

A photograph of Joe Biden, President of the United States, standing on a purple carpet with several Middle Eastern leaders. Biden is in the center, wearing a dark blue suit and a light blue tie. To his left is a man in a tan thobe and ghutra. To his right is a man in a brown thobe and ghutra. Further right is a man in a dark suit. In the background, there are flags of the United States, Saudi Arabia, and Jordan. A large emblem is visible on the wall behind them, featuring a map of the Middle East and North Africa. The text "مجلس التعاون الخليجي" and "1443" is visible on the wall.

Looking Beyond the Biden Visit to the Middle East and the “Fist Bump”: The Need to Meet the Key Strategic Challenges in the Middle East and North Africa

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Looking Beyond the Biden Visit to the Middle East and the “Fist Bump”: The Need to Meet the Key Strategic Challenges in the Middle East and North Africa

Anthony H. Cordesman

If one looks back on media coverage of Biden’s visit to the Saudi Arabia – and far too many of the analyses of the visit that have followed – it is amazing to see how much of that coverage focused on the assassination of Jamal Khashoggi, the President’s “fist bump,” and on short term issues and trends.

The key strategic challenges the U.S. faces in the Middle East are longer term and they go far beyond most of the reporting and discussion of the Biden visit.

These strategic challenges involve:

- Dealing with the Broader Levels of Instability and Failure in the Greater Middle East
- Failing to Address the Key Security Issues in the MENA Region, and Rebuild Relations with Security Partners.
- U.S. Relations with Israel and the Palestinians: The Death of the Two State Solution and “Facts on the Ground,” and
- Looking Beyond the Gas and Oil Crisis Triggered by the Ukraine War.

President Biden did touch upon some aspects of these challenges during his visit to Israel and Saudi Arabia. While much of this effort tended to be ignored in the media, it is clear from the briefs and Fact Sheets issued by the White House. Yet, almost all of this official reporting consisted of strategic rhetoric rather than plans and actions that could lead to real progress. Moreover, the Biden Administration has not announced clear strategies and plans for dealing with any of these major strategic challenges in the MENA region in any other open source report or forum.

This report examines each of these major shortfalls in U.S. strategy and policy. It examines the outcome of the President’s visit, what the U.S. has and has not accomplished in dealing with each may challenge, what can be learned from the key trends in each challenge, and what the United States and its strategic partners now need to do to create a more stable and secure set of strategic partnerships.

Dealing with the Broader Levels of Instability and Failure in the Greater Middle East

Moreover, even the limited areas of progress that did occur during the President’s visit were also largely buried, shaped by the media focus on one narrow aspect of human rights violations: the murder of Jamal Khashoggi on October 2, 2018. The vast majority of the reporting and commentary on the President’s visit made only passing reference to the broader human rights and human development issues in what has become one of troubled and conflict-torn regions in the world. When it came to U.S. policy, the coverage and discussion of the visit focused on Biden’s somewhat careless past statements that he would treat the Kingdom as a “pariah” state, and the contrast between these statements and Biden’s “fist bump” with the Saudi Crown Prince, Mohammed bin Salman.

Dealing with One of the Most Stupid Murders in Recent Political History

The President did encourage this coverage. His “fist bump” was gratuitous, given the extraordinarily brutal way in which Khashoggi had been murdered, given the other excesses in Saudi security operations, and given the visibility the President had already given the Crown Prince’s Khashoggi’s death.

The killing came close to butchery and was incredibly provocative and incompetent, and did far more to damage the image of the Saudi leadership than to protect it. We may never know what led the Crown Prince and his security team to single out Khashoggi for such extreme action. What is clear is that it was one of the most stupid, politically visible, and self-destructive creations of a martyr since the supporters of Henry II assassinated Thomas Becket in Canterbury Cathedral in 1170.

Even worse, there was no meaningful reason for any such action. While there has been a tendency to exaggerate Khashoggi’s importance since his killing, all that Mohammed bin Salman ever had to do to minimize Khashoggi’s limited influence was to ignore him. If Mohammed bin Salman had done that, the impact of an occasional hostile article or statement by Khashoggi would almost certainly have remained in the noise level of public affairs, along with the steady stream of other such criticism and reporting.

For all its flaws, Prince Salman’s creation of the Vision 2030 development program, and his other reform efforts, would have offset such low-level political challenges. Moreover, if the Crown Prince did insist on some hardline action, there would have been almost negligible risk in putting political or financial pressure on Khashoggi and his family. Given normal human rights coverage, and even kidnaping and imprisoning him would probably have produced a comparatively limited reaction.

Moreover, it took an incredible level of incompetence to commit the murder in ways that gave it so much visibility once the Saudi government chose to actually carry it out. The murder alone was bad enough, but it only acquired so much political and media impact because it relied on a network of incompetent and easily identifiable security personnel that were close to the Crown Prince, because it targeted Khashoggi during a visit to the Saudi consulate in Istanbul – a place that Saudi security must have known was under intense surveillance by a then hostile Turkey, escalated the murder to the point of butchery, and because the Saudi government then tried to deal with its impact with an equally clumsy denial campaign.

While there is no way to know just how directly Mohammed bin Salman was personally responsible for each of these mistakes in deciding on the killing and executing it, there is no question that the killing turned Khashoggi into one of the best known political martyrs in the Middle East, and did so through sheer incompetence in every aspect of his murder. From that perspective, Biden’s original criticisms of the killing were all too correct, and one can only wonder how the President’s handlers blundered into letting a photo op of the fist bump occur.

Abuses are the Regional Norm, Not the Exception

At the same time, any focus on U.S. policy towards human rights issues in Saudi Arabia and in the MENA region should still be put in a broader regional – and global – perspective. First, the U.S. has far more important strategic priorities in Saudi Arabia and the region. Second, the U.S. must deal with the strategic partners that actually exist, and deal with a troubled region in real world terms. Third, the Khashoggi killing may have had unique visibility, but such killings and acts of

state terrorism are the norm in the MENA region where most ruling elites abuse their power. And fourth, there are other human rights and development problems that affect far more of the region's population and future.

The fact the U.S. must compete for leverage and influence with other powers scarcely means that the U.S. should ignore any aspect of human rights – particularly when a violation as gratuitously stupid and excessive as Khashoggi's murder. *But*, the U.S. has to be practical. It needs to work with flawed strategic partners all over the world, and to seek to persuade them to change, rather than threaten their leadership and sever relations.

Moreover, the killing of Khashoggi – no matter how stupid and clumsy – was only one of many such killings in the region. Even a quick examination of the MENA country chapters in the *2021 Country Reports on Human Rights Practices* makes it all too clear that while the Khashoggi killing may have been remarkably public – and the report does also state that its direct perpetrators are reported to be visibly living in luxury in the Kingdom – such excesses in internal security operations and authoritarian abuse are typical in many other nations in the region.¹ It reports that politically inspired killings by MENA governments occurred in other key strategic partners like Egypt and Iraq, and that Israel committed more in 2021 than Saudi Arabia. It also reports that more human rights killings occurred in a number of other states.

Moreover, UN and other reports on total violent casualties in the region show that conventional human rights totals generally exclude most of those killed by governments in civil wars. They exclude those killed in the many ethnic and sectarian clashes where governments did not act directly, and they do not include estimate of the deaths resulting from reducing significant portions of the population to refugee or IDP status.

For example, the State Department report on Syria for 2021 highlights what seems to be the worst case of state-driven killings in the MENA region. It notes that,²

The regime continued to commit extrajudicial killings and to cause the death of large numbers of civilians throughout regime-controlled territories. For example, human rights groups and other international organizations reported that in June the Fourth Division of the Syrian Arab Army and other regime forces surrounded and attacked the city of Daraa, breaking the Russian-brokered cease-fire and conducting heavy and indiscriminate shelling. The UN Commission of Inquiry for Syria (COI) and numerous human rights groups reported the regime continued to torture and kill persons in detention facilities. According to the SNHR, more than 14,580 individuals died due to torture between 2011 and November, including 181 children and 93 women; the SNHR attributed approximately 99 percent of all cases to regime forces during the year ... The April report issued by the UN secretary-general on children and armed conflict in Syria noted that the United Nations verified 4,724 grave violations against children during the year, affecting at least 4,470 children, including the killing and maiming of more than 2,700 children.

To put these killings in perspective, they need to be compared with recent UN estimates of the total numbers killed in Syria since its popular protests turned into civil war in March 2011. These kinds of wartime killings are not counted as conventional human rights violations, but they have been dominated by killings of ordinary civilians by the Assad regime, and the Office of the High Commissioner for Human rights in the UN reported on June 28, 2022 that,³

The UN Human Rights Office today published a report that, following rigorous assessment and statistical analysis of available data on civilian casualties, estimates that 306,887 civilians were killed between 1 March 2011 and 31 March 2021 in Syria due to the conflict. This is the highest estimate yet of conflict-related civilian deaths in Syria.

The report, mandated by the UN Human Rights Council, referred to 143,350 civilian deaths that have been individually documented by various sources with detailed information, including at least their full name, date

and location of death. In addition, statistical estimation techniques of *imputation* and *multiple systems estimation* were used to connect the dots where there were missing elements of information. Using these techniques, a further 163,537 civilian deaths were estimated to have occurred, bringing the total estimated civilian death toll to 306,887.

“The conflict-related casualty figures in this report are not simply a set of abstract numbers, but represent individual human beings. The impact of the killing of each of these 306,887 civilians would have had a profound, reverberating impact on the family and community to which they belonged,” UN High Commissioner for Human Rights Michelle Bachelet said.

Looking Beyond the Killings

Human rights killings and permanent disappearances are also only part of many other types of human rights violations reported by the State Department – many of which affect vastly larger parts of the population. The State Department human rights report – and virtually every other detailed human rights report – makes it clear that most MENA countries have a broad pattern of arbitrary arrests and detentions, official suppression of legitimate dissent, misuse of the national justice systems, and use of extensive extra-legal intimidation or some form of torture.

If one reads through the annual State Department reports for all the MENA countries from 2000 onwards, the regional trends in these activities are grim regardless of political system and ruler. This has been particularly true since “9/11,” and the start of the “Arab spring.” The increased focus on counterterrorism often led to excessive measures in dealing with legitimate dissent.

Taking Effective U.S. Action Against “Conventional” Human Rights Violations

The United States has limited leverage in changing this situation. The same partner states where it has the most leverage because of their dependence on U.S. military capabilities and arms sales are also the ones which generally have the most counter leverage in terms of energy exports, political and financial leverage, and the value to the U.S. of their military forces.

Yet, there still are practical options for more decisive U.S. official action in dealing with the total mix of abuses reported in the State Department human rights report. As U.S. diplomats in the field have shown, the U.S. can achieve progress through quiet negotiation and consistent pressure by focusing on the areas where such changes are most negotiable. The U.S. can do more to persuade its partners that progress in dealing with the causes of extremism is one of the most effective ways of fight extremism and terrorism, and that excessive repression is counterproductive.

Official transparency in providing detailed and easily accessible reporting on human rights also has value even in cases where the U.S. does not openly confront the regime involved. The annual State Department report may not provide kind of media storm that the Khashoggi killing did, but it does gain worldwide media exposure. So to some extent, so do the short mentions of human rights issues in official U.S. statements, in meetings, and in the various communiques and international reports that touch upon the issue.

This does, however, require the U.S. to be consistent in keeping up the pressure. President Biden did make his continuing concern with human rights clear in a personal statement before, during, and after his trip. However, no such effort was reflected in the joint policy statements that came out of the meeting. Both *The Jeddah Communiqué: A Joint Statement Between the United States of America and the Kingdom of Saudi Arabia*, which was issued after the President met with Mohammed bin Salman; and the *Joint Statement Following the Summit of the Leaders of the United States and the Gulf Cooperation Council (GCC) Countries* that the U.S. and its Arab partners issued on June 16th, made no mention of human rights. The most they did was to briefly

mention the need for development and foreign aid in the context of a long list of other policy issues.⁴

The U.S. can probably accomplish more over time, by constantly making its concern with human rights clear in its formal reports, meetings with foreign states, and putting such issues in a broader regional context rather than by publicizing worst case violations. One example would be giving annual State Department human rights report far more visibility – rather than simply issuing it with minimal public efforts.

The State Department has already made recent improvements in the ability to access and use the web site for its annual reports, and this should be given more visibility. Both media and regional scholars need to be regularly briefed and educated as to its contents, and the work of Department's Bureau Democracy, Human Rights, and Labor should be given a higher public profile and expanded to cover regular briefings and open source studies. At the same time, patient and consistent U.S. efforts at the U.S. policy and embassy levels may well accomplish more over time than any form of confrontation.

The Broader Trends in Human Development as Human Rights

At the same time, U.S. policy must not define the scope of human rights so narrowly that they ignore some of the most critical aspects and value of human life. Civil war and civil conflict, failed economic development, failed and corrupt government, population pressure and inadequate job creation, hyperurbanization, excessive military and internal security spending and rivalries with neighboring states, and failures to deal with ethnic, sectarian, tribal, and regional violence have all done more to damage the lives of ordinary citizens than conventional human rights violations.

Failed and inadequate governance has also probably done far more damage than repressive governance. The World Bank's graphs of the trends in MENA governance tend to be all too negative, as do the reports on corruption from respected sources like Transparency International.⁵ The databases and reports of the IMF and World Bank, UN development reports and the UN Arab development reports, and the CIA World Factbooks all provide good indications of how well a given MENA country's development activities have served its people.

If the U.S. is to put pressure on the region for meaningful change in human rights it must consider the full range of changes in human development. Both regional and national behavior need to be judged by their overall success or failure in creating political stability, effective governance, and increasing economic growth and the equity of income distribution and opportunity.

For all of the human rights failures in Saudi Arabia and most surviving regional monarchies, most of the other nations involved in the Arab Spring – or that have had some form of recent major political upheavals – have become more authoritarian and repressive or have become unstable – often to the point of constant internal violence and civil war. The list of such MENA countries includes Algeria, Libya, Tunisia, Egypt to some extent, Israel's Palestinians, Gaza, Lebanon, Syria, Iraq, and Yemen. At the margin, it also includes Turkey, Mauritania, Chad, Sudan, and all the nations on the southern cost of the Red Sea.

The wealthier Arab energy exporting states have their failures, but they generally provide far better job opportunities, health and education services, other government services, and per capita incomes. As Libya, Lebanon, Syria, Iraq, and Yemen demonstrate all too clearly, states bogged down in divisive civil wars, internal political upheavals, and/or ethnic and sectarian conflicts have created population-wide abuses of human rights on a massive scale.

The trends are also generally all too negative in spite of annual statements calling for progress and reform. If one looks at the broader country-by-country trends in governance, political stability, and economic development in the MENA region since the outbursts of hope following the start of the Arab Spring in Tunisia in December 2010.

There are no simple metrics that reliably show all of these trends, although. Some UN, IMF, and World Bank data do, however, make it clear that there has been a net decline in regional economic development, in real employment opportunities, and in the quality and integrity of governance – although there are some important areas of national progress. Population pressure, major shifts towards urbanization, and failures to create adequate levels of growth and employment have all become regional norms and not the exception. So does the work of outside groups like Transparency International and the Fragile States Index.

Figure One illustrates these facts. It uses the World Bank reporting on GDP per capita income in purchasing power parity (PPP) terms in constant 2017 US dollars. It should be stressed that it is only one metric and has many limitations. The data suffer from major reporting issues, do not reflect the fairness of the distribution of income, and the figures tend to rise with population growth regardless of actual progress in developing a modern economy.

Nevertheless, they still show just how different the levels of national per capita income are and the limits to the progress that has actually occurred. The data provide at least a crude indication of how well a given MENA country's development activities have served its people. They also show how little real progress occurred in the MENA region between 2010 and 2020/2021, and that only the more successful oil/gas exporting monarchies were able to offer their populations average per capita incomes that matched those of developed states

It should be stressed that a focus on these issues does not mean that the U.S. should ignore more conventional human rights issues, and the killing of Khashoggi is only one of many incidents where the Crown Prince and Saudi government have been excessively authoritarian. At the same time, focusing on Khashoggi and Saudi Arabia out of the broader context of what was happening in the rest of the MENA region ignores the grim realities that affect both its future and the need for U.S. help in bringing lasting stability. It also ignores the practical issue that the U.S. must seek to find real world solutions to the region's overall development, security, and human rights problems instead of focusing on a single major human rights violation in ways that do not reflect the region's full range of real human needs.

**Figure One: Key Trends in the World Bank Estimate of GDP Per Capita
in Purchasing Power Party Terms: 2010 Versus 2021
(In 2017 International Dollars)**

North Africa Subregion	Income in 2010	Income in 2020/2021
Algeria	10,971	10,957
Libya	32,885	21,260
Morocco	6,281	7,413
Tunisia	10,410	10,554
Arab-Israeli Subregion		
Egypt	10,340	12,121
Israel	33,864	41,582
Jordan	11,316	9,969
Lebanon	19,382	9,732
Syria	no data	no data
West Bank and Gaza	5,411	5,643
Gulf Subregion		
Bahrain	44,600	41,336
Iran	15,249	14,971
Iraq	8,597	9,475
Kuwait	58,810	44,847
Oman	38,679	29,502
Qatar	95,909	85,128
Saudi Arabia 44,037	45,104	
UAE	54,922	63,069
Yemen	no data	no data
Standards of Comparison		
U.S.	54,510	63,069
EU	39,066	44,024
Middle Income (worldwide)	8,435	11,960
Arab World	13,340	13,768
Middle East and North Africa	15,323	16,146

Source: World Bank, <https://data.worldbank.org/indicator/NY.GDP.PCAP.PP.KD>.

Failing to Address the Key Security Issues in the MENA Region, and Rebuild Relations with Security Partners.

At the same time, U.S. efforts to promote human rights and advance the broader aspects of human development must be balanced against the need to advance U.S. security interests in the region and to build more effective strategic partnerships with Saudi Arabia and other Arab states. These security issues – and a steady decline in Arab partner confidence in the U.S. as a security partner in the Gulf – were the major reasons for the President Biden’s visit, although they got substantially less press coverage than the “fist bump” and human rights issues.

It is also important to note that for all the media focus on Saudi Arabia, President Biden did meet with the leaders of Iraq, Egypt, the United Arab Emirates, and other Arab strategic partners in a meeting chaired by the Saudi Crown Prince. If the first meeting was designed to rebuild the U.S. Saudi strategic partnership, the latter meeting was clearly intended to reassure Arab states that the U.S. would keep a major security presence in the region.

The White House made this clear in a fact sheet called the *Results of Bilateral Meeting Between the United States and the Kingdom of Saudi Arabia*, in the two communiqués on the President’s meetings, and in the statements made about the summit meeting with the leaders of the Gulf Cooperation Council (GCC) countries plus Egypt, Iraq, and Jordan:⁶ *The Jeddah Communique: A Joint Statement Between the United States of America and the Kingdom of Saudi Arabia*, and the *Joint Statement Following the Summit of the Leaders of the United States and the Gulf Cooperation Council (GCC) Countries*.⁷

The White House also made a major effort to ensure that President Biden was publicly quoted as saying that,⁸

“The United States is clear-eyed about the challenges in the Middle East and about where we have the greatest capacity to help drive positive outcomes... We will not walk away and leave the vacuum to be filled by China, Russia or Iran.”

There were good reasons for the Biden Administration to make such efforts in dealing with Saudi Arabia and to America’s other key Arab security partners in the Middle East. All had growing reasons to be concerned over the uncertainties in the U.S. commitment to keep its forces in the region and be a reliable source of outside military support that dated back to at least the Obama Administration.

All had suffered from ill-judged American pressures to shift more of the burden of regional defense to its Arab partners. All were concerned by the America’s withdrawals from Afghanistan and Iraq, by the pre-Ukraine War decline in U.S. interest in the stability of global energy exports, and by U.S. national strategy statements that started with the Trump Administration and focused almost exclusively on China and Russia.

The Changing Security Threats in the MENA Region

At the same time, there was a growing need to deal with steadily more urgent regional security issues. The MENA region remains a region of critical strategic concern to the U.S. because of its energy exports, and because of the continuing threat posed by terrorism and extremism, the rising security concerns presented by Iran, Syria, and the changing mixed military threats posed by missiles, nuclear weapons, and unconventional warfare. Both Arab partner states, and U.S. experts in State, USCENTCOM and the of Department of Defense, and the US intelligence community all were concerned over the steadily rising mix of security threats.

Terrorism and extremism are still serious strategic challenges and continue to evolve in unexpected ways. ISIS may have failed to create a “caliphate” in Iraq, and dominate any given MENA state, but such movements are still serious threats throughout the region. The efforts to suppress these threats have often made serious progress, but – as noted earlier – they also have often led to hardline and excessive international security issues and operations which help such movements survive. Furthermore, some internal security efforts have exacerbated ethnic, sectarian, and regional divisions in many countries in the region – leading to growing tensions between mainstream Sunnis, Shi’ites, and smaller sects – especially in Iraq and Bahrain. There has been a major outflow of Christians in many countries – particularly Iraq.

Major diplomatic and peacemaking efforts have not been able to counter the destructive security impacts and legacies of the Arab spring. Civil war and failed governance remain serious problems in Libya, Tunisia, Lebanon, Syria, Iraq, and Yemen – as well as in the Red Sea and Horn of Africa. Iran and its nuclear program remain a real threat. Iran is also a growing regional and unconventional warfare threat.

More broadly, the U.S., Israel, and its Arab strategic partners in the region must deal with the possible emergence of a more threatening Iranian and Syrian power bloc whose character cannot, as yet, be fully characterized or predicted. This potential bloc already includes Syria, Iran, and Yemen – and links to Russia, the Hezbollah in Lebanon, and major elements in Iraq.

If Assad gains stable control of most or all Syria, and if Iraq should come under lasting Iranian influence, the emergence of a “crescent” will present serious new challenges to the U.S. and its strategic partners. The same will be true if Iran does deploy nuclear weapons and its increasingly threatening mix of long-range precision-guided conventionally armed missiles, new air defense systems, arms transfers, and unconventional warfare capabilities is already steadily increasing the risk of any conflict.

So far, the U.S., its Arab strategic partners, and Israel have not shown that they can prevent the emergence of such a bloc. Moreover, China and Russia are clearly attempting to increase their influence over America’s strategic partners as well as the other states in the region, and to replace the U.S. as the dominant powers in the region. As part of these efforts, Russia is deploying a growing presence in the Mediterranean and Black Sea, and China is building up its presence and power projection capabilities in the Indian Ocean and near the Gulf.

As part of these efforts, Russia and China are courting both America’s Arab strategic partners and Syria and Iran. Their efforts are having at least some success in a region where America’s Arab partners have seen the U.S. focus so heavily on the threat from China and Russia, withdraw from Afghanistan and much of Iraq, and focus on shifting the regional defense burden to Arab states.

U.S. Attempts to Shift in Security Burden in Ways That Undermine Security

There are still some strong points in the U.S. military relations with its Arab partners – largely in military-to-military relations. USCENTCOM has done much to help stabilize U.S. strategic relations with its Arab partners, but local military-to-military relations are not enough. America’s withdrawals from Afghanistan and most of Iraq, lesser withdrawals from partner states, its growing focus on China and Russia at the White House level, the uncertain levels of U.S. efforts to check Iran, and the Russian presence in Syria have all led to growing doubts.

However, America’s Arab security partners not only have had reason to question whether they can rely on the U.S., they have had reason to resent the fact that the U.S. has tried to shift too much of

the burden in funding regional defense to Arab states at a time they already are making very high levels military expenditures and one that helps explain the limited civil development trends shown in **Figure One**.

This means the U.S. needs to rebuild its strategic ties to its Arab partners in ways that will create a real partnership, and lead to the right forms of force modernization and deterrent and defense capabilities, rather than a focus that pushes its Arab partners to increase their military spending and that involves larger U.S. arms sales.

The unclassified data on regional military spending are uncertain. MENA countries have very different levels of honesty and transparency in reporting military spending and arms imports, and quality of outside analysis is also mixed. The most reliable sources have generally been declassified U.S. official estimates of the trends in MENA country defense spending – and of the expenditures in arms exports.

The most recent open source U.S. reports of such of data are summarized in **Figure Two** and **Figure Three**. They are based on data provided by the Department of State in a report on *World Military Expenditures and Arms Transfers* that once was the most authoritative and well-presented reports on the subject. However, U.S. unclassified reporting now lags several years behind the most current trends, and the WMEAT report has been changed from a detailed analysis to a quantitative data dump that is one of the worst designed computer data bases in the U.S. government.

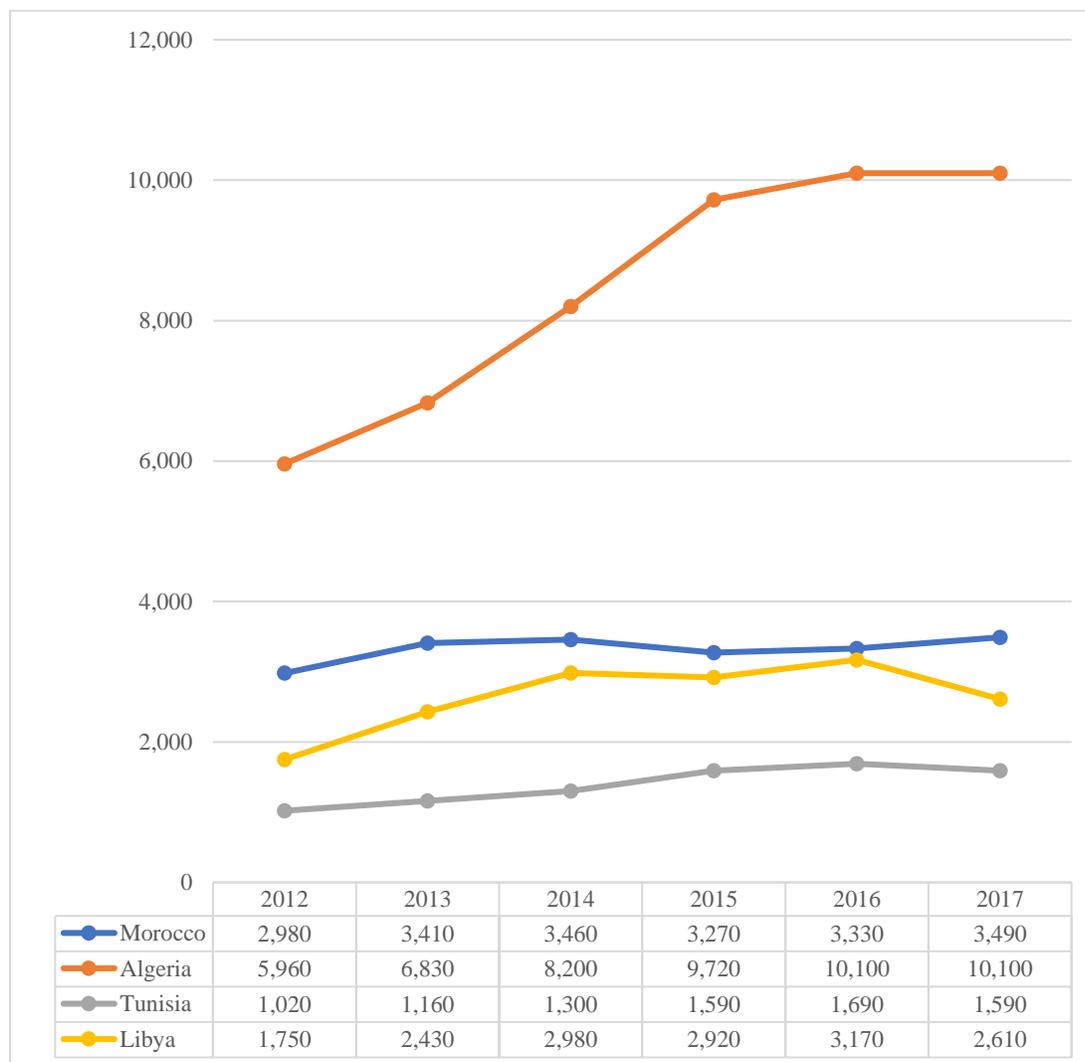
The International Institute for Strategic Studies (IISS) does, however, provide a relatively reliable and updated estimate of military spending through 2021. Its data make it clear that America's Arab strategic partners maintained the high levels of military spending shown in **Figure Two** through 2021. The IISS also provides an equally accurate estimate of the burden this military spending had placed on the gross domestic product (GDP) of each MENA state through 2021.

These IISS data show that military spending already accounts for an extremely high percentage of the GDP in many MENA states. The IISS estimates for 2021 show that Algeria spent 5.52% of its GDP on military forces in 2021, Bahrain spent 3.52%, Iraq spent 3.65%, Israel spent 5.05%, Jordan spent 5.07%, Kuwait spent 7.28%, a bankrupt Lebanon spent 3.50% (not counting the Hezbollah and other factions), Morocco spent 5.04%, and Oman spent 7.98%. Three Gulf states that chronically under-report real spending still had high estimates: Qatar spent 3.70%, Saudi Arabia spent 5.54%, and the UAE spent 4.67%.⁹ To put these percentages in a broader international perspective, most NATO countries – virtually all of which are developed modern states – fall short of NATO's goal of 2%.

These Arab country spending levels are so high that they have to come at the costs of civil development, and many have helped to help create and sustain pointless local arms races within the MENA region. Yet, the U.S. has made repeated efforts to push its Arab partners into taking over more of the regional security burden ever since the Obama Administration. It has also pushed U.S. arms sales with uncertain regard to actual need, and done so with little regard to the economic development problems reflected in the per capita income data in **Figure One**.

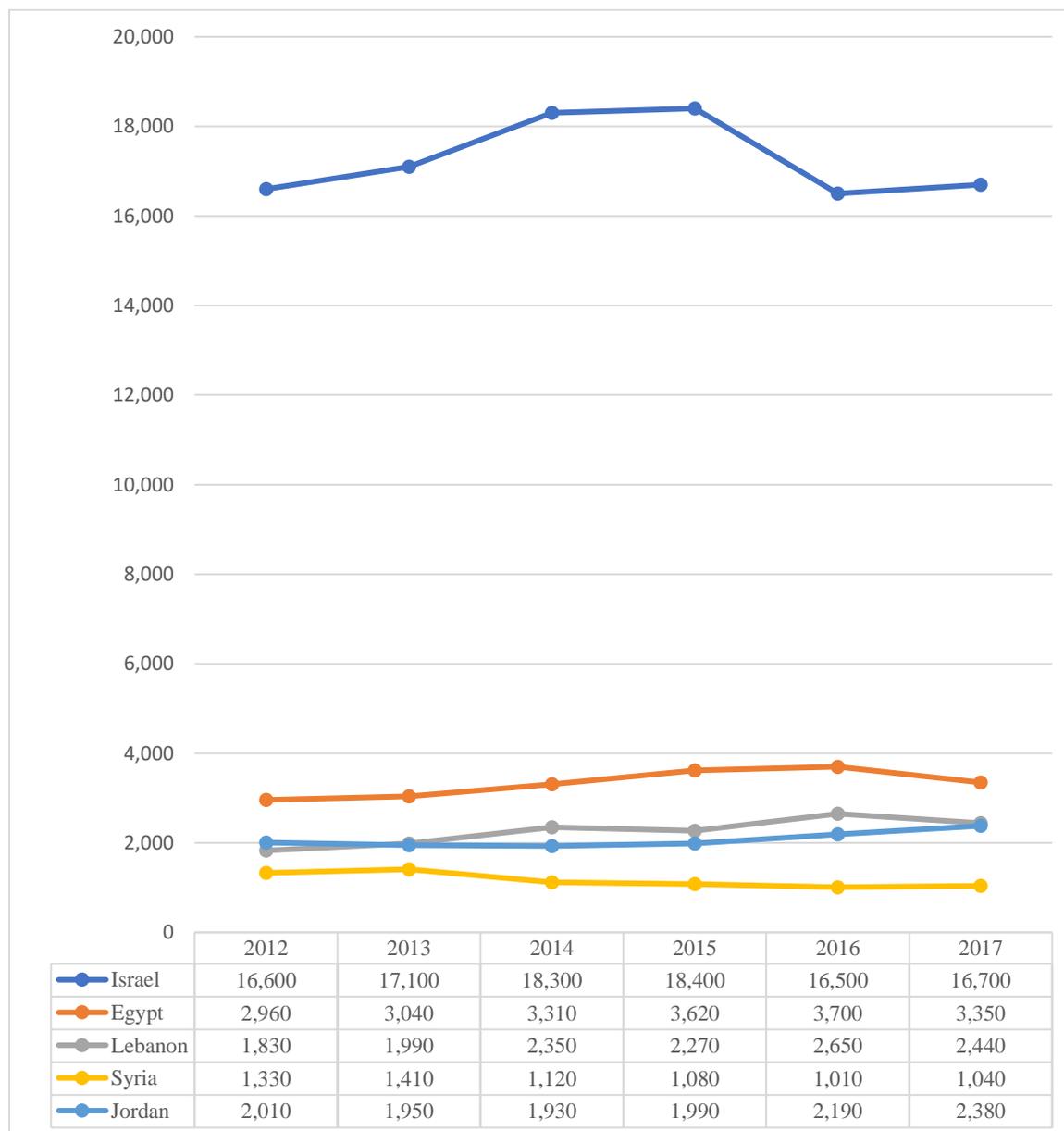
It should also be obvious that excessive defense spending in developing states comes at the expense of political and social stability, support for the government, and the ability to counter extremist and terrorist movements.

Figure Two: Annual Military Expenditures of MENA Countries from 2012-2017
Part One: The North African Sub-Region
(In Millions of Current \$US)



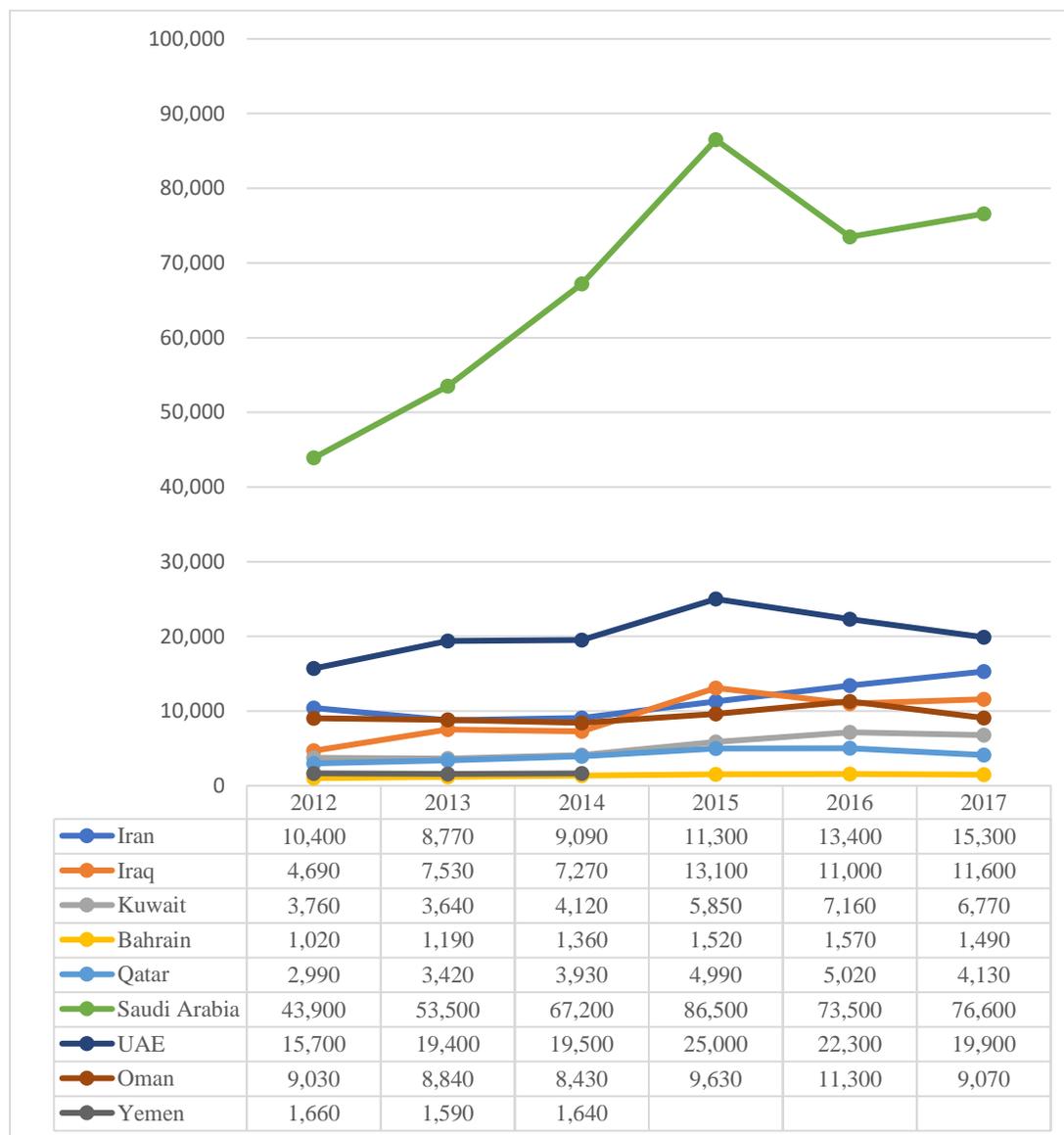
Source: U.S. Department of State, “World Military Expenditures and Arms Transfers 2019,” *Bureau of Arms Control, Verification and Compliance*, WMEAT 2019 Table I Military Expenditures And Armed Forces Personnel, 2019, <https://www.state.gov/world-military-expenditures-and-arms-transfers-2019/>.

Figure Two: Annual Military Expenditures of MENA Countries from 2012-2017
Part Two: Arab-Israeli Sub-Region
(In Millions of Current \$US)



Source: U.S. Department of State, "World Military Expenditures and Arms Transfers 2019," *Bureau of Arms Control, Verification and Compliance*, WMEAT 2019 Table I Military Expenditures And Armed Forces Personnel, 2019, <https://www.state.gov/world-military-expenditures-and-arms-transfers-2019/>.

Figure Two: Annual Military Expenditures of MENA Countries from 2012-2017
Part Two: Gulf Sub-Region
(In Millions of Current \$US)



Note: Data for the years of 2015-2017 in Yemen are unavailable

Source: U.S. Department of State, "World Military Expenditures and Arms Transfers 2019," *Bureau of Arms Control, Verification and Compliance*, WMEAT 2019 Table I Military Expenditures And Armed Forces Personnel, 2019, <https://www.state.gov/world-military-expenditures-and-arms-transfers-2019/>.

The data in **Figure Three** on the size of the burden Arab national arms imports have placed on development and stability are more uncertain. They also only cover the sales by the major powers and all of Europe. At the same time, they still are clearly high enough to represent a major burden on MENA country development that helps explain the limited level of real economic growth reflected in **Figure One**. They also show that Russia is already a major supplier to a number of MENA powers.

There also is no reliable source of the actual total cost of arms imports to a given MENA state that covers the period after 2017. However, the Stockholm International Peace Research Institute (SIPRI) does provide more current data on what it defines as Trend Indicator Values (TIVs). These TIV data are often good indicators of the level of arms transfers to a given MENA country. *It should be stressed, however, that TIVs are not estimates of actual national spending on arms imports.* SIPRI defines TIVs as follows:¹⁰

The TIV is based on the known unit production costs of a core set of weapons and is intended to represent the transfer of military resources rather than the financial value of the transfer. Weapons for which a production cost is not known are compared with core weapons based on: size and performance characteristics (weight, speed, range and payload); type of electronics, loading or unloading arrangements, engine, tracks or wheels, armament and materials; and the year in which the weapon was produced. A weapon that has been in service in another armed force is given a value 40 per cent of that of a new weapon. A used weapon that has been significantly refurbished or modified by the supplier before delivery is given a value of 66 per cent of that of a new weapon.

A review of these TIV data for 2016-2021 on a nation-by-nation basis does not reveal major shifts in the trends in U.S., Russia, China, and European arms sales from the in **Figure Three**. It does, however, indicate that the total size of arms sales often varied sharply from year to year, and that significant annual shifts take place in the imports from particular European suppliers.¹¹

They indicate that Egypt did increase the European share of arms exports, and that Russia did continue to be a significant exporter. Iraq reduced its imports significantly after the defeat of the ISIS “caliphate.” Morocco imported some arms from China. Qatar did increase its arm imports. Saudi Arabia and the UAE remained major importers and Saudi Arabia imported some arms from China. The data on Iran, Syria, and Yemen also seem particularly uncertain.

Put more simply, the data in **Table Two** and **Table Three** make it clear that many Arab partners in need of added funds for investment in civil development are spending more on military forces and arms imports than they can really afford if they are to meet their urgent civil and development needs. As for the quality of the national military forces these expenditures and arms transfers have created, most nations have made limited increases in effectiveness, training, and readiness in recent years, but only Iran has made radical improvements in new capabilities like offensive missile forces and its ability to carry out irregular warfare in the Gulf.

Figure Three: Cumulative Value of Arms Transfers to the MENA Region from Major Suppliers): 2012-2014 versus 2015-2017- Part One

(In Millions of Current \$US

Country	U.S.	Major European	Russia	China	
NORTH AFRICA SUBREGION					
Algeria					
2012-2014	1,700		0	3,700	200
2015-2017	1,500		3,500	4,500	500
Libya					
2012-2014	100		0	50	0
2015-2017	100		0	0	0
Morocco					
2012-2014	1,000		1,200	100	0
2015-2017	600		50	50	100
Tunisia					
2012-2014	300		50	0	0
2015-2017	500		50	0	50
SUBTOTAL					
2012-2014	3,100		1,250	3,850	200
2015-2017	2,700		3,600	4,550	650
ARAB-ISRAELI SUBREGION					
Egypt					
2012-2014	4,200		50	600	400
2015-2017	3,200		5,900	4,500	200
Israel					
2012-2014	14,200		800	0	0
2015-2017	11,300		1,600	0	0
Jordan					
2012-2014	1,700		50	50	50
2015-2017	1,400		150	0	200
Lebanon					
2012-2014	200		0	0	50
2015-2017	300		100	0	50
Syria					
2012-2014	50		0	1,300	50
2015-2017	0		0	3,600	0
SUBTOTAL					
2012-2014	20,350		900	1,950	550
2015-2017	16,200		7,750	8,100	450

Figure Three: Cumulative Value of Arms Transfers to the MENA Region from Major Suppliers): 2012-2014 versus 2015-2017- Part Two
(In Millions of Current \$US)

Country	U.S.	Major European	Russia	China	
Bahrain					
2012-2014		700	0	50	0
2015-2017		500	50	50	50
Iran					
2012-2014		0	0	50	0
2015-2017		0	0	1,000	0
Iraq					
2012-2014		6,200	400	2,000	100
2015-2017		8,600	350	3,200	700
Kuwait					
2012-2014		2,900	100	300	50
2015-2017		2,400	100	300	50
Oman					
2012-2014		1,300	2,100	50	0
2015-2017		1,100	2,600	0	0
Qatar					
2012-2014		3,100	500	0	0
2015-2017		2,400	2,000	0	50
Saudi Arabia					
2012-2014		14,600	4,400	0	0
2015-2017		27,300	7,700	0	3,600
UAE					
2012-2014		17,300	1,200	200	0
2015-2017		1,600	700	100	200
Yemen					
2012-2014		100	0	50	50
2015-2017		50	0	50	50
SUBTOTAL					
2012-2014		46,200	8,700	2,700	200
2015-2017		43,950	13,500	4,700	4,700
TOTAL					
2012-2014		82,750	12,200	8,500	950
2015-2017		71,350	25,250	17,350	5800
Turkey					
2012-2014		13,100	1,350	0	0
2015-2017		8,500	400	0	0

Source: U.S. Department of State, "World Military Expenditures and Arms Transfers 2019," *Bureau of Arms Control, Verification and Compliance*, WMEAT 2019 Tables II IV Arms Transfer Deliveries, 2019, <https://www.state.gov/world-military-expenditures-and-arms-transfers-2019/>.

But, There is an All Too Real Need for Effective Security Cooperation and Reform

These problems in U.S. cooperation with its Arab partners have long been made worse by the fact that Arab states have tended to develop their forces, and arm them, in ways that make effective and interoperable joint military operations very difficult. Most of America's Arab strategic partners do not cooperate effectively in force planning, procurement, exercises and training, interoperability, creating integrated regional capabilities, and developing new tools for Joint All Domain Warfare. They often make very different show piece weapons buys, and many of America's Arab strategic partners have come to tacitly rely on U.S. C4I/battle management, naval and air force, power projection capabilities, and space and cyber assessment.

These real world flaws in Arab forces – and the resulting waste and limited effectiveness – are partly disguised by the fact that the region has created a long list of Arab “alliances” and security agreements – most of which are empty shells. As is always the case with real world strategic capabilities, rhetoric is a miserable substitute for reality.

So far, the closest thing to a real, functional regional alliance is the Gulf Cooperation Council (GCC), but its member country defense spending and force postures remain uncoordinated and largely national. In practice, the real-world military relations members have with other Arab states are often more dependent on strategic partnerships with the U.S. and UK – or on focused bilateral or smaller areas of cooperation – than any efforts at coordinated force plans, exercises, and real development of alliances.

As for the U.S., it too has also tended to substitute a different kind of rhetoric for reality. Since the beginning of the Trump Administration, the U.S. has issued several unclassified summaries of new national U.S. military strategies.¹² None, however, have addressed the future force posture of the U.S. in the MENA region, how this will shape the future role and size of USCENTCOM and the nature of strategic partnerships with given MENA states. None begin to address the challenges the U.S. faces in reshaping its force posture in nations like Egypt, Lebanon, Iraq, and the Arab Gulf states – and in dealing with outside states like Turkey – in any detail.

The future U.S. military role in eastern Syria and Iraq remains particularly uncertain, and for all of the press that focuses on arms sales to Saudi Arabia, there was almost no mention during the visit of how the overall U.S. security relationship and posture in that country – or in any other MENA country – is intended to evolve. More broadly, there has been no meaningful open-source indication of how the U.S. strategic posture should evolve in the Mediterranean, in North Africa, in the increasingly troubled states on the southern coast of the Red Sea, and in the Indian Ocean area.

Key Areas for Strategic Cooperation and Force Modernization

None of the recent open source U.S. strategy documents have addressed how the U.S. can build more effective partnerships with Arab partners, provide them with effective U.S. and European support, and counter Russian and Chinese military and politico-economic pressure. None focus in any detail on the key areas of future cooperation between the U.S. and its Arab partners, as well as Israel.

These areas include:

- Developments in U.S. power projection and the U.S. military presence in the region.

- Creating collective deterrents to deal with growing long-range threat strike capabilities and possible Iranian nuclear forces.
- Updating air, naval, and ground weapons fleets and making them more interoperable.
- Advances in cyber operations, use of space systems, integrated sensor coverage, advanced battle management and C4I systems, and Joint All Domain Warfare capabilities.
- Creating integrated air and missile defense capabilities that can cover the range of threats from drones to long range precision guided ballistic missiles.
- Conventional and unconventional naval/air/missile warfare capabilities in the Gulf, Red Sea, and the Mediterranean
- Advanced counterterrorism and unconventional warfare capabilities,
- Joint exercise, training, maintenance and support, and cross basing capabilities.
- Adopting and defending against emerging and disruptive technologies.
- Joint resource and budget planning with a focus on economies of scale, purchase of high priority joint and interoperable systems, and force integration.

Setting Broad Goals Without Plans and Details Substitutes Rhetoric for Reality

President Biden’s meetings in the Gulf did lead to reassuring statements about cooperation, but the end result rarely went beyond strategic rhetoric. The Joint declaration with Saudi Arabia stated the need for their strategic partnership and broad cooperation in security. It listed the protection of the Bab al-Mandab and Strait of Hormuz, cybersecurity, space exploration, Yemen, Iraq, Israel-Palestinian issues, Syria, Lebanon, the Ukraine, Sudan, Afghanistan, and counter-terrorism as specific areas where progress was needed.

However, none of the communiqués coming out of the President’s meetings presented major new sets or actions or solutions to deal with them. The President also did not announce any details about the future U.S. military posture in the region beyond the creating of new task force names for the U.S. naval forces in the area.

The communiqué describing the outcome of the meetings with Saudi leaders did not present any major new security initiatives or provide any tangible plans for U.S. and Saudi military cooperation.¹³

A communiqué on a separate meeting between President Biden and the President of the UAE Sheikh Mohammed bin Zayed in Jeddah on July 16th was equally vague. The U.S. thanked the UAE for breaking down the barriers with Israel, and stated that, “President Biden noted that the UAE is the only country in the Middle East to have deployed its military forces alongside the U.S. military in every international security coalition involving the United States since Desert Shield/Desert Storm in 1990-1991.”

It also called for added security cooperation, dealing with Yemen, Iraq and even included a passage stating “the importance of protecting the prospects of a two-state solution and of assuring that the benefits of the Abraham Accords also accrue to Palestinians.” (Perhaps as much to ease the sale of the F-35 and other advanced U.S. arms as for any other reason.) Once again, however, it did not announce any tangible plans for future cooperation on security.¹⁴

The joint communique that came out of the meeting between the President and the leaders of the Gulf Cooperation Council on June 16, 2022 did at least call for improved military cooperation in some detail,¹⁵

The leaders affirmed their commitment to joint cooperation to bolster global economic recovery efforts, address the economic repercussions caused by the pandemic and the war in Ukraine, ensure the resiliency of supply chains and the security of food and energy supplies, develop clean energy sources and technologies, and assist countries in need by helping address their humanitarian and relief needs.

In this context, the United States welcomed the decision by the Arab Coordination Group (ACG), which includes ten Arab and national specialized financial developmental institutions, to provide a minimum of \$10 billion USD in response to food security challenges regionally and internationally, in line with the objectives of the U.S.-led Roadmap for Global Food Security — Call to Action. The leaders also welcomed the United States' announcement of \$1 billion in new acute humanitarian and near to long term food security assistance for the Middle East and North Africa region.

The leaders recognized ongoing efforts of OPEC+ towards stabilizing the global oil market in the interests of consumers, producers, and supporting economic growth. They welcomed the recent announcement by OPEC+ members to increase supply over the course of July and August, and commended the Kingdom of Saudi Arabia's leading role in achieving consensus between the members of OPEC.

President Biden welcomed the announcement that some GCC partners plan to invest a total of \$3 billion in projects that align with U.S. Partnership for Global Infrastructure and Investment (PGII) goals to invest in critical infrastructure in low- and middle-income countries, including through investing in projects that advance climate and energy security and digital connectivity, and that strengthen and diversify global supply chains.

President Biden expressed appreciation for the GCC countries' pledge to provide \$100 million for the East Jerusalem Hospital Network, which provides life-saving healthcare to Palestinians in the West Bank, Gaza, and East Jerusalem.

The leaders affirmed their joint commitment to preserve regional security and stability, support diplomacy with the aim of regional de-escalation, deepen their region-wide defense, security, and intelligence cooperation, and ensure the freedom and security of waterways. In this context, the leaders of the GCC member states welcomed President Biden's affirmation of the United States' commitment to its strategic partnership with GCC member states, and that it stands ready to work jointly with its partners in the GCC to deter and confront all external threats to their security, as well as against threats to vital waterways, especially the Strait of Hormuz and the Bab Al- Mandab.

The leaders affirmed their support for ensuring that the Arab Gulf region is free from all weapons of mass destruction, underscoring the centrality of diplomatic efforts to prevent Iran from developing a nuclear weapon, and for confronting terrorism and all activities that threatens security and stability.

The leaders commended the ongoing cooperation between the GCC member states and the United States to promote the security and stability of the region and its waterways. They affirmed their commitment to cooperate and coordinate between their countries to enhance their defense and joint deterrence capabilities against the increasing threat posed by the proliferation of unmanned aerial systems and cruise missiles, as well as against the arming of terrorist militias and armed groups, including in violation of UN Security Council Resolutions.

The leaders discussed various ways to enhance their joint cooperation aimed at strengthening deterrence and the defense capabilities of GCC member states, as well as enhanced integration and interoperability in their air and missile defenses and maritime security capabilities, and early warning systems and information sharing.

The Joint Declaration dealing with his meetings with Saudi Arabia and the leaders of Egypt, Morocco and the other Gulf states made a long series of general statements about the need for improved cooperation in security that broadly committed the U.S. to a major security role in the Gulf.

Once again, these statements did represent some progress on both sides in rebuilding and modernizing the goals behind their strategic partnership. However, the declaration only addressed two tangible area of progress. It called for annual meetings between the U.S. and the leaders of the Gulf Cooperation Council, and “welcomed the establishment of Combined Task Force 153 and Task Force 59, which will enhance joint defense coordination between the GCC member states and the U.S. Central Command to better monitor maritime threats and improve naval defenses by utilizing the latest technologies and systems.” It did not address the key strategic priorities listed earlier in any meaningful way.

Strategic rhetoric is not enough to deal with strategic partners, nor is letting the momentum of events drive regional instability and then reacting to events on an opportunistic basis. This already has clearly failed to win their support. Neither is slowly withdrawing combat forces and then tinkering with individual crises.

As is the case in dealing with the rest of the rest of its global strategic partners, the U.S. needs to show what its strategy and force plans really are. It needs to show that it has real plans to implement these goals and will take tangible actions. The U.S. needs to explain how it will aid Arab partners in each of the areas listed above, and show how it is seeking to encourage a real partnership – including Britain and France. It also needs to show that it has clear plans to provide steady future improvements in both deployed U.S. forces and U.S. power projection capabilities and to define the future role that USCENTCOM, INDOPACOM, and AFRICOM will play inside and at the margins of the MENA region.

U.S. Relations with Israel and the Palestinians: The Death of the Two State Solution and “Facts on the Ground”

Two other aspects of President Biden’s visit also deserve far more attention. One is the impact of the effective death of the two-state solution on the exchanging prospect for new Arab-Israeli clashes and conflicts. The other is the need to take a far more honest look at the strategic importance of the MENA region’s oil and gas exports, and to adjust U.S. strategic priorities accordingly.

The problems the U.S. faces in dealing with Iran and Syria cannot be decoupled from U.S. strategic relations with Israel, although President Biden came close to doing this during his visits to Israel and Saudi Arabia, and the U.S. strategy documents cited earlier make no mention of the extent to which the changing strategic threats in the MENA region affect Israel as well as the U.S. and its Arab strategic partners.

Focusing on a Pro-Israel Visibility Exercise

The President did make some gestures toward the Palestinians during his visits to Israel and Saudi Arabia. The formal results of his meeting with Israel’s Prime Minister Lapid are presented in *The Jerusalem U.S.-Israel Strategic Partnership Joint Declaration*.¹⁶

This document makes it clear that the President concentrated on efforts to show his support for Israel and publicize increases in aid. It focused on the terrorist attacks on Israel and antisemitism. Unlike the limited statements made regarding strategic partnerships with Arab states, the

declaration also highlighted the critical to importance of its strategic partnership with Israel in detail. It stated that,¹⁷

Consistent with the longstanding security relationship between the United States and Israel and the unshakeable U.S. commitment to Israel's security, and especially to the maintenance of its qualitative military edge, the United States reiterates its steadfast commitment to preserve and strengthen Israel's capability to deter its enemies and to defend itself by itself against any threat or combination of threats. The United States further reiterates that these commitments are bipartisan and sacrosanct, and that they are not only moral commitments, but also strategic commitments that are vitally important to the national security of the United States itself.

Giving the Abraham Accords Priority

The U.S. declaration only touched upon U.S. Arab relations with its Arab strategic partners by stating that,¹⁸

The United States stresses that integral to this pledge is the commitment never to allow Iran to acquire a nuclear weapon, and that it is prepared to use all elements of its national power to ensure that outcome. The United States further affirms the commitment to work together with other partners to confront Iran's aggression and destabilizing activities, whether advanced directly or through proxies and terrorist organizations such as Hezbollah, Hamas, and Palestinian Islamic Jihad.

The U.S. did, however, play a role in persuading Israel to provide a comparatively long passage that formally thanked the United States for its "ongoing and extensive support for deepening and broadening the historic Abraham Accords," and did focus on improving its relations with America's strategic partners. It names Egypt and Jordan, and the Declaration affirmed that, "Israel's peace and normalization agreements with the United Arab Emirates, Bahrain, and Morocco constitute a critical addition to Israel's strategic peace treaties with Egypt and Jordan, all of which are important to the future of the Middle East region and to the cause of regional security, prosperity, and peace." It also mentioned the Negev Summit, Manama meeting, formation of the Negev Forum on Cooperation, and I2U2 initiative for cooperation between Israel, the UAE, India, and the U.S.

The U.S. also included one paragraph dealing with U.S. policy towards the Palestinians, the prospects for an Israel-Palestinian peace, and the prospects for a two-state solution:¹⁹

President Biden reaffirms his longstanding and consistent support of a two-state solution and for advancing toward a reality in which Israelis and Palestinians alike can enjoy equal measures of security, freedom and prosperity. The United States stands ready to work with Israel, the Palestinian Authority, and regional stakeholders toward that goal. The leaders also affirm their shared commitment to initiatives that strengthen the Palestinian economy and improve the quality of life of Palestinians.

Aside from the fact this paragraph does mention "leaders" in ways that include Israel in "advancing toward a reality in which Israelis and Palestinians alike can enjoy equal measures of security, freedom and prosperity." Neither the communique or other U.S. actions during and immediately following the President's meeting in Jerusalem represented any actual progress in improving Israeli-Palestinian relations and does not represent any joint endorsement of the peace process or two state solution.

Silent Acceptance that the Two State Solution is Dead?

In practice, Biden's near silence regarding any real steps forward in the Israeli-Palestinian peace process tacitly recognized that while the two-state solution might not be formally dead, it was not actually alive. His actions tacitly reinforced the Trump administration's focus on the Abraham Accords and on improving Israel's relations with the Arab Gulf Arab states. At the same time, he

did not seriously address the continuing crisis in Gaza, and largely ignored the changes in Israel's politics that have created a steady pressure to increase Israeli settlements in the West Bank and Jerusalem and to ignore the Palestinian Authority while creating new facts on the ground.

There also was little mention of the fact that the Abraham Accords had only a tenuous improvement in the overall security and stability of the region. If anything, they were driven more by the concern of Arab Gulf states with the threat posed by Iran, their concern over the uncertain U.S. strategic commitment to the region, Iran's ties to Syria and nuclear program, the instability in Iraq that could lead it to establish closer ties to Iran, the uncertain role of Turkey, Assad's (and Russia's) gains in Syria, and the implosion of Lebanon and the threat posed by the Hezbollah. They were not a move towards a real peace with Israel as much as a shift in focus towards different threats and different kinds of wars where they need U.S. political and military support and advanced U.S. arms.

In fairness, there was little President Biden or anyone else could credibly do to move the existing peace process forward. The prospects for a real two-state Israeli-Palestinian peace process were always uncertain and they have steadily declined since the assassination of Yitzhak Rabin and the Intifadas. In retrospect, they also probably collapsed in January 2006, when Hamas won the legislative election in Gaza. The wars between Israel and Hamas that have followed, tension and clashes with the Hezbollah and Syria, and the hardline shifts in Israeli politics in favor of settlements and control of Jerusalem, have all resulted in growing tensions and clashes between Israelis and Palestinians in the West Bank, in Jerusalem, and in Israel proper.

The Israeli settlements in the West Bank, and the expansion of Israeli control of Jerusalem, will continue to grow. The Palestinian Authority has no clear future. It has become steadily more ineffective and corrupt, and the always hopeless calls for some return to the boundaries in 1967 now border on the ludicrous. The end result is that Israel will continue to exploit its position as a "winner," sporadic clashes with Gaza will continue, and the Palestinian Authority will self-destructively make its position as a "loser" even worse.

In practice, the silent message the President's meetings in Israel and Saudi Arabia sent regarding a revival of the two-state solution is that U.S. or other efforts to revive it have about as much chance of changing the world as giving mouth-to-mouth resuscitation to the dead.

Looking Beyond the Two State Solution and the Abraham Accords

At the same time, the need for a better solution to dealing with the Palestinian issue, and one that offers them more rights and security, is all too clear. The Abraham Accords deal largely with Arab powers that are not a major threat. They also do not address the more immediate military threats that Israel does face.

Gaza's leaders are at least as responsible for the long series of conflicts and violent incidents between Israel and Gaza as Israel. At the same time, it is important to note that Israel and Hamas remain engaged in what has become a seemingly endless cycle of violence and major clashes. Israel's efforts to defend itself are all too justified, but turning Gaza into a hostile and armed concentration camp means an endless cycle of Israel-Palestinian violence.

The Hezbollah are another continuing threat to Israel, and the Hezbollah has steadily improving long-range precision missile strike forces. Clashes continue with Syria, and it may become a far more serious threat if Assad fully wins the Syrian civil war. Iran's growing missile forces and potential nuclear arms also pose a serious and growing threat.

The regional ties between Lebanon and the Hezbollah, Syria, and Yemen have already created a loose coalition that raises far more serious prospects of a future war than one with the Arab Gulf states, and this coalition would become a far more serious threat to Israel if Iran should join it. At the same time, Russian and Chinese efforts to expand their regional roles (and arms sales) add to these risks.

Reaching the Abraham Accords with the Arab regimes in the Gulf is still useful, and their impact will be reinforced by the fact the major Arab powers need to focus on other threats like Iran, that Egypt needs to cooperate with Israel in dealing with extremist threats in the Sinai, and that Egypt and Jordan must do their best to avoid any conflict that does further damage to their economies and political stability.

At the same time, all of these forces ignore the reality that they do not persuade populations of the Arab states to support or tolerate Israel, or deal with the the risk that some exceptionally provocative clash, or series of clashes between Israel and the Palestinians, could lead to some broad conflict or a more serious period of confrontation. Their impact is also likely to be offset by the fact Israel keeps pushing facts on the ground in the west Bank, Jerusalem, and the rest of Israel, and its considering steps like making large, formal “annexations” of the West Bank territory that could sharply inflame the situation.

Practical Options for U.S. Action

These threats and tensions are all further reasons for the U.S. to strengthen its strategic commitment to the region, and its strategic partnerships with Egypt, Jordan, and the Arab Gulf states. There also however, are good reasons for the U.S. to put growing pressure on Israel to limit its efforts to expand its settlements, respect Palestinian property rights in Jerusalem and the rest of Israel, give Palestinians more civil rights and legal protection, moderate some aspects of its security activities, consider ways to offer the Palestinian Authority some form of lasting autonomy, and offer some positive incentive to the people of Gaza that might persuade them to turn away from Hamas.

The practical “peace” options for the U.S. do not consist of hoping for the two-state solution to rise from the dead. They are to work with Israel to improve the rights, welfare, and income of Palestinians in both the West Bank and Israel proper; to work for some lasting autonomy agreement with the Palestinian Authority in the West Bank and over the status of the Dome of the Rock; and to create some form of international aid and relief package that might challenge Hamas and help the Palestinians in Gaza in return for an end to violence.

Looking Beyond the Gas and Oil Crisis Triggered by the Ukraine War

The final issue involves U.S. strategic interests in the MENA region, and have a major strategic impact on both the U.S. and the world. The energy crisis triggered by the Ukraine War has done far more than create a wartime crisis over global oil and gas exports and prices. It has shown all too clearly that the global (and U.S.) economy is still heavily shaped by the MENA region’s ability to provide stable exports of oil and gas. It also has shown that this flow of exports plays a critical role in shaping the economics of the U.S. and European strategic competition with Russia, and that the U.S. and both its European and Asian strategic partners must pay close attention to MENA energy export capabilities in shaping their competition with China.

The short-term impact of sanctions on Russia, and their impact on Russian energy exports and the need for MENA exports has already shown that such strategic issues impact heavily on the U.S.

economy. At the time of the President’s visit, they had already had a major impact on global inflation and on U.S. trade with the global economy. Since his visit, it has also become clear that Russia can restrict gas exports to Europe –impacting heavily on the economies of major economic powers like Germany and France.

The President clearly recognized the importance of these issues, and once again, the communiqués coming out of the meeting did provide some reassuring rhetoric. The Joint Communiqué coming out of the Presidents broader meeting with Arab leaders at the end of his visit states that,²⁰

The leaders affirmed their commitment to joint cooperation to bolster global economic recovery efforts, address the economic repercussions caused by the pandemic and the war in Ukraine, ensure the resiliency of supply chains and the security of food and energy supplies, develop clean energy sources and technologies, and assist countries in need by helping address their humanitarian and relief needs.

... The leaders recognized ongoing efforts of OPEC+ towards stabilizing the global oil market in the interests of consumers, producers, and supporting economic growth. They welcomed the recent announcement by OPEC+ members to increase supply over the course of July and August, and commended the Kingdom of Saudi Arabia’s leading role in achieving consensus between the members of OPEC.

His trip did not, however, make any substantive progress in dealing with the fact that Europe’s dependence on oil and gas imports, sanctions on Russia, and Russian cuts in exports to Europe had created a major global energy crisis. It also did not address that face that this crisis provides a much broader warning as to how critical stable and increased MENA energy exports will be to meeting projected global demands for energy through 2050s.

There are major uncertainties in projecting the global trends in energy supply even over a comparatively short period like 2022-2050. These issues are addressed in detail in an earlier CSIS Emeritus Chair study, entitled, *U.S. Strategy: Rebalancing Global Energy between Europe, Russia, and Asia and U.S. Security Policy in the Middle East and the Gulf*.²¹

However, even summary graphic projections of the future global trends in energy use like the one in **Figure Four** provide a clear warning that dependence on oil and gas exports will grow in many areas through 2050, and that credible estimates of the growth of renewable energy supplies will not change this situation.

The data in **Figure Four** are taken from an official U.S. government source: The *International Energy Outlook* (IEO) of the U.S. Department of Energy’s (DoE) Energy Information Administration (EIA). They clearly warn that increased global oil and gas exports will remain critical to the global economy through 2050, and that the flow of such exports will be particularly critical to developing nations as well as to limiting the future rises in prices.

This dependence on rising oil and gas exports also occurs even though the EIA projections of the trends in world energy supplies in **Figure Four** show an extremely rapid rise in renewables and in the shifts in the overall balance of global energy supplies. Like almost all such projections, they still project a major continuing rise in oil and gas use, and they warn that the global economy will remain highly dependent on increased oil and gas use for the next three decades. To put these shifts in perspective, the share of the largest Middle Eastern oil and gas exporters was already 28.1% of world oil exports in 2020 and 14.9% of world gas exports.²²

Figure Five expands this summary trend analysis to show that the Middle East is projected to drive oil exports from the areas outside the U.S., Canada, Europe, Russia, and China and will be critical to meeting the global need for oil. They also help illustrate why the U.S. should encourage

MENA states to increase their export capability even as it encourages the increased production of renewable energy.

Figure Five also indicates that much of the required increase in liquid fuels will come from the MENA region. While these projections were made before the Ukraine War, the EIA projected that the MENA region would continue to increase its share of global production: It also projected that Russian oil production would increase more modestly, while U.S. and Canadian production would only make limited future increases or begin to drop. The analysis supporting these projections stated that,²³

In the Reference case, crude oil production in OPEC countries increases over the projection period. Compared with the four largest non-OPEC oil producers—Russia, the United States, Canada, and Brazil—OPEC crude oil production shows significant growth. Although OPEC member countries in Africa and South America contribute to this production, the Middle East drives increases in projected OPEC production, increasing production by more than 50% from 2020 to 2050 in this region. The combination of resources available in this region and the proximity of the Middle East to growing non-OECD economies in Asia contribute to the growth. The Middle East is already a prevalent supplier of crude oil to Asia, and we project it to remain so as demand for liquid fuels continues to increase and as many Asian refineries configure to process the Middle East's crude oil.

... Russia's proximity to the growing non-OECD Asian markets provides a strong incentive to continue increasing production rates. By 2050, production in Russia will approach levels close to those of the United States.

Meanwhile, the United States will increase production at a much more modest level. U.S. production will begin to decrease after 2030, and similarly, Canada's production growth will begin to subside after 2040. The leveling off of production in North America occurs as tight oil development moves into less productive areas and well productivity declines. The relatively high transportation costs associated with moving North America's crude oil to Asia also contributes to the leveling off in production. Additional production growth from Brazil relies on overall increasing oil prices and continued technological and efficiency improvements. Brazil's future production originates primarily in technically challenging offshore environments.

Figure Six provides a further warning regarding the importance of increased gas exports. It shows that much of the projected increase in global gas exports before the Ukraine War was expected to come from Russia – an increase that the U.S. and its strategic partners in NATO Europe and Asia must now seek to reverse. It shows that the problem created by the leverage Russian oil and gas exports have over importing states will also go far beyond the leverage Russia now exports in its war with Ukraine.

The U.S. and its strategic partners must find solutions that extend decades into the future. And to put this challenge in perspective, and energy supply, inflation, and economic impact issues that have arisen since the Russian invasion of Ukraine have already involved larger shifts in energy exports than real-world impact of the oil embargo in 1973.

Figure Six also shows how sharply Asian demand for oil and gas are projected to be through 2050, and it warns that the longer-term strategic challenges in ensuring that increases in meeting Chinese, Indian, and other non-OECD Asian demand for oil and gas exports will be as critical in strategic terms over the coming decades as finding alternatives to dependence on Russian exports.

Finally, **Figure Seven** sounds a warning about U.S. energy independence in terms of oil and gas imports. The EIA's reference case for the U.S. shows that the U.S. already had only a limited surplus in domestic oil production compared to its needs, and that this surplus will decline to something close to zero by 2050. Gas is more reassuring, but the data scarcely indicate that the projected U.S. increases in exports could meet a large part of European and other needs.

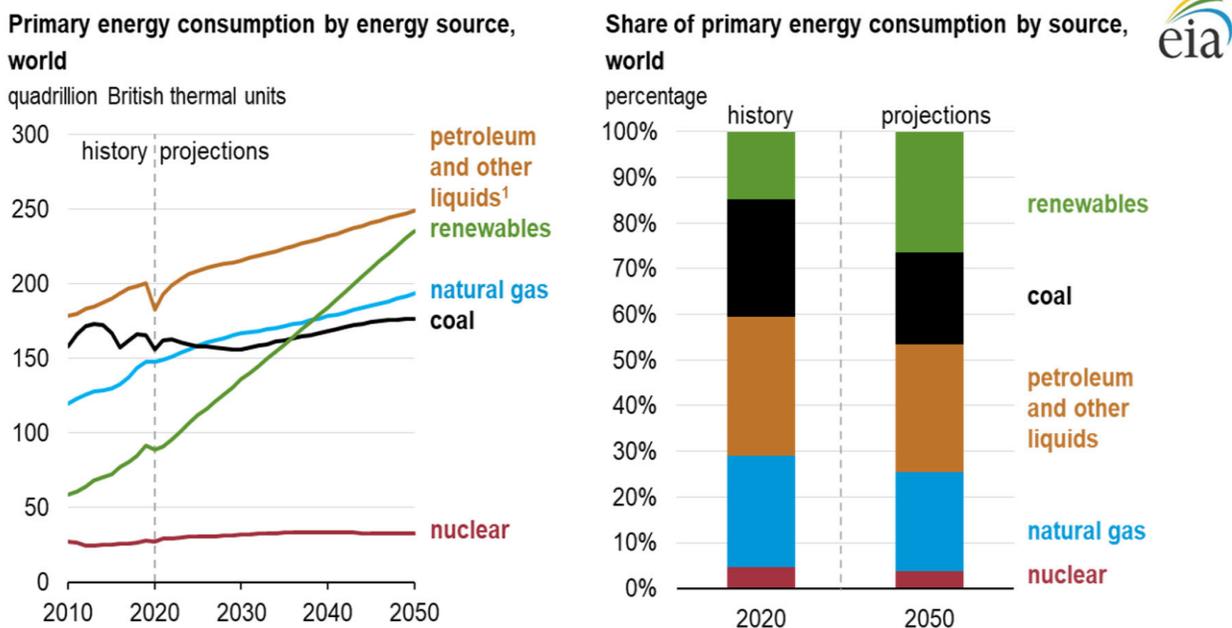
Some other projections of the future need for oil and gas and of the rate of increase in renewable energy – like some in the International Energy Administration’s (IEA) *World Energy Statistics, 2021* – examine alternatives that are far more optimistic about the ability to reduce future oil and gas consumption.²⁴ Such estimates, however, seem to be based more on national political goals and efforts to limit climate change than real-world probabilities. It is also striking that the legislation to create new incentives for alternative fuels production in the U.S. that is now being discussed within the U.S. Congress has made very broad claims about their ability to increase the future production of renewables that are not linked clearly to any credible analyses of such impacts or their impact incentives on even U.S. dependence on oil and gas.

The same issues affect the most optimistic projections of possible increases in global dependence both inside and outside the U.S. Producing over-optimistic forecasts for political reasons is very different from having the practical ability to change the realities of world economics and energy use.

At present, the EIA analyses seem all too realistic in showing that MENA oil and gas exports will become steadily more important in meeting the world’s expanding needs for energy and that the strategic importance of the MENA region must be judged accordingly – especially in light of the fact that there currently is no way to predict a point in the future where dependence on Russian exports will not pose a threat.

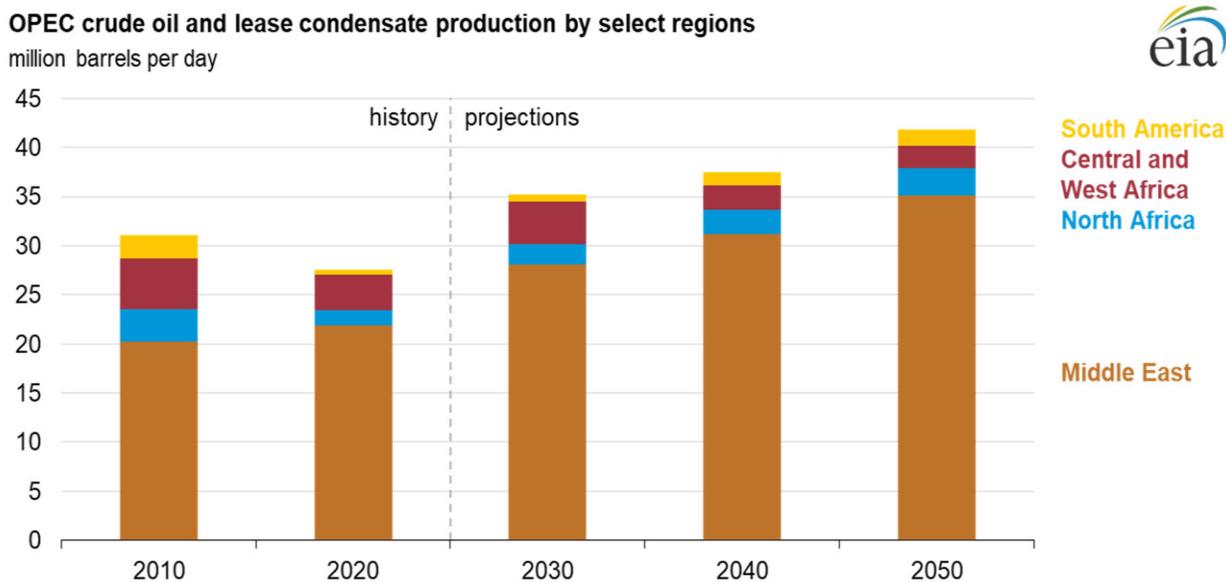
Finally, U.S. efforts to address these energy issues need to ensure that every aspect of U.S. strategies and actions in dealing with the MENA region involve a continued focus on the threats to MENA oil and gas exports. President Biden’s visit only seems to have sought a temporary rise in Saudi oil production to ease the strains that sanctions have placed on supply and prices. More generally, it is not clear that the U.S. has any real plan for helping its Arab partners to secure their oil and gas exports, or for dealing with what may well be years of future problems in dealing with Russia and Chinese efforts to win influence over these exports. The challenges in energy go far beyond encouraging renewables attempting to cut the use of fossil fuels, and the level of strategic leverage Russia has exploit in the Ukraine War.

Figure Four: Rises in Primary Energy Consumption by Energy Source



Source: U.S. Energy Information Administration, *International Energy Outlook 2021* (IEO2021) Reference case
¹ includes biofuels

Figure Five: Major Sources of Oil Production Through 2050

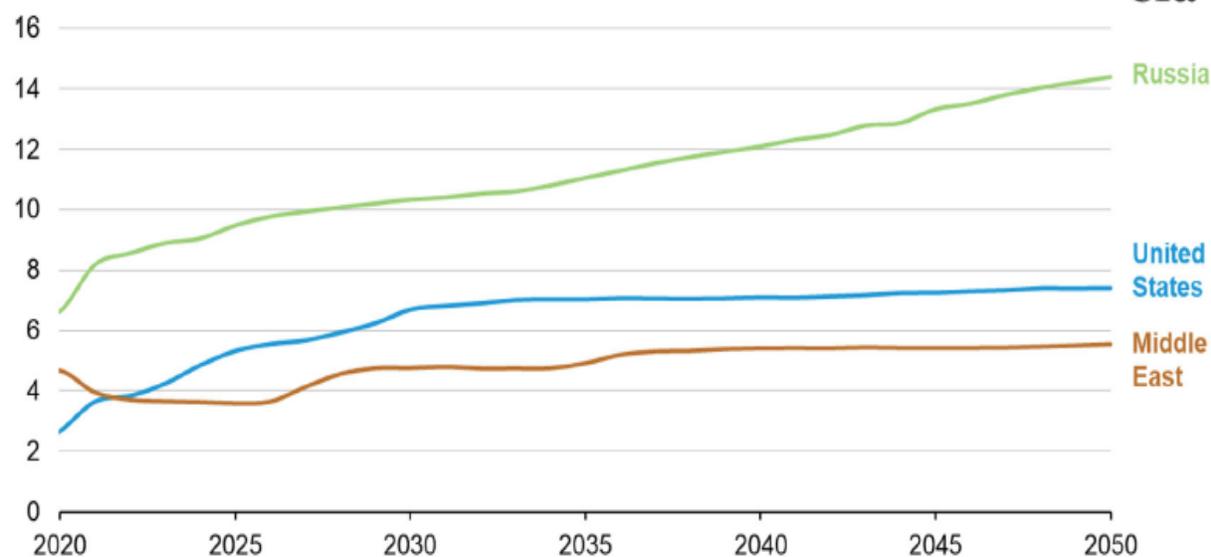


Source: U.S. Energy Information Administration, *International Energy Outlook 2021* (IEO2021) Reference case

Figure Six: Gas Exports and Imports: 2010-2050

Net exports of natural gas

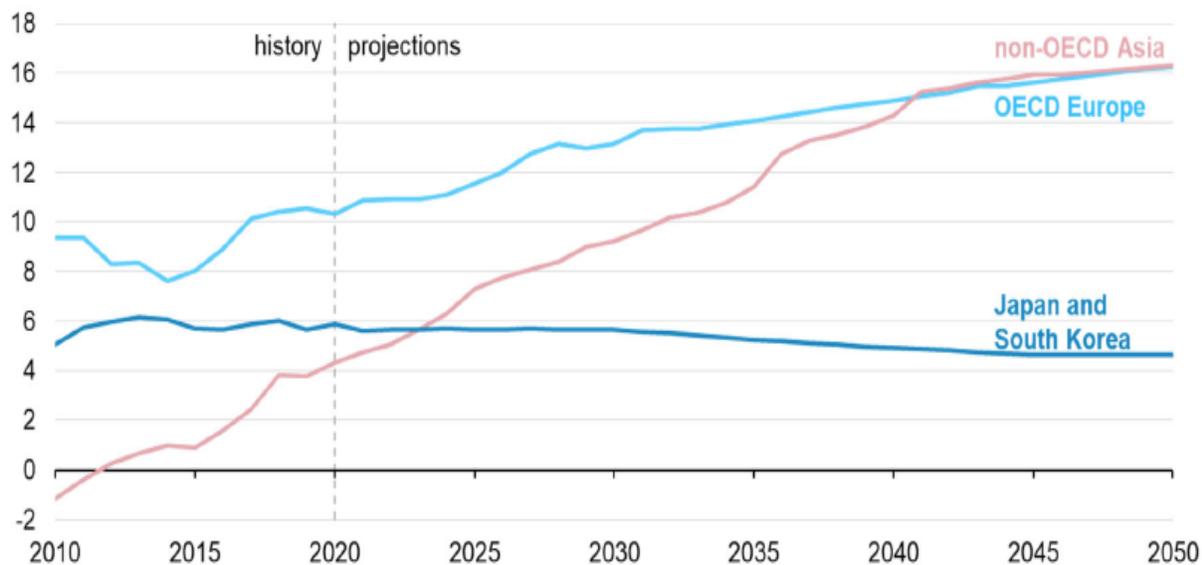
trillion cubic feet



Source: U.S. Energy Information Administration, *International Energy Outlook 2021* (IEO2021) Reference case

Net imports of natural gas

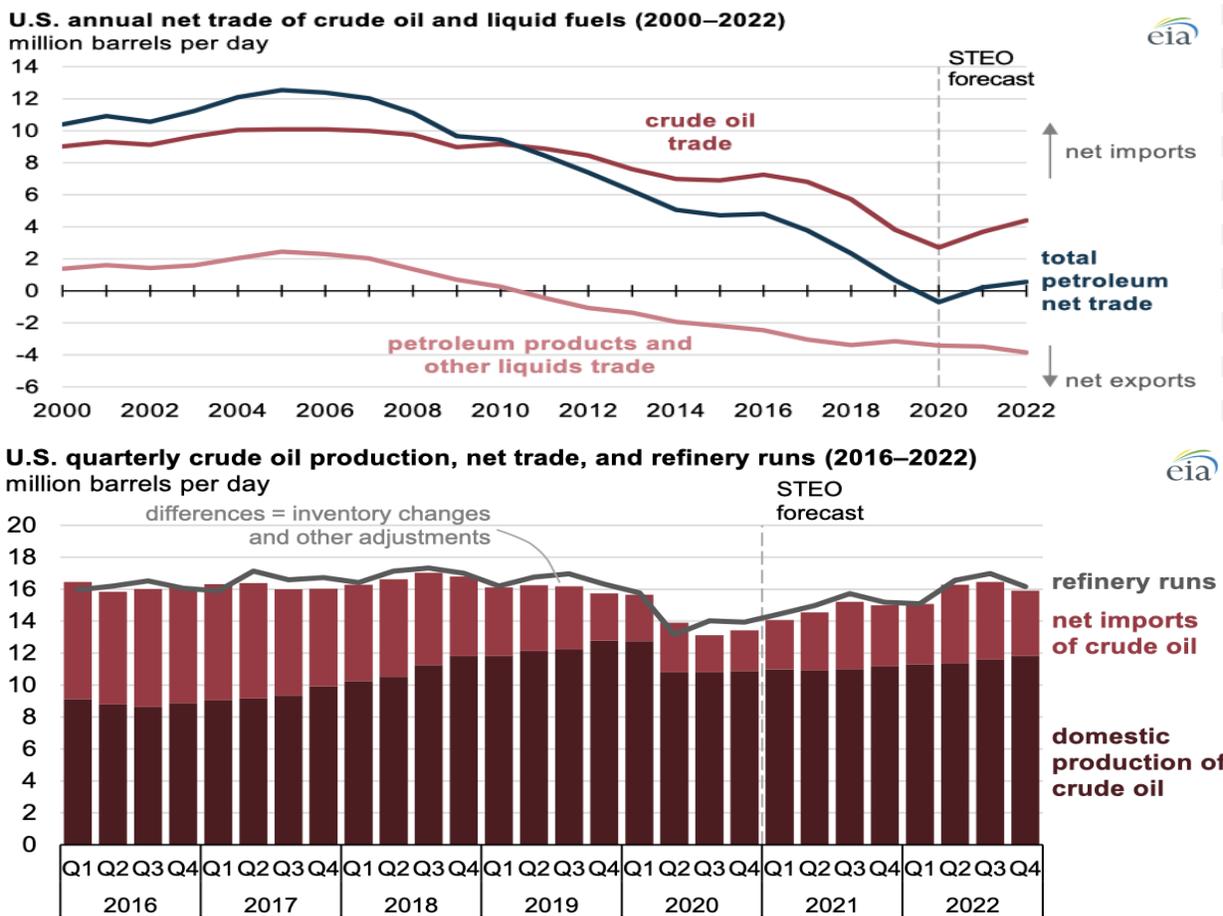
trillion cubic feet



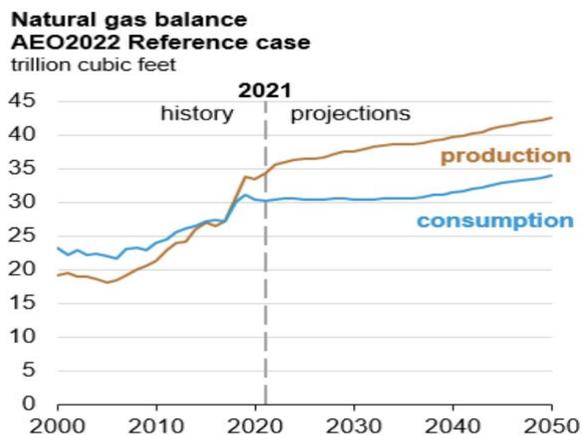
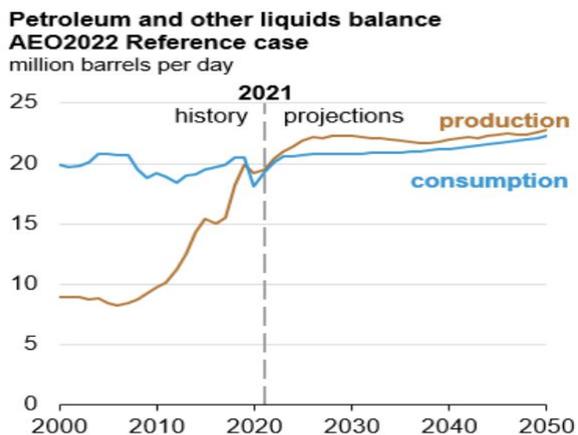
Source: U.S. Energy Information Administration, *International Energy Outlook 2021* (IEO2021) Reference case

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Figure Seven: U.S. Independence from Energy Imports



Source: U.S. Energy Information Administration, *Short-Term Energy Outlook* (STEO), February 2021



Source: U.S. Energy Information Administration, *Annual Energy Outlook 2022* (AEO2022) Reference case

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¹⁷ Ibid.

¹⁸ Ibid.

¹⁹ Ibid.

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