of power remains contested, partly due to differing definitions of unipolarity and multipolarity.² Nonetheless, as early as 2008, the U.S. government itself projected that the world order would be multipolar by 2025.³ Although the exact timing of the emergence of multipolarity may elude consensus, the overall trajectory is clear, raising critical questions about how a more fragmented global order might impact the arms trade and the broader security paradigms in the MENA region.

Spending Under American Hegemony

The dynamics driving current spending provide valuable insights into how these trends might evolve in the future. Officially, U.S. weapons sales to the Middle East are framed as advancing policy goals such as “fostering greater intra-regional security and cooperation,” “building partner capacity,” and enhancing “interoperability.”⁴ While interoperability has largely been achieved, the persistent lack of meaningful security, regional cooperation, and

1 Pieter Wezeman, Katarina Djokic, Mathew George, Zain Hussain, and Siemon Wezeman, “Trends in International Arms Transfers, 2023.” SIPRI Fact Sheet, March 2024. https://www.sipri.org/sites/default/files/2024-03/fs_2403_at_2023.pdf

2 Emma Ashford, Evan Cooper, “Assumption Testing: Multipolarity is more dangerous than bipolarity for the United States,” Stimson Center, October 2, 2023. <https://www.stimson.org/2023/assumption-testing-multipolarity-is-more-dangerous-than-bipolarity-for-the-united-states/>

3 “Global Trends 2025: A Transformed World,” U.S. National Intelligence Council, November 2008. https://www.dni.gov/files/documents/Newsroom/Reports%20and%20Pubs/2025_Global_Trends_Final_Report.pdf

4 “Arms Sales in the Middle East: Trends and Analytical Perspectives for U.S. Policy,” Congressional Research Service, November 2020. <https://crsreports.congress.gov/product/pdf/R/R44984/7>



partner capacity raises important questions as to why America's partners in the region remain such loyal customers, despite billions of dollars spent on U.S. weapons that seemingly fail to deliver the stated objectives?

Examining the unofficial drivers of weapons purchases sheds more light on these dynamics than the officially stated goals. Under American military hegemony, purchasing U.S. weapons serves as a way for partner governments to cement their relationship with Washington. For wealthy states, particularly in the Gulf Cooperation Council (GCC), the possession of big ticket American-made weapons represents a powerful signal of prestige. Gaining access to cutting-edge technology – the F-35 being the most prominent contemporary example – also reflects the depth of the partnership with the hegemon, another powerful marker of status.

Supply-side considerations are equally significant. The origins of massive military expenditures by Middle Eastern governments can be traced back to the 1970s and 80s when arms sales were a means of recycling petrodollars into the U.S. economy.⁵ Today, even in an era of American energy independence, powerful lobbies ensure the continuity of these arrangements. U.S. weapons manufacturers spend millions of dollars annually to influence Congressional legislation favorable to their contracts.⁶ Despite occasional debates, Congress has never successfully voted to block a weapons sale; no Congress has managed to overcome a Presidential veto on such issues.⁷

This success persists despite the fact that arms manufacture only employs approximately 1 million Americans, accounting for just half of one percent of the U.S. labor force.⁸ Official justifications for continuing to prioritize U.S. weapons exports as a crucial arm of foreign policy often exaggerate its importance to the U.S. industrial base while overlooking the sheer scale of financial and institutional resources that sustain this sector. These include influential lobbies, elite think tanks, and experts whose careers depend on perpetuating the arms trade.⁹

Luckily, the success of weapons manufacturers in protecting their interests also offers a lesson for those advocating for military restraint and alternatives to militarized foreign policy. While peace-oriented research organizations and advocacy groups lack comparable resources, they could forge alliances with like-minded organizations and even governments

5 James Paul, Joe Stork, "Arms Sales and the Militarization of the Middle East," Middle East Report 112 (February 1983). <https://merip.org/1983/02/arms-sales-and-the-militarization-of-the-middle-east/>

6 William Hartung, "Promoting Stability or Fueling Conflict? The Impact of U.S. Arms Sales on National and Global Security," The Quincy Institute, 9, October 20, 2022. <https://quincyinst.org/research/promoting-stability-or-fueling-conflict-the-impact-of-u-s-arms-sales-on-national-and-global-security/>

7 Paul Kerr, "Arms Sales: Congressional Review Process," Congressional Research Service, August 13, 2024. <https://sgp.fas.org/crs/weapons/RL31675.pdf>

8 William Hartung, "More Money, Less Security: Pentagon Spending and Strategy in the Biden Administration," The Quincy Institute, 12, June 8, 2023. <https://quincyinst.org/research/more-money-less-security-pentagon-spending-and-strategy-in-the-biden-administration>

9 Shana Marshall. "The Defense Industry's Role in Militarizing US Foreign Policy." Middle East Report 294, 2020. <https://merip.org/2020/06/the-defense-industrys-role-in-militarizing-us-foreign-policy/>



in the Middle East that see value in decentering arms from U.S. foreign policy. By modeling the strategies that have sustained weapons manufacturers' influence, restraint-oriented initiatives could thus begin to counterbalance the entrenched militaristic approach to U.S. foreign policy.

Additional factors reinforce the region's status as the largest destination for American weapons exports, chief among them the presence of Israel. Long the largest recipient of U.S. foreign assistance, Israel has been a key driver of regional arms races and repeated escalations of conflict. As of this writing, the United States has provided an unprecedented \$17.9 billion in military support to Israel in the year after the events of October 7, 2023.¹⁰ The U.S. is legally bound to promote Israel's security: in 2008, Congress amended the 1968 Arms Export Control Act to ensure Israel's ability "to counter and defeat any credible conventional military threat from any individual state or possible coalition of states or from non-state actors," codifying the preservation of Israel's so-called "Qualitative Military Edge,"¹¹ which the U.S. had long pursued. Overall, the provision of approximately \$310 billion (inflation-adjusted) in U.S. assistance to Israel since its establishment in 1948—much of which has been directed toward the Israeli security sector—has played a central role in the region's militarization.¹²

Following the creation of Israel, countries such as Egypt and Jordan engaged in a series of conflicts with Israel, which significantly increased their military spending. Egypt and Jordan's peace treaties with Israel in 1979 and 1994, respectively, guaranteed access to U.S. security assistance, currently set at \$1.3B¹³ and \$1.45B¹⁴ annually. The almost half century of U.S. security assistance to Egypt has contributed significantly to Egypt becoming "a military with a country."¹⁵ Jordan is likewise heavily dependent on foreign funding, due to its "refugee burden and lack of major economic resources," which have rendered it fully dependent on aid from the U.S., Europe, and the wealthy Gulf states.¹⁶ Meanwhile, countries that remained hostile to Israel, such as Syria and later Iran, militarized further in response to the perceived threat of the Israeli military and its growing arsenal of increasingly high-tech weapons systems. Neighboring countries, such as in the Gulf, likewise felt compelled to expand their own military investments, perpetuating

10 Ellen Knickmeyer, "U.S. Spends a Record \$17.9 billion on military aid to Israel since last Oct. 7," Associated Press, October 7, 2024. <https://apnews.com/article/israel-hamas-war-us-military-spending-8e6e5033f7a1334bf6e35f86e7040e14>

11 H.R.7177 - Naval Vessel Transfer Act of 2008. <https://www.congress.gov/bill/110th-congress/house-bill/7177>

12 Jonathan Masters and Will Marrow, "U.S. Aid to Israel in Four Charts," Council on Foreign Relations, November 13, 2024. <https://www.cfr.org/article/us-aid-israel-four-charts>

13 Humeyra Pamuk, "US allows much of Egypt military aid despite human rights concerns," Reuters, September 14, 2023. <https://www.reuters.com/world/us-allows-much-egypt-military-aid-despite-human-rights-concerns-2023-09-14/>

14 U.S. Embassy in Jordan, "Policy & History: U.S. Assistance to Jordan," Accessed November 18, 2024. <https://jo.usembassy.gov/our-relationship/policy-history/>

15 This quote has been attributed to Anne Patterson, former U.S. ambassador to Egypt (2011-2013).

16 Jeremy Sharp, "Jordan: Background and U.S. Relations," Congressional Research Service, July 1, 2024. <https://sgp.fas.org/crs/mideast/RL33546.pdf>



a regional security dilemma that has primarily benefited the U.S. weapons industry—at great cost to the inhabitants of the region.

The drivers of this militarization, rooted in Cold War dynamics, have persisted well beyond that era. Policies originally designed to counter Soviet influence continued through the post-Cold War period of American unipolarity, even as the geopolitical rationale shifted. For example, the strategic imperative to secure U.S. access to Middle Eastern fossil fuels in the face of a possible Soviet threat has largely diminished in recent years, yet the policies supporting militarization remain firmly in place.

Spending Under Multipolarity

Many MENA countries are already hedging by developing security relationships with other countries. While this diversification might initially seem likely to drive overall spending higher, as countries try to maintain relationships with competing suppliers, weapons systems offered by other countries are often significantly less expensive. Additionally, evolving warfare trends—such as the rising utility and lethality of armed drones—favor strategies based on affordable, numerous systems over the “few and exquisite” munitions traditionally produced by the U.S.¹⁷

MENA governments may choose non-American armaments because countries like Russia, China, and Turkey often deliver weapons faster and with fewer conditions than the U.S. Although the notion that weapons sales endow the United States with leverage over its customers’ behavior has proven illusory, concerns about domestic or Congressional pushback increasingly alarm U.S. security partners such as Saudi Arabia, Egypt, and more recently, Israel. Finally, the United States is not a useful source of certain types of munitions, such as short range air defenses or drones, either because U.S. versions are prohibitively expensive or insufficiently available due to stockpile limitations.¹⁸ MENA governments also understand that the U.S. views maintaining its customer base and global influence as critical, enabling them to extract concessions on price and conditions tied to American weapons purchases. To be clear, the scale of the investment in U.S.-made weapons and weapons-systems – which in wealthy countries frequently amounts to hundreds of billions of dollars – means that countries will continue to rely on U.S. armaments for decades, despite American handwringing about its perceived declining dominance.

Hedging behaviors by partner governments not only reflect cheaper and easier to obtain alternative sources of weapons, but also a growing concern that the purchase of American armaments no longer conveys the security guarantee that it was once seen as providing.

17 T.X. Hammes, “The Future of Warfare: Small, Many, Smart vs. Few & Exquisite?” War on the Rocks, July 16, 2014. <https://warontherocks.com/2014/07/the-future-of-warfare-small-many-smart-vs-few-exquisite/>

18 Tyler Rogoway, “America’s Startling Short Range Air Defense Gap And How To Close It Fast,” The War Zone, July 5, 2020. <https://www.twz.com/13284/americas-gaping-short-range-air-defense-gap-and-why-it-has-to-be-closed-immediately>



Following the 2019 Iranian drone attack on the Abqaiq and Khurais oil facilities in Saudi Arabia, Riyadh expected Washington to respond definitively in order to demonstrate the consequences of harming a key U.S. partner. But despite the Trump administration's overall embrace of the Saudis and antipathy towards Iran, Trump decided against significant retaliation.¹⁹ The Saudis were shocked: no longer assured of American backing, they responded by deepening their ties with China and Russia, reaching back out to Turkey and Iran, and generally adopting a less confrontational foreign policy.²⁰ America's muted reaction was not limited to Trump: in 2022, Yemen's Houthis attacked Abu Dhabi. Although the Biden administration sent F-22s, the Emirati government expressed disappointment that the U.S. did not do more.²¹ The U.S. response to these two events differed markedly from the overwhelming support the U.S. provided to Israel in the aftermath of the Hamas October 7 attack, reinforcing the pattern that support generates more aggressive behavior by partners. Yet regardless of U.S. actions, governments across the region have expanded their ties to China as well as their purchases of non-American weapons.

Another factor likely to influence foreign weapons purchases is the rise of domestic defense industries. In Israel's case, this growth has been heavily subsidized by the United States. "Since FY1984, Israel has been allowed to spend a portion of its U.S. Foreign Military Financing (FMF) assistance on arms produced by Israeli manufacturers. Israel is unique in this regard—no other FMF recipient can use any of the FMF for domestic procurement."²² Israeli firms have also been privileged well beyond other customers in being allowed to form partnerships with major U.S. weapons producers to draw on their capabilities to enhance their own domestic industry. Saudi Arabia, the UAE, and Egypt have also invested significantly in developing their own defense industries, though without the same level of U.S. subsidies.²³ The rise of homegrown defense industries has increased the scale of weapons trading within the Middle East and the Global South more broadly.²⁴ Competition among these emerging arms industries may help keep prices lower initially. However, the

19 Khalil Jahshan, Kristian Coates Ulrichsen, Abdulwahab Al-Qassab, Joe Macaron, Imad Harb, "The Attacks on Saudi Oil Installations are a Game Changer," The Arab Center, Washington DC, September 17, 2019. <https://arabcenterdc.org/resource/the-attacks-on-saudi-oil-installations-are-a-game-changer/>

20 Peter Baker, "Chinese-Brokered Deal Upends Mideast Diplomacy and Challenges U.S.," The New York Times, March 11, 2023. <https://www.nytimes.com/2023/03/11/us/politics/saudi-arabia-iran-china-biden.html>

21 Barak Ravid, "Scoop: Blinken apologized to UAE crown prince for delayed response to Houthi attacks," Axios, April 13, 2022. <https://www.axios.com/2022/04/13/blinken-apologize-mbz-houthi-attacks-uae>

22 Clayton Thomas et al, "Arms Sales in the Middle East: Trends and Analytical Perspectives for U.S. Policy," Congressional Research Service, November 2020. <https://crsreports.congress.gov/product/pdf/R/R44984/7>

23 Robert Mason, "Egypt and the United Arab Emirates: Roots and Growth of an Emerging Arab Military Ecosystem." PRISME Initiative, June 4, 2024. <https://prismeinitiative.org/blog/egypt-uae-emerging-arab-military-ecosystem-robert-mason/>

24 Emma Soubrier, "Gulf Security in a Multipolar World: Power Competition, Diversified Cooperation". AGSIW Issue Papers, 2020, n° 2. <https://agsiw.org/gulf-security-in-a-multipolar-world-power-competition-diversified-cooperation/>; Shana Marshall, "The Role of the GCC States in Expanded Weapons Production in the Global South." PRISME Initiative, Fall 2024.



significant investment required to build indigenous defense industries—including research and development, testing facilities, and expanding education and training in weapons-related fields—may drive militarization and spending even higher. Alternatively, supporting initiatives that expand and deepen technology transfer and collaboration in non-military sectors such as renewable energy and pharmaceuticals, notably by loosening the Global North’s chokehold on patents and intellectual property, could provide a concrete way to decenter the role of arms in South-South and North-South relations.

Conclusion

While trends in weapons technology and an expanding pool of global arms manufacturers may suggest the possibility of declining security sector spending in the Middle East under conditions of multipolarity, such optimism is likely misplaced. One could hope that public pressure might push MENA governments to prioritize investments in human security, including healthcare, education, and infrastructure to combat the effects of climate change. However, as Waleed Hazbun aptly noted, “In the foreseeable future, the Middle East will likely experience more instability and conflict due to, in large part, the legacy of U.S. policies over the past two decades.”²⁵ The U.S. policy of flooding the region with weapons has left a lasting imprint on its security dynamics, fueling instability that will persist long after the decline of U.S. hegemony.

Multipolarity will coincide with, although will not drive, conditions of intensified resource scarcity and increasingly severe impacts of climate change. In a future where threats to the ruling class feel more acute, these elites are likely to allocate even greater resources to trying to ensure their own security. This could include surveillance, repression, coup-proofing, and other tactics aimed at consolidating power and wealth, often at the expense of societal well-being, and sometimes directly targeting citizens. Unfortunately, these dynamics suggest that, although the end of American hegemony offers an opportunity for MENA governments to reduce military expenditures, other factors are more likely to sustain or even increase security sector spending.

²⁵ Waleed Hazbun, “Reimagining US Engagement with a Turbulent Middle East,” Middle East Report 294 (Spring 2020). <https://merip.org/2020/06/reimagining-us-engagement-with-a-turbulent-middle-east/>



PRISME

Pathways to Renewed and Inclusive
Security in the Middle East



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PRISME

Pathways to Renewed and Inclusive
Security in the Middle East

PRISME Initiative

PRISME aims to redefine the conception of “security” in the Middle East and North Africa, as the starting point for strategic relations between MENA countries and their European and North American partners. It does so in pursuit of effective, collaborative approaches to ensuring a more peaceful and stable future. To this end, PRISME sponsors dialogue and debate between foreign policy professionals across diverse backgrounds and perspectives. These include individuals in governments, thinktanks and academic institutions located in the MENA region, Europe and North America, with a specific focus on engaging young and emerging thinkers and practitioners. Its goal is to re-define security in the Middle East, broadening the definitions of what it looks like, for whom, how it can be achieved, and how outside actors can contribute to it.

SALAM Project

SALAM (Sustaining Alternative Links beyond Arms and the Military) proposes to rethink the centrality of the arms trade in international relations with and among Middle East & North Africa (MENA) countries.

It fosters and amplifies ideas from a network of scholars and practitioners working in and with the Middle East. Issues they will address include the arms trade’s advertised role in cementing bilateral and multilateral ties between North America, Europe and the MENA region; the opportunity costs of over- or sole reliance on weaponry as security; and alternative modes of engagement that might redefine a shared strategic agenda.